Appendix 1: 19/11567/PREP Pre-App Layout Plan

Scale Bar 1:1,250 @ A3

0m 25 50 75 100

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Notes
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Legend

Application Boundary

Rev	Description	By	CB	Date

MAKING COMPLEX EASY

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Client South Shores Country Park Ltd

Project Rolston Camp,Main Road, Rolston, East Riding of Yorkshire, HU18 1XP.

Title Illustrative Site Layout Plan

Status	Drawn By	PM/Checked by
FINAL	AJC	DH
Job Ref	**Scale @ A3**	**Date Created**
PPS1431	1:1,000	OCT 2019
RPS Drawing/Figure Number		**Rev**
1431-0002-01		-

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Appendix 2: 19/11567/PREP Pre-App Written Response

EAST RIDING OF YORKSHIRE COUNCIL

County Hall, Beverley, East Riding Of Yorkshire, HU17 9BA Telephone 01482 393939
www.eastriding.gov.uk
Stephen Hunt Head of Planning and Development Management

RPS
FAO Mr David Hancock
20 Western Avenue
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OX14 4SH

Your ref:
Our ref: **19/11567/PREP**
Enquiries to: **Mrs Joanne Marshall**
E-mail:
joanne.marshall@eastriding.gov.uk
Telephone: **(01482) 393872**
Date: **17 August 2020**

Dear Sirs

Proposal:	Change of use of land to caravan site
Location:	Disused Childrens Holiday Camp, Main Road, Rolston, East Riding Of Yorkshire, HU18 1XP,
Applicant:	
Application Type:	Pre Application Planning Enquiry

I write further to your pre-application enquiry received by this office on 19 December 2019 and can make the following comments:

Firstly, please may I apologise for the delay in responding to your enquiry. I note that you are investigating the change of use of land to caravan site at Main Road, Rolston. The site address suggests the area was previously used as a Children's Holiday Camp however there does not appear to be any recent planning history to suggest the site still operates as a children's holiday camp and furthermore the site appears to be fairly overgrown and devoid of any remnants of development.

The Development Plan for the area comprises of the East Riding Local Plan Strategy Document (ERLP SD) and the National Planning Policy Framework (NPPF). The relevant policies to the proposal are Policy A2: Bridlington Coastal Sub Area, Policy S1: Presumption in favour of sustainable development, Policy S4: Supporting development in Villages and the Countryside, Policy ENV6: Managing environmental hazards, Policy EC2: Developing and diversifying the visitor economy and Policy EC6: Protecting mineral resources of the ERLP SD and Part 2 'Achieving sustainable development', Part 11 'Making effective use of land' and Part 14 'Meeting the challenge of climate change, flooding and coastal change' of the NPPF. I have also reviewed the Tourism Accommodation Study for the East Riding of Yorkshire Council (2016) which can be viewed on the East Riding Website.

Principle of Development

In terms of the principle of development and policy context, the site is located to the south of Hornsea, and to the north of Mappleton outside of their defined Development Limits, and is therefore in the Countryside. As such policy S4 of the ERLP SD is of relevance. Policy S4 states that certain forms of development will be supported in the countryside where they are an appropriate scale to its location and encourages re-use of previously developed land. Part C (11) of the policy specifies tourism as one of the forms of development that may be acceptable in the Countryside. Policy EC2 of the ERLP SD states that tourism developments including facilities and accommodation will be encouraged to help strengthen and broaden the tourism offer across the East Riding. Part B of the policy states that in the Countryside, proposals for tourism development will be supported where their scale and cumulative impact is appropriate for the location. As such given, the proposal would support an existing holiday park it would comply with policies S4 and EC2 in principle. Nevertheless, any application would also have to be acceptable in terms of issues of impact on surrounding countryside, coastal erosion and nature conservation for any development to be supported by officers.

Coastal Change Management Area (CCMA) - Rollback Issues
In terms of Coastal Change, the site is designated within an area of Coastal Change Management Area (CCMA) by policy ENV6 of the ERLP SD as the site is located within close proximity to the North Sea. Policy ENV6 states that within the CCMA proposals will be supported where the development is for a temporary use such as touring pitches, temporary car parking, temporary modifications to other existing commercial facilities and furthermore where development is safe from the risks associated with coastal change. This proposal would be for more permanent static caravan structures with associated decking and hot tubs and as such would not necessarily be temporary in their nature.

It is understood that there were initial concerns from the Principal Sustainable Development Officer as the site may only have 11 years at most from the rate of coastal erosion for the development to remain on the site. The Officer requested confirmation of other sites that is within the ownership of the applicant and you provided, on behalf of the applicant, other available sites such as Little Eden - Bridlington, Applegrove – Scarborough and Riverside Village – Lincoln. Should a formal planning application be submitted the Principal Sustainable Development Officer requests that applicant should provide information to demonstrate that the development will contribute to the local economy and help improve the East Riding's tourism offer, provide an adaptation plan setting out how the site, caravans, bases, infrastructure etc will not become a risk to staff, customers and the members of the public as a result of coastal erosion and also commit to ensuring the most seaward portion of the CCMA remains free of all development and temporary uses to provide a safe buffer from the impacts of coastal erosion.

Whilst the Principal Sustainable Development Officer may not have objections to the scheme if the information they have requested can be demonstrated to be acceptable and if adequate alternative roll back sites can be confirmed, should a formal planning application be submitted, the provision of only 11 years for the site to be developed as a caravan site would not be supportable from a planning perspective as it would not comply with the uses highlighted in the policy and would not constitute a sustainable form of development in accordance with policy ENV6 of the ERLP SD.

Highway Control
The site would be accessed from the B1242. The Highway Control Officer has been consulted on the proposal and have submitted the following comments for your attention.
'*Highway Development Management is in receipt of a pre-application enquiry for a change of use of the disused childrens holiday camp, Main Road, Rolston, to a caravan site.*

Access to the site will be taken directly from the B1242 via a new vehicular access which appears to be roughly in the same location as the disused access.
The B1242 in the vicinity of the site is a two way single carriageway road approximately 5.7m wide, there is no footway provision in the vicinity of the site. There is a 50mph speed limit along this section of the B1242.
There have been no accident injury collisions in the vicinity of the site since 2014.
The visibility requirements at the access will need to be in line with the recommendations of Manual for Streets (MfS) for a 50mph road, i.e. 2.4mx160m. If this cannot be achieved, an access appraisal must be submitted as part of the planning submission to fully assess the access and its location.
From my site visit it is clear that some of the existing vegetation along the site frontage will need to be removed in order to achieve suitable visibility spays. No vegetation shall be allowed to grow over 1.05m in height within the visibility splays along the site frontage. This can be controlled by condition.
The indicative site layout plan shows 60 static caravan spaces are proposed and as such a Transport Statement (TS) will need to be submitted as part of any future planning application to fully assess the impact of the development on the local highway network.
The access and internal access road(s) will need to be wide enough to cater for two way vehicle movements and also be wide enough to cater for the static caravan delivery vehicles. Swept paths showing the vehicle tracking of the static caravan delivery vehicle should be submitted as part of the TS.
The indicative layout shows the access roads, turning head positions and locations of the parking facilities. I would also suggest that some visitor car parking spaces are provided.
Wheel wash facilities and contractor parking will be required during the construction phase and again, this can be controlled by planning conditions.'

<u>Public Protection</u>
In terms of responses from our Public Protection Teams, both the Environmental Control District Team and the Environmental Control Specialist Teams have been consulted on the proposal. Please find below their responses for your attention:

Environmental Control Specialist Team: *'I acknowledge receipt of the above planning consultation. I must comment that I do not wish to object to this application, however I have concerns relating to the site and the proposed development and would comment as follows:*

My colleagues from the Council's Environmental Control Specialist team will respond separately to this matter.
Due to the proximity of the nearest existing noise sensitive properties, I have concerns with regards noise, vibration, odour and dust issues during the demolition and construction phase. I also have requested that the applicant ensures that appropriate sewerage systems are installed for the site, as well as their removal upon remediation. In order to protect the neighbouring residents from being adversely affected by these issues I would expect to see the following matters addressed as part of any approved application:

<u>Noise, vibration, odour and dust during the construction phases</u>:

- *Deliveries to and from the site and the loading or unloading of materials during the demolition phase of the development shall be restricted to the hours of 08:00 and 18:00 Monday to Friday and 08:00 to 13:00 on a Saturday, except as otherwise agreed by the Local Planning Authority. No deliveries on Sundays and Bank Holidays.*

- *During demolition, operation shall be restricted to the hours of 08:00 and 18:00 Monday to Friday and*

08:00 and 13:00 on a Saturday, except as otherwise agreed by the Local Planning Authority. No work on Sundays and Bank Holidays.

- *There shall be no burning, crushing, screening or other treatment of demolition waste on site unless a scheme for such activities has been submitted to and is approved in writing by the Local Planning Authority. The scheme shall include the types of machinery to be used and the proposed times of operation and the measures taken to minimise the impact of noise, smoke, odours and dust in the locality.*

- *Deliveries to and from the site and the loading or unloading of raw materials during the construction phase of the development shall be restricted to the hours of 08:00 and 18:00 Monday to Friday and 08:00 to 13:00 on a Saturday, except as otherwise agreed by the Local Planning Authority. No deliveries on Sundays and Bank Holidays.*

- *During construction, operation shall be restricted to the hours of 08:00 and 18:00 Monday to Friday and 08:00 and 13:00 on a Saturday, except as otherwise agreed by the Local Planning Authority. No work on Sundays and Bank Holidays.*

- *The development shall not commence until there has been submitted to and approved in writing by the Local Planning Authority, a scheme showing the location of any external plant including generators and groundwater pumps to be used during the demolition and construction phases. The scheme shall address their sound output, and any measures to be taken to prevent noise and vibration problems to neighbouring residential properties. This might be in the form of a Construction Management Plan.*

- *No development shall commence on site until wheel cleaning facilities have been provided within the curtilage of the site. Details to be submitted to and be provided in writing by the Local Planning Authority and this facility shall be retained and used for the duration of the works.*

- *Demolition and construction work shall not commence until such time that a code of good working practice for protecting the nearest residential dwellings including measures to control dust and control noise and vibration arising from on site activities, as set out in BS 5228-1:2009+A1:2014– "Noise and Vibration Control on Construction and Open Sites", has been submitted to and approved in writing by the Local Planning Authority. Site contractors shall adopt such a code of practice and the applicant shall monitor compliance against it.*

  The code of practice shall include the use of vehicles, plant and equipment, piling operations, excavations, earth moving, site communications systems and the loading and unloading of raw materials.

- *Any temporary lighting erected as part of the demolition and/or development phase shall be arranged and/or orientated in such a manner that it does not affect the amenity of nearby properties.*

- *Any external lighting that is erected or altered as part of the application shall be arranged and/or orientated in such a manner that it does not affect the amenity of nearby properties.*

  The above conditions are imposed in order to ensure that the amenities of adjacent properties are not adversely affected by noise, dust, light or vibration.

I cannot see any mention on the map or in the information provided which addresses how sewage waste created on site

will be disposed of or managed. I would expect to see some form of sewage management and/or storage system which is considered in line with the Environment Agency Code of Practice – Flows and loads 3, Sizing Criteria, treatment capacity for sewage treatment systems.
Further to this and in line with the suggestion made by the applicant in the information submitted, given that this is an area of significant coastal erosion, at the stage where "roll back" or removal of the site is required due to coastal erosion. Along with the removal of all buildings, hardstandings and other items/structures which form the site, The applicant or owner at that time shall see that all pipework and items associated with the drainage system for the site, to include any onsite treatment works, waste storage etc is removed as part of the remediation of the site, before it reaches the point where erosion makes this impossible.'

Environmental Control Specialist Team: *'I acknowledge receipt of the above planning consultation. This response only considers potential land contamination and air quality issues. A separate response will be provided by my colleagues in the Environmental Control District team.*

The Environmental Control Specialist team would have no objections to the proposed development, but if planning permission were given, we may recommend a condition to maintain a watching brief for potential land contamination during any site preparation and construction work.'

Biodiversity
Given the close proximity of the site in relation to the North Sea the proposal will have an impact on the surrounding wildlife. As such the Biodiversity Officer has been consulted on the proposal and have provided the following comments for your information.
'The application should be accompanied by sufficient ecological information to enable the Council to assess the impacts of the development on biodiversity, prior to the application being determined. As such it will be necessary for the applicant to demonstrate that the proposals are in compliance with the under mentioned legislation, planning policies and guidance.

- *The Conservation of Habitats and Species Regulations 2017.*
- *The Wildlife and Countryside Act 1981 (as amended).*
- *The Natural Environment and Rural Communities Act 2006*
- *The Countryside and Right of Ways Act 2000.*
- *The Protection of Badgers Act 1992.*
- *National Planning Policy Framework (NPPF) 2018*
- *Government Circular 06/2005: Biodiversity and Geological Conservation – Statutory Obligations and Their Impact Within The Planning System*
- *Biodiversity policies of the East Riding Local Plan Strategy Document.*
- *UK Post-2010 Biodiversity Framework (Revised Implementation Plan (2018 – 2020)*
- *The East Riding of Yorkshire Biodiversity Action Plan (ERYBAP)*
- *Section G of the Part Two Checklist of the ERYC Planning Application Requirements & Validation Checklist July 2013.*

UK BAP Priority Habitats

UK BAP priority habitats cover a wide range of semi-natural habitat types, and were those that were identified as *being the most threatened and requiring conservation action under the UK Biodiversity Action Plan (UK BAP).*

Adjacent to the site lie the following UK BAP priority habitats:- 'Maritime cliff and slope' and 'Deciduous woodland'.

Though not within the site boundary all considerations within the application should be made as to not adversely affect these habitats.

Protected Species

There are features of biodiversity value on and adjacent to the application area including ditches, hedgerows and trees. Some of these habitats may be suitable to support protected and priority species including bats, breeding birds, common toads and hedgehogs. The proposals may therefore have the potential to result in adverse impacts on such species. Therefore an ecological appraisal that is proportionate to the nature and scale of the proposals should be submitted with this application. This must assess the impact of all phases of the proposal, provide essential baseline information about the site's ecological characteristics, and allow an assessment to be made of the likely impacts of the proposals on the ecology of the site and adjoining land. Records of protected species should be sought from the North and East Yorkshire Ecological Data Centre (NEYEDC). In this instance a Preliminary Ecological Appraisal should be undertaken to assess the site for its ecological value and to identify any potential constraints to the proposals. Should the results of the appraisal highlight the need for species specific surveys for protected species these should be carried out within the areas affected by the development. Such surveys should always be carried out in optimal survey time periods and to current guidance by suitably qualified and where necessary, licensed consultants. There is a need to conserve and enhance biodiversity by applying the 'mitigation hierarchy' to cancel or reduce the negative effects of the development [i.e. avoid harming species, reduce harm (minimizing and mitigating harm) or compensate for harmful effects]. If it's not possible to avoid affecting protected species the applicant should include an appropriate and robust mitigation strategy with the survey report.

Construction Environmental Management Plan

A construction environmental management plan (CEMP: Biodiversity) should be prepared by the applicant. The purpose of the CEMP will be to ensure that adverse environmental effects of development activities are mitigated see BS 42020:2013 (section 10, Implementation of development: biodiversity on construction sites). The CEMP can be provided at different stages of the planning process. Ideally it will be submitted as part of the planning application for approval by the local planning authority prior to determination of the application. Otherwise it will be necessary to impose a pre-commencement condition to secure the CEMP, which will need to be discharged before development begins. The CEMP should be compiled by a suitably qualified ecologist, include a timetable for implementation and a detailed plan. The scheme should provide full details of all ecological mitigation and management measures along with a programme for implementation.

Biodiversity Enhancement

Appropriate biodiversity enhancements, which must be over and above any avoidance, mitigation and compensation measures required to neutralise the impacts of the development on nature conservation interests, which will improve the ecological condition of the development site after the development is complete, will need to be incorporated into the design of the development. Such measures may include provision of bird and bat boxes, strengthening of hedgerows, the creation of areas of semi natural habitat, wildlife ponds and/or provision of wildlife friendly landscaping. The proposals should identify site wide enhancement opportunities and include full design details of what biodiversity enhancement measures are to be implemented within the development. In any event measures should include built-in bat and bird features at a 25% box to caravan ratio to enhance nesting opportunities for birds, and a 25% box/brick/tube/tile to caravan ratio *to enhance bat roosting provision. Appropriate measures should be incorporated into an Ecological Enhancement and Management Plan (EEMP) which should be submitted in support of the application.*

Site Layout

Any landscaping proposals should be multifunctional by design to address both the ecological and landscape requirements of the development. Native plants of local origin should be incorporated into the planting proposals so as to create viable wildlife corridors that will provide suitable habitat and food source for many different species. Tree species should also be selected to ensure that there is a year round supply of fruit and berries for birds by choosing species that fruit at different times of year.

Any public open space requirements should be designed to maximise wildlife connectivity, reduce habitat fragmentation and managed to maximise their potential for both people and wildlife to accord with key principles of the NPPF (Paragraph 118). In this respect grassland areas should be planted with native grass and wildflower species and managed to establish areas of varying sward lengths so as to attract interesting wildlife, such as good bird populations, insects and butterflies.

Should Sustainable Drainage Systems (SUDs) infrastructure be incorporated into the development the Council would encourage the developer to maximise the value of the SUDS ponds as wildlife habitat. As such the physical structure of the scheme should be designed to provide separate permanent, semi-permanent and seasonal water bodies, with gentle sloping side slopes that cover a large area and have hummocky, undulating margins to encourage high species diversity. Only native plants of local origin that are wildlife friendly should be included in the planting schemes.

Hedgerows

It will be necessary for the applicant to mitigate the impact of any hedgerow or tree loss by providing compensatory habitat at loss ratio of at least 1:1 to ensure no nett loss of habitat on the site. Appropriate mitigation should be incorporated into the design of the development.

Lighting

The design and operation of lighting should avoid light pollution in any identified "sensitive" areas, ensuring that they remain sufficiently dark for nocturnal species.

Nesting Birds

The proposals involve the removal of vegetation, and clearly appropriate measures will need to be implemented for the avoidance of impacts on nesting birds (breaches of the Wildlife and Countryside Act 1981 (as amended). Impacts on nesting birds can best be avoided by vegetation removal outside of the bird nesting period (March to August inclusive). The Council would expect the developer to ensure such matters are appropriately addressed in any application that may be submitted. If it's not possible to avoid affecting nesting birds the applicant should include an appropriate and robust mitigation strategy with a survey report. Embedded mitigation measures should be incorporated into the scheme design. The applicant should provide sufficient information for mitigation measures to be implemented effectively. Additionally, the buildings appears to offer opportunities for nesting birds, appropriate measures will need to be implemented for the avoidance of impacts on nesting birds (breaches of the Wildlife and Countryside Act 1981 (as amended).'

<u>Conclusion</u>
In summary, whilst it is acknowledged that the change of use of land to a caravan site may accord with the guidance set in policy S4 and EC2, however given the relatively short life span of the proposal being only for a possible 11 years, it is considered that the proposal would not comply with the guidance as set in policy ENV6 of the ERLP SD and as such should a formal application be submitted it would not gain the support of Officers on this basis.

Notwithstanding this advice, please see the attached documents which sets out the key Development Plan policies that are of relevance, and what would be required should you choose to submit an application for the proposed development.

The Council encourage the use of Planning Performance Agreements (PPAs) where relevant to agree timescales, actions and resources for handling particular applications. PPAs seek to set out an efficient and transparent process for determining applications which covers all aspects from the pre-application through to the post-application stages. Further information on the Council's approach to PPAs can be found on the Council's website, or you can contact the office for advice.

You may also need permission under the Building Regulations. Local Authority Building Control is wholly independent, non-profit making service that operates only to protect and look after your interests. The service operates from regional offices in Beverley, Bridlington and Goole so help and advice is always available and enables us to offer same day inspections for requests made prior to 10am. All the details of the Building Regulation Approval service, and the relevant application forms, are available at https://www.eastriding.gov.uk/buildingcontrolservices/. You can also contact Building Control at building.control@eastriding.gov.uk or by calling the Building Control helpdesk on 01482 393800.

Please note that while every effort is made to ensure that the advice given is as accurate as possible, I must advise you that the contents of this letter are the informal opinion of an officer and cannot prejudice the outcome of a formal application for planning permission. Planning applications are subject to consultation processed and any responses have to be taken into consideration prior to a decision being made. Please also note that in the interests of transparent decision making, if you progress to make a planning application for this proposal then this pre-application advice will be made available by the Council in the public domain. Until then, however, the advice will remain confidential and will not be disclosed by the Council.

I trust that this information is satisfactory, should you wish to discuss these matters further please do not hesitate to contact this office.

Yours faithfully

Stephen Hunt

Stephen Hunt MRTPI
Head of Planning and Development Management

Advice for 19/11567/PREP

Key Development Plan Policies	
These are the key local plan policies against which your application will be considered. Your proposal will also be considered against guidance in the NPPF and the Planning Practice Guidance. You can view the Local Plan in the councils website at https://www.eastriding.gov.uk/planning-permission-and-building-control/planning-policy-and-the-local-plan/	**East Riding Local Plan** A1 S1 S4 ENV6 EC2 EC6 **Other Relevant Documents** NPPF Tourism Accommodation Study for the East Riding of Yorkshire Council (2016)

Validation Requirements	
These are the items from the Council's Local List that you need to submit with your application for it to be registered as a valid application. These are in addition to the national requirements (application form, certificates, fees and plans). You can find more guidance on each of these requirements in the Validation Checklist which is available on the Council's website at https://eryc.link/planning-permission-prior-approvals Fees can be calculated on the Planning Portal at https://1app.planningportal.co.uk/FeeCalculator/Standalone?region=1	**Local List validation requirements** Application Form Fees Location Plan Site Layout Plan Elevations Sewage and drainage details Biodiversity Reports Transport Statement CCMA Report Construction Management Plan

Appendix 3: Local Plan Policy ENV6 supporting Table 11

Table 11 - Guide to appropriate development within the CCMA

Timeframe to cliff edge	Examples of Appropriate Temporary Development
Present to 2025	Development within this zone will be strictly limited and temporary uses. Parts of this zone may be considered suitable for use for new and existing caravan parks, however, this should be linked to an agreed planned approach for adapting to coastal change in the future. Other examples of potential uses include the following: • Assigning areas as touring pitches to remove hard development needed to support static caravans; • Temporary car parking; • Temporary tourism concessions (ice cream/pop-up cafes), supporting the local tourism offer and economy; • Temporary modifications to other existing commercial facilities, including fishing compounds may also be considered where a clear positive link can be made with the local economy; and • Nationally Significant Infrastructure, such as pipelines, that are related to off shore energy development and constructed to a standard that will not be impacted by coastal erosion. The most seaward portion of this zone would exclude all development and temporary uses to provide a safe buffer from the impacts of coastal erosion. The extent of the exclusion buffer would be based on the coastal monitoring data, and advice on proposals should be sought from the Council's Flood and Coastal Erosion Risk Management Team.
2025 to 2055	In addition to the development allowed in the present to 2025 zone, the only development allowed will be replacement, relocation and adaptation of facilities and infrastructure deemed to be essential to support the continued operation of existing commercial/ business uses. Examples of potentially suitable uses in this zone include: • Adaptation of electricity, gas or sewerage infrastructure for existing sites;
Timeframe to cliff edge	**Examples of Appropriate Temporary Development**
	• Adaptation of access routes including roads and footpaths; and • Changes of use from permanent residential to other strictly limited temporary uses, including change of use to agricultural or tourism uses.
2055 to 2105	Limited development may be considered within this zone. In addition to development allowed within the present to 2055 zones, temporary development to replace existing permanent developments/properties may be considered within the 2055 to 2105 zone. This would be conditional on the development being proposed to replace an existing permanent property/structure at risk from coastal erosion. The proposal would have to recognise that it was within the CCMA and its ability to be relocated in the future. The relocation of residential properties would not be excluded from this limited development. Extensions to existing properties and householder applications are likely to be acceptable in this zone.

Appendix 4: "Welcome to Yorkshire" - Tourism Data Report 2019

TOURISM DATA REPORT

The latest tourism data for the Yorkshire and Humber region

JULY 2019

This quarterly newsletter shares the latest tourism data for the Yorkshire and Humber region including:

- Visitor Numbers and Spend
- Tourism Spend
- Accommodation Occupancy and Revenue
- Visitor Attractions Admissions Growth
- Visitor Attractions Revenue Growth

Welcome to Yorkshire
yorkshire.com

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yorkshire.com

Please note that the latest 2018 results are subject to minor changes.

VISITOR NUMBERS AND SPEND

The table below show the total number of trips attributed to Domestic Overnight, Tourism Day Visits and Inbound Tourism in 2018.

It shows a comparison of the Yorkshire and Humber region against the overall results for England and provides a year on year comparison with the 2017 performance for each metric.

TABLE 1: VISITOR NUMBERS AND SPEND - YORKSHIRE AND HUMBER VERSUS ENGLAND 2018

YORKSHIRE AND THE HUMBER

	Trips (2018)	% change on 2017	Spend (2018)	% change on 2017
Domestic Overnight	10.479 million	-2.04%	£1.744 billion	-0.06%
Tourism Day Visits	129.8 million	-13%	£5.066 billion	+1%
Inbound Tourism	1.39 million	+3.83%	£603.73 million	+6.44%

ENGLAND

	Trips (2018)	% change on 2017	Spend (2018)	% change on 2017
Domestic Overnight	97.404 million	-3.2%	£19.347 billion	+1.56%
Tourism Day Visits	1.431 million	-5%	£53.036 billion	+4%
Inbound Tourism	37.9 million	-3.34%	£22.8 billion	-6.66%

Source: Visit England, 2018

The number of domestic overnight trips in Yorkshire and Humber were -2.04% on 2018 figures, however this a more favourable result than the -3.2% result seen across England. Spend remained roughly in line year on year.

Tourism day visits were -13% down on 2018 results but spend increased by £43 million (1%).

The inbound tourism figures show a record-breaking 1.39 million international visitors were welcomed to Yorkshire in 2018, that's an increase of almost 4% (3.83%) on the previous year.

The annual overseas visitor spend has topped £600 million for the very first time as more people than ever travel from abroad to experience everything Yorkshire has to offer. It reached £603.73 million in 2018, an increase of 6.44% compared to 2017 and the highest figure since records began.

Yorkshire is the only region in the UK to have seen an increase in the number of visits and the spend of international visitors in 2018.

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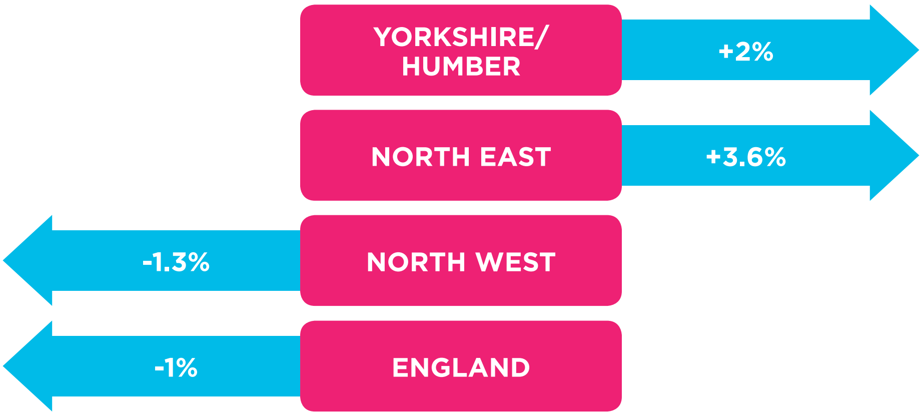
Please note that the latest 2018 results are subject to minor changes.

TOURISM SPEND

Both Yorkshire and Humber and the North East region have increased total tourism spend, with the Yorkshire and Humber increasing by 2%. This is against slight decreases in total tourist spending in the North West and England overall.

FIGURE 1: TOURISM SPEND CHANGES 2018 VERSUS 2017



Source: Visit Britain, 2018

THE VALUE AND IMPACT OF TOURISM RELATED ACTIVITIES TO THE YORKSHIRE REGION.

Tourism is worth
£9 billion
to the Yorkshire economy*

*Total tourism spend by visitors £7.3 billion. Supply chain effect on the tourism industry £1.7 billion

Welcome to Yorkshire
yorkshire.com

Please note that the latest 2018 results are subject to minor changes.

ACCOMMODATION OCCUPANCY AND REVENUE

In 2018, room occupancy was highest in the months of July and September. This is the same as experienced in 2017.

There has been growth in room occupancy in all months except July (decreased by 2% points in 2018), August and October (remained static), and September (decreased by 1% point in 2018).

The Average Daily Rate (ADR)* and the Revenue per Available Room (RevPAR)** were also the highest in the months of July and September 2018. This is the same pattern as 2017 where comparative ADR and RevPAR data is available.

TABLE 2: YORKSHIRE AND HUMBER OCCUPANCY AND REVENUE JANUARY - NOVEMBER 2018 VERSUS 2017

MONTH	ROOM OCC (18)	ROOM OCC (17)	BEDSPACE OCC (18)	BEDSPACE OCC (17)	ADR (18)	ADR (17)	RevPAR (18)	RevPAR (17)
January	61%	53%	43%	37%	£57.00		£34.69	
February	71%	63%	50%	46%	£59.91		£42.29	
March	69%	64%	50%	46%	£61.02		£42.25	
April	74%	68%	53%	53%	£61.90		£45.53	
May	75%	70%	54%	52%	£64.93		£48.86	
June	78%	77%	56%	55%	£65.85		£51.52	
July	80%	82%	57%	59%	£66.64	£66.51	£53.37	£54.31
August	79%	79%	59%	59%	£62.82	£63.77	£49.63	£50.33
September	80%	81%	57%	56%	£66.27	£66.29	£53.26	£53.80
October	78%	78%	55%	55%	£64.54	£64.95	£50.20	£50.75
November	77%	76%	55%	53%	£64.91	£66.30	£50.06	£50.68
December	69%	68%	50%	51%	£63.73	£64.49	£43.98	£43.71

Source: Visit England, 2018

So far in 2019 occupancy is higher than 2018 for February and March. However, ADR and RevPAR are marginally lower with the exception of March RevPAR.

TABLE 2A: YORKSHIRE AND HUMBER OCCUPANCY AND REVENUE JANUARY - MARCH 2019 VERSUS 2018

MONTH	ROOM OCC (19)	ROOM OCC (18)	BEDSPACE OCC (19)	BEDSPACE OCC (18)	ADR (19)	ADR (18)	RevPAR (19)	RevPAR (18)
January	60%	61%	43%	43%	£56.31	£57.00	£33.89	£34.69
February	74%	71%	53%	50%	£58.76	£59.91	£42.03	£42.29
March	72%	69%	51%	50%	£60.10	£61.02	£43.23	£42.25

Source: Visit England, 2018

Key terms:

*Average Daily Rate (ADR) - This is the average rate paid for rooms sold. It is calculated by dividing room revenue by rooms sold, i.e. ADR = Room Revenue / Rooms Sold.

**Revenue per Available Room (RevPAR) - This is the revenue generated from the sale of actual rooms. RevPAR can be calculated by using one of the following formulas - total revenue from guest rooms / total number of available rooms or Occupancy x ADR

Please note that the latest 2018 results are subject to minor changes.

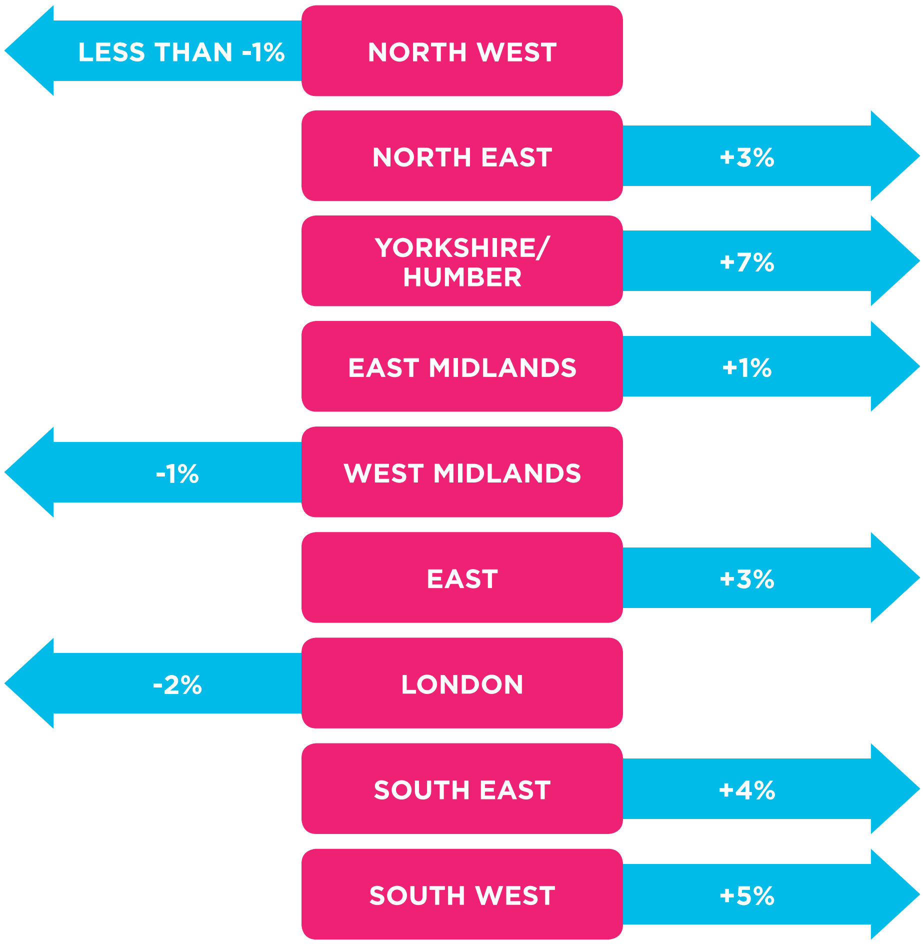
VISITOR ATTRACTIONS ADMISSIONS GROWTH

Yorkshire and Humber showed the highest levels of regional visitor growth at attractions in 2017 as seen in Figure 2, with a 7% increase in total visitor admissions on 2016 figures.

This increase could once again be attributed to the attractions in Hull, which were part of the 'UK City of Culture' in 2017.

The result compares favourably against an average increase of 2% across all regions in 2017.

FIGURE 2: VISITOR ATTRACTION ADMISSION GROWTH TRENDS - 2017 VERSUS 2016



Source: Visit England, 2018

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Please note that the latest 2018 results are subject to minor changes.

VISITOR ATTRACTIONS REVENUE GROWTH

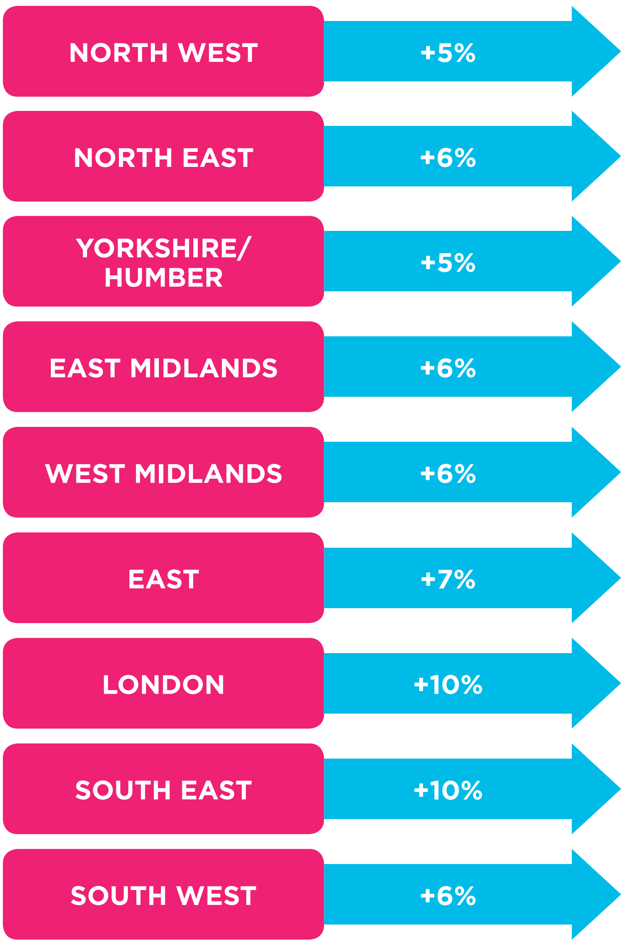
Yorkshire and Humber also showed a 5% gain in revenue from visitor attractions in 2017 as can be seen in Figure 3. This could have been driven by a 6% growth in adult admission charges to £8.24 from 2016 in the Yorkshire and Humber region (Visit England, 2018).

All regions in England saw positive increases in revenue with the average gain being 7%. The highest revenue gains were in London and the South East.

Although Yorkshire and Humber grew 2% less than the average, this could be attributed to the region having the second to lowest average admission charges of all the regions with the North East being the lowest at £7.55.

In regions with higher admission charges, there was an overall average percentage increase in adult admission charges of 4%, with London increasing by 5% to £11.65 (Visit England, 2018).

FIGURE 3: GROSS VISITOR ADMISSIONS REVENUE GROWTH TRENDS 2017 VERSUS 2016



Source: Visit England, 2018

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Appendix 5: ONS Travel Trends: 2019 Report

Office for National Statistics

Article

Travel trends: 2019

Annual estimates of travel and tourism visits to the UK (of less than 12 months' duration) and associated earnings and expenditure between the UK and the rest of the world.

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Release date:
22 May 2020

Next release:
To be announced

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1 . Main points

- Overseas residents made 40.9 million visits to the UK in 2019, an increase of 0.6 million compared with 2018.
- There were 93.1 million visits overseas by UK residents in 2019, an increase of 3% compared with 2018.
- UK residents spent £62.3 billion on visits overseas in 2019, an increase of 7% compared with 2018.
- Overseas residents spent £28.4 billion on visits to the UK in 2019, an increase of 7% compared with 2018.
- The results presented in this article were produced using an improved methodology for 2019 and a revised series of estimates for 2009 to 2018.

2 . Overview and COVID-19

This article analyses data from the International Passenger Survey (IPS), which collects data from overseas residents leaving the UK and UK residents returning home.

An improved methodology was used to produce the estimates presented in this article. This includes both the final results for 2019 and revised results for 2009 to 2018. The principles of the new methodology are explained in Section 5: Improved methodology for the estimates, while the impacts of the new method on the figures are shown in Section 6: Impacts of the new IPS methodology. The datasets accompanying this article present the main estimates produced using the new method for 2009 to 2019.

The revised data for 2009 to 2018 presented in this article and the accompanying datasets supersede figures published previously for this period.

International Passenger Survey and COVID-19

International Passenger Survey (IPS) interviewing was suspended on 16 March 2020 because of the coronavirus (COVID-19). It is not certain when it will resume.

Travel and tourism estimates for Quarter 1 (Jan to Mar) 2020 will be published in July 2020, making the best possible use of the available data. We expect that publishable estimates for March 2020 can be produced using the data collected up to 16 March 2020.

No IPS data will be collected for the period when the survey is not operational, and the usual travel and tourism outputs from the IPS will not be published for this period. However, the IPS team will publish information to help users to understand trends in total international travel, based on the available administrative data from the Civil Aviation Authority (CAA) and the Department for Transport (DfT). This will provide figures on numbers of international journeys arriving into and departing from the UK, but there will be no information about the characteristics of these passengers.

Initial figures will be produced in July 2020, relating to passenger numbers in April and May 2020. These will be published alongside the provisional travel and tourism estimates for Quarter 1 2020. Under the usual IPS publication schedule, estimates for Quarter 2 (Apr to June) 2020 would be published in October 2020. At this time, we will seek to provide more information on international travel patterns for the quarter, drawing on available data sources.

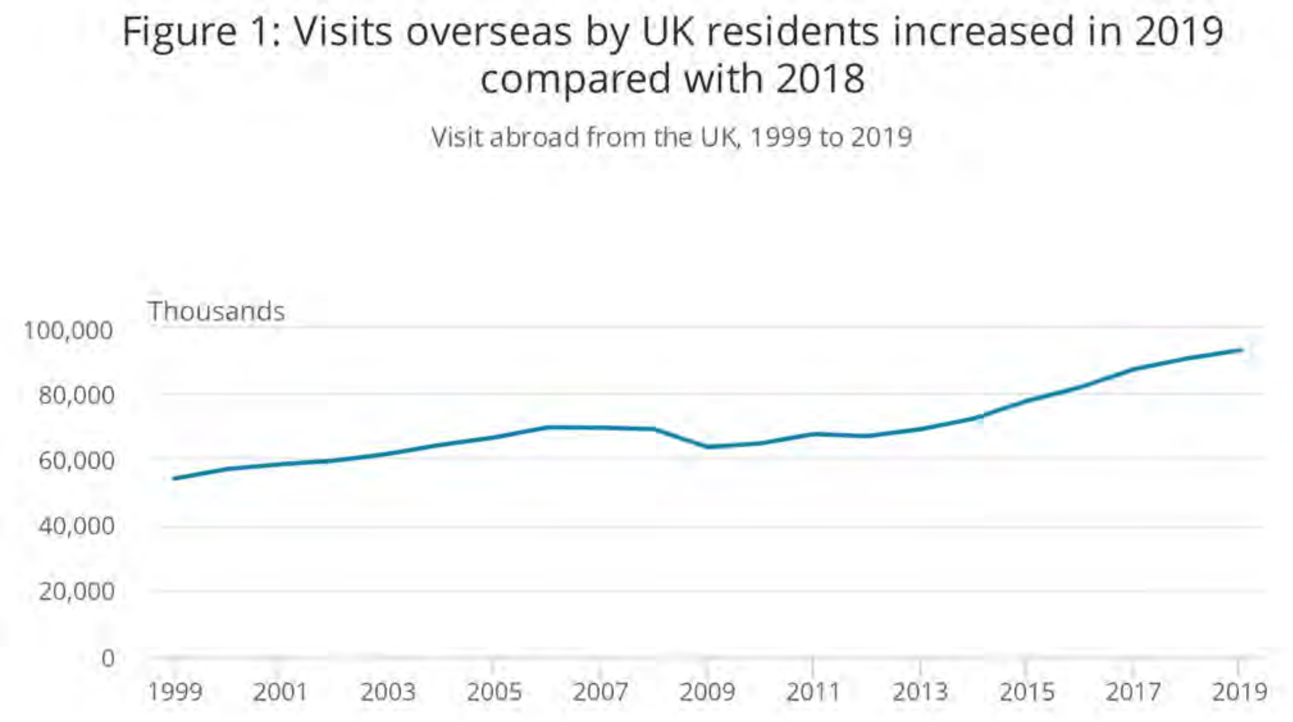
The IPS is an important input to Office for National Statistics (ONS) figures on international trade. More information about their plans to produce figures in the absence of the IPS can be found in our [statement on trade, published on 21 May 2020](). More information about the plans of international migration statistics can be found in the latest [Migration Statistics Quarterly Report (MSQR)]().

3 . UK residents visits and spend abroad

There were 93.1 million visits overseas by UK residents in 2019 (Figure 1), an increase of 3% compared with 2018. Overall, visits overseas have increased steadily over the last 20 years, except for a notable fall observed in 2009.

Figure 1: Visits overseas by UK residents increased in 2019 compared with 2018

Visit abroad from the UK, 1999 to 2019

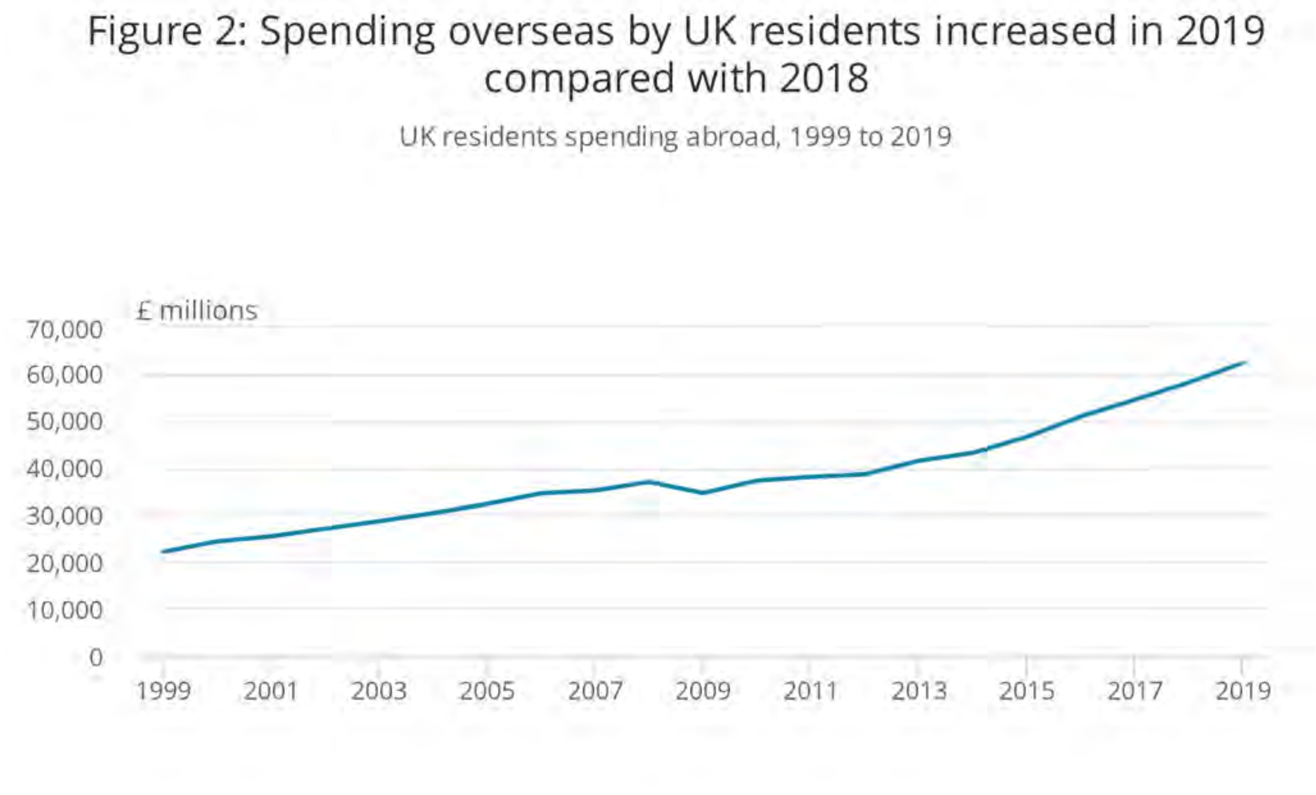


Source: Office for National Statistics – International Passenger Survey

UK residents spent a record amount of £62.3 billion on visits abroad in 2019 (Figure 2), which was 7% more than in 2018. The average spend per visit increased from £642 in 2018 to £670 in 2019, contributing to the overall increase in spending.

Figure 2: Spending overseas by UK residents increased in 2019 compared with 2018

UK residents spending abroad, 1999 to 2019



Source: Office for National Statistics – International Passenger Survey

Holiday was the most popular reason for UK residents to visit another country

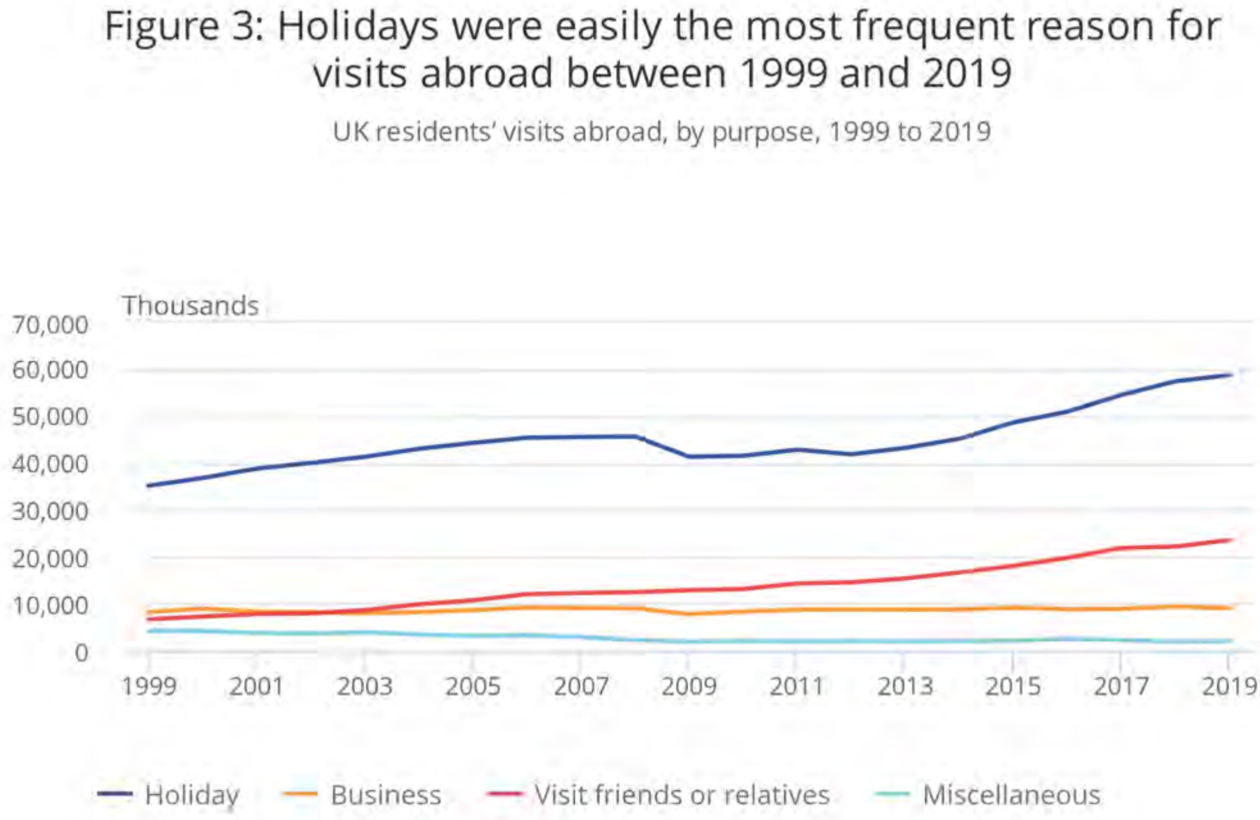
There were 93.1 million visits overseas by UK residents in 2019, the highest figure recorded by the International Passenger Survey (IPS). The number of visits in 2019 was 3% more than in 2018, when there were 90.6 million visits.

Nearly two-thirds of UK residents' visits abroad were for holidays; this was constant over the five-year period from 2015 to 2019. There were 58.7 million holiday visits abroad in 2019, a 2% increase on the previous year (Figure 3); most of these visitors travelled to countries within the EU (44.6 million).

Visiting friends or relatives overseas was also popular with UK residents. The number of these visits increased from 6.6 million in 1999 to 23.5 million visits in 2019. The number of business trips has varied relatively little over the last 20 years: the number of business trips fell slightly in 2019 to 9.0 million visits from a 10-year high of 9.3 million in 2018.

Figure 3: Holidays were easily the most frequent reason for visits abroad between 1999 and 2019

UK residents' visits abroad, by purpose, 1999 to 2019



Source: Office for National Statistics – International Passenger Survey

Spending abroad increased for all purposes except business in 2019. UK residents travelling abroad for holidays spent £43.4 billion in 2019; this is 70% of the total spent by UK residents abroad. Business spend reflected the fall in business visits, and spending on these trips fell by 9%, from £6.9 billion in 2018 to £6.3 billion in 2019.

Spain was still the most visited country by UK residents

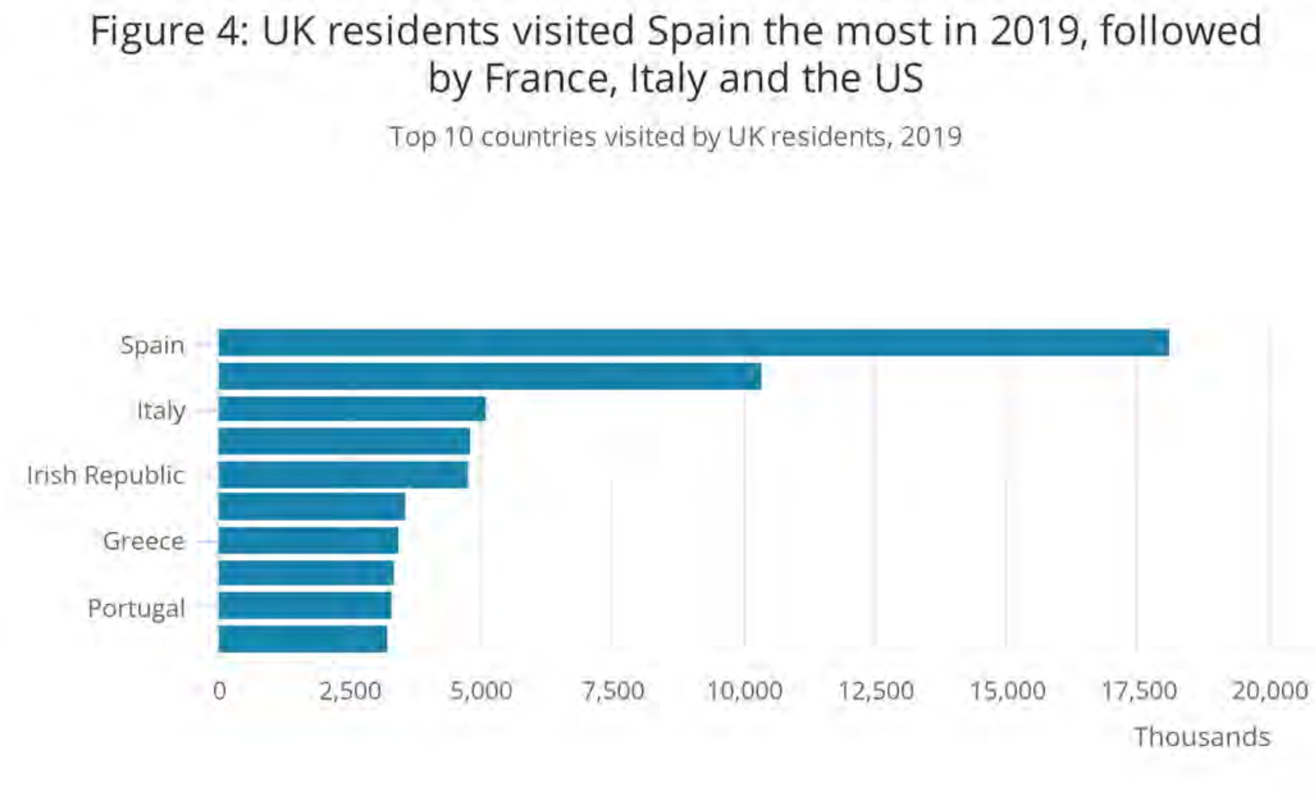
There were 18.1 million visits to Spain by UK residents in 2019, which was a 1% increase on 2018. Visits to Spain were mainly for holidays (87% of the total).

Spain, France, Italy, the US and the Republic of Ireland, in that order, remain the top five most popular countries for UK residents to visit (Figure 4), accounting for 46% of all visits abroad and approximately 43% of total spend abroad. Overall, 72% of visits were to EU countries.

Among the top 10 most visited countries, Greece saw the largest percentage change between 2018 and 2019, increasing by 18% from 2.9 million to 3.4 million. Of these visits, 90% were for holidays.

Figure 4: UK residents visited Spain the most in 2019, followed by France, Italy and the US

Top 10 countries visited by UK residents, 2019



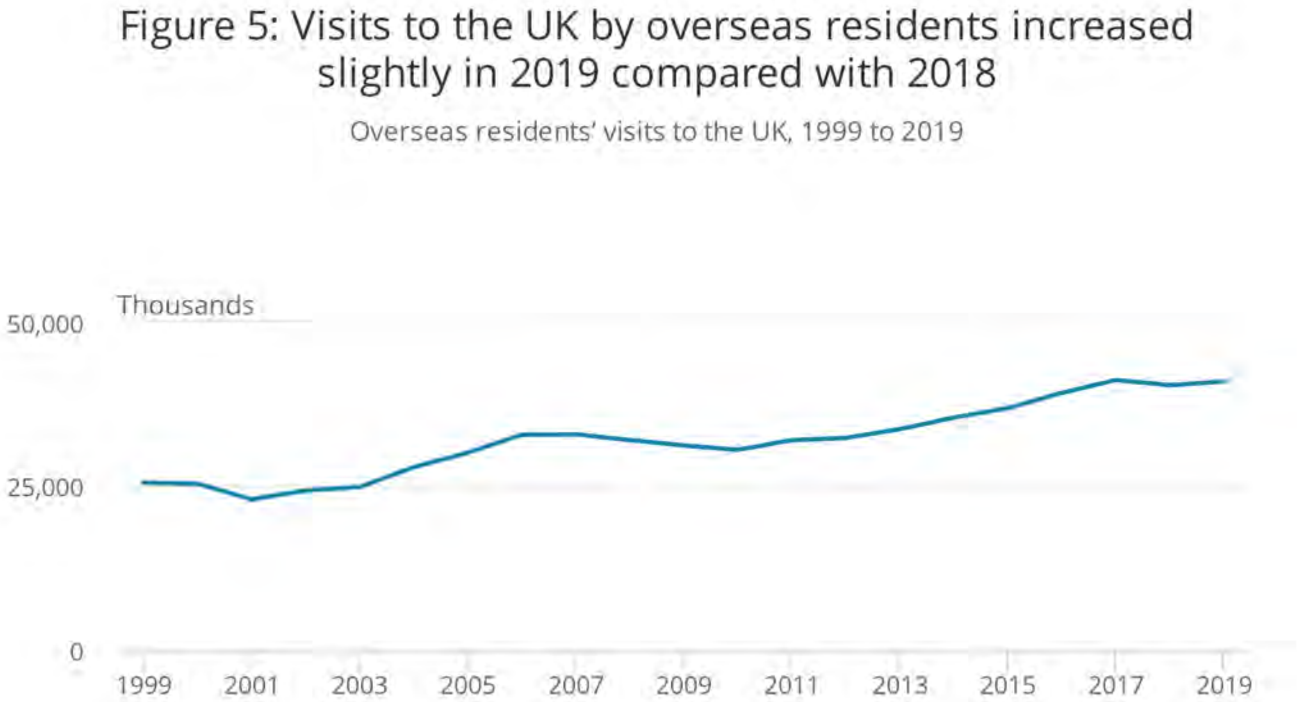
Source: Office for National Statistics – International Passenger Survey

4 . Overseas residents' visits to and spend in the UK

Overseas residents made a total of 40.9 million visits to the UK during 2019 (Figure 5), an increase of 1% compared with 2018 but lower than the peak reached in 2017 (41.1 million visits).

Figure 5: Visits to the UK by overseas residents increased slightly in 2019 compared with 2018

Overseas residents’ visits to the UK, 1999 to 2019

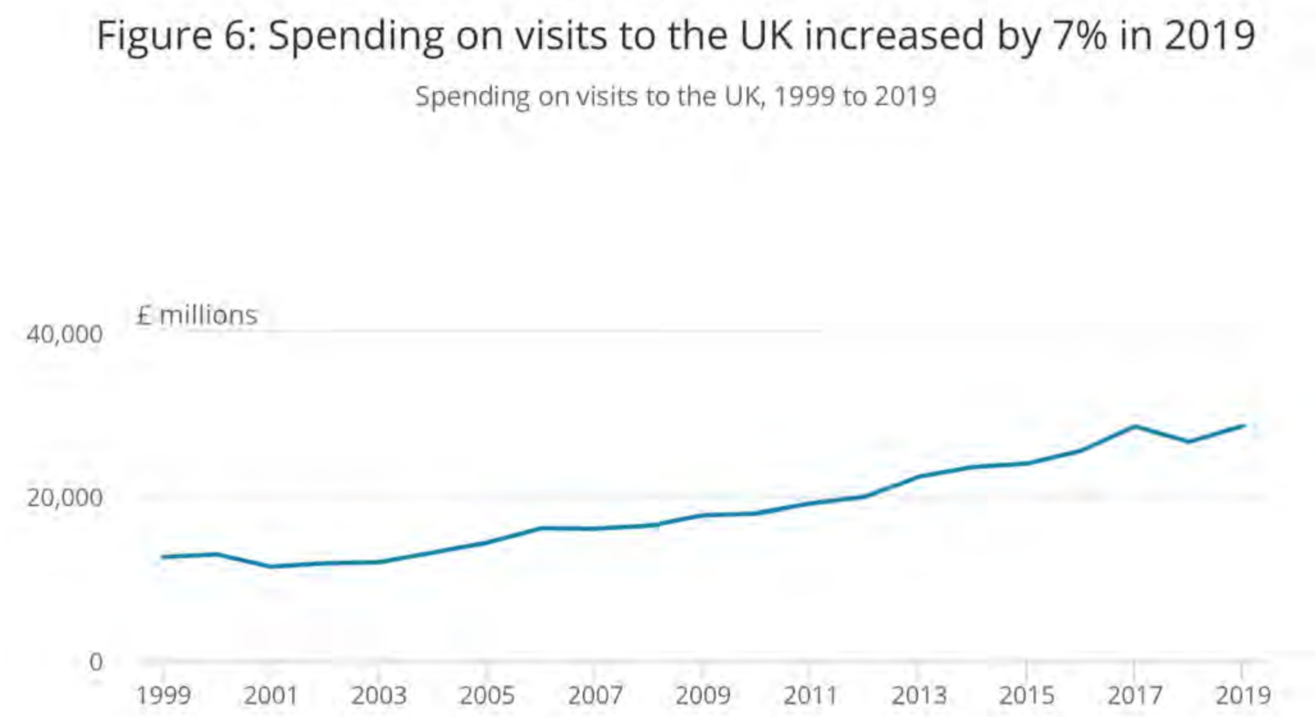


Source: Office for National Statistics – International Passenger Survey

A total of £28.4 billion was spent on visits to the UK by overseas residents in 2019, an increase of 7% compared with 2018 (Figure 6). The increase in spending was bigger than the increase in visits (1%). One factor in the larger increase in spending is the higher average spend per day (increasing from £91 in 2018 to £98 in 2019) and the overall average spend per visit increasing from £658 in 2018 to £696 in 2019.

Figure 6: Spending on visits to the UK increased by 7% in 2019

Spending on visits to the UK, 1999 to 2019



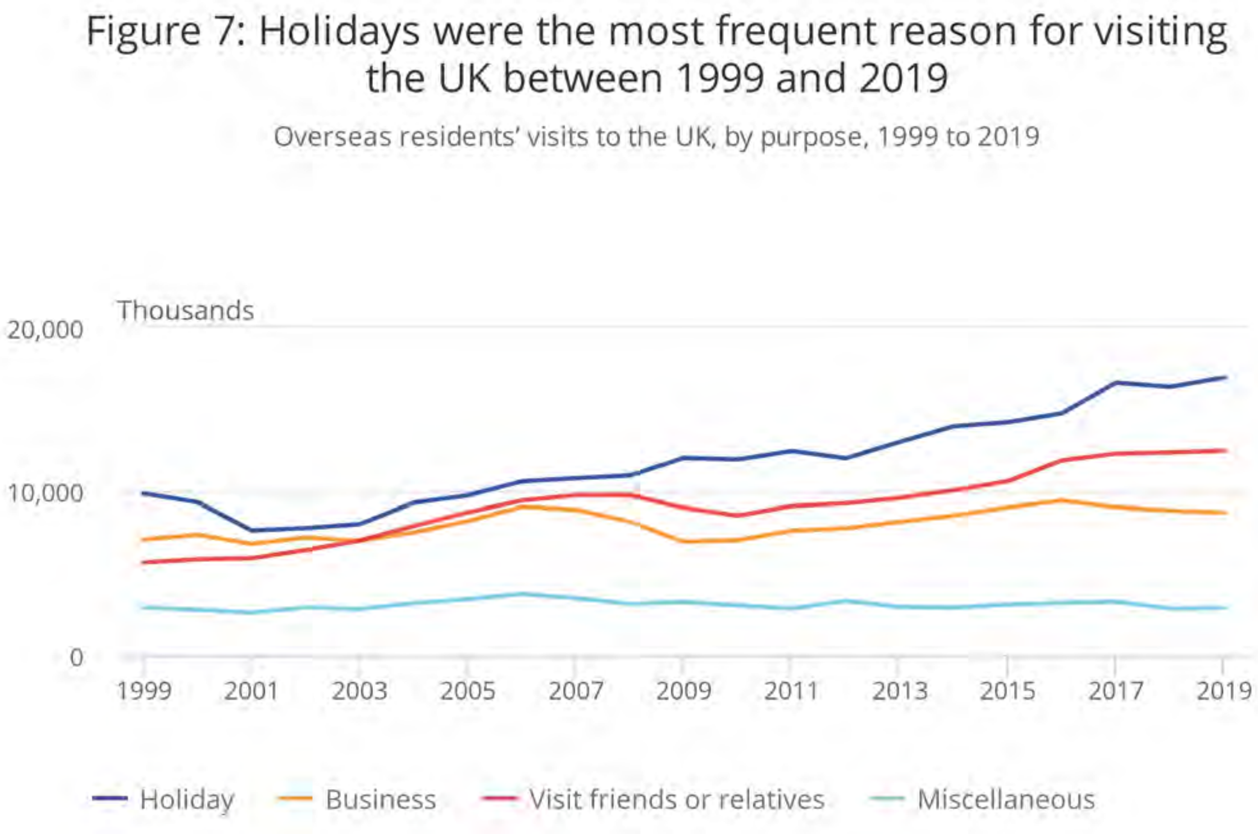
Holidays were still the most common reason for visiting the UK

The rise in visits to the UK was driven by an increase in holiday visits (Figure 7). Despite a small fall in 2018, holiday visits have generally increased year-by-year, and in 2019 they accounted for 16.9 million visits and 41% of all visits; this was the highest number of holiday visits recorded.

Visits to friends and family also rose over the last two decades; however, the figures have been stable recently, with over 12 million visits reported for each of the years 2017, 2018 and 2019. Business visits saw a peak in 2016 of 9.4 million, but the numbers have fallen slightly every year since to 8.7 million in 2019. Numbers of visits to the UK for miscellaneous reasons have changed relatively little in the years since 1999, with 2.9 million estimated visits in 2019.

Figure 7: Holidays were the most frequent reason for visiting the UK between 1999 and 2019

Overseas residents' visits to the UK, by purpose, 1999 to 2019



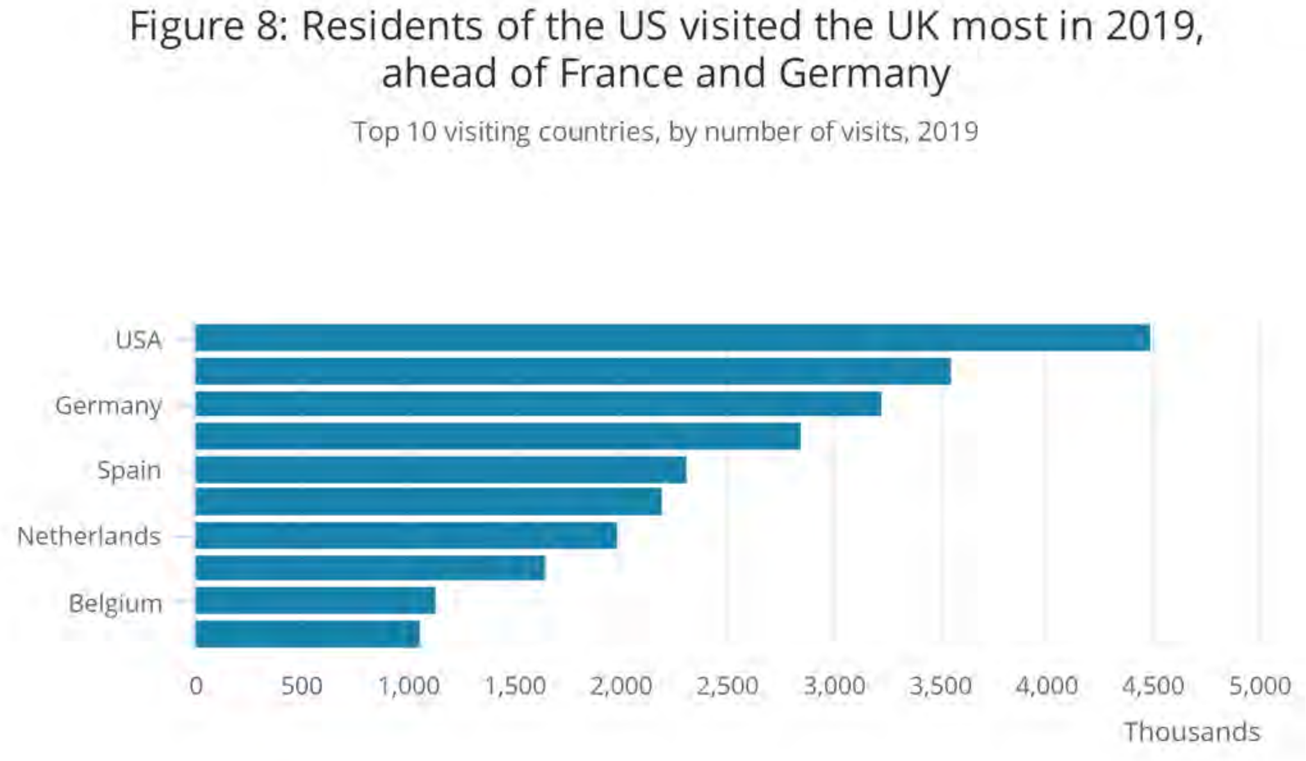
Source: Office for National Statistics – International Passenger Survey

The three countries whose residents visited the UK most in 2019 were the US, France and Germany. This has been the same for the last five years. Residents of Germany have remained the third most frequent visitors during this time, while those from France and the US swapped first and second places in 2016; the US has been at the top of this list since 2017. There were 4.5 million visits to the UK by residents from the US in 2019, more than any other country.

Of the 10 countries whose residents visited the UK the most frequently in 2019, eight were EU countries (Figure 8). The non-EU countries were the US and Australia (1.0 million visits, the 10th highest total). The countries featuring in the top 10 list have not changed since 2010.

Figure 8: Residents of the US visited the UK most in 2019, ahead of France and Germany

Top 10 visiting countries, by number of visits, 2019



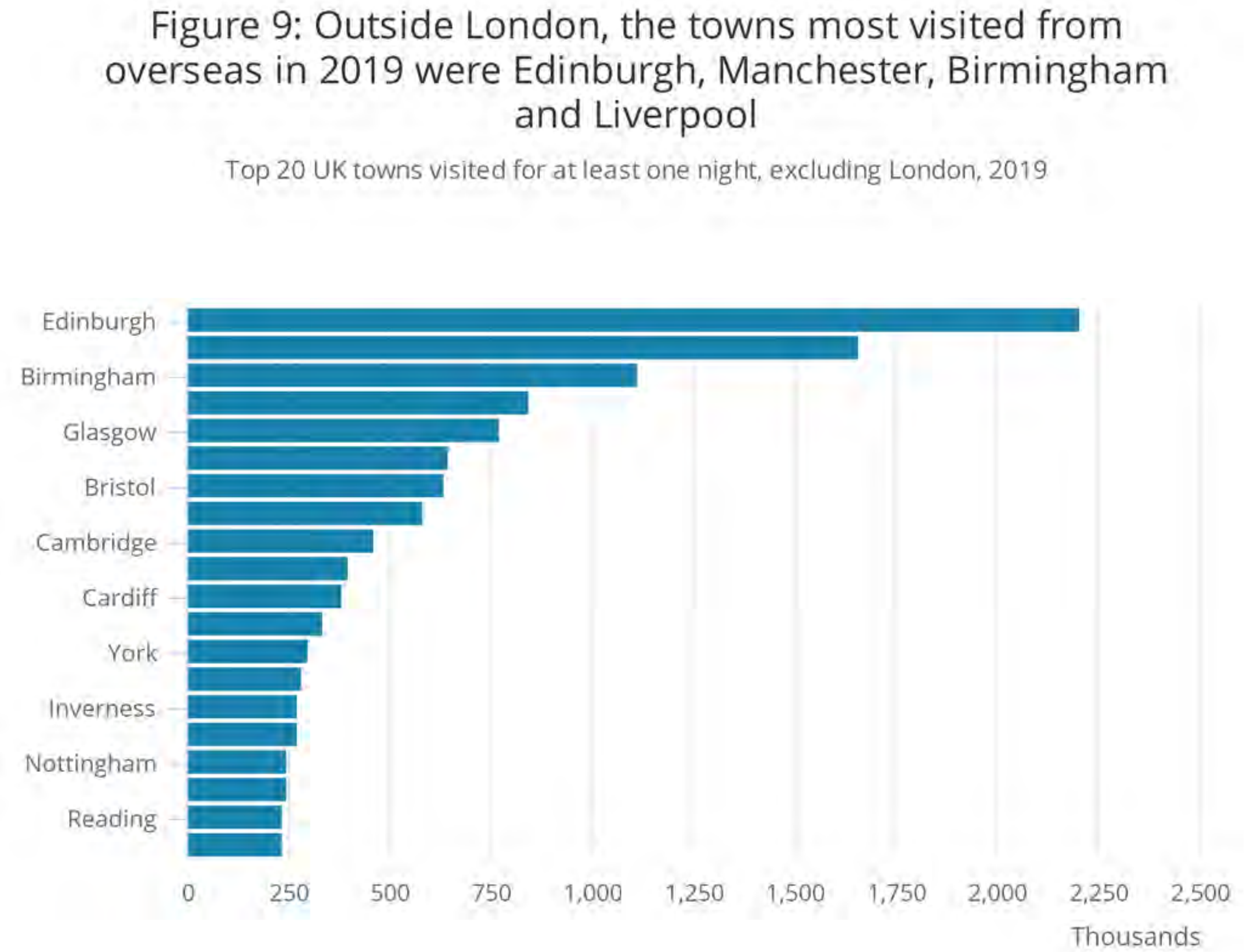
Source: Office for National Statistics – International Passenger Survey

London, Edinburgh, Manchester and Birmingham each attracted over 1 million stays from overseas visitors

London attracted 21.7 million overnight visits in 2019, far more than any other town or city. More than half of the visits to the UK included a trip to London. Overnight visits to cities other than London are shown in Figure 9. Edinburgh (2.2 million), Manchester (1.7 million) and Birmingham (1.1 million) each received more than 1 million overnight visits.

Figure 9: Outside London, the towns most visited from overseas in 2019 were Edinburgh, Manchester, Birmingham and Liverpool

Top 20 UK towns visited for at least one night, excluding London, 2019



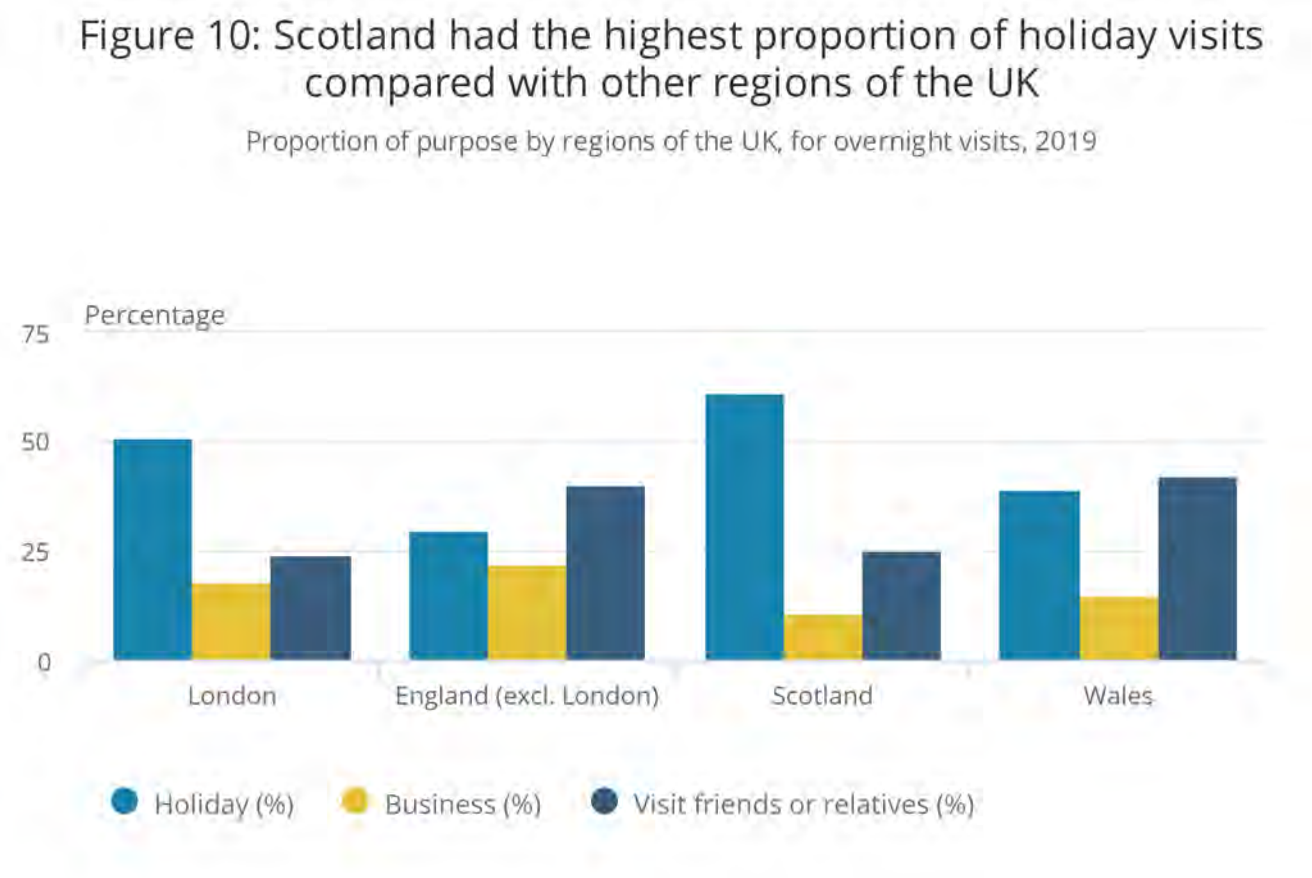
Source: Office for National Statistics – International Passenger Survey

Most of overseas residents' visits to Scotland were for holidays

Overseas residents made 3.5 million overnight visits to Scotland in 2019, of which 61% were for holidays and 25% were to visit friends and relatives (Figure 10). There were a million overnight visits to Wales, of which 39% were for holidays and 42% to visit friends and relatives, while 51% of overnight visits to London were for holidays and 24% to visit friends and relatives.

Figure 10: Scotland had the highest proportion of holiday visits compared with other regions of the UK

Proportion of purpose by regions of the UK, for overnight visits, 2019



Source: Office for National Statistics – International Passenger Survey

5 . Improved methodology for the estimates

We have made methodological improvements to the travel and tourism estimates from the International Passenger Survey (IPS). These relate to the survey's weighting process. The improvements are described in this section in outline. A detailed technical paper will be published in due course, setting out the changes comprehensively. These changes affect only travel and tourism and not estimates of long-term international migration.

The estimates presented in this article were produced using the new estimation method. The new method was also used to produce final results for 2019 and a revised series for 2009 to 2018. The impacts of the new method, and how these differ from the old, are presented in Section 6: Impacts of the new IPS methodology.

These changes have been planned for some time and have been referenced in previous travel and tourism publications. A statement about the upcoming changes was published on 16 March 2020.

At the time the statement was published, the new adjustment method was still being improved, so some of the published results are slightly different to the indicative results presented in the statement.

Why we made these improvements

There was substantial evidence that the previous estimation method was not providing accurate results for certain groups, in particular visits by Chinese residents. Users of the data reported that these figures were likely to be substantial underestimates. The evidence came from comparisons with other sources, notably Home Office landing card data.

Another strand of evidence came from the fact that the survey interviewed more passengers at the starts of their visits than at the end, whereas the numbers would be expected to be approximately equal. For the IPS, we interview passengers both as they enter and leave the UK. Interviews conducted at the start of visits are very brief and establish only the passengers' nationality and country of residence. Interviews conducted at the end of visits capture the detailed information relating to the visit, for example, how long they stayed and how much they spent. This is true both for UK residents visiting abroad and for people living in other countries visiting the UK. All published estimates from the IPS are based on interviews conducted at the end of visits, although all visits receive weights in IPS weighting.

This discrepancy between passengers interviewed at the start and end of their visits has been termed the IPS "imbalance".

One outcome of the imbalance is that published IPS estimates did not align closely to the administrative data on passenger numbers used in the weighting process. These administrative data are produced by the Civil Aviation Authority (CAA), the Department for Transport (DfT), Eurotunnel and Eurostar.

Researching the issues

The Office for National Statistics (ONS) launched a programme of research into the issue, both to understand the causes and to develop an appropriate and robust adjustment method. This drew on the expertise of users of the survey, and it was conducted in collaboration with ONS Methodology and academic experts. Home Office landing card data, where applicable, were a central source in the development and evaluation of the new method.

The main findings of the research for overseas residents were that:

- estimates of overseas residents, in general, showed slight under-representation, owing to a higher tendency not to respond to the survey; the effect was slight, and for most countries the survey represented visits by overseas residents accurately

- residents of certain countries (notably China) showed a much higher tendency to be under-represented in the departures data

- the proportions of overseas residents by country among total arrivals were correct; to recap, overseas passengers arriving in the UK (at the start of their visits) are included in the IPS weighting process but not in the published estimates, and this was a crucial finding in the development of the method

The main findings of the research for UK residents were that the IPS underestimated the numbers of UK residents returning to the UK. To understand why this happens, it is necessary to explain a little about how the survey sampling operates.

The IPS generally samples from passengers crossing a line at set intervals. For example, every 20th person leaving security or passport checks. Sometimes, at busy times, IPS interviewers cannot interview the selected person because the sheer volume of passengers mean that they are all already occupied interviewing other passengers. The survey compensates statistically for the passengers missed, but this process works correctly only if the passengers missed are missed at random, relying on the assumption that the missed passengers have, on average, the same characteristics as those who are interviewed.

The new research concluded that this crucial assumption did not hold up as well as had been expected since changes to the sample design were implemented in 2009. In fact, the busiest times, when interviews are more likely to be missed, occur when UK residents arrive back in the UK in large numbers. It happens less when overseas residents arrive in the UK. This means that a UK resident arriving back in the UK after a visit abroad is more likely to be missed than an overseas resident arriving at the start of their visit. Hence, missing interviews because of surges of high passenger flow leads to bias in data collected during arrivals, with proportionally fewer UK residents interviewed as a result. This happens only on arrivals, not departures, because of the big surges of passengers sometimes seen in airport arrivals. Traffic at departures is generally more manageable.

How the new method works

The new adjustment method was developed in collaboration with ONS Methodology and academic experts. The following is a description of the method; a complete technical explanation will be published in due course.

- Step one: a small uplift is applied to the total estimates of overseas visits to the UK; this compensates for the small general under-representation of overseas visitors identified by the research.

The next two steps rest on the essential finding that the arrivals data provide the correct proportions of overseas residents.

- Step two: the new method compares the results obtained in the arrivals and departures data (specifically, the proportions by country, among overseas residents, are compared); this is because the research concluded that the IPS captured these proportions correctly in arrivals.
- Step three: where this comparison provides robust statistical evidence that the departures figures for a particular country are underestimates, an adjustment is applied to bring the departures figures in line with the proportion by country, among overseas residents, obtained in arrivals; conversely, the comparison might reveal that the departures figure is an overestimate, in which case it can be adjusted downwards.

The adjustment criteria are complex and will be described fully in the upcoming technical paper.

- Step four: the previous steps compute the estimates of overseas residents visiting the UK, while administrative data provide total numbers of international travellers; these figures combined are used to calculate the numbers of UK residents visiting overseas.

The new method made published estimates of UK and overseas visitors consistent with administrative data on total passenger numbers entering and leaving the UK, collected by the CAA and DfT.

Further planned improvements

We are confident that the new imbalance adjustment method gives improved estimates of travel and tourism. However, we are keen to improve the estimates obtained “at source” by the IPS and to reduce the need for the adjustments. The new method will adapt to such improvements automatically, and the scale of the adjustments will reduce.

We are researching measures to increase response rates among those nationals who have proved they are less likely to respond to the IPS. We are assessing the reasons why visitors from some countries are, overall, less likely to take part, with a view to addressing the issues and improving survey response. We are also launching an investigation into passenger flows on arrivals at busy times and measures that can be taken to improve the results obtained at such times.

Collection of Home Office landing card data ceased in spring 2019. Landing cards were used extensively in the development of this new method, but the method is self-contained and does not require administrative sources to operate. It will be valuable to use other sources of administrative data to monitor IPS results and the continued efficacy of the imbalance adjustment method over time. We will monitor and evaluate such sources for the future.

Impact on other ONS outputs

This revised methodology will affect estimates of travel services, which feed into the monthly UK trade publication as well as the gross domestic product (GDP) first quarterly estimate and GDP quarterly national accounts releases. It will also affect tourism figures within household's final consumption expenditure data within quarterly GDP publications. These changes will be introduced during 2021 alongside our annual updates to data and methodology as part of the Blue Book publication; until then, these statistics will continue to be produced under the existing weighting method.

6 . Impacts of the new IPS methodology

The figures presented in this article have been produced using an improved methodology, relating to adjusting the weights applied during the survey's processing. The improved method has been used to produce the final travel and tourism estimates for 2019 and revised estimates for 2009 to 2018.

The background to this change, and the principles of the new method, are described in Section 5: Improved methodology for the estimates. This section presents the impact of the change on International Passenger Survey (IPS) estimates, giving comparisons of some of the main results computed using both the old and new methods for 2009 to 2018.

Total international visitor numbers are higher under the new estimates

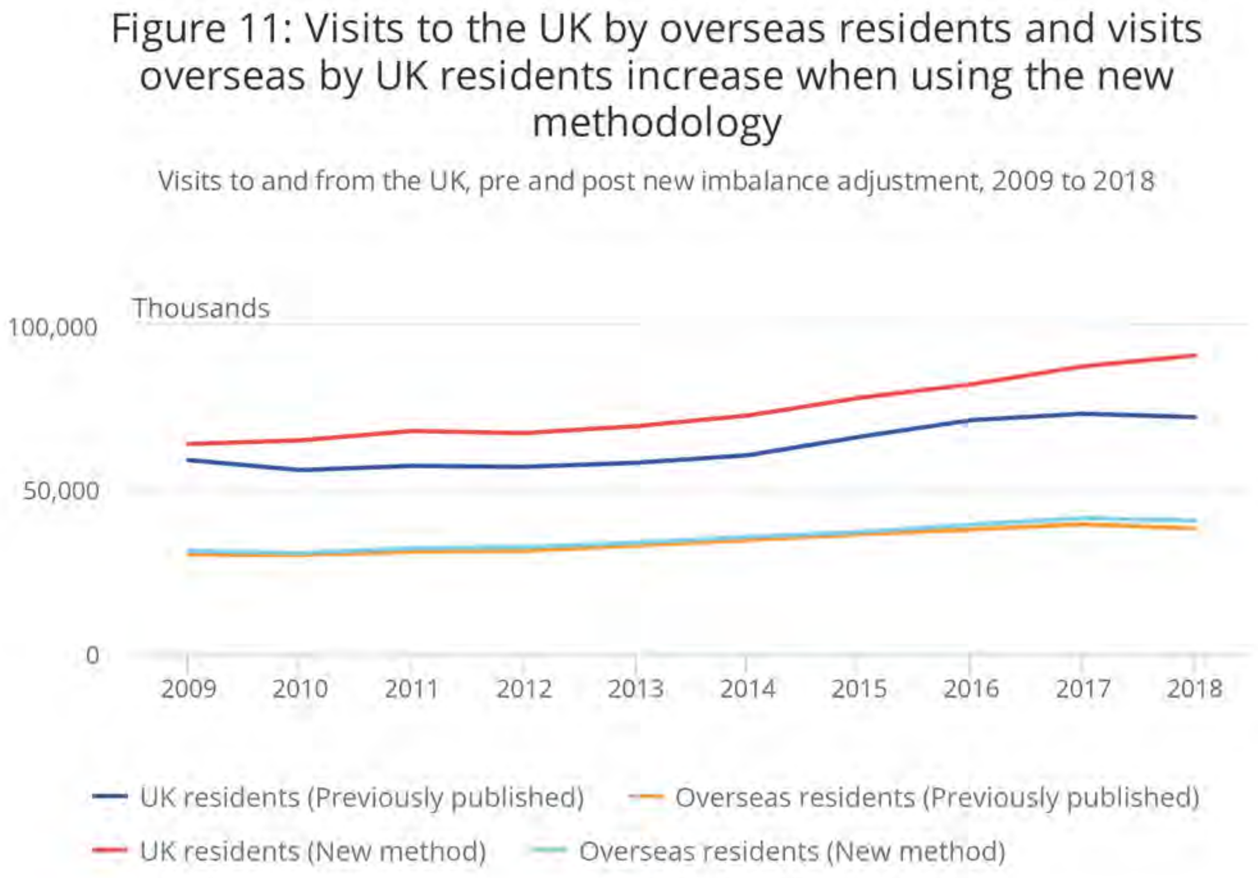
The new methodology produces higher estimates of UK residents visiting abroad and slightly higher estimates, overall, of overseas residents visiting the UK (Figure 11).

Overseas residents' visits to the UK were 4% higher for 2009 under the new method than the previous method (increasing from 29.9 million to 31.1 million), rising to a larger increase of 6% in 2018 (from 37.9 million to 40.3 million visits).

UK residents' estimated visits abroad were 8% higher under the new method for 2009 (from 58.6 million to 63.5 million). Between 2010 and 2017, the new method increased estimates by around 20%. For 2018, visits abroad were 26% higher under the new method (rising from 71.7 million to 90.6 million).

Figure 11: Visits to the UK by overseas residents and visits overseas by UK residents increase when using the new methodology

Visits to and from the UK, pre and post new imbalance adjustment, 2009 to 2018



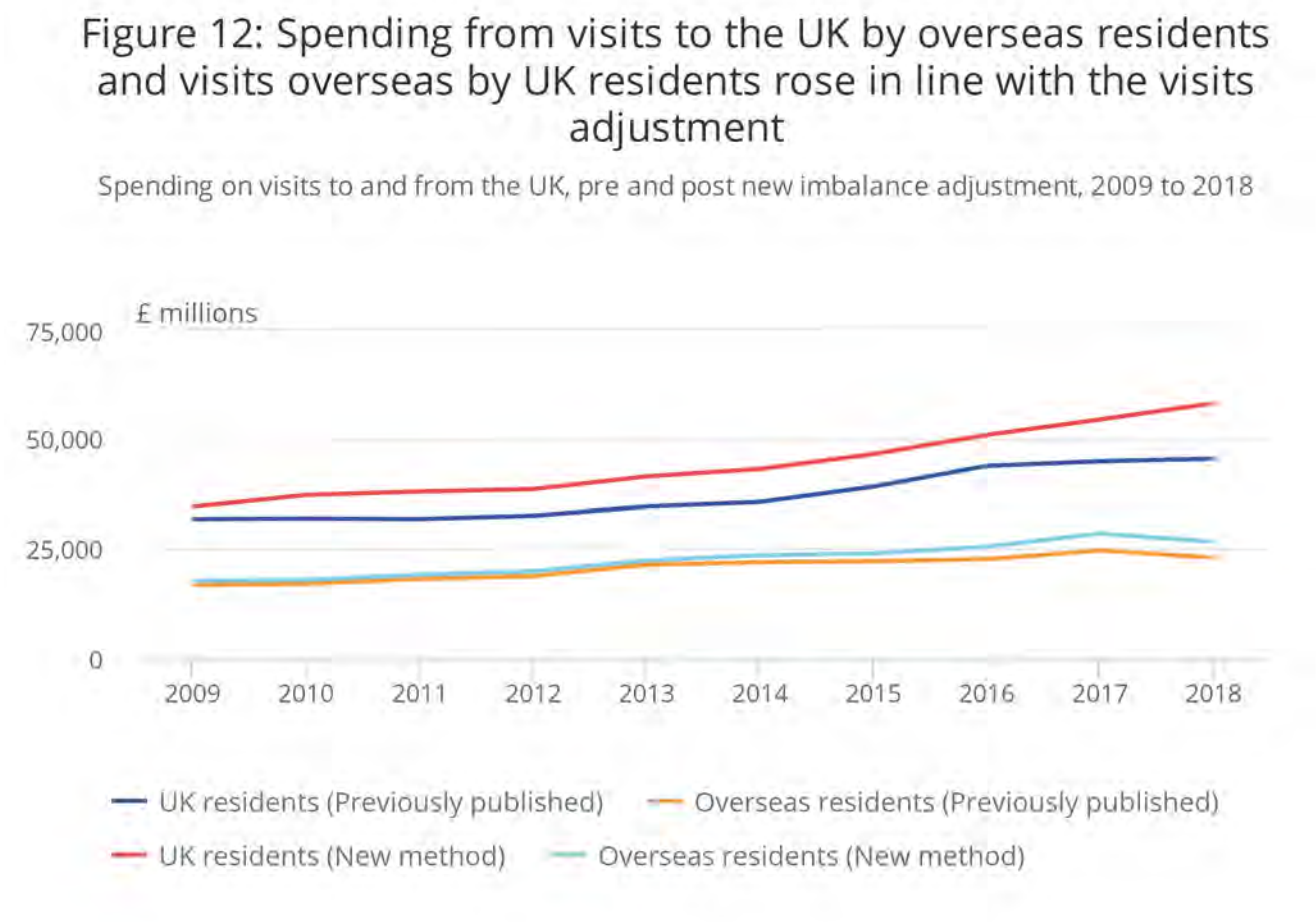
Source: Office for National Statistics – International Passenger Survey

The impact of the new method on estimates of spending showed similar patterns to visits but with larger increases for both UK residents and overseas residents (Figure 12). Overseas residents spent 6% more in 2009 and 16% more in 2018, when compared with previously published figures. This was a rise from £16.6 billion to £17.6 billion in 2009 and from £22.9 billion to £26.5 billion in 2019.

Spending by UK residents rose more steeply, increasing from £31.7 billion to £34.5 billion in 2009 (an increase of 9%) and from £45.4 billion to £58.1 billion in 2018 (an increase of 28%). This increase in spending abroad generally reflects the increased visits abroad.

Figure 12: Spending from visits to the UK by overseas residents and visits overseas by UK residents rose in line with the visits adjustment

Spending on visits to and from the UK, pre and post new imbalance adjustment, 2009 to 2018



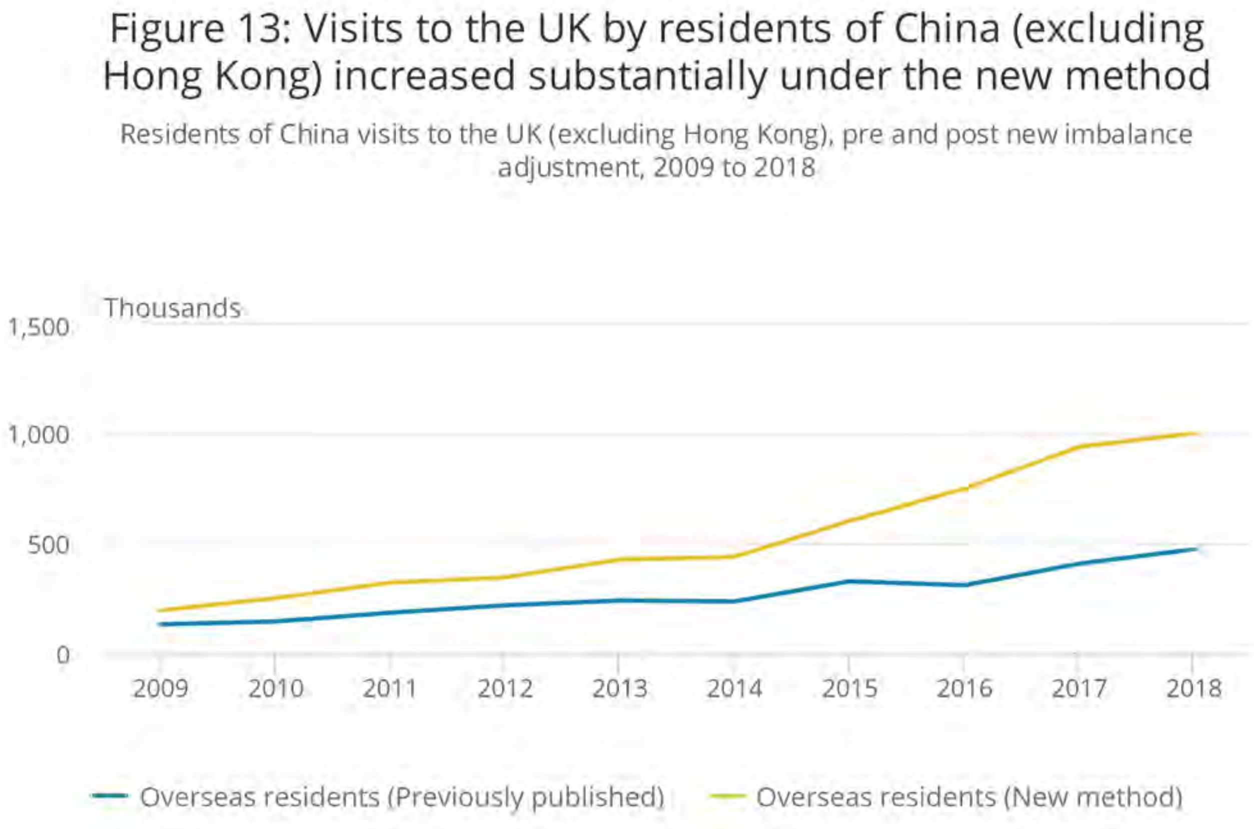
Source: Office for National Statistics – International Passenger Survey

The impact of the new method on estimates of visitors to the UK is not uniform, and it varies greatly by country of residence. It can also vary over time for a specific country. Estimates of visits from some countries have increased, notably China, while estimates of visits from a few countries have decreased, for example, Australia.

As expected, Chinese (excluding Hong Kong) residents' visits showed a marked difference using the new method. Visits more than doubled in 2018 from 472,000 visits to 1 million (Figure 13). There was a smaller increase in 2009 from 128,000 to 192,000 visits, an increase of 50%.

Figure 13: Visits to the UK by residents of China (excluding Hong Kong) increased substantially under the new method

Residents of China visits to the UK (excluding Hong Kong), pre and post new imbalance adjustment, 2009 to 2018

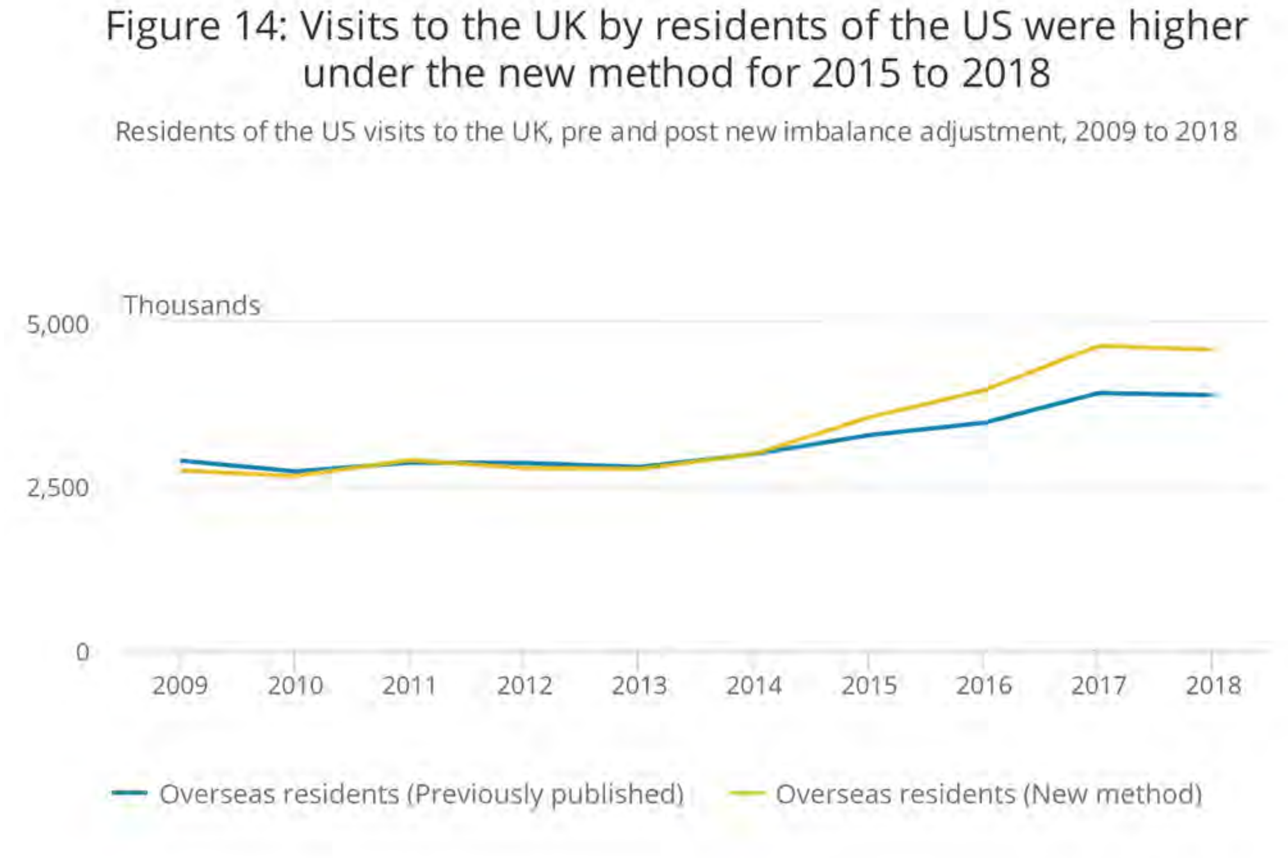


Source: Office for National Statistics – International Passenger Survey

Visits to the US under the new method were similar to previously published figures between 2009 and 2014, but they were higher under the new method for 2015 to 2018. The new method estimated that 4.6 million US residents visited the UK in 2018; this was 18% higher than the previously published estimate of 3.9 million (Figure 14).

Figure 14: Visits to the UK by residents of the US were higher under the new method for 2015 to 2018

Residents of the US visits to the UK, pre and post new imbalance adjustment, 2009 to 2018



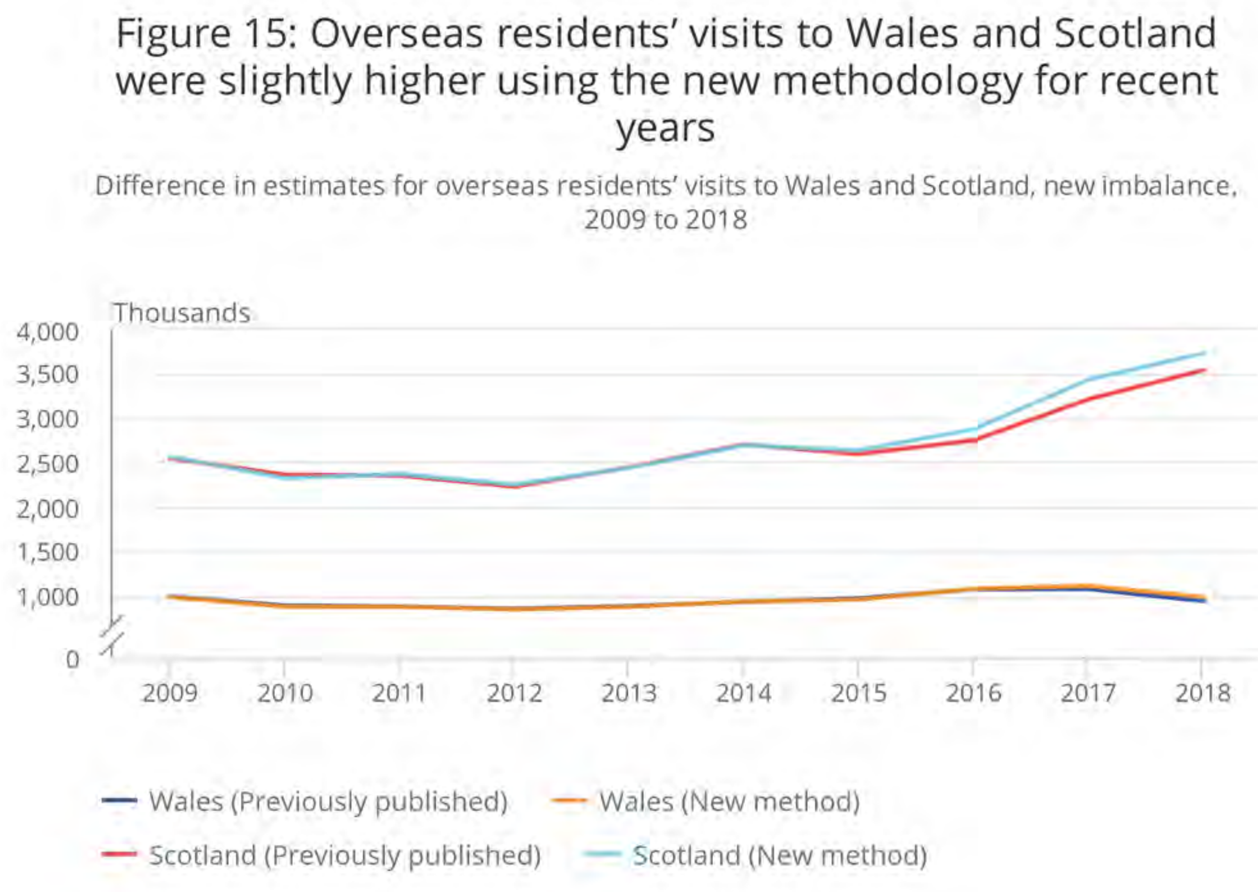
Source: Office for National Statistics – International Passenger Survey

Visits to Wales and Scotland were slightly higher in recent years using the new methodology

The new method estimated similar numbers of visits from overseas to Wales and Scotland, compared with the previous method, for 2009 to 2015. The new method produced higher numbers of visits for 2016 to 2018 (Figure 15). There were 3.7 million visits to Scotland in 2018 under the new method compared with 3.5 million visits under the previous method (5% higher under the new method). There were 990,000 visits to Wales under the new method compared with 940,000 visits under the previous method (5% higher under the new method).

Figure 15: Overseas residents' visits to Wales and Scotland were slightly higher using the new methodology for recent years

Difference in estimates for overseas residents' visits to Wales and Scotland, new imbalance, 2009 to 2018



Source: Office for National Statistics – International Passenger Survey

7 . Data quality and methodology

The collection of the IPS data

International Passenger Survey (IPS) data are collected by a team of over 200 interviewers who are recruited and trained specifically to work on the IPS. Interviews are carried out at air and sea ports, on board vessels leaving or returning to the UK, and on board the Eurotunnel Trains. Interviews are carried out on all days of the year, apart from Christmas Eve, Christmas Day, Boxing Day and New Year's Day.

Until recently, responses were initially recorded on paper forms. In September 2017, data collection on tablets started to be phased in, and this implementation was completed in April 2018. Now data are keyed directly into the collection program, which includes a series of electronic checks. The data are then transmitted to the Office for National Statistics' (ONS') headquarters where a series of further quality and accuracy checks are made on the data before processing and analysis. Analysis has shown that results obtained on tablets are comparable to those collected on paper forms. There is a reasonable change seen in a few series but the recommendation is these changes are not large enough or there is not enough evidence to attribute them to the introduction of the tablets.

IPS response rates

Sample surveys such as the IPS depend on achieving high levels of response from the public. Non-respondents often have different characteristics of travel and expenditure compared with those who do respond, and this can lead to biases being introduced into the results.

The response rates for the air, sea and the Channel Tunnel samples are shown in Table 1. These response rates relate to complete and partial interviews. The overall response rate in 2019 was 74.2%.

Table 1: International Passenger Survey response rates for 2018 and 2019 estimates, percentage of complete or partial responses

		2018 Q1	2019 Q1	2018 Q2	2019 Q2	2018 Q3	2019 Q3	2018 Q4	2019 Q4	2018	2019
	Arrivals	74.8	73.0	70.8	71.8	72.0	69.6	71.5	72.2	72.5	71.6
Total IPS response rate	**Departures**	79.8	78.3	75.3	76.9	75.3	72.3	77.8	77.0	76.8	75.8
	Total	77.7	76.2	73.5	75.0	73.9	71.2	75.5	75.2	75.1	74.2
	Arrivals	73.2	71.7	68.7	70.6	70.7	68.3	69.9	70.0	70.9	70.2
IPS response rate (Air)	**Departures**	79.1	77.8	74.4	76.4	74.7	71.7	77.4	76.4	76.2	75.3
	Total	76.7	75.5	72.2	74.3	73.1	70.3	74.8	74.2	74.1	73.4
	Arrivals	86.8	78.1	83.1	82.2	80.6	76.3	87.4	81.9	83.2	78.4
IPS response rate (Sea)	**Departures**	86.9	84.9	81.4	82.9	80.7	77.8	89.1	82.2	83.1	80.7
	Total	86.9	81.7	82.2	82.6	80.7	77.1	88.3	82.1	83.1	79.7
	Arrivals	82.3	83.6	82.8	73.6	75.9	78.6	75.2	88.0	79.3	80.9
IPS response rate (Tunnel)	**Departures**	86.6	81.0	84.4	78.0	78.2	75.6	75.3	83.4	81.4	79.5
	Total	84.3	82.5	83.6	76.3	77.0	77.0	75.2	85.9	80.3	80.2

Source: Office for National Statistics – International Passenger Survey

Accuracy of overseas travel and tourism estimates

The estimates produced from the IPS are subject to sampling errors that result because not every traveller to or from the UK is interviewed on the survey. Sampling errors are determined both by the sample design and by the sample size – generally speaking, the larger the sample supporting a particular estimate, the proportionately smaller is its sampling error. The survey sample size is approximately 70,000 per calendar quarter.

Table 2 shows the 95% confidence intervals for the 2019 estimates of the total number of visits, number of nights and expenditure for both overseas residents visiting the UK and UK residents going abroad. These represent the interval into which there are 19 chances out of 20 that the true figure (had all travellers been surveyed) would lie.

If, for example, the relative 95% confidence interval relating to an estimate of 10,000 was 5.0%, there would be 19 chances out of 20 that the true figure (if all travellers had been surveyed) would lie in the range 9,500 to 10,500.

The following guidelines are provided to aid in the interpretation of the estimates and to enable their reliability to be assessed:

- percentage of confidence interval is below 10%: precise
- percentage of confidence interval is between 10% and 20%: reasonably precise
- percentage of confidence interval is between 20% and 40%: acceptable
- percentage of confidence interval is over 40%: unreliable (these estimates should be used with caution for practical purposes)

Table 2: International Passenger Survey confidence intervals for 2019 estimates

		Estimate	Relative 95% confidence interval (+/- % of the estimate)
	Number of visits ('000s)	40,857	2.5%
Overseas visitors to the UK	Total earnings (£million)	28,448	3.4%
	Number of visitor nights ('000s)	289,628	3.9%
UK residents going abroad	Number of visits ('000s)	93,086	1.4%
	Total expenditure (£million)	62,325	2.8%
	Number of visitor nights ('000s)	904,905	2.6%

Source: Office for National Statistics – International Passenger Survey

Confidence intervals for purposes for visit, region of the world, regions of the UK visited, and individual country of visit to and from the UK are presented for easy access in the relevant datasets.

More quality and methodology information on strengths, limitations, appropriate uses, and how the data were created is available in the IPS QMI. This will be updated shortly to reflect recent changes to the survey's processes.

8 . Glossary

Visits

The figures relate to the number of completed visits, not the number of visitors. Anyone entering or leaving more than once in the same period is counted on each visit.

Day-visits

Trips that do not involve an overnight stay abroad by UK residents, as well as day trips to the UK by overseas residents, are included in the total figures for visits and expenditure, but figures presented at lower levels of geography relate to overnight says only.

Overseas visitor

An overseas visitor is a person who, being permanently resident in a country outside the UK, visits the UK for a period of less than 12 months. UK citizens resident overseas for 12 months or more coming home on leave are included in this category. Visits abroad are visits for a period of less than 12 months by people permanently resident in the UK (who may be of foreign nationality).

Visiting multiple countries

When a resident of the UK has visited more than one country, expenditure and stay are allocated to the country stayed in for the longest time.

Miscellaneous visits

Visits for miscellaneous purposes include those for study; to attend sporting events; and for shopping, health, religious or other purposes, together with visits for more than one purpose when none predominates (for example, visits both on business and on holiday). Overseas visitors staying overnight in the UK on their way to other destinations are also included in miscellaneous purposes.

Earnings and expenditure

Earnings refer to spending in the UK by overseas residents, whereas expenditure refers to spending abroad by UK residents.

9 . Strenghs and limitations

Strengths

A major strength of the International Passenger Survey (IPS) is that it is the main source of information in the UK on international travel and tourism and associated earnings and expenditure. It has been running since 1961, so it provides a comprehensive time series of travel and tourism, which can be useful for identifying long-term trends and patterns or undertaking time series analysis and forecasting. In addition, interviewing at the principal air, sea and tunnel routes and the use of a dedicated field force gives the survey some uniqueness.

Limitations

IPS survey data are subject to both sampling and non-sampling errors. About 90% of passengers entering and leaving the UK have a chance of being sampled in the survey. The remainder are either passengers travelling at night, when interviewing is suspended, or on those routes too small in volume or too expensive to be covered. Furthermore, the number of survey interviews on particular routes or for some main reasons for visit, such as playing sports or getting married, are sometimes small and consequently attract higher sampling errors. This also applies to visits to or from countries with low visit numbers.

10 . Related links

[Travelpac: travel to and from the UK]
Dataset | Released 22 May 2020
Quarterly data on travel to and from the UK, taken from the IPS. Includes detail on age and sex of travellers, purpose and length of trip, and spending. These data are in a form suitable for small businesses and students. Travelpac comprises 14 of the most widely used variables, and the data are available for each year from 1993 onwards, in both SPSS and Excel formats.

Appendix 6: ONS Travel Trends: 2021 Report

Office for National Statistics

Article

Travel trends: 2021

Visits to the UK by overseas residents, visits abroad by UK residents and spending estimates by travellers.

Contact:
Angie Osborn
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Release date:
15 June 2022

Next release:
To be announced

Correction

16 August 2022 11:00

We have identified an issue with data collected from the International Passenger Survey (IPS) in 2021, linked to challenges collecting and publishing consistent data during the pandemic.

After correcting this issue, total visits to the UK by Overseas' residents show an increase from 6.2 million to 6.4 million. The number of nights has fallen from 99.3 million to 93.5 million and spend has also fallen from £5.8 billion to £5.6 billion.

UK residents made 19.1 million visits abroad in 2021, which is unchanged, the number of nights increased from 336.9 million to 340.9 million.

There are however, bigger impacts to visitor and spend data at individual country level. These errors have been corrected within the relevant data tables.

This affects the following releases:

Travel trends: 2021
Overseas travel and tourism: April 2022 provisional results

Corrections have been made to the main points, commentary and accompanying data tables.

Publication of our monthly and quarterly overseas travel and tourism releases will resume as soon as possible.

We apologise for the inconvenience.

Notice

15 June 2022

The estimates provided for 2021 should be treated with caution as the numbers are much smaller than pre-coronavirus pandemic years, especially for the first six months of the year, resulting in some cases with larger confidence intervals. The data exclude the EuroTunnel completely and the Dover ferries until August 2021 as the Office for National Statistics (ONS) was unable to interview at these sites. No estimates are included for any travel across the Irish border.

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1 . Main points

- Overseas residents made 6.4 million visits to the UK in 2021; this was 43% less than in 2020 as travel continued to be reduced because of the coronavirus (COVID-19) pandemic.

- Overseas residents spent £5.6 billion on their visits to the UK in 2021; this was 9% less than in 2020.

- UK residents made 19.1 million visits abroad in 2021, which was 20% less than the previous year and was because of the continued travel restrictions.

- UK residents spent £15.5 billion on visits abroad in 2021; this was a 13% increase on 2020.

- The average length of stay for both overseas residents' and UK residents' visits was much longer than in previous years and resulted in a higher spend per visit.

- Some visits and spend are lower in 2021 than 2020; this is because travel in the first quarter of 2020 (January to March) was unrestricted.

- Following the suspension of data collection on 16 March 2020, data collection by the International Passenger Survey (IPS) was restarted on 18 January 2021 after travel restrictions were relaxed; estimates for the period April to December 2020 in this release are based on administrative sources and modelling.

The estimates provided for 2021 should be treated with caution as the numbers are much smaller than pre-coronavirus pandemic years, especially for the first six months of the year, resulting in some cases with larger confidence intervals. The data exclude the EuroTunnel completely and the Dover ferries until August 2021 as the Office for National Statistics (ONS) was unable to interview at these sites. No estimates are included for any travel across the Irish border.

2 . Travel and tourism statistics and coronavirus (COVID-19)

Travel and tourism statistics are usually based on the results of the International Passenger Survey (IPS), but the survey was suspended on 16 March 2020 because of the coronavirus (COVID-19) pandemic. No IPS data were collected from this date until the survey restarted on 18 January 2021.

The figures published in this article, for April to December 2020, are based on administrative sources and modelling, and the methods used are described in Section 6: Data sources and quality. The statistics have been produced to the highest quality possible, but the methods used have not been subject to full review and scrutiny.

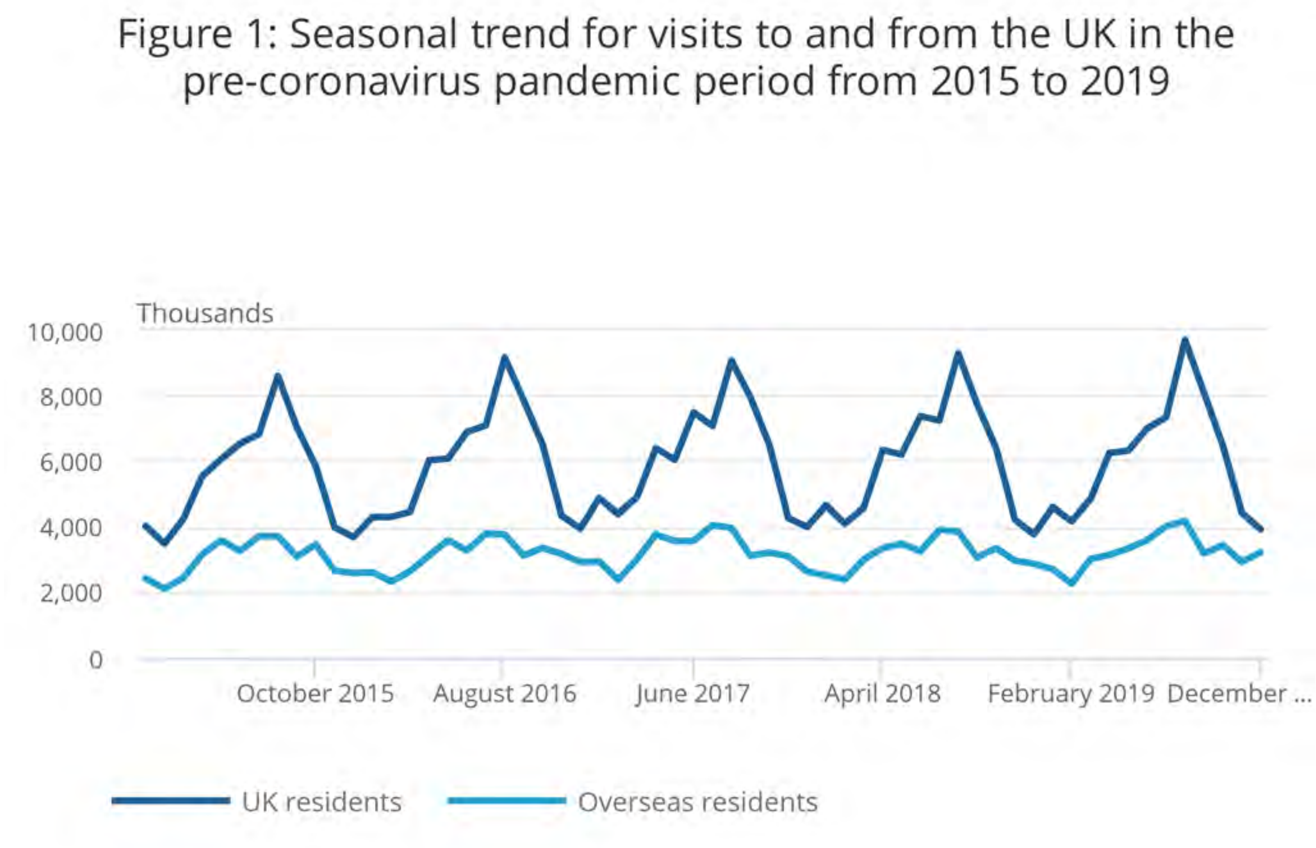
Furthermore, we have made assumptions that some previous trends have continued; for example, the proportions of passengers travelling for business or holidays. The results are indicative and should therefore be viewed with caution. We have produced these estimates to provide users with as much information as possible about international travel over this period.

A limited number of visits to and from different countries means the data collected for 2021 are not as complete as in other years and some tables are not available. Within the tables, some data are grouped as the numbers are too small to show separately. As a result of the inability to collect data at the EuroTunnel and the late starting of Dover Seaport data collection (in August 2021), no separate mode of travel tables are shown.

3 . Overseas visits to the UK and UK visits abroad: 2021

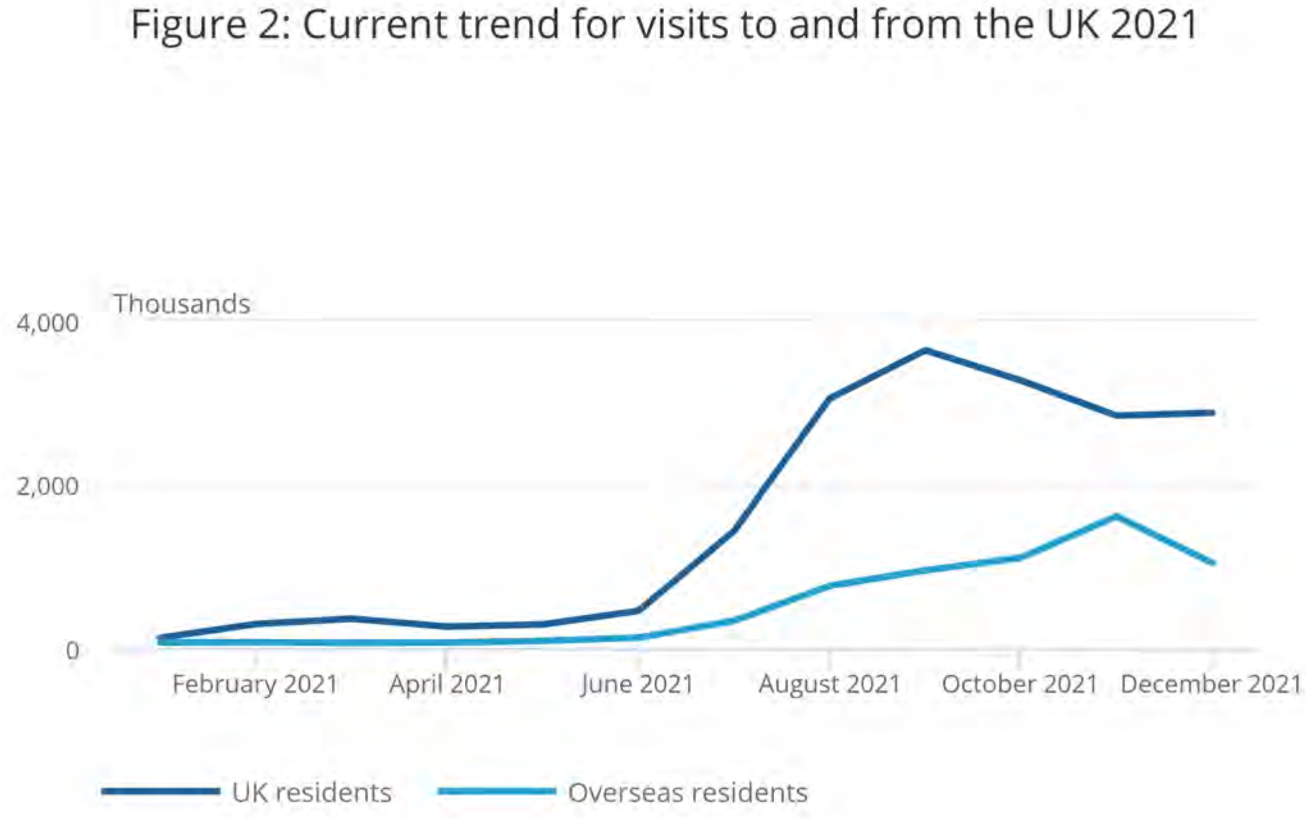
Normal seasonal trends in visits were not seen in data for 2021 as both visits to and from the UK continued to increase all year after the easing of travel restrictions because of the coronavirus (COVID-19) pandemic. The difference in travel patterns for 2021 compared with pre-coronavirus pandemic trends can be seen in Figures 1 and 2.

Figure 1: Seasonal trend for visits to and from the UK in the pre-coronavirus pandemic period from 2015 to 2019



Source: Source: Office for National Statistics - International Passenger Survey 2021

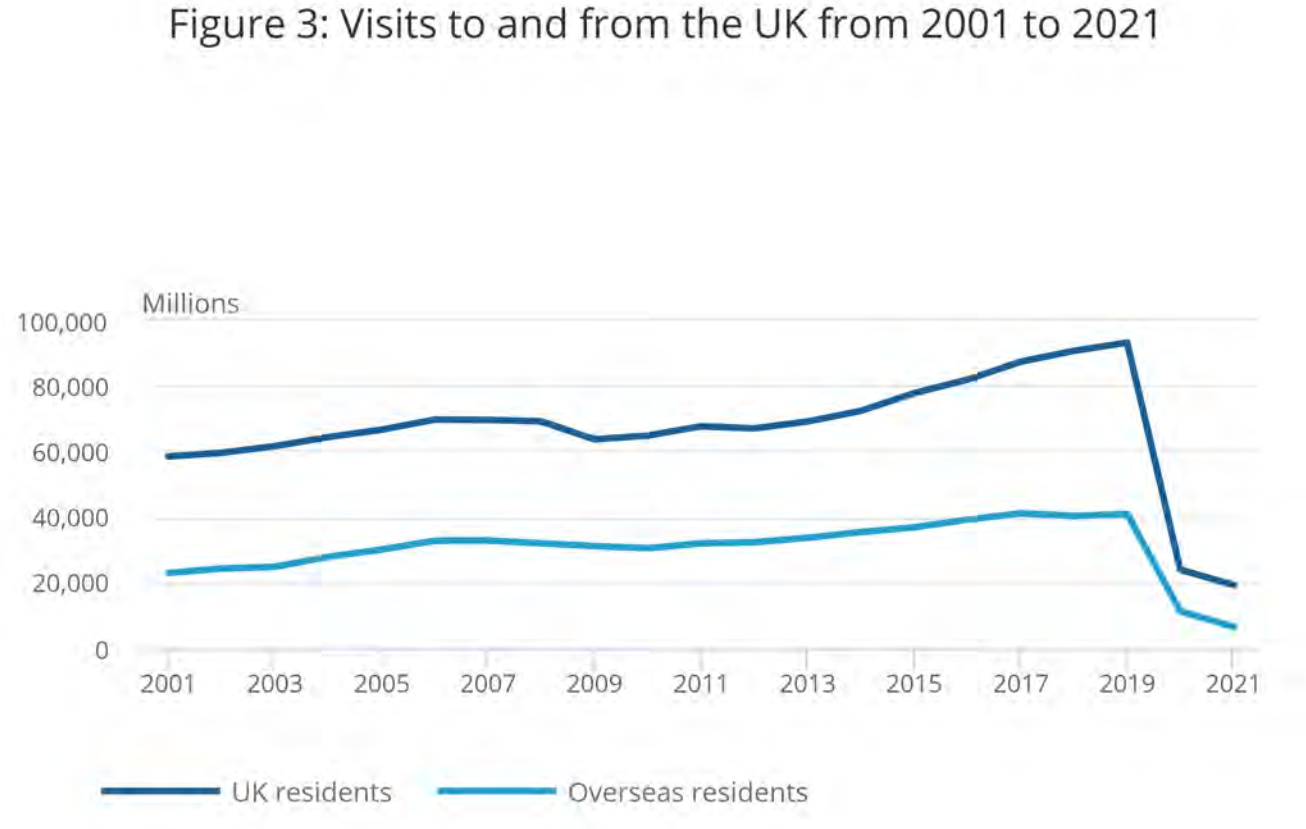
Figure 2: Current trend for visits to and from the UK 2021



Source: Office for National Statistics - International Passenger Survey 2021

There were 6.4 million visits to the UK during 2021, a decrease of 43% compared with modelled data for 2020 (Figure 3). UK residents' visits abroad in 2021 decreased by 20% to 19.1 million.

Figure 3: Visits to and from the UK from 2001 to 2021

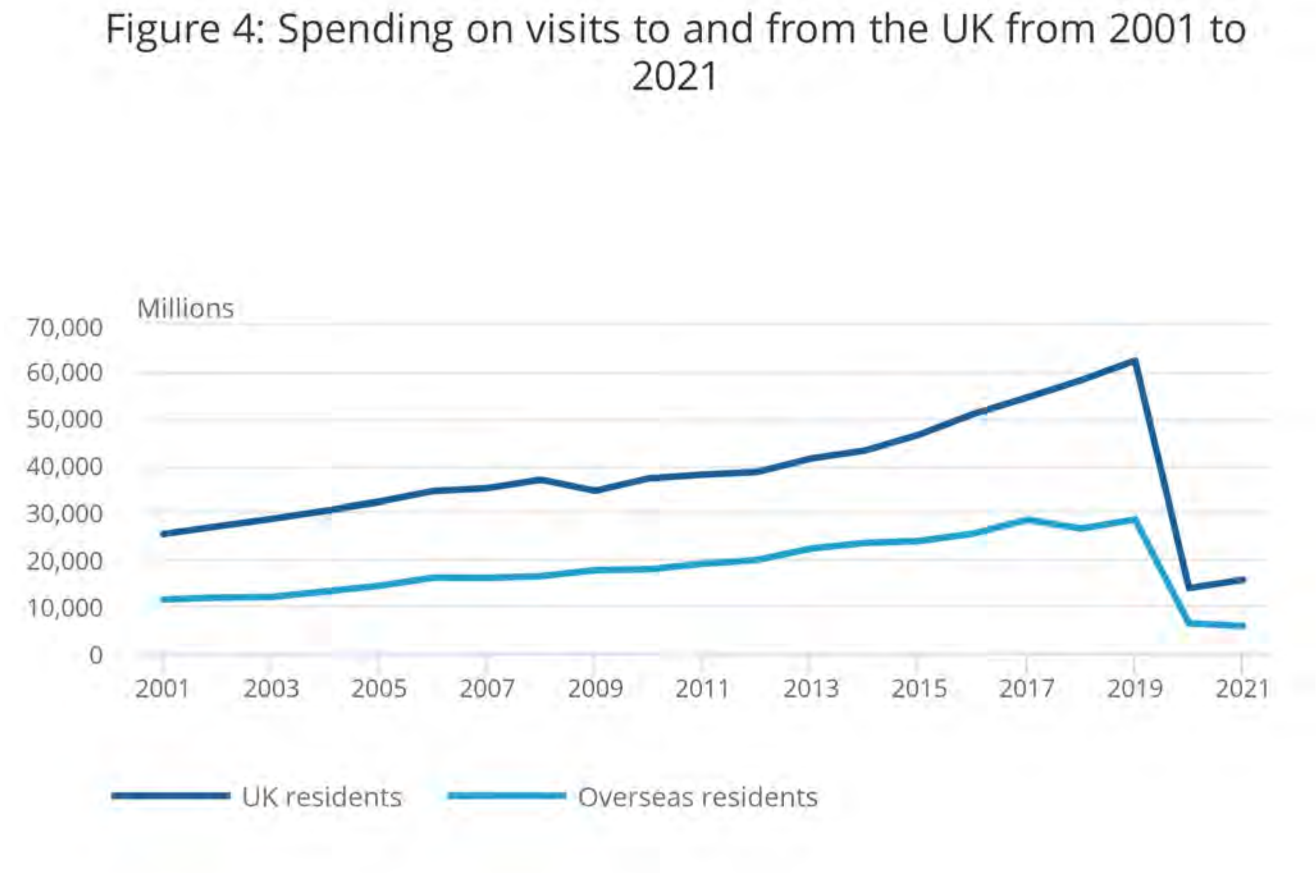


Source: Office for National Statistics - International Travel and Tourism

Overseas spending in the UK fell from a modelled amount of £6.2 billion in 2020 to £5.6 billion 2021, a decrease of 9% (Figure 4). This was an 80% decrease when compared with 2019. Overseas residents spent longer in the UK and spent less money per day – an average of 15 nights and an average spend of £60 per day. This compares with 2019 where the average stay was just seven nights with an average spend of £98 per day.

UK residents spent £15.5 billion on visits abroad in 2021, an increase of 13% compared with modelled data for 2020. The average spend per visit was £808 in 2021. Values for 2020 are not known, but this was an increase from £670 in 2019. Some of this increase is because of the longer time spent abroad. As with overseas residents' visits, the number of nights away increased compared with previous years to an average of 18 days. This is likely to be because of the restrictions on travel during the coronavirus pandemic and visitors not being able to return home. The average spend per day fell from £69 in 2019 to £46 in 2021 as more visits were to visit friends and family rather than the usual holidays.

Figure 4: Spending on visits to and from the UK from 2001 to 2021



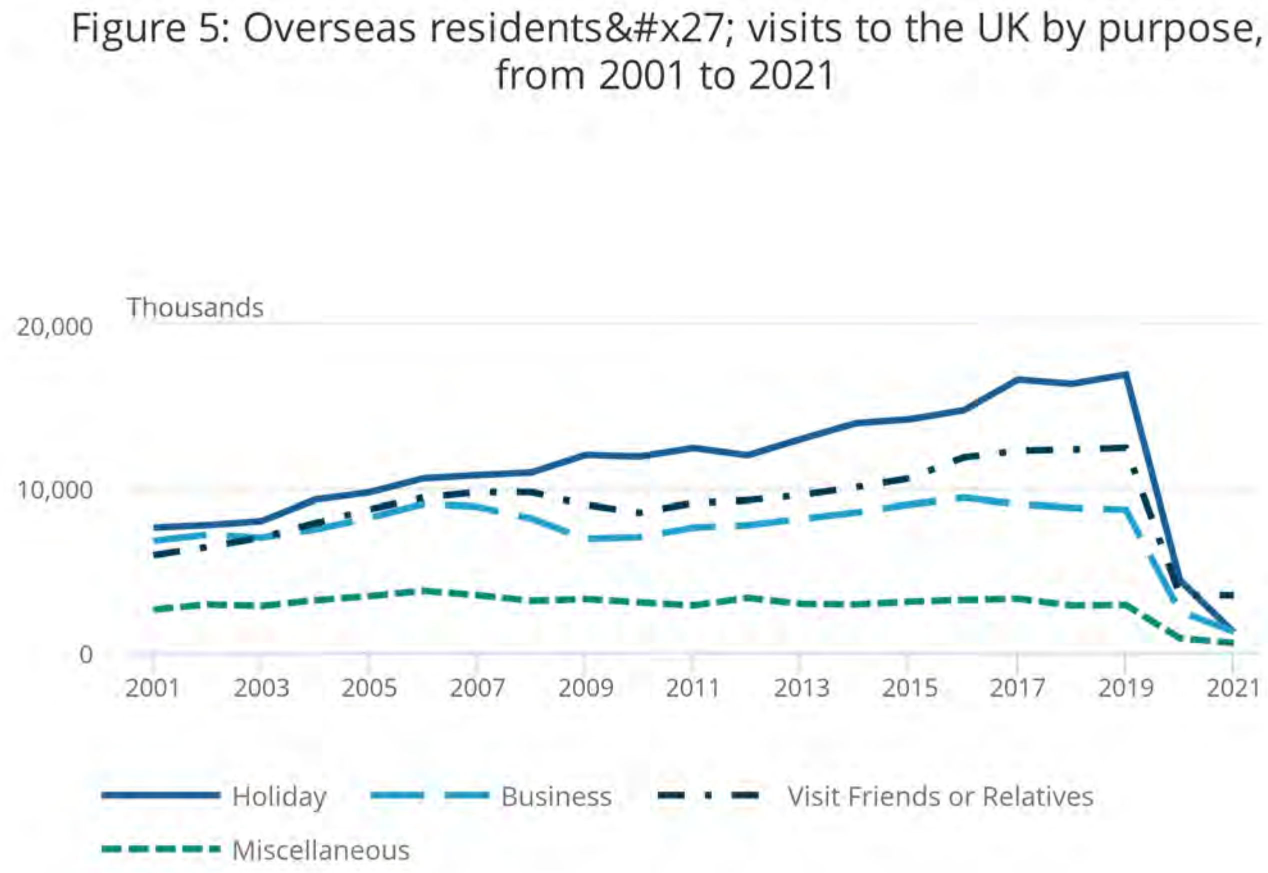
Source: Office for National Statistics - International Travel and Tourism

4 . Overseas residents’ visits to the UK

Visiting friends and relatives was the most popular reason for visiting the UK in 2021, with 3.5 million visits (Figure 5). For the first time, this type of visit overtook holidays because of the coronavirus (COVID-19) pandemic. There were 1.2 million holidays in the UK and the same number of business trips to the UK in 2021.

Similar trends were observed for different areas of the world. Most visits by North American residents were to visit friends and relatives – 437,000 out of a total of 792,000 visits. Holidays made up just 175,000 visits from residents of this region. Visits by European residents totalled 4.8 million, with visiting friends and relatives topping the list of reasons with 2.6 million visits. Business trips were 1.1 million and holidays were 820,000. Visits by residents of “other countries” (countries outside of Europe and North America) were 759,000 with more than half, 417,000, to see friends and relatives.

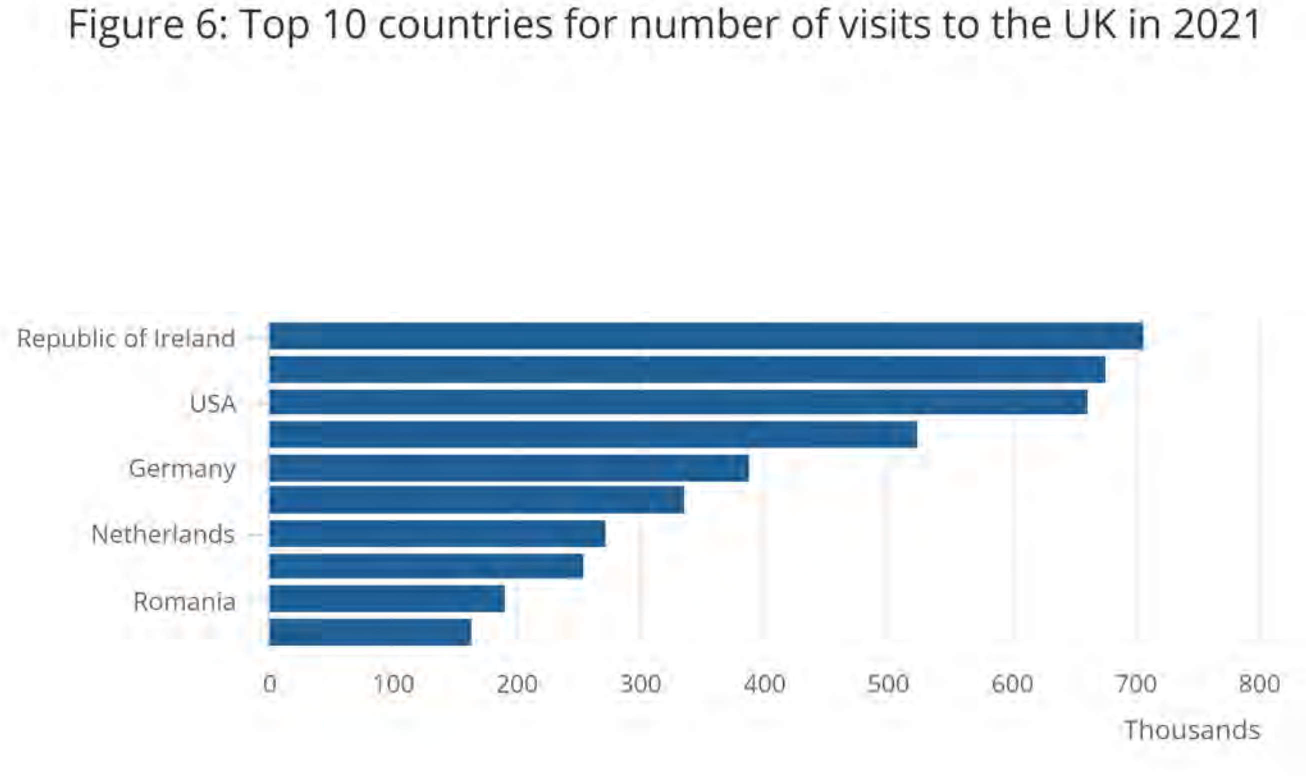
Figure 5: Overseas residents' visits to the UK by purpose, from 2001 to 2021



Source: Office for National Statistics - International Travel and Tourism

In previous years, residents from the US made the most visits to the UK but in 2021, residents from the Republic of Ireland made more, a total of 708,000 visits and French residents made 677,000 visits. In previous years, residents from Australia appeared in the top 10, but as this country was locked down for most of 2021 because of the coronavirus pandemic, they have slipped down the rankings.

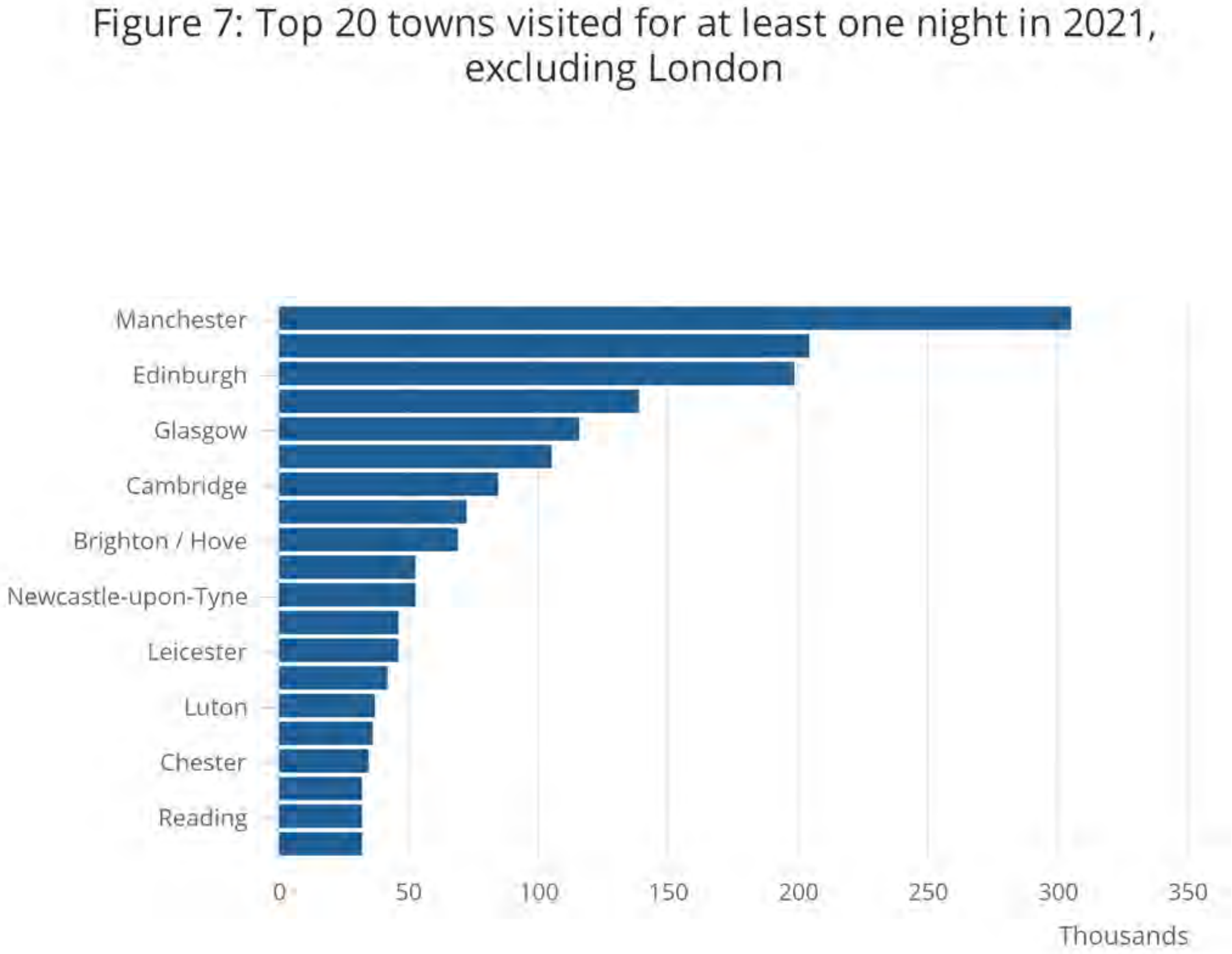
Figure 6: Top 10 countries for number of visits to the UK in 2021



Source: Office for National Statistics - International Passenger Survey 2021

As in previous years, London attracted the most visits although the numbers were much smaller than in previous years – 2.7 million in 2021 compared with 21.7 million visits in 2019. Overnight visits to cities outside London are shown in Figure 7. For the first time, Manchester (306,000 visits) and Birmingham (205,000) overtook Edinburgh (199,000 visits). This difference is likely to be because of the reason for visiting changing in 2021 with holidays being less popular than visiting friends and family.

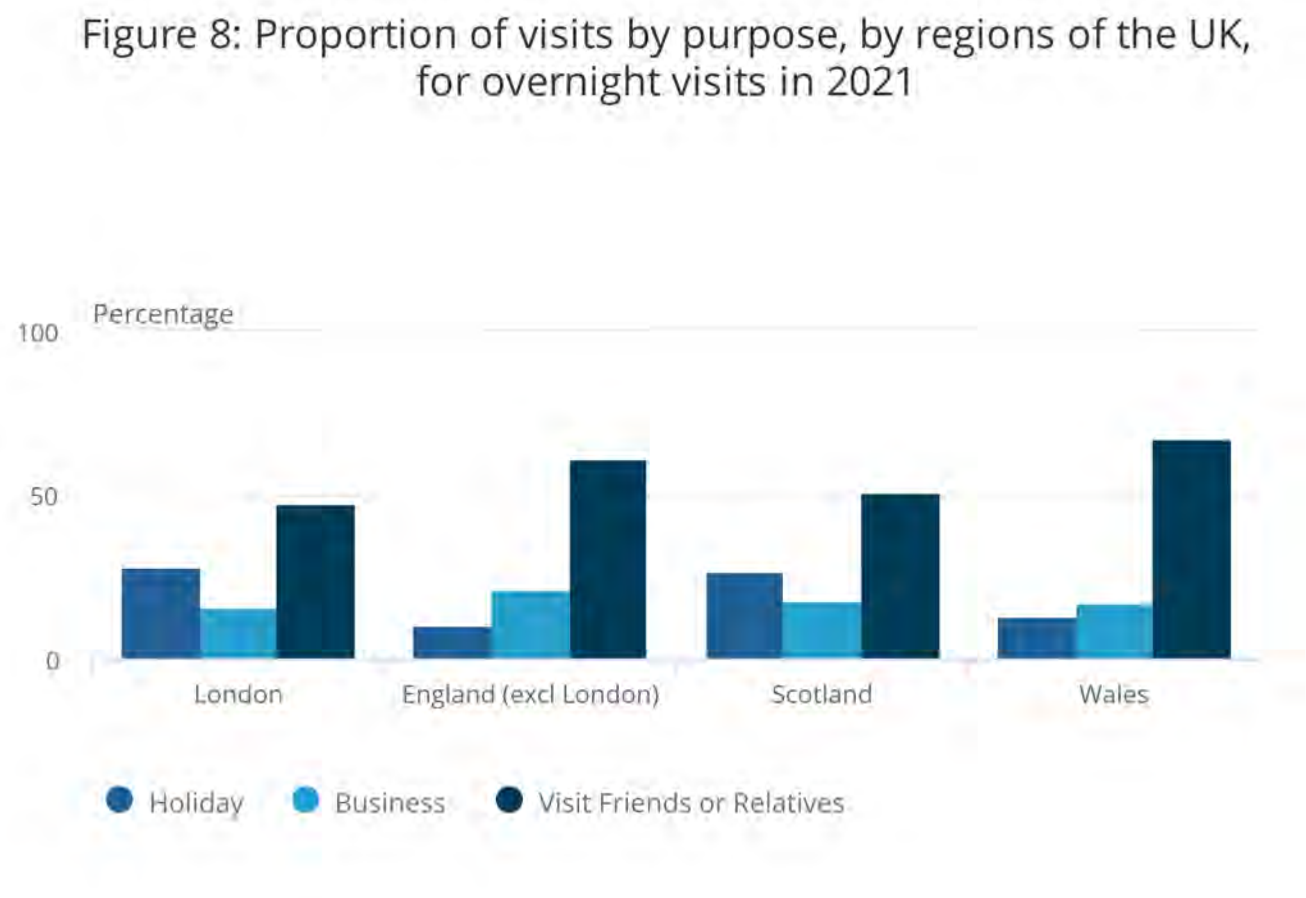
Figure 7: Top 20 towns visited for at least one night in 2021, excluding London



Source: Office for National Statistics - International Passenger Survey 2021

Overseas residents made 479,000 overnight visits to Scotland in 2021, of which 51% were to visit friends and relatives and 27% were for holidays (see Figure 8). There were 124,000 overnight visits to Wales, of which 66% were to visit friends and relatives and 17% were for holidays, while 47% of overnight visits to London were to visit friends and relatives and 28% were for holidays.

Figure 8: Proportion of visits by purpose, by regions of the UK, for overnight visits in 2021



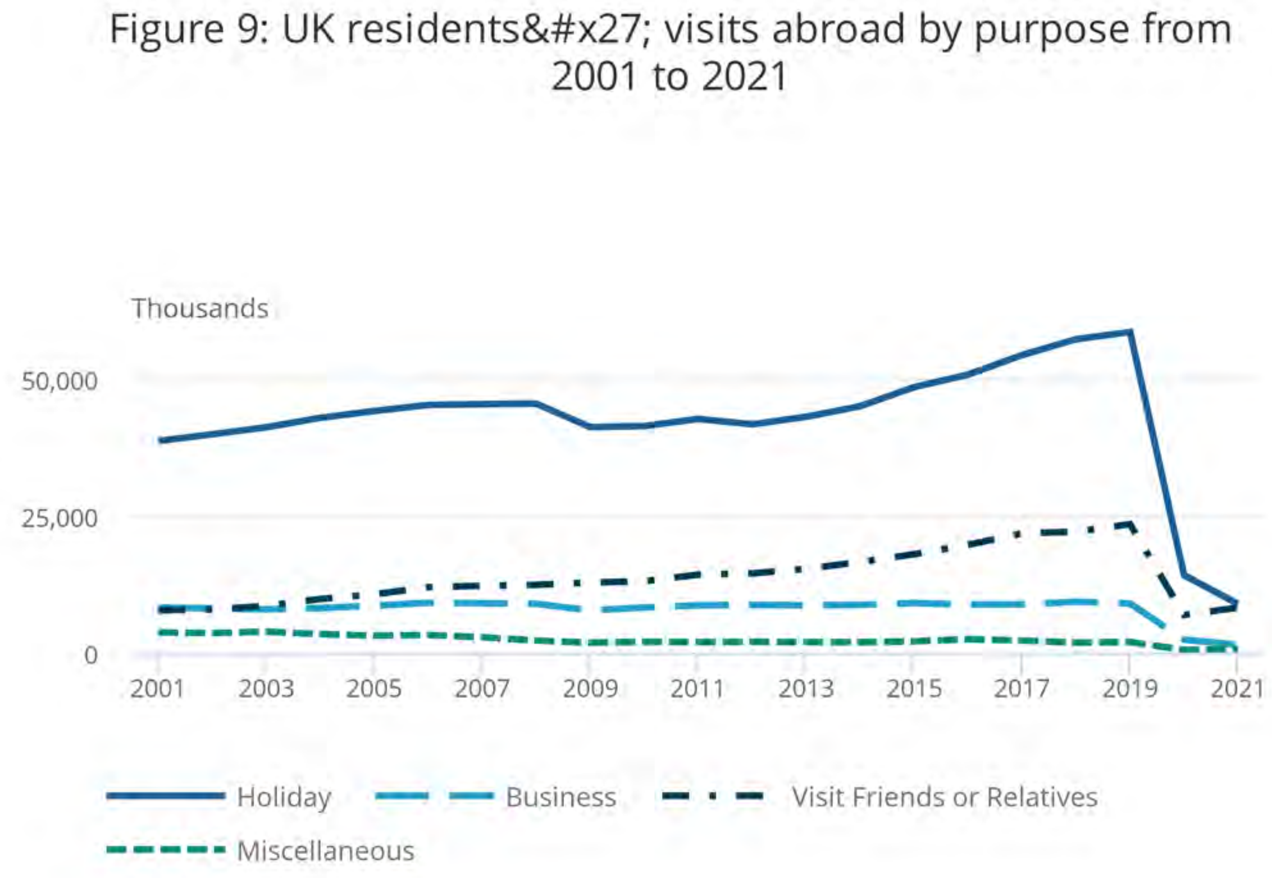
Source: Office for National Statistics - International Passenger Survey 2021

5 . Visits abroad by UK residents

There were 19.1 million visits overseas by UK residents in 2021; similar to 1981. The number of visits in 2021 was 79% less than the peak in 2019, when there were 93.1 million visits.

Holidays were still the most popular reason (46%) for travelling abroad in 2021. However, this was driven by an increase in the second half of the year when travel restrictions started to lift. During January to June 2021, only 18% of visits, 242,000 out of 2.1 million, were for holidays; between July and December 2021, this percentage rose to 51% (8.6 million out of a total of 17.1 million). The overall proportion of visits to see friends and relatives was 43%, which was much higher than the 25% in 2019.

Figure 9: UK residents' visits abroad by purpose from 2001 to 2021

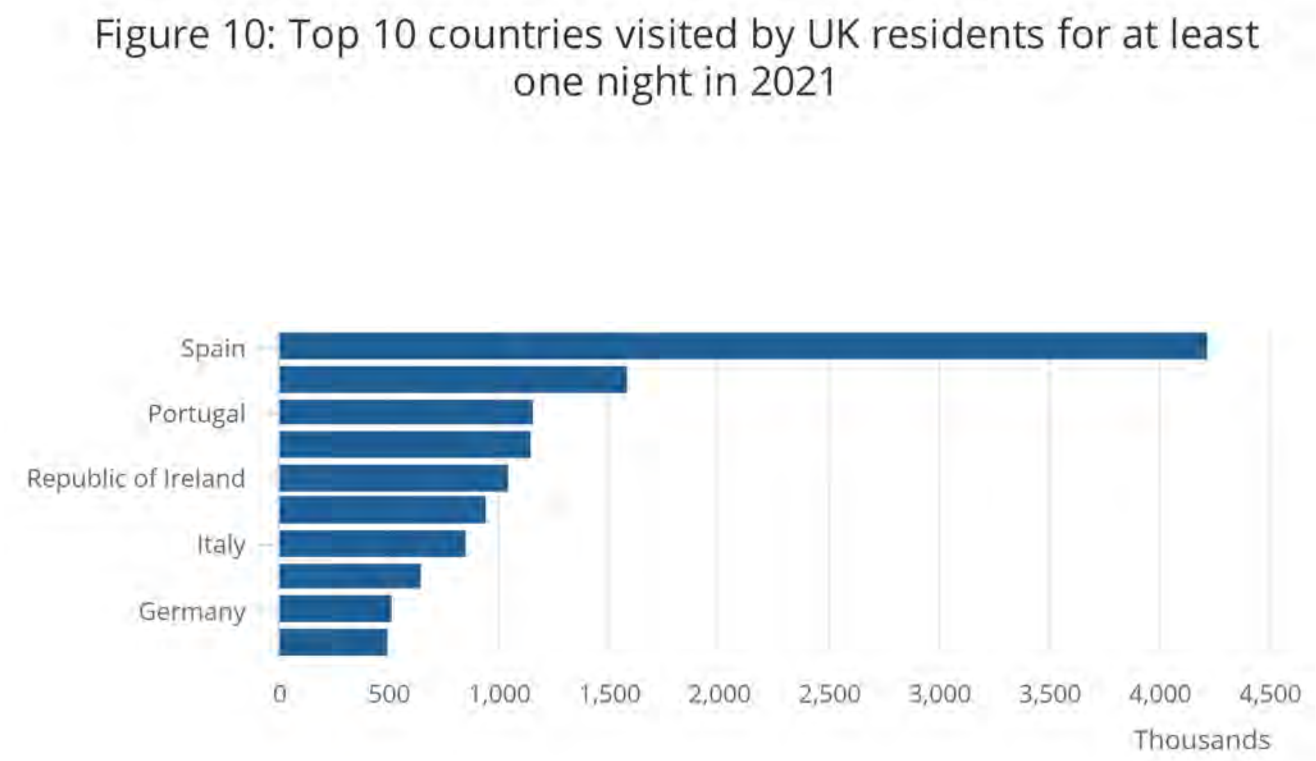


Source: Office for National Statistics - International Travel and Tourism

The number of visits to North America fell by 89% to 623,000 compared with 2019 when there were 5.6 million visits to this region. Visits to Europe also fell by a large proportion, when compared with 2019, to 78% from 72.5 million to 15.8 million visits. Visits to “other countries” (countries outside of Europe and North America) fell over the same period by 82% to 2.7 million (Figure 10).

Estimated spending abroad by UK residents decreased by 75% to £15.5 billion in 2021 when compared with 2019. Over half of the total spend was on holidays (£7.9 billion) with an additional £5.2 billion spent on visiting friends and relatives.

Figure 10: Top 10 countries visited by UK residents for at least one night in 2021



Source: Office for National Statistics - International Passenger Survey 2021

As would be expected, spending abroad since 2019 has decreased for all purposes; the largest fall was seen for holidays, which was 82% lower than in 2019. Business also saw a large decrease of 76% over the same time. The overall percentage decrease was 75%, from £62.3 billion in 2019 to just £15.5 billion in 2021.

Spain and France remained the most popular destination for UK visits abroad, but the United States dropped from 4th in 2019 to 10th in 2021 because of coronavirus (COVID-19) travel restrictions. Over a fifth of all visits abroad were to Spain (22%) with the second most popular country, France, only seeing 8% of the total visits abroad.

6 . Travel trends data

Travel trends estimates: UK residents‘ visits abroad
Dataset | Released 15 June 2022
Annual estimates on visits and spending by UK residents abroad, by purpose and region of visit. New methods were introduced for producing the 2021 estimates. The datasets presented for 2021, and for 2017 to 2021, contain estimates produced using the new method. The other datasets presented on this page were produced using the previous method and are now superseded.

Travel trends estimates: overseas residents in the UK
Dataset | Released 15 June 2022
Annual estimates on visits and spending in the UK by overseas residents, by purpose and region of visit. New methods were introduced for producing the 2021 estimates. The datasets presented for 2021, and for 2017 to 2021, contain estimates produced using the new method. The other datasets presented on this page were produced using the previous method and are now superseded.

Travel trends estimates: overseas residents in the UK and UK residents abroad
Dataset | Released 15 June 2022
Annual estimates on visits and spending of UK residents abroad and for overseas residents visiting the UK.

Overseas travel and tourism, quarterly
Dataset | Released 15 June 2022
Seasonally adjusted and non-seasonally adjusted estimates of completed international visits to and from the UK and earnings and expenditure associated with these visits.

UK residents visits and expenditure abroad, quarterly
Dataset | Released 15 June 2022
Seasonally adjusted and non-seasonally adjusted estimates of completed international visits and spending abroad by UK residents.

7 . Glossary

Visits

The figures relate to the number of completed visits, not the number of visitors. Anyone entering or leaving more than once in the same period is counted on each visit.

Overseas visitor

An overseas visitor is a person who, being permanently resident in a country outside the UK, visits the UK for a period of less than 12 months. UK citizens resident overseas for 12 months or more coming home on leave are included in this category. Visits abroad are visits for a period of less than 12 months by people permanently resident in the UK (who may be of foreign nationality).

Visiting multiple countries

When a resident of the UK has visited more than one country, expenditure and stay are allocated to the country stayed in for the longest time.

Miscellaneous visits

Visits for miscellaneous purposes include those for study, to attend sporting events, and for shopping, health, religious or other purposes, together with visits for more than one purpose when none predominates (for example, visits both on business and on holiday). Overseas visitors staying overnight in the UK on their way to other destinations are also included in miscellaneous purposes.

Earnings and expenditure

Earnings refer to spending in the UK by overseas residents, whereas expenditure refers to spending abroad by UK residents.

8 . Data sources and quality

Methods used to produce these estimates

Apart from the time when the International Passenger Survey (IPS) was not running (16 March 2020 to 18 January 2021), figures shown are produced from results of the IPS. These results do not include any travel via the Channel Tunnel vehicle trains as the trains were isolated and no interviewing could take place. It was also not possible to obtain any survey results from Dover to France until August 2021. It should be noted that there was very little travel-related traffic at that time. Results for when the IPS was not operating were limited to totals, and the method used can be found in Section 6 of our Overseas travel and tourism, provisional: April to June 2020 publication. Although traffic volumes have increased during 2021, figures should be treated with caution as the numbers are much smaller than in the past and are subject to higher sampling errors than previous estimates released.

Accuracy of the IPS estimates

Estimates produced from the IPS are subject to sampling errors that result because not every traveller to or from the UK is interviewed on the survey. Sampling errors are determined both by the sample design and by the sample size - generally speaking, the larger the sample supporting a particular estimate, the proportionately smaller is its sampling error. The survey sample size in 2021 is much smaller than in previous years because of the travel restrictions resulting from the coronavirus (COVID-19) pandemic.

The estimates presented in this article for the whole of 2020 must be treated with particular caution, since the methods used have not been fully scrutinised or tested.

The estimates presented in this article make the best use of the available data and methods to produce estimates of international visits and spending. However, as noted, the numbers are small and the results should be treated with caution.

9 . Related links

[Travelpac: travel to and from the UK]
Dataset | Released 24 July 2020
Quarterly data on travel to and from the UK, taken from the International Passenger Survey (IPS). Includes detail on age and sex of travellers, purpose and length of trip, and spending. These data are in a form suitable for small businesses and students. National Statistics designation applies to the data for all periods up to 2019. Designation has been temporarily withdrawn for Quarter 1 (Jan to Mar) 2020 because of incomplete data collection as a result of coronavirus (COVID-19).

[Travel trends: 2019]
Article | Released 22 May 2020
Annual estimates of travel and tourism visits to the UK (of less than 12 months' duration) and associated earnings and expenditure between the UK and the rest of the world.

[Overseas travel and tourism, UK, provisional: July to September 2021]
Article | Released 7 February 2022
Visits to the UK by overseas residents, visits abroad by UK residents and spending estimates by travellers, using administrative sources of passenger travel data.

[Overseas travel and tourism: January, February and March 2020 provisional results]
Bulletin | Released 24 July 2020
Visits to the UK by overseas residents, visits abroad by UK residents and spending by travellers, using provisional passenger traffic data.

Appendix 7: BH & HPA 2019 Economic Benefit Report: Holiday Parks and Campsites UK Report

Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites UK

Report for the UK Caravan and Camping Alliance

February 2019

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11 Academy Street, Coatbridge, Lanarkshire, Scotland, ML5 3AW
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www.frontline-consultants.com
Also at: Central Court, 25 Southampton Buildings, London, WC2A 1AL

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Executive Summary

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

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

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

Background

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

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

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

Report Purpose

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

Stakeholder feedback

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

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

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

Economic Impact

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

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

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, in the summer of 2018 there were 6,243 member holiday parks/campsites operating in the UK accounting for 438,076 pitches[7]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 790 of these parks. Research found that UK holiday parks/campsites offer a wide range of accommodation options to visitors, which allows it to serve a diverse range of customers' tastes and budgets. These include touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts. In addition to this diverse accommodation, UK holiday parks/campsites also offer a wide range of facilities and amenities, including restaurants, swimming pools, cafés and games rooms.

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

Holiday park/campsite operators support their local communities through:

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

Park Visitors

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

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

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

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

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

1 Introduction

In November 2017, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent economic impact and benefit assessment of the holiday park/campsite sector across the UK. This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland. This report is for the UK[10].

The UKCCA comprises the following sponsor organisations:

1.1 Research objectives

The objectives of the impact and benefit assessment were to:

- provide an independent, evidence-based, understanding of the direct and indirect economic impact/contribution of the holiday park/camping sector in the UK
- provide the economic impact/contribution from all forms of holiday parks/campsites accommodation including:
  - touring caravan/motorhome/ campervan (owned and hired)
  - caravan holiday homes/lodges (park or privately owned/rented)
  - camping
  - glamping
  - self-catering (apartments, chalets, permanent lodges/cabins)
- understand the type of spend by the sector and each subset and estimate how much tourism spend, both direct and indirect, is made, and how much income remains in the UK/regional economies
- determine the number of full-time equivalent (FTE) jobs supported by the sector and each subset, both those employed directly and indirectly as well as seasonal and part-time jobs
- report and provide robust data at the UK level as well as the four countries (England, Scotland, Wales and Northern Ireland); include to a regional level within each of the four countries
- consider expenditure by the holiday park/ campsite owners/ operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities
- consider spend by visitors to the holiday parks/campsites, both on and off-site, for all types of accommodation; identify spend by overseas visitors
- consider how the study can link to aspects of health and social wellbeing

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

The assessment method is presented in Appendix 1.

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

2 UK Tourism in Context

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

2.1 National tourism strategies

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

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

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

VisitBritain's strategy has the ambitions of:

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

This strategy aims to build from the past while taking advantage of the opportunities for Britain including:

- prominence following the London 2012 Olympics
- large global aviation route network
- strong associations with culture and heritage
- strong tourism infrastructure
- English language
- London being a global city

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

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

2.2 National tourism statistics

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

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

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

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

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

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

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

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

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

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

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

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

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

3 Stakeholder Feedback

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

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

3.1 Drivers for change

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

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

3.2 SWOT analysis

The strengths of the sector were:

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

The weaknesses of the sector were:

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

Some comments around drivers for change included:

> *"The cost of doing business has risen as a result of Brexit; many products we procure are imported."*
>
> *"Getting visitors more active outdoors and outdoor recreation is important to our club. We started Britain on Foot campaign to help support this."*
>
> *"Heading towards a time where cars or the younger generation can't tow a caravan."*
>
> *"Skills shortage is an issue – working in the sector not seen as a career of choice."*

[20] *Including Chris Greenwood from VisitScotland.*

The opportunities for the sector were:

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

The threats for the sector were:

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

Some comments included:

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

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

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

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

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

3.3 Summary SWOT

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

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

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

Some comments include:

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

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

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

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

4 Holiday Park/Campsite Operator Consultation

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

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

While this represents a comprehensive list of the UKCCA member holiday parks/campsites in the UK it does not include all holiday parks/campsites. For this reason, the impact figures presented in this report can be considered to be a prudent estimate of the total value of the sector.

4.1 Composition of the UK holiday parks/campsites

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

However, the holiday parks/campsites have a wide and growing mix of other accommodation options which cater for a broad range of tastes and budgets, including wigwams, yurts and pods. England contains both the highest number of holiday parks/campsites (4,845) and the highest number of pitches (320,005).

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

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

Table 4.1: Composition of UK holiday park/campsites sector

	Number of parks	Touring Pitches	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Glamping	Lodge/ chalet/ cottage Owned	Lodge/ chalet/ cottage Rented	Total pitches
England	4,845	120,363	138,966	40,340	1,354	11,765	7,217	320,005
Wales	898	15,943	37,488	6,055	81	2,621	398	62,586
Scotland	390	1,3048	16,287	3,280	250	1,058	739	34,662
Northern Ireland	110	2,567	15,303	2,854	0	49	49	20,823
Total	6,243	151,921	208,044	52,529	1,685	15,493	8,403	438,076

Source: UKCCA, 2018

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

4.2 Sampling methodology

Holiday parks/campsites across the UK were invited to participate in the research. This was done by the various sponsor groups reaching out to holiday park/campsite operators and gaining consent. Telephone interviews and e-surveys were conducted with those agreeing to participate.

The UKCCA and Frontline met at various stages throughout the project to review the response rates, identifying which geographic areas or accommodation types were under-represented and those were targeted accordingly.

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

4.3 Geographic locations

The geographic location of the surveyed holiday parks/campsites was broadly representative of the sector as a whole. For example, it included holiday parks/campsites from all four countries, receiving a minimum response of at least 11%.

Table 4.2: Locations of holiday parks/campsites

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

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

4.4 Holiday parks/campsites size

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

Table 4.3: Sizes of the holiday parks/campsites surveyed

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

Source: UKCCA, 2018

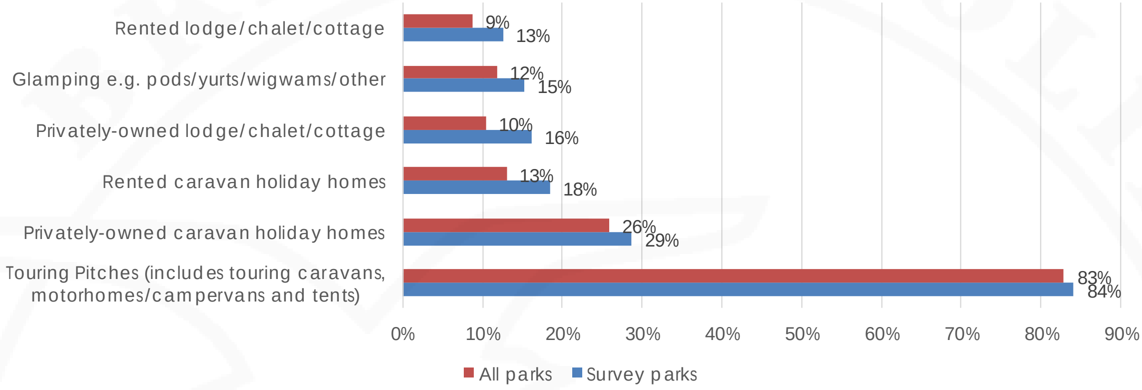
[24] *Note this only includes a subset of the Northern Ireland holiday parks/campsites population i.e. the 40 UKCCA member holiday parks/campsites instead of the estimated population of 110.*

4.5 Accommodation provided

The accommodation type of surveyed holiday parks/campsites was broadly representative of the sector as a whole. The majority of holiday parks/campsites (84%) had touring pitches which includes touring caravans, motorhomes/campervans and tents.

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

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



N=780

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

4.6 Facilities and activities provided

In addition to accommodation, many holiday parks/campsites offer a range of facilities. Surveyed holiday parks/campsites were asked to list what other facilities they had on-site. In the very small sites (1-5 pitches) just over half (53%) had toilet blocks, 41% had shower blocks and 38% had Wi-Fi. In the small to large holiday parks/campsites (6-250+ pitches), facilities were more frequent with toilet blocks, Wi-Fi and laundry being most common.

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

'Other' facilities included:

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

Table 4.4: Facilities listed by holiday park/campsite operators

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

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

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

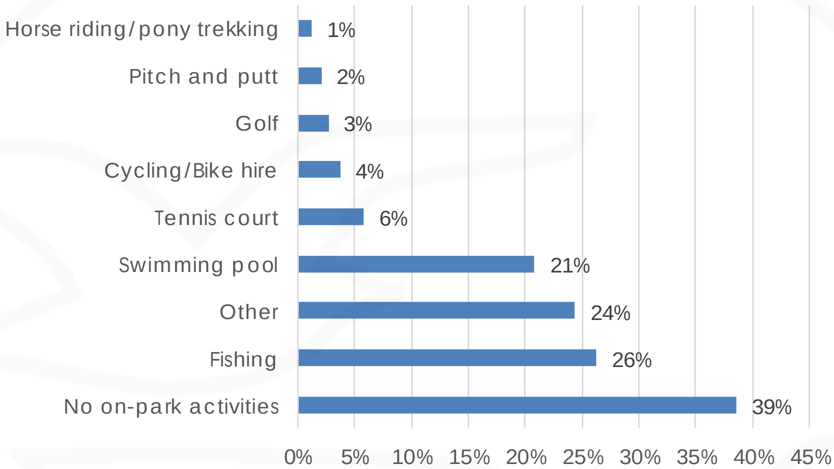
The figures in Table 4.4 capture only those holiday parks/campsites who listed each type of facility in their response; it is possible that some of the holiday parks/campsites may have some of these activities but did not answer this question in full. Therefore, the figures may under-estimate the true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

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

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

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

Figure 4.2: Activities listed by holiday park/campsite operators



N=480

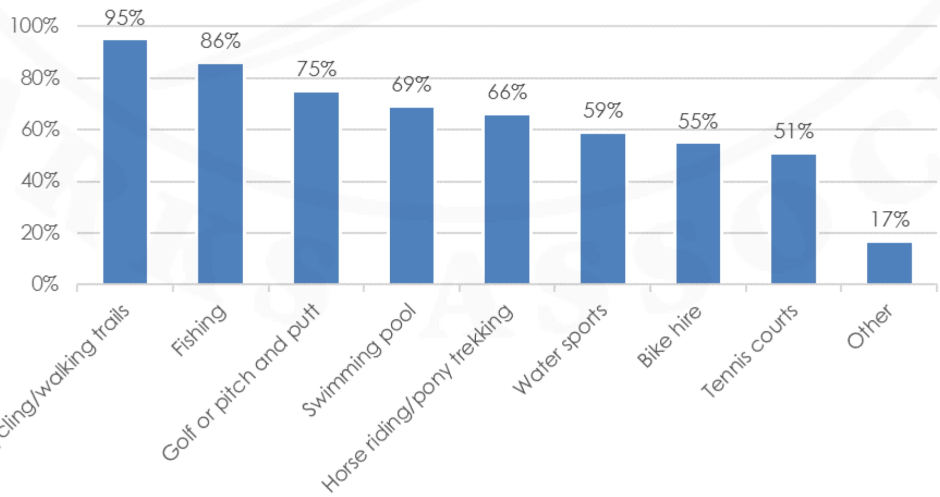
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks offer more than one type of facility)

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

'Other' activities included:

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

Figure 4.3: Range of activities in the local area



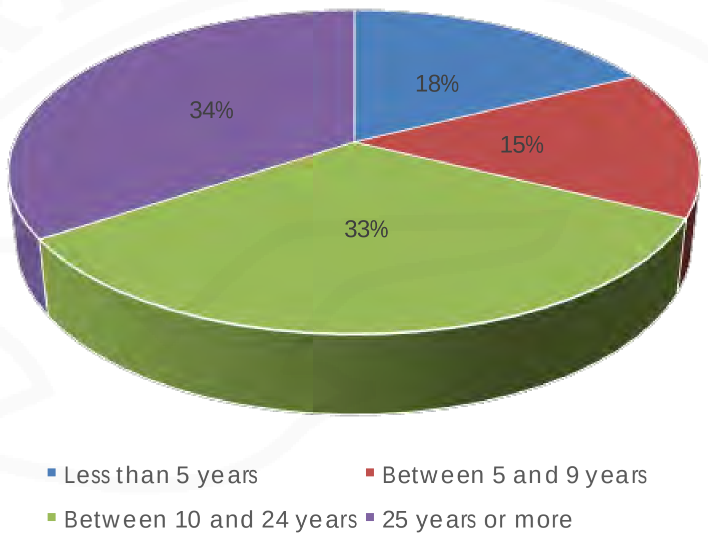
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites *had more than one type of activity in the local area)* N=627

4.7 Holiday park/campsite ownership

In the majority of cases holiday park/campsite operators, saw their holiday parks/campsites as long-term investments, with the holiday parks/campsites owned and operated for more than ten years (67%).

Figure 4.4 summarises the feedback.

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



N=787

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

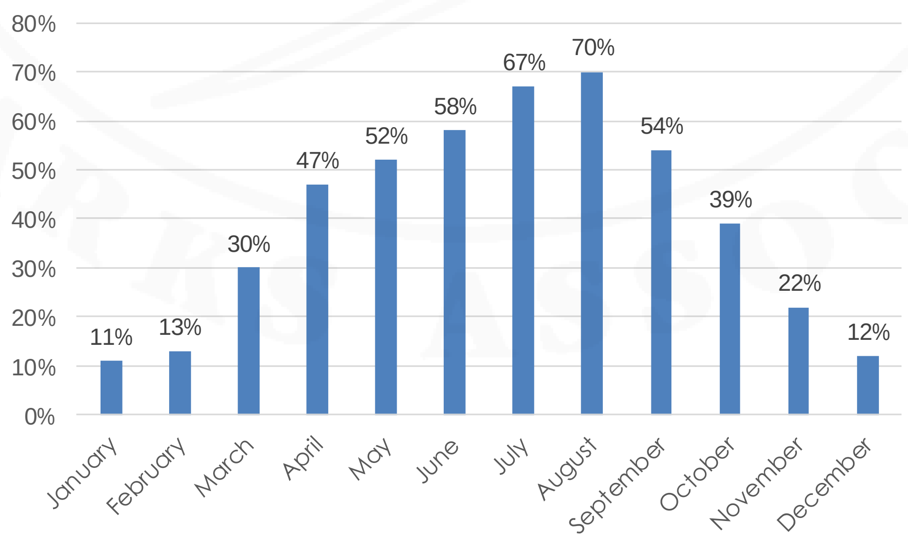
4.8 Length of season and occupancy rates

The majority of holiday parks/campsites (58%) operated seasonally with 42% open all year round. The majority (69%) are open from late March to the end of October.

Holiday park/campsite operators were asked to report their typical occupancy rates for each month opened.

Occupancy rates in UK holiday parks/campsites peaked at 70% in high season (August) and 54% in mid season (September). Low season average occupancy ranged from a low of 12% in December to a high of 30% in March as presented in Figure 4.5.

Figure 4.**5: Average occupancy rates on participants'** holiday parks/campsites



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

4.9 Staff employed

Surveyed holiday parks/campsites were asked about staff numbers across part and full-time as well as seasonal and all year round. Results show that on average, across all holiday parks/campsites, there were 14.2 full-time and 15 part-time seasonal staff and 7.7 full-time and 2.4 part-time all year round staff.

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

Table 4.5: Average staff employed per holiday parks/campsites

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

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

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

4.10 Expenditure by holiday park/campsite[26]

Surveyed holiday parks/campsites were asked to provide details of their capital expenditure, operating expenditure, wages and salaries for the last financial year (2017/18).

The total expenditure for respondent holiday parks/campsites is presented in Table 4.6.

Table 4.6: Total expenditure by holiday parks/campsites

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

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

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

- accommodation – new and existing renovation across all types of accommodation; purchase of new types of accommodation e.g. glamping pods, yurts
- utility development – electric hook up and connections; power upgrades and water supplies
- pitch development – adding new and improving existing – across touring and owned
- facilities – new and refurbishment of washrooms, shower blocks, play areas, leisure facilities and restaurants
- park infrastructure – such as roads and wider landscaping
- park maintenance equipment – plant and machinery
- connectivity – IT and fibre networking
- fleet development – cars and wider transportation, covering new and refurbishment

Looking to the future, parks were then asked to provide their planned expenditure for maintenance and/or expansion/improvement of their holiday parks/campsites and on-site facilities. The total expenditure is presented in Table 4.7.

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

Table 4.7: Planned expenditure

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

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

4.11 Community engagement

Of the 790 holiday parks/campsites, almost half (47%) provided information on how they engage with the local community, the most frequently occurring included:

- promotion and sponsorship of local events – including leaflet display and local information
- fundraising – including historic landmarks, sports events and local charities
- actively promoting local producers, suppliers restaurants and shops
- working with community groups and community councils
- social media advertising and signposting

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

Some holiday park/campsite operator feedback included:

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

Scotland

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

England

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

Wales

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

Northern Ireland

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

Scotland

4.12 Environmental improvement

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

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

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

Some holiday park/campsite operator feedback included:

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

Scotland

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

Northern Ireland

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

Wales

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

England

"We have introduced water and energy saving initiatives deployed via the 'Save It' campaign and are considering negative emissions technologies in collaboration with buying specifications for new assets."

Wales

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

England

4.13 Health and wellbeing

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

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

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

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

Some holiday park/campsite operator feedback included:

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

Northern Ireland

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

Scotland

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

England

"We seek to promote a healthier lifestyle in an environment of outdoor living, which encourages exercise and physical activity. We promote local events such as charity runs and other fun events to both visitors and staff."

Wales

4.14 External factors impacting the business

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

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

Some holiday park/campsite operator feedback included:

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

Northern Ireland

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

England

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

Wales

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

Scotland

4.15 In summary

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

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

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

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

5 Visitor Survey

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

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

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

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

Table 5.1: Location of holiday parks/campsites visited

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

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

5.1 Visitor origin and number of trips

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

Table 5.2: Visitor home country

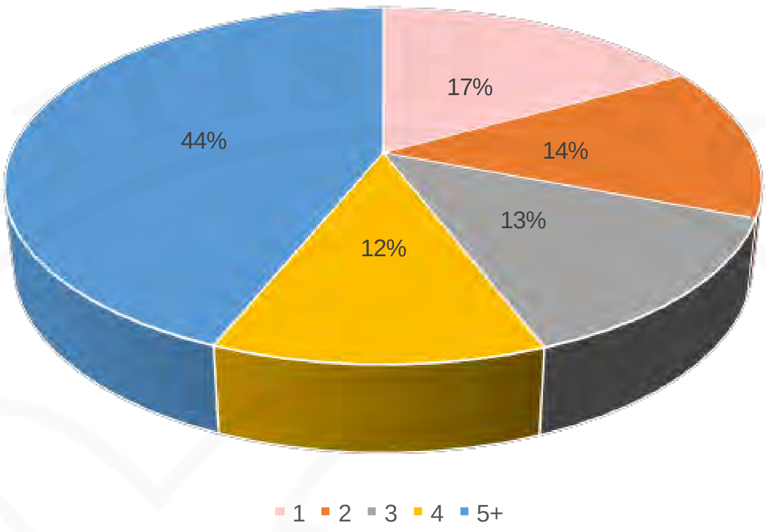
Location	Visitors
England	80%
Scotland	9%
Wales	6%
Northern Ireland	4%
Outside the UK[27]	1%

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

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

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

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



N=7,462

5.2 Visitor characteristics

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

Table 5.3 provides a full breakdown.

Table 5.3: Type of accommodation stayed in

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

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

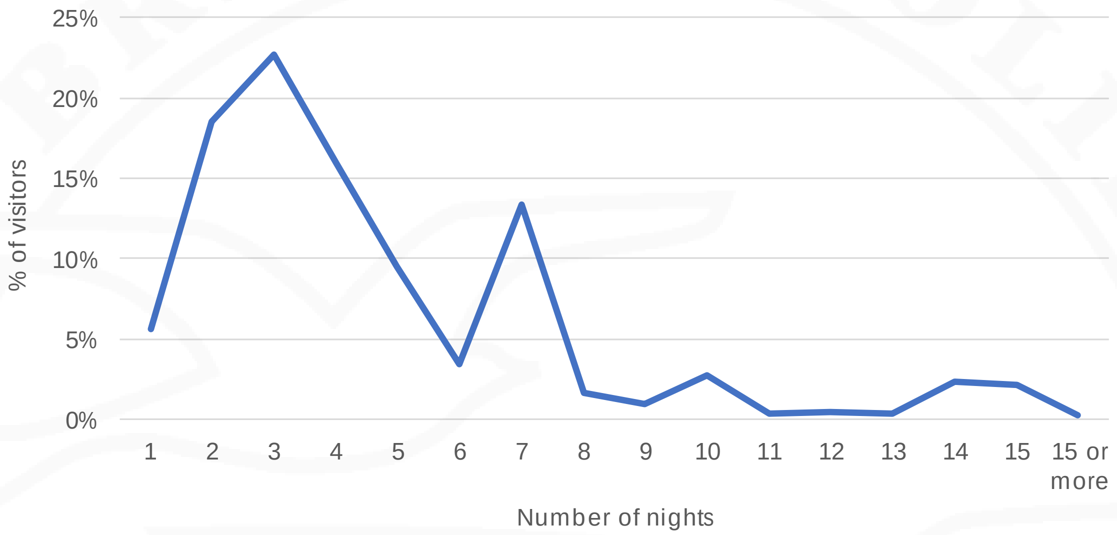
The high level of tourers is not surprising as two thirds (66%) of visitors responding were a member of either the Camping and Caravanning Club and or Caravan and Motorhome Club[28].

When broken down further:

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

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

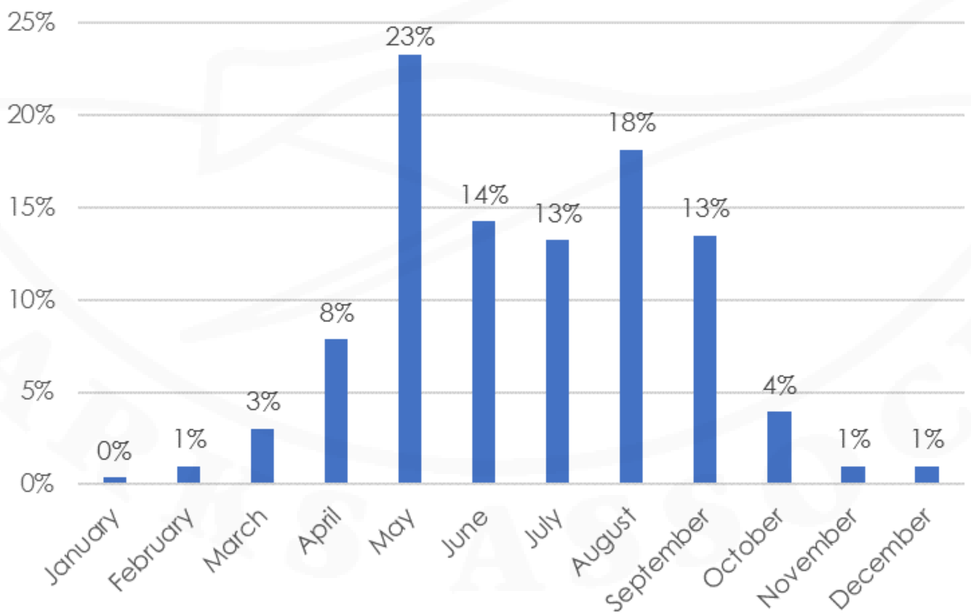
Figure 5.2: Number of nights stayed per visit



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

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

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



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

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

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

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

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

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

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

5.3 Visitor expenditure

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

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

Table 5.5: Visitor spend per visit

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

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

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

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

Table 5.6: Visitor spend per day

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

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

5.4 International visitors

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

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

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

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

Visitors were asked *"what influenced you in making these visits?"*. The most popular responses were *"I wanted to visit the area"*; and *"I wanted to revisit the area"*.

Table 5.7 provides a full breakdown of influences.

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

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

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

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

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

5.6 Health and wellbeing

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

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

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

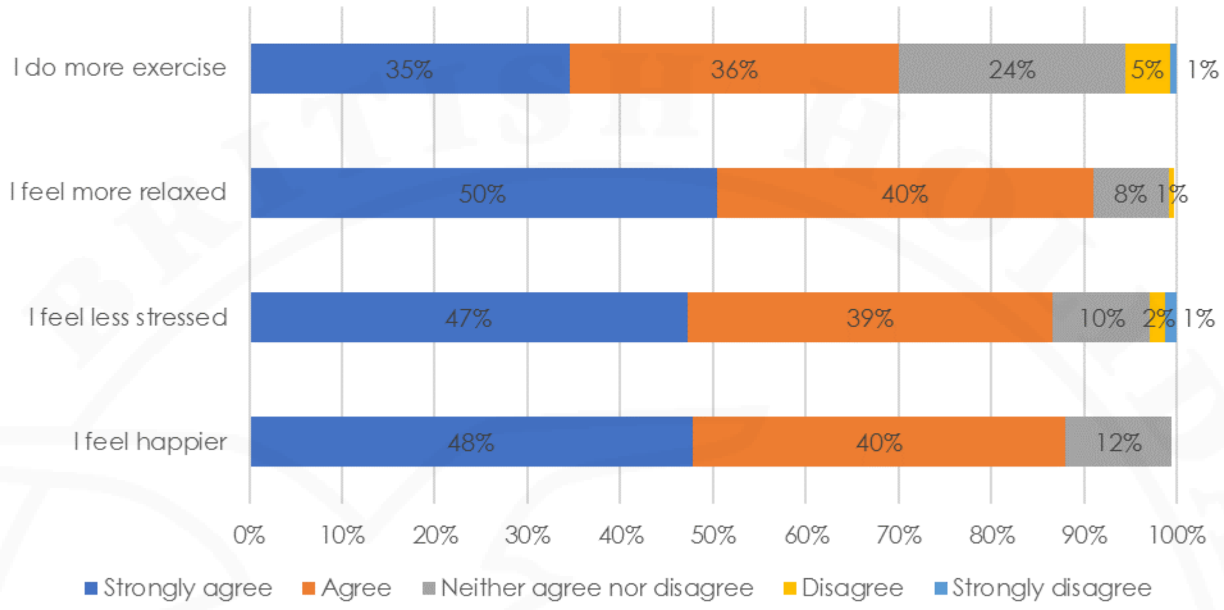
Frontline Holiday Park/Campsite Visitors Survey, 2018 N=5,198-5,778

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

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

Figure 5.4 presents the detailed feedback.

Figure 5.4: When visiting a holiday park/campsite…



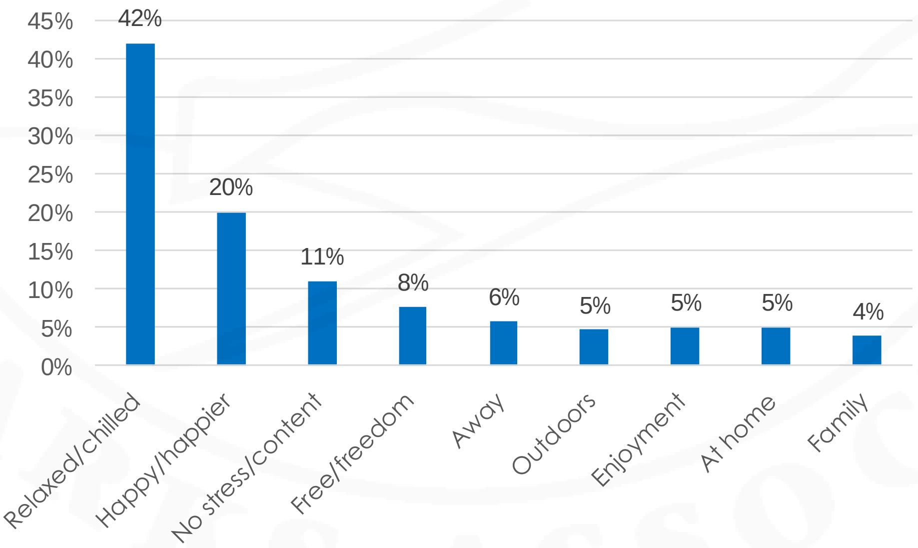
Frontline Holiday Park/Campsite Visitors Survey, 2018

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

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

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

Figure 5.5: During my time visiting a holiday park/camp**site I feel……**



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

Some visitor comments included:

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

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

"Able to enjoy the area and maximise my relaxation time doing things not normally available where I live."
Motorhome/Campervan Owner, England

"Happy in our little camping bubble!"
Motorhome/Campervan Owner, England

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

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

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

"Relaxed and at one with nature, having unwound over our weekends away and feel refreshed when we go back to work every Monday."
Motorhome/Campervan Owner, Wales

5.6.1 Benefits and impacts of improved physical and mental health

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

According to the Chief Medical Officer[32]:

> *"If a medication existed which had a similar effect to physical activity [like walking], it would be regarded as a wonder drug or a miracle cure"* (2010).

Data shows that walking regularly at any speed will[33]:

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

As well as health impacts, there are significant socioeconomic implications. Physical inactivity currently costs the NHS between £1bn and £1.8bn a year. Costs to the wider economy are conservatively estimated at £5.5bn in sickness absence and £1bn in premature deaths – a total of £8.3bn.

Research also shows that feeling more relaxed **can reduce stress in a person's everyday life** which is vital for maintaining overall health, as it can improve mood, boost immune function, promote longevity and allow greater productivity. A study by the New Economics Foundation[34] found there were 17,500 episodes where stress or anxiety was the primary cause for hospital admissions in 2016/17, which led to 165,800 days when beds were occupied. According to the think tank, the average cost of a bed day to the NHS is around £429, which means the total cost to the taxpayer of these episodes is £71.1m.

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

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

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

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

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

Visitors were:

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

Therefore the UK holiday park/campsite sector is supporting the UK policy agenda for health and wellbeing.

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

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

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

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

Some visitor comments included:

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

Campervan Owner, Scotland

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

Glamping User, England

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

Rented Caravan User, England

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

Tent Owner, England

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

Caravan Owner, Northern Ireland

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

Rented Caravan User, Wales

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

Tent Owner, Wales

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

Touring Caravan owner, Northern Ireland

5.7 In summary

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

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

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

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

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

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

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

6 Economic Impact Assessment – Methodological Approach

6.1 General approach

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

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

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

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

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

6.2 Measuring on-site and off-site expenditure

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

Table 6.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	8,736
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	6,115
Multiplied by:	
Ave. on-site expenditure per day for renting holiday-makers	£53.71
= On-site expenditure of touring caravan visitors to a region on 4th August	£328,437

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

Table 6.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	8,736
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	6,115
Multiplied by:	
Ave. off-site expenditure per day for renting holiday-makers	£41.48
= Off-site expenditure of touring caravan visitors to a region on 4th August	£253,650

6.3 Measuring indirect and induced expenditure

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

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

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

The most up-to-date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (March 2018). This publication recommended that the 0.47 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 6.3 presents a worked example for the UK.

Table 6.3: Indirect and induced effects

Total on-site expenditure	£328,437
Plus	
Total off-site expenditure	£253,650
Total combined on and off-site expenditure	£582,087
Multiplied by:	0.47
= Indirect and induced effects:	£273,581

6.4 Measuring visitor impact

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

Table 6.4 presents a worked example.

Table 6.4: Visitor impact

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

6.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[38], every £54,000 spent by tourists in a local economy sustains one full-time equivalent (FTE) job. This proxy was applied in the assessment of the FTE employment impacts associated with the holiday park/campsite visitor expenditure.

According to figures from the most recent ONS's publication[39], turnover generated by the tourism industry translates to a Gross Value Added (GVA) impact. Figures are presented in each country report as to the turnover: GVA ratio[40].

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

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

These are presented in Section 7.

[38] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[39] *2018 Annual Business Survey, ONS, 2018.*

[40] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

7 Economic Impact of Holiday Parks/Campsites in the UK

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

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

7.1 Impact by UK country

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

Table 7.1 summarises the impact at a country level.

Table 7.1: Economic impacts by UK Country

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

Source: Frontline, 2019

7.2 Impact by accommodation type

Table 7.2 summarises the impacts aligned to accommodation type.

Table 7.2: Economic impacts by accommodation type

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

Source: Frontline, 2019

7.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure in holiday parks/campsites in the UK, including their pitch fees. However, the figures do not capture the ongoing costs of maintaining their accommodation.

Based on the survey, Table 7.3 estimates the average maintenance expenditure across the UK.

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

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

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

**Includes touring caravans, motorhomes/campervans and tents.*

The predicted expenditure figure for touring caravan owners is equal to the estimated number of touring caravans/owned motorhomes in the UK (780,000[43]) multiplied by average maintenance expenditure per touring caravan/motorhome (£864). This equals £673.9m.

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

7.4 In summary

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

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

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

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

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

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

8 Conclusions

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

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

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

Flexible accommodation and facilities provision, support local communities, protect the environment and encourages a healthier lifestyle: The UK's 6,243 member holiday parks/campsites account for 438,076 pitches[49]. These holiday parks/campsites offer a flexible choice of accommodation and wide-ranging facilities, and regularly undertake activities which support local communities, help to protect the local environment and promote health and wellbeing.

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

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

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

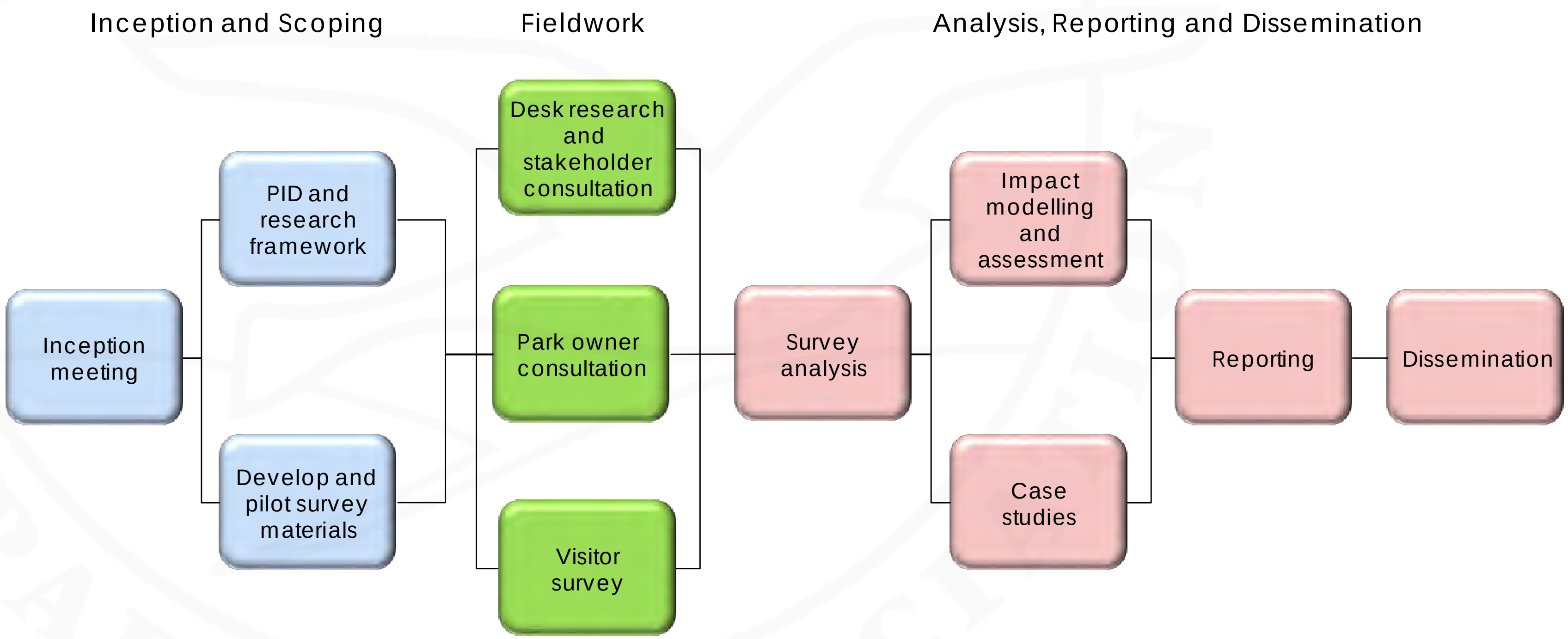
[47] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf

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

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

Appendix 1 – Method

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



UKCCA Group:

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

Other:

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

Scotland

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

England

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

Wales

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

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	991.8	1,130.0	332.5	11.0	95.7	59.6	2,620.6
Wales	142.3	317.4	54.0	0.7	22.2	3.6	540.2
Scotland	114.9	120.3	28.9	2.1	7.7	6.6	280.5
Northern Ireland	23.2	116.4	25.8	0.0	0.4	0.4	166.2
Total	1,272.2	1,684.1	441.2	13.8	126.0	70.2	3,607.5

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet / cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	815.7	797.1	273.3	9.1	67.5	38.6	2,001.3
Wales	109.9	197.6	41.7	0.6	13.8	2.7	366.3
Scotland	104.3	100.1	26.2	1.9	6.4	6.0	244.9
Northern Ireland	15.2	35.4	16.9	0.0	0.1	0.3	67.9
Total	1,045.1	1,130.2	358.1	11.6	87.8	47.6	2,680.4

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	849.5	905.8	284.6	9.6	76.8	61.1	2,187.4
Wales	118.5	242.0	45.0	0.6	16.9	3.0	426.0
Scotland	103.0	103.6	26.0	1.9	6.6	5.8	246.9
Northern Ireland	18.1	71.2	20.1	0.0	0.2	0.4	110.0
Total	1,089.1	1,322.6	375.7	12.1	100.5	70.3	2,970.3

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	2,657.0	2,832.9	890.4	29.7	240.0	159.3	6,809.3
Wales	370.7	757.0	140.7	1.9	52.9	9.3	1,332.5
Scotland	322.2	324.0	81.1	5.9	20.7	18.4	772.3
Northern Ireland	56.5	223.0	62.8	0.0	0.7	1.1	344.1
Total	3,406.4	4,136.9	1,175.0	37.5	314.3	188.1	9,258.2

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	18,369	20,926	6,156	207	1,771	1,101	48,530
Wales	2,635	5,878	1,001	13	411	66	10,004
Scotland	2,126	2,226	535	40	145	119	5,191
Northern Ireland	430	2,155	477	0	7	8	3,077
Total	23,560	31,185	8,169	260	2,334	1,294	66,802

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	15,101	14,761	5,061	170	1,249	717	37,059
Wales	2,036	3,657	773	11	256	51	6,784
Scotland	1,930	1,856	485	38	121	110	4,540
Northern Ireland	282	655	314	0	2	5	1,258
Total	19,349	20,929	6,633	219	1,628	883	49,641

Employment associated with indirect and induced multiplier impacts (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	15,732	16,775	5,273	177	1,419	1,133	40,509
Wales	2,195	4,482	834	11	313	54	7,889
Scotland	1,904	1,916	480	37	124	109	4,570
Northern Ireland	334	1,320	372	0	4	7	2,037
Total	20,165	24,493	6,959	225	1,860	1,303	55,005

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	49,202	52,462	16,490	554	4,439	2,951	126,098
Wales	6,866	14,017	2,608	35	980	171	24,677
Scotland	5,960	5,998	1,500	115	390	338	14,301
Northern Ireland	1,046	4,130	1,163	0	13	20	6,372
Total	63,074	76,607	21,761	704	5,822	3,480	171,448

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	564.7	643.1	189.3	6.4	54.4	33.9	1,491.8
Wales	81.6	181.5	31.0	0.4	12.8	2.0	309.3
Scotland	71.2	74.5	17.8	1.4	4.8	4.0	173.7
Northern Ireland	11.9	59.6	13.2	0.0	0.2	0.2	85.1
Total	729.4	958.7	251.3	8.2	72.2	40.1	2,059.9

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	464.3	453.7	155.5	5.3	38.3	22.5	1,139.6
Wales	63.0	114.1	23.8	0.3	7.9	1.5	210.6
Scotland	64.6	62.0	16.3	1.3	4.0	3.7	151.9
Northern Ireland	7.8	18.1	8.7	0.0	0.1	0.2	34.9
Total	599.7	647.9	204.3	6.9	50.3	27.9	1,537.0

GVA associated with indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	483.6	515.5	162.0	5.4	43.6	34.3	1,244.4
Wales	67.2	137.2	25.6	0.3	9.6	1.6	241.5
Scotland	63.8	64.0	16.0	1.2	4.0	3.6	152.6
Northern Ireland	9.2	36.4	10.3	0.0	0.1	0.2	56.2
Total	623.8	753.1	213.9	6.9	57.3	39.7	1,694.7

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
England	1,512.6	1,612.3	506.8	17.1	136.3	90.7	3,875.8
Wales	211.8	432.8	80.4	1.0	30.3	5.1	761.4
Scotland	199.6	200.5	50.1	3.9	12.8	11.3	478.2
Northern Ireland	28.9	114.1	32.2	0.0	0.4	0.6	176.2
Total	1,952.9	2,359.7	669.5	22.0	179.8	107.7	5,291.6