



BWRDD CROESO CYMRU
WALES TOURIST BOARD

Caravan Tourism to Wales 2004

IMPORTANT PLEASE READ

Following an extensive review of tourism data, UKTS is moving to a new methodology for measuring the volume and value of domestic overnight trips: face-to-face interviews. This requires an increased investment in domestic data that VisitBritain, VisitScotland, Wales Tourist Board and Northern Ireland Tourist Board are committed to making from May 2005.

In the meantime we are cautious about using the 2004 data. The methodology used in 2004 (and since 2000) was telephone interviewing. Over 50,000 people were interviewed a year in order to get a suitable level of reliability in the data at regional level. However, in 2004 there appeared to be a growing problem with a changing demographic profile of the sample interviewed. Changes in the relationship between the public and the telephone survey industry appears to have skewed the sample so that each month there was a greater proportion of DE and low income respondents to the survey, and AB's and higher income earners appeared to be more likely to screen calls or refuse outright to take part in the interview.

Owing to the concerns about the telephone methodology not delivering a truly representative sample of the UK population in 2004, we advise caution in using and interpreting the 2004 data. Through feedback from the industry we know that, overall, in 2004 the domestic market was at worst stable. In addition, the United Kingdom Occupancy Survey revealed occupancy rates of 62% on average in the UK in 2004, up from 60% in 2003.

Caravan Tourism to Wales 2004

	Trips (m)	Nights (m)	Spend (£m)
Static	1.4	6.7	201
Towed	0.3	2.5	33

Caravan Tourism by Duration 2004

	Trips (m)		Nights (m)		Spend (£m)	
	Static	Towed	Static	Towed	Static	Towed
Short (1-3 nights)	0.6	0.1	1.3	0.2	59	9
Long (4+ nights)	0.8	0.2	505	2.3	142	24
TOTAL	1.4m	0.3m	6.7m	2.5m	£201m	£33m

Regional Distribution within Wales 2004

	All Caravan Trips (%)	All Holiday Trips (%)	Static Caravan Trips (%)	Trips in Towed Caravans (%)
North Wales	45	39	41	64
Mid Wales	25	20	26	18
South West Wales	22	22	25	7
South East Wales	10	20	8	18
BASE	1.7m	6.2m	1.4m	0.3m

Region of Origin 2004

	All Caravan Trips %	All Holiday Trips %	Static Caravan Trips (%)	Trips in Towed Caravans (%)
England	71	79	69	83
Wales	29	19	31	17
Scotland	-	2	-	-
Northern Ireland	-	1	-	-
English Region				
North East	-	1	-	-
North West/Merseyside	30	23	26	48
Yorkshire & Humber	4	5	4	3
East Midlands	4	5	1	13
West Midlands	31	21	34	17
South West	3	6	3	2
Eastern	-	2	-	-
London	1	6	1	-
South East	1	11	1	-
BASE	1.7m	6.2m	1.4m	0.3m

Month/Quarter Trip Started 2004

	Caravan Trips %	All Holiday Trips %	Static Caravan Trips %	Trips in Towed Caravans %
January	0	3	0	0
February	2	5	1	4
March	2	5	2	0
April	18	11	17	11
May	14	10	11	18
June	17	11	15	1
July	18	13	16	14
August	27	18	21	39
September	11	8	11	4
October	5	6	5	0
November	1	4	1	0
December	0	6	0	0
Jan – Mar	5	13	4	4
Apr – Jun	49	31	43	43
Jul – Sep	54	40	46	54
Oct – Dec	3	16	6	0

Main or Secondary Holiday 2004

	Caravan Trips %	All Holiday Trips %	Static Caravan Trips %	Trips in Towed Caravans %
Only Holiday	11	10	12	4
Main Holiday	10	9	9	14
One of 2 or more Main Holidays	34	27	35	29
Secondary Holiday	36	41	37	32
BASE	1.7m	6.2m	1.4m	0.3m

Type of Location 2004

	Caravan Trips %	All Holiday Trips %	Static Caravan Trips %	Trips in Towed Caravans %
Seaside	57	42	60	43
Large city/large town	1	11	1	0
Small town	17	19	19	11
Countryside/village	24	27	20	46
BASE	1.7m	6.2m	1.4m	0.3m

Length of Stay and Average Expenditure 2004

	Caravan Trips %	All Holiday Trips %	Static Caravan Trips %	Trips in Towed Caravans %
1 night	5	11	6	0
2-3 nights	36	46	36	36
4-7 nights	42	33	47	18
8+ nights	17	10	12	43
BASE	1.7m	6.2m	1.4m	0.3m
Average length of stay (nights)	5.4	4.3	4.8	8.9
Average spend per trip	£138	£182	£143	£117
Average spend per night	£26	£43	£43	£13

Spending by Category 2004

	Caravan Spend		Holiday Spend		Static Caravan		Towed Caravans	
	£m	%	£m	%	£m	%	£m	%
Package trip	9	4	85	8	9	4	0	0
Accommodation	62	27	305	27	54	24	8	25
Travel	29	13	156	14	25	11	4	12
Services or advice	2	1	12	1	2	1	0.4	1
Buying clothes	15	6	87	8	12	5	3	10
Eating and drinking	47	20	223	20	39	17	8	26
General shopping	18	8	60	5	17	7	1	4
Entertainment	22	10	91	8	20	9	2	7
Other expenditure	12	5	40	4	10	4	2	7

Activities on Holiday Trips 2004

	Caravan Trips (2.5m) %	All Holiday Trips (8.8m) %	Static Caravan Trips %	Trips in Towed Caravans %
Participant Activities				
Walking	83	17	80	93
Swimming	23	13	18	50
Field study/nature study/bird or wildlife watching	33	26	30	46
Fishing	17	6	13	39
Sailing/yachting/boating	8	7	8	4
Cycling	14	11	10	36
Mountaineering/rock climbing/abseiling/caving/potholing	5	6	4	11
Golf	11	7	9	18
Attractions/Entertainment				
Visiting castles, monuments, churches, etc	35	38	34	39
Visiting museums, art galleries, heritage centres etc	20	22	20	36
Visiting a theme park or activity park	23	13	20	39
Watching performing arts/cinema	14	14	16	7
Any 'activity' undertaken	95	95	94	100

Age and Socio Economic Group 2004

	Caravan Trips %	All Holiday Trips %	Static Caravan Trips %	Trips in Towed Caravans %
Age				
16-24	7	9	8	4
25-34	14	17	14	18
35-44	35	30	30	57
45-54	11	15	13	4
55-64	10	13	9	14
65+	23	15	27	7
Lifecycle				
Pre-/no family	17	30	17	29
Family	48	41	48	50
Third Age	33	28	33	18
Social Class				
AB	18	30	19	14
C1	24	29	23	29
C2	32	21	28	50
DE	27	19	31	7
BASE	1.7m	6.2m	1.4m	0.3m

Definitions

The figures included here, unless otherwise stated, refer to annual averages over the period 2000-2003, with percentages referring to the same period, to increase statistical confidence. BASE also refers to annual average figures.

A Caravan Trip includes stays in touring vans, static (owned) vans and static (rented) vans

Static Caravan Trips includes all those rented and owned

A Tourist Trip is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes expect such things as boarding education or semi-permanent employment.

Tourist Nights are those spent away from home using any type of accommodation, or in transit, on a tourist trip (as above).

Tourist Spending is expenditure incurred while away from home on a tourist trip and on advance payments for such things as fares and accommodation.