CARAVAN HOLIDAY HOMES IN WALES

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KEY FINDINGS

The Industry View

Fees / hire rates

- Pitch fees for owners siting a caravan holiday home (CHH) on parks in our survey ranged from £680 to £3275 per year and averaged £1838 p.a. These costs were in addition to other charges such as utility bills, insurance and rates.

- Rates for rented CHHs ranged from £750 to £530 per week, with the fee varying depending on the season.

Sub-letting policy

- The majority (60%) of parks in our survey did not allow commercial sub-letting of owned CHHs. Instead owners were allowed to let friends and family use them on an informal basis.

- Where hire fleet were operated, most operators offered the rental service direct rather than used an agency.

Occupancy rates

- Park owners were reticent to provide information on occupancy rates for the hire fleet due to commercial confidentiality issues. Where figures were provided, these ranged between 60% and 100% over the operating season. Park owners had little idea of the usage patterns of owned CHHs on their park.

Reasons for CHH Ownership/Hiring

- Park operators identified a range of factors that they felt had led to the buoyant market in sales of CHHs. These included the fact that high property prices meant that CHH ownership was seen by potential owners as an attractive alternative way of getting a second home. Owners were also felt to want to offer cheap / free holidays for their family. Operators also believed that there was a market drawn from those fed up with towing a touring caravan.

- Those people renting CHHs were seen by operators to be looking for affordable holidays that offered value for money. They were also very keen to have a holiday that the kids would enjoy.

Park choice factors

- Operators of parks with no facilities (such as pool, bar/café) felt that owners were looking for peace and quiet and not too many kids around. They felt owners also wanted a high quality park environment. Operators felt their lack of facilities was a positive factor and a major selling point.

- Operators on parks with facilities felt that owners were attracted by the entertainment on offer. They felt that there were also many owners who had initially rented a CHH on the park and then decided to buy.

Promotion

- Operators felt that informal marketing methods such as word of mouth and recommendation by friends and family were the most effective means of attracting owners as well as renters.

- Advertising in local and Wales Tourist Board guides provided some business for those offering rented CHHs.

- For some parks, the internet was playing an increasing role in attracting rental business.

Grading schemes

- For hired CHHs, operators found it hard to judge the importance of grading schemes to customers. Part of the reason for this was that they didn't get asked directly about it. For owned CHH, operators felt gradings were not important at all.

- The David Bellamy Award scheme, operated by the BH&HPA, was generally well thought of and used by operators as "a stamp of quality".

Economic Impact

- The average number of staff employed on parks in our survey was 20 in low season. This figure more than doubled in high season.

- Most operators were able to name at least one local shop or business that relied on the park's visitors for a high percentage of their trade.

- Even on parks with facilities, operators felt that CHH owners wanted to use off-park facilities such as restaurants in order to have variety.

- In general terms, on-park facilities (e.g. shops) were provided as a service and didn't make money.

Outlook for Industry / Market Trends

- Park owners were generally very positive about the outlook for the industry. They couldn't see any major problems affecting business.

- Reasons given by operators for their optimism included the fact that they perceived a shift back towards taking domestic holidays. They also felt that people were taking more holidays so they were not worried by people taking overseas holidays. Central heating in CHHs had also extended the potential season.

- Limited opportunities for physical expansion of parks meant that business growth would come from up-grading of CHHs and parks.

- Operators were increasing focusing on sales of caravan holiday homes rather than operating hire fleets. This was because owned CHHs were seen as less "hassle" than a hire fleet. Factors contributing to the "hassle" factor included difficulties in recruiting staff to clean hired CHHs and the extra management time involved in promoting a hire fleet.

- Park owners / managers still enjoyed the job but felt it was getting harder, particularly due to increased health and safety legislation and "red tape".

The Visitors' View

Market Segmentation

- The survey of users revealed two main sectors in the caravan holiday home market - those owning their caravan holiday home and those renting or borrowing. Each of the two sectors had distinct characteristics and user profiles.

- The rental/borrowing sector could be further divided into a number of different sub-segments, of which renting from private owners was the largest (40% of all those not owning). Informal arrangements involving renting or borrowing from friends / relatives made up a quarter of the rental market.

Visitor characteristics

- Owners tended to have an older age profile than those renting. Half of owners were aged 55 years or older, compared to just 20% of renters.

- Renting or borrowing a CHH was most popular amongst those aged 35-54 years of age.

- Compared to all Wales holiday-takers, owners had an older profile than average, whilst renters were fairly typical.

- Owners tended to be more ‘up-market’ than those renting. Owners were twice as likely to be from ABC1 socio-economic groups than renters (61% as compared with 29%). Nearly ¾ of renters were from the C2DE socio-economic groups.

- Owners showed a slightly greater tendency to be from ABC1 socio-economic groups than Wales holiday-takers as a whole (61% compared with 56%).

- Average household income amongst owners was £25,000 p.a and £20,000 p.a. amongst renters.

- The rental market was predominately a family market with 72% in the family life-stage. This contrasted with owners, of which only 40% were in the family life-stage. In this latter market those in the post-family life-stage made up almost half of the market (47%).

- Just over a quarter of CHH owners were from Wales (28%). The remainder were drawn from the England and the West Midlands and North West in particular.

- Renters were less likely than owners to be from Wales (18%). The largest market for rental CHHs was in the North West of England (34%).

Holiday taking patterns

- Owners took longer holidays than renters (8.6 as compared with 7.8), but both groups took holidays that were more than double the length that is typical in Wales (3.6).

- Owners were most likely to be using their CHH for one of several main holidays they were taking during the year (50% of owners). There was also significant evidence of use of CHH by owners for secondary/ additional holidays (26%).

- Only 2% of owners saw this as their only holiday of the year.

- Amongst renters, the current CHH holiday tended to be the main holiday of 2003 (36% of all renters) with more than a fifth stating it to be their only holiday of the year.

- Owners were prolific holiday takers. They took an average of 3 short holidays (1-6 nights) and over 2 long holidays (7+ nights) during 2002. Almost half of owners (45%) took 5 or more short breaks. Renters were much less prolific, averaging less than one short holiday and one long holiday.

- Caravan holiday homes were intensely used by their owners. Almost half, (49%) used them almost every week. When not using them, the majority allowed friend or family to rent or borrow them.

Competitor destinations and accommodation

- Owners were very loyal to Wales in terms of the destinations chosen for a holiday in 2002. Only a quarter of long holiday trips by owners were to alternative destinations, with less than a tenth of short break trips being anywhere else.

- Despite the lack of a 'vested' interest, renters also displayed a considerable loyalty to Wales, particularly with regard to long holidays. Less than half of long holiday trips taken by them were outside Wales whilst 44% of short break trips were to Wales.

- Caravan holiday homes were a definite accommodation choice. Nearly half of renters (46%) said they would consider another caravan park than an alternative type of accommodation.

- Where alternatives were considered, other forms of self-catering were much more likely to be used than serviced accommodation.

Motivations and satisfactions

- Amongst renters, value for money was the most important factor influencing their current holiday choice. Of the other factors, the desire to stay in a caravan holiday home was more important than the area of Wales it was in or the fact that it was in Wales at all.

- Caravan holiday home parks in Wales were acting as a major 'factor' in the selection of the destination country amongst renters.

- Satisfaction with caravan holiday homes was high amongst owners and renters. Rates of approval were highest when considering the location and the area surrounding a park, whilst comparatively lower ratings were given to the facilities on the park. Interestingly, renters were more satisfied than owners in all regards except the caravan holiday home itself.

Appeal of CHH holidays and reasons for park choice

- Freedom and flexibility were the main appeals of CHHs among renters. Renters were much more likely than owners to rate the holiday's appeal to children as a key factor. Relaxation featured as the main appeal for owners, although freedom ranked almost alongside this factor.

- When selecting a particular park, owners looked for a more peaceful and relaxing environment than renters. For renters, it was the needs of their children that drove the choice of park.

Booking behaviour

- Caravan holiday home holidays were planned well in advance by those renting with relatively little last-minute booking. Almost half were booked more than 3 months prior to departure.

- Only a small minority of CHH users were aware of the grading of their caravan park (5%). Those renting from companies showed slightly higher levels of awareness of gradings (12%).

- The market for CHH holidays was largely self-generated and risk-adverse. A high percentage had been before (39%) or had found out through word of mouth (26%).

- More informal information sources out-performed traditional marketing methods, with only adverts in local newspapers and holiday brochures being used by more than 1 in 10 renters.

Expenditure

- Renters spent an average of £194 per trip. This was over three times the amount spent by owners £61 (owners' figure did not include any apportionment of cost associated with ownership such as pitch fees, rates etc).

- Allowing for an average expenditure of pitch fees, owners spent £13 per night per person and renters £25 per night per person. These figures need to be treated with caution and probably underestimate the spend of owners.

- Owners spending patterns reflected a more CHH-centred holiday or break with fewer meals out than renters and more eating within the CHH.

- Meals and drinks out were the main items of expenditure for owners but represented a smaller proportion of total spend when compared with renters. Owners also spent less than renters on entertainment and attractions.

- Higher transport expenditure by owners reflected more touring but the lower expenditure in other categories suggested owners pursued free activities such as time in the countryside rather than paid attractions or activities.

- Renters' spending patterns reflected more time spent away from the CHH itself, but not necessarily off-park. Eating out, visiting attractions and enjoying nightlife attracted higher spending than amongst owners.

- Owners spent more money off-park (as opposed to on-park) as a proportion of total spend per trip than renters (61% for owners, compared with 52% for renters). However their overall lower spend meant that owners injected less money per trip into the local economy than renters.

Economic Impacts

- The survey estimated that owners and renters in Wales contributed £209m to the Wales economy per year. This represents 17% of all holiday spending in Wales.

- The report developed two scenarios on which estimates of economic impact were based. The first scenario suggested that a small park with 100 owned CHHs could generate an income of around £544,000 per year. A large park with 300 owned and 200 rented CHH could generate an annual spend of £4.7m.

- Based on the same assumptions, each owned caravan generates a spending of £5,440 in the local economy each year and each rented caravan a spend of £15,490. The difference is due to the fact that renters spend more and rented caravans are used more intensively. However, these figures underestimate the economic impact of owned caravans, a proportion of which are sublet.

1 INTRODUCTION

This Report examines the caravan holiday home sector in Wales. It looks at the nature of the sector, the market for caravan holidays and highlights some of the policy issues that flow from these.

The study was commissioned by Wales Tourist Board (WTB) and the British Holiday and Home Parks Association (BH&HPA) and the research was carried out by The Tourism Company during the summer of 2003.

By caravan holiday homes (CHH) we mean caravans which are more or less permanently located in a caravan park and which are either owner occupied or rented out for holiday lets by the owner of the park or a holiday company. We are not concerned in this study with touring caravans or residential parks.

The study is based on two new pieces of research:

- Structured interviews with 26 park operators spread across Wales. These operators represent a mix of parks and were drawn from a list provided by BH&HPA.

- On park interviews (807) with people staying in CHHs, spread over 17 caravan parks in three areas of Wales. These parks were all BH&HPA members and selected to provide a representative sample of all BH&HPA parks in terms of size and type of park. The interviews were carried out in three phases during the summer to cover school holidays and periods either side.

For the sake of clarity, we have simplified reference to the users of CHHs to either owners or renters. The latter term covers those renting CHHs but also includes people who are borrowing CHHs from friends or relatives.

We would like to take this opportunity to formally thank all the operators who kindly made time to answer our questions and who allowed interviewing to take place on their parks. We would also like to acknowledge the help and guidance of our steering group who always responded promptly and constructively to our requests.

The report is structured as follows.

- Chapter 2 describes the feedback from operators and provides an industry perspective about the sector and its concerns.

- Chapter 3 provides a summary of the results of the user survey and examines the characteristics, attitudes and behaviour of people taking holidays in CHHs.

- Chapter 4 draws out some of the economic, social and tourism impacts of caravan holidays

Detailed tabulations from the visitor survey are provided in a separate volume.

2 THE INDUSTRY VIEW

This chapter summarises the interviews with park managers and owners and provides an industry perspective of the market, letting policies, business prospects and other concerns etc.

The information was based on 26 structured telephone interviews. The table below outlines the main characteristics of the selected parks. More detail is given about the methodology in Appendix 1 and a full list of the people interviewed in Appendix 2.

Table 1 Main characteristics of parks included in interview sample

Park Category	No. of parks	No. CHH pitches	No. of owned CHH pitches	% of owned CHH as % of total pitches	No. of parks that have facilities*
Small (< 100)	10	456	307	67%	4
Medium (101-250)	7	967	908	94%	3
Large (over 250)	9	6,807	5,099	75%	9
Total	26	8,230	6,314	79%	16

*Source: BH&HPA database. * Note: parks with facilities are defined as those with any of the following – bar, club, restaurant, cafe or swimming pool.*

It should be noted that most findings apply equally to both caravan holiday homes that are owned and those that are hired. Where a distinction was made by the park managers, these are reflected in the report.

Interviewees are referred to as park managers throughout the report whether they were owners or employees.

2.1 Charges & letting policies

Park fees / pitch fees varied very considerably. Most, but not all of the variation was attributed by operators to the level of facilities provided on a park. Fees were highest on parks with extensive leisure facilities such as indoor swimming pools, health clubs and gyms. Fees also varied considerably on parks with no facilities and this was largely attributable to the amount and quality of park landscaping undertaken by the operator. There was also evidence of price being used to attract a certain sort of clientele.

Taking into account the number of pitches on each park, fees for owners of caravan holiday homes averaged £1838 but ranged from £680 – £3275 per year. These prices were basic fees and were, in most cases, subject to additional charges such as rates, water rates, insurance and VAT. Fees were higher on parks with facilities such as leisure and entertainment facilities although on parks with no facilities, fees ranged from £680 to £1500.

In general terms, park managers said they tried to keep pitch fee increases to a minimum although a number of parks had increased fees as a result of up-grading the facilities.

> *"Increases are up by inflation and a little bit on top" (large coastal park with facilities)*

Hire charges for caravan holiday homes (CHHs) also varied very considerably by park and by season. Prices ranged from £65 in low season to £900 in high season. As would be expected, all parks offered weekly rates with a majority also offering short break rates. Most of those with short break rates offered them only outside the main holiday season. This was because running short breaks during high season often meant leaving CHH unoccupied for the remainder of the week when the high demand for long holidays present during the high season could have seen the CHH fully occupied.

2.1.1. Replacement policies

It was a policy on the vast majority of parks that CHHs, whether owned or rented, were replaced at regular intervals.

<u>Owned caravan holiday homes</u>

About ¾ of the parks had a replacement policy for owned caravan holiday homes and amongst those, the most common replacement period was 10 years. Owners who had purchased very expensive homes (i.e. £40K +) were sometimes allowed additional time before replacement. (i.e. 12 years before replacement on a park with a 10 year replacement policy).

There were a few parks with 15 and 20 year replacement policies and one or two had no upper age limit for caravan holiday homes. Where the latter was the case, the condition of caravan holiday homes was checked on an annual basis. If the condition of a particular caravan holiday home fell below an acceptable standard then the managers asked for it to be replaced.

One park had a policy of decreasing the age of replacement for an owned caravan holiday home that was sub-let by the owner rather than through the park. Replacement decreased by one year for every year that the CHH was sublet by the owner. For example, the standard replacement period for an owned CHH might be ten years, but should an owner choose to rent out their own CHH for one year then they would need to be replace the CHH after nine years. The park owner saw this policy as a way of encouraging owners to sub-let through the park and thus be able to keep a closer eye on who was using the park.

Hire fleet

Replacement policies relating to the hire fleet were more informal than for the owned caravan holiday homes but were characterised by more rapid replacement. Three to five years was a typical age at which a holiday home used for hiring was replaced. Caravan holiday homes of this age were often sold to someone on the park as a second-hand model.

> *"We've got nothing older than 3 years. We sell them onto owners." (large coastal park with facilities)*

Managers considered the replacement of hire fleet to be an important way of keeping up standards on the park and also responding to the latest customer demands for quality and facilities of caravan holiday homes.

2.1.2. Sub-letting policy

Policies on sub-letting varied according to the size of the park. Smaller parks were much less likely to allow this than larger ones.

Table 2 Sub-letting policies according to park category

Park Category	No. of parks that allow sub-letting
Small	0 out of 10
Medium	2 out of 7
Large	7 out of 9

Source: CHH Operators' survey

As the table above shows, none of the managers of small parks (less than 100 pitches) that had owned CHH on their park allowed sub-letting, whilst 2 out of 7 medium-sized parks did allow it. Of the 9 large parks, 7 allowed commercial sub-letting. In total, about 40% of parks in our sample (representing 77% of owned pitches) allowed commercial sub-letting.

Managers of small parks felt that a 'no-sub-letting policy' was a way of maintaining standards on the park by ensuring that they kept close control on who was using the park. Managers also reflected the view that caravan holiday home owners felt sub-letting would change the atmosphere of the park.

> *"our customers wouldn't like it if we had holiday-makers." (medium-sized inland park with facilities)*

On large parks, the higher occupancy achieved by sub-letting was considered important in ensuring sufficient numbers of people were on-park to use the facilities and hence boost takings and income generation.

Sub-letting tended to be run by the owners themselves with a few parks also offering a letting service for owners. Where this latter service was in place, there was a mix of services, some taking a commission and others not.

Where commercial sub-letting was not allowed, owners were allowed to offer their caravan holiday home to close friends and family. The system was run informally, with only a few parks requiring written notification of family members using the caravan holiday home.

Where no commercial sub-letting was allowed most park managers felt the policy worked well and was generally respected. They put this down to the fact that the policy was self-policing with owners of other caravan holiday homes tipping off the park managers if it was being used for illicit commercial sub-letting.

The policies on sub-letting appeared to have remained constant for some time, but a few had changed their policy from allowing subletting to not allowing it, or only allowing it through the park. There was no evidence from the park managers interviewed that these changes in policy had been met with resistance from owners.

2.1.3. Opening season

On average, parks were open for 40 weeks (10 months) per year. The most common length of opening season was 43 weeks. 1 March was the most cited opening date and the most popular closing date was 5 January.

A significant minority of parks had applied for an extension of their opening season. This often entailed extending opening from October until January. The reasons for extension were related to the desire of caravan holiday home owners to be able to visit their properties for longer. The maximum opening season allowed was 10 ½ months. There were a number of parks that operated such a system but there were also parks that had a 10 ½ month licence but who chose only to open for 8 months. This was because they felt there was no demand for the park to be open for the longer period. One manager also suggested that once a park was open for 10 ½ months it could encourage full time residential use with owners going on holiday for the 6 week closure period but living there the rest of the year.

2.2 Patterns of use and occupancy

It was difficult to get detailed occupancy figures from operators. Many of them were reluctant to share information on hire fleet occupancy and found it hard to estimate the amount of use owners made of their CHH. It should be borne in mind that the occupancy figures quoted below are not statistically representative of parks as a whole or based on detailed occupancy information.

<u>Hire fleet</u>

Average annual occupancy (over the operating season) on parks with hire fleets was 70% with rates typically between 60% to 98%. Figures were quoted as a simple estimate of the % of weeks let during the park's opening season.

In line with many other tourism sectors, occupancy was highest during the school holiday period (end July – end August) and lower in the shoulder months although operators did not offer % for these differing periods.

Most of the parks reported an upturn in bookings during this season (2003) as compared with previous years. One manager had seen a 40% increase on business during this time. Most attributed this to the effects of 11 September and in particular the reticence of people to fly and travel abroad. A number also felt that the good weather experienced during the early part of the 2003 season meant that people were deciding to stay in the UK.

Owned caravan holiday homes

Park managers had great difficulty in estimating the occupancy of owned caravan holiday homes. Where figures were offered, they tended to be in the range of 10-15% use during mid-week periods and rising somewhat at weekends.

Despite difficulties in coming up with figures, managers were able to characterise differing usage patterns amongst owners. These patterns have been summarised below. The descriptors are ours and not used by the operators

Weekenders are owners who come down every weekend or every other weekend. Even on parks with facilities, these owners prefer to enjoy staying in or outside their caravan holiday home rather than use the facilities. These owners tend to come less often during the high season, preferring instead to let their grown-up children and families use the caravan holiday home.

Rarely-Seens appear infrequently, using their vans on just one or two occasions each year. Managers felt that these owners took a lot of other holidays and many, if not all, of these holidays were abroad. They were considered by managers to be more wealthy than the other types of owners.

Stay-Puts[1] are owners who stay in the caravan holiday home for the full time the park is open. They are usually retired couples who have sold their house and now use their caravan holiday home as their main home. During the time the park is shut (usually around 6 weeks) they holiday abroad.

1 BH&HPA Comment: The planning permission for each park will differ but for most caravan holiday home parks, it will stipulate that they are for holiday usage only. In a minority of cases however, the caravan is purchased as a holiday home but domestic circumstances change and occupation takes on a residential nature, in breach of planning conditions and leaving the park owner vulnerable to enforcement action. Guidance has been published to assist park owners in preventing residential use of their holiday park and in policing this aspect of consumer behaviour which brings with it serious disadvantages to the park business.

2.3 Market characteristics

2.3.1. Origin

There was a marked difference between the origin of those owning caravan holiday homes and those renting them.

Owned caravan holiday homes

Most park managers typified their owners as coming from between one or two hours' drive away. They stated that most owners originated from the large urban conurbations of Manchester, Liverpool, The Wirral, Stoke on Trent, Telford, Cannock and the Black Country. On parks located in the southern part of Wales, there was also a large constituent of Welsh owners, mainly originating from Cardiff and Swansea.

Overseas owners were rare, although there was some evidence that the growth in the use of the internet as a park searching tool had led to a few Americans choosing to buy a caravan holiday home in Wales. Although geographically close to some of the parks interviewed, very few parks spoke of having Southern Irish owners. This was attributed by one park manager to the fact that they were not UK citizens and therefore could not get underwritten in order to be able to make use of the park's finance scheme.

Hire-fleet

In contrast with owners, holiday-makers using caravan holiday homes were felt to originate from right across the UK, with a major hotspot being the South East of England. Managers spoke of very little presence of overseas hirers who, they observed, tended to go for touring caravans or camping.

2.3.2. Customer profile

There appeared to be an understanding amongst park managers that different types of parks appealed to different types of people. A number felt comfortable that their park would not be attractive to certain types of people.

> *"People on this site would not stay on the coast." (medium-sized inland park with facilities)*

A small number of managers said their park deliberately kept a low profile by not advertising and not participating in grading schemes. They believed that this was a way of attracting a certain sort of customer.

> *"it attracts people who really fit in." (small inland park with no facilities)*

Owned caravan holiday homes

Caravan holiday home owners were generally thought by the interviewees to be mature couples, aged 45 and upwards, with grown-up children. Considered to be 'relatively well-off ', these people take several holidays a year, the main one of which would be taken abroad. In most cases, park managers didn't define their owners in terms of socio-economic classifications, preferring to describe them in more general terms.

> *"middle-of-the-road people, ordinary guy in the street plus a few people who've got a bit." (large coastal park with facilities)*

Those that did define owners in socio-economic terms felt that they were 'C/D' in the main but that more 'B's' were coming onto the park in recent years. This trend was attributed to the increase in quality of park facilities and caravan holiday homes.

Owners were felt to use their caravan holiday home for weekend and short breaks. Their main holiday was still likely to be taken abroad.

Hire fleet

Hirers were split into two main groups. Outside the main school holidays, park managers felt that couples and families with pre-school children were the major markets. Within the school Summer holiday, families with pre-teenage children were felt to dominate.

All park managers concurred with/ supported this picture except those from small inland parks with no facilities. Here, park managers aimed to attract only families with well-behaved children in order to maintain the peace and quiet.

Those hiring a caravan holiday home or borrowing one from a family member or close friend were thought to be more likely to be using the caravan holiday home for their main holiday. This trend was more likely to be reported at parks with entertainment facilities such as swimming pools or clubs. This type of usage tended to take place during the main summer period.

2.3.3. Promotion /booking methods

Managers thought that the methods by which customers were attracted to their park varied according to whether they were owners or renters.

Owned caravan holiday homes

In terms of owned caravan holiday homes, there was little evidence that active promotion was used at all, except for on the large parks, where advertising was undertaken. For attracting buyers for caravan holiday homes, word of mouth was the most important method. A lot of business was also generated by people who had first encountered the park through hiring a caravan holiday home. Another source was through introductions by existing owners. A few parks actively promoted ownership through adverts in local papers and on websites.

Hire fleet

In terms of hire fleet, business was generally derived from word of mouth and return visits. The production of a brochure was also considered an important way to drum-up sales. Local tourist guides were used consistently with a considerable number also placing adverts in Wales Tourist Board publications. Larger parks placed advertisements in regional newspapers and were also the most likely type of park to produce a guide to caravan holiday homes that could be hired from owners.

Internet websites were considered an increasingly important marketing tool for park managers promoting a hire fleet. The web was responsible for anywhere between 5% and 80% of new business. For a significant minority of the parks, the web was now the main promotional tool. One park manager said he was thinking of dropping all other promotional methods in favour of the website.

Managers on the larger parks that were part of multiple-park groups were less aware of the business generated by the internet as these enquiries were often directed via Head Office. Click-throughs from other websites, particularly Wales Tourist Board and ukparks.com (run by the BH&HPA), were cited as being particularly important for generating business.

2.3.4. Motivations for ownership / use

Owners

Park managers reported a variety of reasons why people chose to own or hire a caravan holiday home. Most felt that the motivations for ownership were distinct from the motivations for hiring.

- **Property price issues:** One of the most commonly cited reasons for ownership was the current high property prices. Park managers felt this has led to caravan holiday homes being seen as an affordable way of getting a 2nd home as the costs of owning a holiday cottage or house is now out of reach for many. Managers also felt that the high property prices has also led to people using the equity tied up in their homes to buy a caravan holiday home. A third phenomena associated with property prices is what has already been described earlier as the *Stay-Puts*. Park managers identify these as people who sold their house to raise income for retirement and downsize to a live in a caravan holiday home during a park's opening season and take a holiday abroad or elsewhere during the closed season[2].

- **Family altruism:** Park managers said that although owners tended to have no children living at home with them, a large part of the motivation of owning was to be able to offer their grown up children a place to bring their families on holiday.

2 see ref 1

- **Increasing holiday taking & improvements in caravan holiday homes:** Park managers felt that people were taking more holidays and short breaks and that this has led to owners feeling that they could now get more out of owning than they used to. Allied with the previous point, improvements in the design of caravan holiday homes and in particular the inclusion of central heating and double-glazing had again contributed to a view amongst owners that they could use their caravan holiday home for more of the year.

- **Fed up with towing:** Park managers said they saw a lot of people buying caravan holiday homes who had previously towed a touring caravan. These people, the park managers assert, liked caravan holidays but were fed up with the inconvenience of towing a caravan around. Increasing traffic levels and storage issues were also mentioned as reasons for switching to a caravan holiday home.

- **Hirers who want to own:** Park managers saw a considerable number of people who had initially hired a caravan holiday home on the park end up buying one. Managers thought this was due to the intrinsic appeal of caravan holiday homes and the first-hand experience gained of their particular park.

- **Security:** Amongst older owners who want to use their caravan holiday home as a second home, park managers felt that the security offered by the parks was a major selling point. The presence of park wardens and lack of public access meant that these owners felt secure and safe. Given that many owners came from large urban conurbations with high crime rates, the prospect was of great appeal.

- **No garden at home and want somewhere to tend:** Although not a major motivator for most, the ability to have a piece of land around the caravan which they were able to tend and garden is an attractive proposition. This was thought by park managers to be particularly the case for those without gardens at home.

<u>Renters of caravan holiday homes</u>

- **Value for money:** The over-riding factor for those hiring caravan holiday homes was considered by the park managers to be value for money. A number of managers spoke about the need to review prices on the hire fleet carefully as £10 could make the difference between someone being able to afford a holiday and not being able to do so.

- **Peace and quiet versus family entertainment:** People hiring a caravan holiday home were characterised by the park managers as seeking one of two types of holiday. Peace and quiet were sought by those without families or very young children, whilst family entertainment holidays were looked for by people with school aged but pre-teenage children.

- **A holiday the kids will enjoy**: One of the key selling points is the parents' view that the children can run free but at the same time be safe. The layout of the parks ensures it is hard for unauthorised people to come on park and the slow traffic speed and large areas without roads means parents are happy to let their kids play by themselves.

2.3.5. Park selection

In addition to the motivations for selecting a caravan holiday home for hire or ownership, park managers highlighted a number of factors that influence the specific choice of a particular caravan holiday home park.

- **Location:** Managers felt that the location of their park was of primary importance. Proximity to the coast was the main selling point for coastal parks, whilst for inland parks it was the location of the park within surrounding countryside. Park managers seemed to feel that location was equally important for both hirers and owners.

- **Lack of park facilities is a positive choice**: Managers of parks with no central facilities promoted this as a positive selling point to prospective owners. Managers said that people equated the lack of facilities with peace and quiet. It was also felt to distinguish their parks from those with facilities. In the case of people hiring caravan holiday homes, managers were often asked if they had facilities and when they replied they hadn't, customers would say, 'That's just want we want.'

- **Entertainment:** On parks with entertainment and facilities such as swimming pools, managers highlighted these as key selling points to both owners and hirers. Owners often took into account the desires of their family who might use the caravan holiday home rather than their own requirements when choosing a park. The availability of on-park entertainment was also considered important for families with children hiring caravan holiday homes.

2.4 Relationships with caravan holiday home owners

Many park managers felt a close affinity with their owners. Many managers talked about not wanting to attract everyone to their park, but wanting 'a certain sort of person'. The only 'fly in the ointment' in terms of relationships with owners appeared to come from decisions to extend parks. In such cases, owners feared that the nature and atmosphere would be adversely affected.

2.5 Business mix

2.5.1. Sales

On average, park managers said they sold on to about 10-12% of their pitches each year. This was a mixture of pitches that became available from owners leaving the park and existing owners upgrading or renewing their caravan holiday homes. Most managers said they used local caravan dealers to purchase caravans and took a commission on each sale. The advantage of this set-up was seen as not having to hold the stock themselves.

All managers involved in the sale of caravan holiday homes reported very good business and said that sales were a very important part of the business' profitability. Managers felt sales to be increasing year-on-year and felt they were enjoying very good trading conditions. Park managers reported that people were willing to invest more in their leisure choices. The average price of caravan holiday home being sold was reported to be increasing considerably. Managers were now selling units worth £45,000. One described this as *"the upwards spiral."*

> *"Two years ago the average price was £13,000, now its £20,000." (small inland park with facilities)*

Most parks had a waiting list for pitches on the park, with many reporting that waiting lists were the longest they could remember.

The main problem with regard to sales was the waiting time to get caravan holiday homes from the manufacturers. One park was on a six months waiting list whilst another was told they would be waiting nine months. The waiting lists were a problem across all manufacturers but most pronounced amongst the high value caravan holiday homes. A number of park managers felt the waiting lists were having an impact on sales.

2.5.2. Hire Fleet

Table 3 No. of parks with hire fleet and/or sub-letting of owned CHHs

Hire fleet and or sub-letting?	No. of parks	% of pitches
Yes	18	88%
No	8	12%
Total	26	100%

Source: CHH Operators' Survey

As the table shows, the majority of parks (18 out of 26) operated hire fleets or had owners' CHHs available for let. This equated to 88% of total pitches. There was a general feeling amongst park managers that the hire fleet was more 'hassle' to manage than owned pitches. Consequently, several of the parks had reduced the number of hire fleet. In one case the park had completely withdrawn from the hire market.

Reasons for the reduction of hire fleet were various but included the fact that more marketing was required to promote the hire fleet than was the case with sales; they involved more work in terms of cleaning etc and needed capital outlay on the caravan holiday homes. These aspects were contrasted with sales which, as has been discussed earlier, were described as booming and buoyant.

One park was looking to increase the number of caravan holiday homes available for hire, but by increasing the number of owners who sub-let through them rather than the park hiring their own vans directly. Such a policy meant that the park owner was not required to purchase the CHH himself.

2.5.3. On-park facilities

Table 4 No. of parks with on-park facilities

On-park facilities	No. of parks
Yes	16
No	10
Total	26

Source: CHH Operators' Survey

16 of the 26 parks had some form of on-park facility. In general terms, on-park facilities (e.g. bar/club, shops, restaurant/cafe, swimming/leisure facility) were provided as a service and didn't make money. Managers believed that customers expected them to be available and so provided them on that basis. The most common type of on-park facility was a shop of some kind selling basic provisions. Only on one or two of the larger parks did these make a significant contribution to the park's profitability.

> *"(Facilities are)...not big money earners. They tend to be a white elephant." (large coastal park with facilities)*

Concessions appeared to be a popular though by no means universal method of running on-park facilities. There was no clear indication that it is was a method that was limited to particular sizes of park as both a number of large and smaller parks operated concessions. At smaller parks, concessions were characterised as the park receiving rent from a person who ran the facility. Opening times for this type of operation tended to be more informal with facility managers operating according to demand.

> *"If there's someone who wants to use the club, then they'll open it." (small inland park with facilities)*

Managers stated that deals regarding concessions were motivated not by a desire to make profit but by a desire to provide a service.

> *"the franchisees do alright, they make a living."*

2.6 Economic Impact

2.6.1. Supporting local businesses

Most managers could name at least one local shop or businesses that relied heavily on their park's visitors for its business. Hardly surprisingly, parks located in rural areas felt they had predominately more impact on local businesses than those in urban or resort areas.

Shops and retailers were felt to hold positive attitudes towards parks and in one case local retailers had leapt to the defence of a park that was under attack from the local council over the park's bid for an extension to its number of pitches.

A number of managers made the point that caravan holiday home owners tended to use on-park facilities less and off-park facilities more than those using a hired van. Owners were thought to eat out regularly and wanted variety of choice and so rarely used the on-park facility if present.

2.6.2. Major purchases

There was evidence from park managers that some caravan holiday home owners were using their time to make major purchases. Boats, cars and clothes were among the items that were mentioned. Managers put this behaviour down to the fact that owners spend their leisure time at the caravan holiday home and so use this time to research and then buy major items. One manager stated that the decision to buy major items whilst on park was due to the cheaper prices available on cars in Wales than the owner's home location.

> *" they buy cars from local garages because they've got the time." (medium-sized inland park, no facilities)*

2.7 Grading schemes

The main grading schemes referred to during interviews were the British Graded Holiday Parks Scheme (a partnership between BH&HPA and WTB, administered by WTB) and the David Bellamy Conservation Awards (administered by BH&HPA). We deal first with opinions that were not attributed by the operators to any particular scheme (although in practice they are likely to refer to one or both of the schemes above). Secondly, we look at comments specific to particular grading schemes.

2.7.1. Generic views

The general consensus amongst park managers was that even though most participated in them, grading schemes were felt to be of little marketing value and made little or no difference to customers.

> *"I've only had 2 or 3 people say that it mattered to them." (small coastal park with no facilities)*

Of those with less definite views, several stated that it was difficult to judge the importance of gradings to customers as they didn't get asked directly about the subject. There was a feeling that they were an act of faith with benefits hoped for rather than known.

> *" I don't know why we do it". (large coastal park with facilities)*

> *"You never get asked but it might be important for initial selection of sites." (small coastal park with facilities)*

Gradings were considered to be important for customers who were trying to choose between a number of parks and might use the gradings as a way of distinguishing.

There was also a feeling that they were "nice to have" rather than an essential. Several of those holding negative views of the grading schemes wanted more guidance after inspections as to what needed to be done to reach a particular grading.

2.7.2. British Graded Holiday Parks Scheme

17 of the 26 parks (65%) were included in this grading scheme. The scheme was actively supported by a few park managers but criticised by several others. Amongst those supportive of the scheme, the gradings were seen as a measure of quality for visitors.

> *"it's very important to me. It shows the standards to a person." (large coastal park with facilities)*

For one or two operators, the scheme was considered useful in promoting their hire fleets.

> *"It's important for the hire fleet as they don't see the place before they hire." (medium-sized coastal park, no facilities)*

However, as was the case with more general comments about grading schemes, the majority of operators felt the scheme was not important as a marketing tool.

“People never mention it.” (medium-sized, inland park with facilities)

“ I like the idea that it’s there but it makes very little difference.” (large coastal park with facilities)

Criticisms also related to the nature of the inspection process and the feeling that inspectors were insensitive to and remote from the nature of the industry.

One operator felt that the criteria on which parks are assessed should centre around customer service rather than the current system which he felt was too based on facilities.

Overall, criticism of the inspection process was a reason given by several managers of parks that did not participate in the grading scheme.

“ We fell out with them (WTB) years ago. They told us how to run our business.“ (medium-sized inland park with facilities)

2.7.3. David Bellamy Conservation Awards

13 of the 26 parks participated in the Awards. In terms of support for individual schemes, there was more positive support for the David Bellamy Award scheme than the quality grading scheme. Park managers appeared to have more of an on-going relationship with the David Bellamy scheme and there was a feeling of warmth towards David Bellamy as the figurehead of the scheme. Managers also felt it was the “right thing to do” with many expressing that they were interested in green issues anyway.

In line with views on grading schemes in general and the British Graded Holiday Parks Scheme, managers saw the David Bellamy Award as a stamp of quality rather than a marketing tool.

“it doesn’t encourage people to come but might encourage them to come back.” (large coastal park with facilities)

It is also used as a way of instilling pride in staff or, in one case, “keeping staff on their toes”. One or two managers with plans for expansion also saw participation in the scheme as a way of demonstrating to local authority planning departments their commitment to the environment.

Like with the British Graded Holiday Parks Scheme, criticisms of the Awards largely centred around the inspection process, with one manager pulling out because they felt they hadn’t been told what they need to do to gain a particular level of award.

2.8 Networking & external relationships

There was little evidence that park managers involved themselves in organisations other than their own park. When asked why this was, lack of time was quoted, as too was the feeling that they considered themselves as independent and set apart from others in the tourism industry.

> *"It's a case of keep yourself to yourself" (medium-sized inland park with no facilities)*

Park managers often only spoke with other park managers when their park was part of a larger group. There was also some involvement with the BH&HPA, local authorities and Wales Tourist Board, relationships which are explored in more detail below.

In general, this lack of networking did not lead to the view that they felt isolated. Instead there was a general acceptance of this state of affairs.

2.8.1. British Holiday and Home Parks Association (BH&HPA)

Park managers generally had a positive view of the BH&HPA. Managers mentioned the *ukparks* website and the magazine as benefits of membership. Regional meetings were also mentioned by one or two park managers as being a way that they had met others in the industry.

2.8.2. Local Authorities

Where relationships with local authorities were mentioned, they were split into two types. Firstly, links with tourism departments or tourism officers were often categorised as positive and supportive. Secondly, relationships with planning departments within the same council were almost always described as wholly negative and focussed largely around planners' resistance to park development.

> *"The council hate sites. The council had said that parks were a blot on the landscape." (medium-sized inland park with facilities)*

A number of managers spoke of local authorities refusing applications for extensions to parks. One manager stated that he had the support of the Tourism Department for his application, but that this held little weight within the planning department who rejected the proposal.

What angered managers most was that there appeared to be a prevailing antagonism and negative view of caravan holiday home parks and that applications were turned down on principle rather than based upon the merits of the individual application.

2.8.3. Wales Tourist Board

A few park managers had positive comments about their relationship with Wales Tourist Board but just under half of interviewees held negative views of the organisation. Negative opinions stemmed from a number of issues. The most commonly cited opinion was that the organisation was out of touch and didn't understand the industry.

> *"I don't think they have a tendency to live in the real world. They're detached." (large coastal park with facilities)*
>
> *" I feel let down by them. They don't consult or ask our views and are out of touch." (small coastal park with facilities)*

The organisation was also seen as a barrier to business rather than a help:

> *"They are more hassle than help." (small inland park with no facilities)*
>
> *"If you want to open at Christmas the WTB say your vans must be double- glazed." (small coastal park with no facilities)*

Opinions of WTB were sometimes based on contact from some time ago with few saying they had many current dealings with the organisation. There was also some negative attitudes derived from perceived problems with the launch of the WTB website. Managers felt that they had lost business due to the delays and technical problems experienced with the website.

2.9 Staffing & employment

The average number of staff employed (both full-time and part-time) across all the parks was 20. In high season, staffing levels tended to double with the recruitment of seasonal staff, reaching an average of 48 full-time and part-time. Jobs tended to be connected with on-park facilities such as shops and entertainment venues, but there was also a core of staff devoted to maintenance and management. In addition, a sizeable minority of park owners used sub-contractors for tasks such as grounds maintenance, grass cutting and gas installation. As expected, staffing levels were much smaller on parks with fewer pitches and where no facilities existed. Here, parks were typically run by a couple or one family.

Generally, managers did not have too many problems recruiting staff to work in caravan holiday parks. However a number of parks had experienced difficulty in recruiting cleaners. Good ones were described as "gold-dust" whilst one manager had made the decision to stop hiring caravan holiday homes purely because he found it so difficult to get the staff to clean the caravan holiday homes.

Most staff were recruited via local newspaper adverts or via notices at the local job centre. Larger parks with requirements for entertainment staff often recruited these nationally rather than locally, drawing on a pool of workers which toured around parks over the course of a year.

2.10 Areas of concern

As part of the interviews, park managers were asked to voice frustrations that affected their jobs. The following list provides the responses to this question.

2.10.1. Health and safety legislation

Almost all the park managers cited increased health and safety legislation as their number one frustration.

> *"health and safety is the worst." (medium-sized inland park with no facilities)*

Whilst a number of managers explicitly acknowledged the need for such legislation, the overwhelming view was that the burden on businesses such as themselves was increasing rapidly.

> *"people aren't allowed to enjoy themselves. It's all - no you can't do this, no you can't do that... you can't even scream in the swimming pool." (medium-sized inland park with facilities)*

Most managers felt that the situation with regard to health and safety law had got a lot worse in the last few years. One manager said there had been 181 new pieces of legislation.

Managers felt frustrated by having to deal with bureaucracy in order to do a range of simple jobs on park.

> *"here's a ridiculous thing. If you want water connected you have to ring the water company to do it. I've asked them several times now and they've still not responded." (small inland park with no facilities)*

One manager also expressed frustration that his staff had to go through a 2 – 3 week Corgi gas training course just in order to connect up gas on the park. In this case, the manager asked why his staff couldn't just learn the skills required for the park rather than learning the full syllabus, most of which the manager argued was not relevant.

Managers of large parks felt that organisations enforcing health and safety targeted the big players in the industry like them, whilst those in smaller parks also felt bureaucracy didn't take account of the realities of their smaller business size.

"They target places like us, they pick big sites...." (large coastal park with facilities)

2.10.2. Employment legislation

Managers felt that excessive legislation and the costs of employing meant that they thought twice about employing people. Instead, managers were favouring contracting work when necessary.

"I don't want to employ, and don't employ. There's a move to contracting." (medium-sized inland park with facilities)

2.10.3. Other issues

A range of other issues were mentioned during the interviews. Most were mentioned only by one or two park managers but it is likely (though not definite) that they may also apply to other parks. The issues are detailed below.

- **Duplication across inspections**: One park manager said that the various inspections they received from a range of official bodies involved a considerable amount of duplication. The instance given was that fire boxes were checked in two or three different inspections. The park manager asked why couldn't the fire boxes be inspected once and the results be passed on to the other organisations requiring the information.

- **Lack of co-ordination between caravan holiday home manufacturers, dealers and park managers:** A problem with a shower in a newly purchased caravan holiday home led to a complaint by a customer. The customer complained to the park manager, who was unable to help because the van was under warranty from the manufacturer and hence if the work was done locally, the guarantee would be invalidated. The park manager wanted to be able to manage such issues locally.

2.11 Business prospects

The almost unanimous verdict of those interviewed was that prospects for the industry were extremely good. "A Boom" and "brilliant" were amongst the words that typified the mood about the state of the industry. Few respondents could see any external factors having a negative impact on the industry.

2.11.1. Quality improvements

The limited potential for physical expansion of existing parks due to planning restrictions meant that many parks were seeking to maintain and improve

profitability through improving quality and facilities. Specifically, park managers were reducing the average age of their hire fleets and implementing more formal replacement policies for owned caravan holiday homes.
In tandem with this, managers spoke of upgrading of facilities such as providing indoor swimming pools and improving the landscaping of parks.

2.11.2. Increase in quantity of holiday-taking

A general trend towards taking more holidays more often was commented upon by a wide range of park managers. This led many to believe that the continued growth in foreign holidays for main holidays was being more than compensated by the taking of many more secondary and short break holidays.

> *"people are taking a lot more holidays, especially the older ones are taking five to seven holiday a year." (small coastal park with facilities)*

2.11.3. Extension of season

Recent innovations in CHH design such as central heating and double glazing had led to a growing trend amongst owners and the family and friends of owners to use the vans for a longer periods of the year. This trend was also reflected in the significant number of parks that had sought to extend their licences, often from 8 to 10 ½ month licences.

3 THE VISITORS' VIEW

This chapter presents the results of the user survey carried out on 17 parks clustered in three areas of Wales – NE Wales, Mid Wales, and SW Wales. The parks were chosen to reflect a cross-section of all BH&HPA member parks with the aim of achieving a representative sample of caravan holiday-takers. Interviews took place in three distinct periods

- July (pre school holidays)
- August
- September (post school holidays)

We interviewed organisers and party leaders who were able to speak on behalf of their group. We refer to these people as our respondents and most of the tables and analysis below relates to the feedback from these people. Occasionally we look at the whole group of people who were on holiday with these respondents (i.e. their families and holiday companions). We note where this is the case and refer to this wider group as sample population.

This chapter picks out the main findings. More detailed tabulations are available in separate report. Details of the methodology are included as Appendix 1 and a copy of the questionnaire is included as Appendix 2.

3.1 Different types of caravan holiday takers

One of the aims for this study was to examine the mix of different types of user of caravan holiday homes. In discussion with the client we split users into the following categories, broken down by ownership and rental type.

- Owners
- Non-owners
    - Renting from private owners
    - Renting through an agency or holiday company
    - Renting direct from the park owner
    - Renting from family or friend
    - Borrowing from friend of family (i.e. not paying)

Table 5 Types of caravan holiday home users

User Type	Total (Respondents)
Owners	58%
Renting from private owner	15%
Renting through an agency/ holiday company	7%
Renting direct from the park owner	6%
Renting from friend/family	5%
Borrowing from friend / family	4%
DK/NA / None of these	4%

Source: CHH user survey

Owners accounted for just over half (58%) of our sample. 28% of our respondents were renting either direct from the owner or via a holiday company or the park owner. 9% had a more informal relationship, either borrowing or renting from friends and family.

The balance of owners and renters varied according to the part of Wales in which we were interviewing. Ownership was much more common in Mid-Wales, where it made up 95% of all users in the area, compared to 57% in SW Wales and 36% in NE Wales. This reflected the different mix of parks in these areas. Parks in Mid-Wales were much more likely to be small and have few letting caravans.

In the remainder of this report we highlight, where appropriate, differences between the different user types. In general, we concentrate on the difference between owners and non-owners because sample sizes for the individual types of non-owner are too small to enable valid analysis, except in a few particular cases. As discussed in Chapter 1, non-owners will be referred to in the remainder of this report as renters.

3.2 Characteristics of CHH users

3.2.1. Age & gender

Table 6 Age profile of CHH owners and renters

Age group	Owners	Renters	Wales holiday trips 2002 (1)
16-34	16%	30%	30%
35-54	35%	49%	47%
55+	50%	20%	23%

Sources: Figures quoted are for the sample population and not respondents. Figures are drawn from CHH user survey except (1) UKTS 2002

Analysis of the age profile of the CHH users shows that owners tended to be older than renters. Half of owners were aged 55 years or older, compared to just 20% of renters. Renting or borrowing a CHH was most popular amongst those aged 35-54 years of age.

Compared to all Wales holiday-takers, CHH owners have an older profile than average, with almost half the proportion of 16-34 year olds (16% as compared with 30%) and over twice the amount of people aged 55 and over (50% as compared with 23%). On the other hand, non-owners are fairly typical of those taking a holiday in Wales.

In terms of gender, the groups in our sample contained slightly higher numbers of females than males (54%).

3.2.2. Family life-stage

Table 7 Family life-stage of respondent

Family life-stage	Owners	Renters
Pre-family	13%	20%
Family	40%	72%
Post-family	47%	8%
Total	100%	100%

Source: CHH user survey. Percentages have been re-calculated to exclude those who offered no reply or answered don't know.

Key findings

- Owners and renters show different patterns. Renters are overwhelmingly a family market (72%) whilst owners are fairly evenly split between families and post-families with the latter slightly in the lead (47% as compared with 40%).
- Those in the post-family lifecycle were more than six times more likely to own than rent (47% as compared with 8%).

3.2.3. Group size and composition

Table 8 Group size

No. in party	Owners	Renters
1	6%	4%
2	49%	21%
3	14%	11%
4	17%	29%
5	7%	14%
6	3%	9%
7 or more	4%	11%
Average group size	3	4.2

Source: CHH user survey. Percentages relate to sample population and are rounded.

The dominance of families amongst renters is reflected in the fact that the average size of party was larger than in the case of owners. 34% of renters were in parties of 5 people or more, whereas only 14% of owners' parties were in this size bracket. Owners were more than twice as likely as renters to be in a party made up of two people (49% as compared with 21%).

In terms of the detailed composition of groups:

- Renters are more than twice as likely than owners to be on holiday as a family with children (63% as compared with 29%).

- Renters are slightly more likely than owners to have children of other households amongst their party (11% as compared with 9%).

Table 9 Age of children (from same household and other households) included in group

Age of children	Owners	Renters
0-4	9%	29%
5-10	33%	49%
11-15	20%	36%

Source: CHH Survey. The figures relate to children from same household and those from other households. Groups bringing children from more than one age group means that percentages do not add up to 100%

There were interesting results relating to the age make-up of children included in groups (Table 9). School age children were more likely to be included in owners' and renters' groups than pre-school children. The most common age for children was in the range 5-10 years old.

Other key findings:

- Extended family living in the same household or families with grown-up children accounted for 17% of owners' groups and 22% of renters' groups.

- CHH holidays were seen as a good opportunity to invite along adults from other households. This practice was almost twice as popular amongst those renting than owners (19% as compared with 10%).

- Husbands and wives were included in 80% of all owners' groups and 82% of renters' groups.

3.2.4. Socio-economic group & other social indicators

Table 10 Socio-economic group make-up of CHH users

	Owners	Renters	Wales holiday trips (1)
AB (profess. and managerial)	22%	9%	26%
C1 (clerical and supervisory)	39%	20%	30%
C2 (skilled manual)	26%	37%	19%
DE (unskilled, state pensioners)	13%	34%	25%
Total	100%	100%	100%

Source: CHH user survey, except (1) UKTS 2002

Table 11 Annual household income

Income	Owners	Renters
Up to £5,000	4%	10%
£5,001- £10,000	12%	11%
£10,001- £15,001	13%	17%
£15,001- £20,000	20%	18%
£20,001- £30,001	22%	26%
£30,001- £40,001	14%	12%
£40,001- £50,000	6%	4%
£50,001- £60,000	5%	1%
£60,001 -£70,000	1%	1%
£70,001- £80,000	1%	0%
£80,000 +	1%	0%
Average household income	£25,000	£20,000

Source: CHH user survey. Percentages are calculated for all those providing an answer to this question. Average income figure is based on mid-point of each income group banding.

Table 12 Ethnic group of respondent

	Owners	Renters	UK pop. (1)
White	99%	97%	92.1%
All minority ethnic population	1%	2%	7.9%
No answer	-	1%	-
Total	100%	100%	100%

Source: CHH User survey. (1) Office for National Statistics, based on figures April 2001

There were marked differences between the profile of CHH owners and renters.

Owners were drawn from a broad spectrum of socio-economic groups, but tended to be more ‘up-market’ than those renting. Owners were roughly twice as likely to be from AB and C1 socio-economic groups than renters (61% as opposed to 29%). CHH owners show a slightly greater tendency to be from

ABC1 socio-economic groups than Wales holiday makers as a whole (61% as compared with 56%)

As has been said, renters were more likely to be from lower socio-economic groups than owners. Almost three quarters, (71%) were from the C2DE socio-economic groups. This is a higher than the 44% of general Wales holiday takers who fall into these groups.

Other key findings:

- Owners had higher average household incomes than renters (£25K as compared with £20K). Owner's income is on a par with the UK average, (£25,170) but renters earn somewhat less than average.

- Caravan holiday homes attracted an almost exclusively white clientele (98%) with little take-up from any other ethnic groups. Compared with the UK population, CHH holidays are taken by smaller percentages of people from ethnic minority populations (2% as compared with 7.9%). Jena heathcote

- Owners were more likely than renters to own a car (96% as compared with 85%). Owners were also almost twice as likely to be in a two-car household (37% as compared with 19%).

3.2.5. Origin of Respondents

Table 13 Origin of Respondent

Origin of Respondent	Sub-sample		Holiday Destination		
	Owners	*Renters*	*NE Wales*	*Mid-Wales*	*SW Wales*
Wales	28%	18%	6%	1%	60%
West Midlands	45%	20%	25%	68%	10%
East Midlands	2%	3%	2%	2%	2%
Yorkshire and Humberside	1%	2%	2%	2%	0%
North West	19%	34%	48%	23%	5%
North East	0%	0%	0%	0%	0%
South West	1%	3%	0%	0%	5%
South East	2%	2%	2%	1%	3%
East of England	2%	4%	6%	1%	1%
Scotland	0%	1%	1%	0%	0%
Northern Ireland	0%	0%	0%	0%	0%
Rep Ireland	0%	2%	1%	0%	1%
DK/NA	6%	11%	6%	4%	13%

Source: CHH Survey. Percentages are rounded up so may not total 100%.

The table above shows that indigenous Welsh owners made up just over a quarter of the market (28%) but that the vast majority of owners came from England. English owners were most likely to be from the West Midlands and the North West.

Renters were less likely than owners to be from Wales (18%), with the vast majority drawn from similar parts of England to owners. However, there was a greater proportion from the North West (34%) and fewer from the West Midlands (20%). There was also a greater tendency amongst renters to travel further than owners to get to their holiday destination.

Other key findings

- Indigenous owners were most likely in South West Wales where they made up 60% of owners interviewed in that area. Major conurbations such as Cardiff, Swansea and Newport provided nearly all of this trade.

- In contrast to SW Wales, respondents in Mid Wales and NE Wales were almost exclusively from England. The West Midlands dominated Mid Wales park usage (68%) whilst those from the North West were the most likely users of parks in NE Wales (48%).

3.3 Holiday-taking patterns

We asked respondents about holiday-taking patterns in 2002.

3.3.1. How many holidays respondent took in 2002

Table 14 Number of short holidays and breaks (1-6 nights) taken by respondents in 2002

No. of trips	Owners	Renters
0	27%	73%
1	8%	17%
2	7%	6%
3	9%	2%
4	4%	1%
5 or more	45%	1%
Avr. No. of trips	2.9	0.5

Source: CHH user survey

Table 15 Number of long holidays (7+ nights) taken by respondents in 2002

No. of trips	Owners	Renters
0	9%	27%
1	24%	48%
2	23%	20%
3	15%	4%
4	6%	0%
5 or more	23%	0%
Avr. No. of trips	2.5	1.0

Source: CHH user survey

Owners took far more holidays of all types than renters. They took nearly three short holidays and breaks (2.9) and over two long holidays (2.5) during the year. Renters averaged less than one short holiday or break (0.5) and one long holiday (1.0) during 2002.

Prolific short break taking was more common amongst owners than renters. Five or more short holidays were taken by 45% of owners and 27% of renters. Renters were much more likely to have not been on a short holiday or break than owners (73% as compared with 27%).

As is the case with short holidays, long holidays were more common amongst owners with 91% of owners taking 1 or more long holiday, as compared with 73% of renters. Taking 5 or more long holidays were a feature only of owners, 23% of whom fell into this category.

3.3.2. Where did they go for their holidays and breaks?

Table 16 Percentage of trips made during 2002

Destination	Owners (% of trips)		Renters (% of trips)	
Type of holiday	*Long*	*Short*	*Long*	*Short*
Wales	74%	91%	55%	44%
Other UK	5%	7%	15%	43%
Abroad	21%	1%	30%	11%
Don't know	1%	0%	0%	1%

Source: CHH user survey, figures are rounded and relate to total trips.

For long holidays, both owners and renters were very loyal to Wales but saw overseas destinations as an alternative destination.

Domestic destinations dominated the short breaks market for both owners and renters with Wales enjoying a dominant position only amongst owners.

Key findings:

- As one might expect, Wales was more popular for all types of holiday amongst owners than it was amongst renters. The country was over three times more popular as a long holiday destination than overseas destinations (74% of trips compared with 21%). In the short breaks market amongst owners Wales was twelve times more popular than the next most popular destination, other parts of the UK (91% as compared with 7%).

- Renters were more likely to consider alternative destinations than owners for both long and short holidays. The majority of long holiday trips by renters (55%) had Wales as the destination. The main competition for long holidays came from abroad, with 30% of trips by renters being overseas. Other UK destinations accounted for 15% of renters' trips.

- Short breaks amongst renters were invariably taken domestically, with UK destinations accounting for 87% of trips. Wales did not have the dominant position it had in the long holiday market, instead it vied with other UK destinations as the most popular place to visit (44% of trips compared with 43%).

3.3.3. Type of accommodation used in 2002 holidays

Table 17 Accommodation used for holidays taken during 2002

Accommodation used	Owners (% of trips)		Renters (% of trips)	
Type of holiday	*Long*	*Short*	*Long*	*Short*
Caravan holiday home	72%	88%	54%	39%
Other self-catering	6%	1%	19%	7%
Hotel	16%	6%	17%	39%
Other serviced	1%	0%	1%	3%
Friends/Relatives	1%	1%	3%	8%
Touring Caravan/ Tent	1%	1%	2%	3%
Other	2%	0%	2%	1%
DK/NA	3%	3%	3%	7%

Source: CHH user survey; figures are rounded so totals may not equal 100%

Key findings:

- As one would expect, owners of CHH were prolific users of caravan holiday homes. 72% of long holidays and 88% of short breaks were taken in caravan holiday homes.

- When not staying in their CHH, the serviced sector and hotels in particular provided the main alternative for owners in the long and short holiday market (16% of long holidays and 6% of short holidays).

- Amongst renters, CHH occupied a dominant position in the long holiday market not so in the short holiday market (54% of all trips for long holidays and 39% of all trips for short holidays).

- In the long holiday market amongst renters, there was limited competition from other forms of self-catering and hotels (19% and 17% respectively). For short breaks CHH competed with hotels as the most favoured accommodation type (39%) amongst renters.

3.3.4. Experience of CHH holidays

We asked respondents about their usage of CHH in the past 5 years.

Table 18 Usage of CHH amongst non-owners in the last 5 years by destination type

CHH User	Wales	Other UK	Abroad
Frequent (5 or more)	25%	5%	1%
Occasional (1-4)	62%	18%	4%
None	14%	77%	95%

Source: CHH user survey. Figures are rounded.

Not surprisingly owners are frequent users of theirs or other caravan holiday homes with 70% taking more than 20 CHH holidays in the last 5 years. Interestingly, many renters are also committed caravan holiday-takers and very loyal to Wales.

Renters had strong loyalty to Wales as the destination for CHH holidays. 86% chose Wales as a destination in the last 5 years compared with 23% who chose other UK destinations and 5% who chose overseas. Indeed, one quarter (25%) of renters could be categorised as frequent users of caravan holiday homes in Wales. This suggests that Wales as a destination was a strong factor in the decision of where to go on a CHH holiday.

Table 19 Experience of camping and caravanning as a child

CHH User	Owners	Renters
Never	39%	31%
Once or twice	15%	20%
Frequently	46%	49%
DK/NA	1%	1%

Source: CHH user survey

We also asked about whether they had had experience of caravanning or camping as a child. The majority of the both owners and renters had childhood experience of camping /caravanning.

Those currently in the family life-stage were the most likely to have camped or stayed in caravans as a child whilst post-family respondents were the least likely.

This does seem to indicate that previous experience is important and that giving people a quality experience now is critically important for future business.

3.4 Current (2003) caravan holiday home holiday

This section looks at the holiday being undertaken at the time of interview

3.4.1. Type of holiday

Table 20 Nature of current CHH holiday

Holiday type	Sub-sample		Season	
	Owners	*Renters*	*Off-peak*	*Peak*
One of several main holidays	50%	24%	37%	40%
Main holiday of 2003	19%	36%	24%	27%
Secondary / additional holiday	26%	18%	29%	19%
Only holiday of 2003	2%	22%	7%	12%
Don't know / not sure	3%	1%	3%	2%

Source: CHH user survey. Peak relates to respondents interviewed during August, off-peak to those interviewed in July and September.

It would appear that owners are using CHH for taking a number of long holidays as well as numerous secondary / additional holidays. For instance, the current holiday was most likely to be one of several main holidays taken by owners (50% agreed with statement). Secondary / additional holidays accounted for 26% of owners' current holidays. Only 2% of owners saw this as their only holiday of 2002

Amongst renters, CHH holidays tended to be the main holiday of 2003 (36%) and for over a fifth of renters (22%), this was their only holiday of 2002.

There was a higher percentage of respondents taking secondary holidays amongst those interviewed outside the peak (29% as compared with 19%) whilst peak season saw the greatest numbers taking what was their only holiday of 2003 (12% as compared with 7% for July/Sept).

3.4.2. Duration & season of holiday

Table 21 Average duration of holiday (in nights)

	Sub-sample		Season	
	Owners	*Renters*	*Off-peak*	*Peak*
No. of nights	8.6	7.8	7.3	8.4

Source: CHH user survey

Table 22 Average duration of holiday (by ownership profile and life-stage)

	Owners			Renters		
	Pre-family	*Family*	*Post-family*	*Pre-family*	*Family*	*Post-family*
No. of nights	6.9	8.9	9.2	7.5	7.5	10.6

Source: CHH user survey

There was a high incidence of long holidays being taken amongst both owners and renters.

Owners took longer holidays than renters (8.6 as compared with 7.8) however both groups took holidays that were more than double the length than is typical in Wales. The average over the year as a whole for all Wales holidays (based on UKTS figures) was just 3.6 nights although this would be higher in the Summer.

Duration of the current holiday varied according to month, with longer holidays taken in August (8.4 nights) and shorter holidays taken during July and September (7.3 nights).

Renters and owners in the post-family life-stage took the longest holidays (10.6 nights and 9.2), whilst young owners in the pre-family life-stage had a tendency towards shorter holidays (6.9).

3.4.3. Transport

Table 23 Extent of car use as mode of transport

	Owners	Renters
Travelled by car	98%	87%
Use of car on holiday	96%	84%

Source: CHH user survey

The car was the dominant mode of transport used to get to the holiday destination and to get around whilst on holiday.

Owners were more likely than renters to travel by car (98% as compared with 87%).

In terms of other transport used, the only other significant method used to reach a destination was the train, used by 9% of renters but only 1% of owners.

Other key findings:

- Access to a car whilst on holiday was lowest amongst renters renting from owners (25% have no access).

- Relatively good train links coupled with the lower car ownership led to highest train use amongst the NE Wales sample (9%).

3.4.4. Activities undertaken whilst on holiday

Table 24 Activities undertaken by respondents whilst on current CHH holiday

Activity	*Owners*	*Renters*	*Wales holiday trips*(1)
Walking	65%	68%	76%
Swimming	43%	76%	31%
Wildlife watching	26%	6%	22%
Fishing	18%	13%	9%
Cycling	14%	18%	6%
Other	10%	15%	-
Golf	14%	6%	5%

Source: CHH user survey; (1) UKTS 2002 Note: The list includes activities that have a participation rate amongst CHH users of more than 10%.

CHH owners and renters were as active as Wales holidaymakers as a whole. Walking was the most popular activity amongst owners whilst swimming was the most popular amongst those renting.

Wildlife watching was particularly attractive to owners, suggesting that the natural environment in and around parks is a major draw. This was particularly the case in Mid-Wales where wildlife watching was an activity for 42% of respondents.

Overall, owners of CHH tended to have higher participation rates than renters in ‘soft adventure’ activities such as, fishing, nature watching and sailing / watersports. They were less likely than renters to be interested in swimming, walking and cycling.

Other key findings:

- On-park activities were largely dictated by the provision of facilities and it is therefore not surprising that swimming was the activity most likely to be undertaken whilst on-park.

- Walking was the most popular off-park activity for renters and owners.

- The presence of family exerted a strong influence on the tendency to include activities in a holiday. Those without children were looking for a more sedate time, but holidays that might include some of the more gentle activities.

- Swimming was most popular amongst families and amongst visitors to NE Wales and SW Wales. Swimming was much less popular amongst Mid Wales visitors. This reflected the greater number of Mid-Wales parks that don't have facilities on-park and the smaller number of family groups visiting the area.

- 81% of family groups took part in swimming whilst only 24% of post-family members took part in the activity. Likewise cycling was part of a CHH holiday for 22% of families, 15% of pre-family and just 7% of post-family members.

3.4.5. Attractions/ entertainment likely to visit

We asked respondents to indicate what attractions/ entertainment they had or were likely to visit during their current CHH holiday.

Table 25 Attractions/ entertainment visited during current CHH holiday

Attraction	**% likely to visit**		
	Owners	*Renters*	*Wales holidays*[(1)]
Visit local towns and villages	93%	90%	-
Beach /seaside	60%	88%	-
Spend time in countryside	70%	47%	-
Other visitor attractions	22%	39%	57%
Cabaret / night club / disco	16%	45%	-
Heritage sites	20%	30%	38%
Theme park	14%	35%	25%
Museums / galleries	10%	10%	24%

Source: CHH user survey; (1) UKTS 2002. The list shows attractions / entertainment with more than 10%

Figures suggest that CHH owners and renters were less likely than Wales holiday-takers as a whole to visit a range of visitor attractions. However it is worth exercising caution when interpreting this result as this survey was carried out during July, August and September whereas the UKTS figures relate to year-round activity.

Of ‘attractions’ visited, local towns and villages were of greatest appeal (93% of owners and 90% of renters). The strong attraction of beach and seaside was demonstrated by the fact that 60% of owners and 88% of renters were likely to visit during their current holiday.

The attraction of ‘spending time in the countryside’ showed considerable variation between owners and renters (70% as compared with 47%). This difference may be attributable to the small numbers of renters from the most rural area (Mid Wales) included in the survey. However, an analysis of renters and owners in Mid Wales (albeit based on a small sample) also displayed a similar pattern of higher interest amongst owners as compared with renters. Further research with a larger sample size is required to obtain a definitive answer to this issue.

Other key findings:

- ‘Spending time in the countryside’ was much more important in Mid-Wales and SW Wales than NE Wales (71% and 70% as compared with 43% for NE Wales). This reflects the different types of park found in these areas.

- Visits to a wide range of attractions (i.e. visitor attractions, theme parks and heritage parks) were heavily influenced by the presence of family. Less interest was shown from pre-family and post-family group members.

- Good nightlife was more than twice as important to renters than owners. Those renting from a company were the group most likely to be looking to visit a nightclub or disco. Indeed this was of interest to a majority of this group (54%) and may well have been reflected in their choice of park.

- Performing arts and sporting events were the least popular attractions amongst both renters and owners.

3.5 Expenditure

One of the aims of this research was to ascertain the economic impact of the CHH industry in Wales. As part of this, the following section looks at overall spending patterns and also at how much was spent on various elements of the trip. Comparisons are also made with spend figures from other surveys.

Estimates of the economic impacts of the CHH industry in Wales using these figures appear in Section 4.1 on page 69.

Whilst the figures in this section provide a useful snapshot, they should be treated with caution for a number of reasons. Firstly, it is widely acknowledged that respondents find it difficult to accurately estimate expenditure over a period of time such as a holiday. Secondly, some respondents to our survey were interviewed in the early part of their holiday and we were therefore asking them to predict spending patterns.

3.5.1. Spend per person per trip/ per night

Respondents were asked to indicate how much they had spent/ would spend in total on the trip. Spend included amounts spent by themselves and by other members of their party.

Table 26 uses these figures to calculate spending per person per trip and spend per person per night. Comparisons with other published sources are included in the subsequent section.

*Table 26 Amount spent per group per trip on accommodation and subsistence**

Spend area	**Amount spent (whole holiday)**	
	Owners	Renters
Accommodation	(see pitch fees below)	£351
Subsistence*	£184	£466
Spend per group per trip	£184	£817
Average group size	4.2	3.0
Spend per person per trip	**£61**	**£194**
Nights/trip	8.6	7.8
Spend per person per night	**£7**	**£25**
Average pitch fees per person per night	£6	£0
Total spend per person per night	£13	£25

*Source: CHH user survey. This table includes respondents who spent nothing on their visit. Accommodation costs for owners were nil. *Subsistence relates to all non-accommodation spending and typically includes food and drink, shopping, transport and entertainment.*

We can see from the table above that CHH renters spend an average of £194 per trip. This is over three times the amount spent by owners (£61) although the figures for owners do not include any apportionment of costs associated with owning a CHH, such as pitch fees, utility charges etc.

We think the survey results tend to underestimate the spend by owners. A fifth of owners said they spent nothing on subsistence. Whilst this might be true for short stays where people bring their own food it is unlikely to be true for longer stays. Respondents may have interpreted the question as meaning they would spend nothing over and above their normal household spending, treating the caravan as a home from home. If we exclude the respondents who said they spent nothing the average spend increases to £9 per head per night.

In addition to subsistence, owners are also paying pitch fees. We have estimated the average cost per night per person of pitch fees based on the operator and user surveys. Our calculation assumes an average pitch fee of £1800pa, an occupancy of 100 days pa. This works out to an average cost of £6 per person per night. This brings the total spend for owners to £13 –£15 ppn.

Other key findings:

- Those renting from companies had the highest average accommodation spend per group per trip (£432), with those renting from owners paying almost 20% less (£346) and those with other arrangements (e.g. hiring from friends) paying the least (£330).

- The amount spent on accommodation varied in line with seasonal pricing. For instance in August, the average spend on accommodation was £402 whilst during July / Sept it was under half that amount (£179).

- Amongst the different rental sectors, subsistence spend per group per trip was highest amongst those renting from owners (£556) and lowest amongst those hiring or borrowing from friends (£293).

3.5.2. Comparison of spend figures

The following section compares spend per person per night figures from the survey with other published sources. The comparison is made in order to test the reliability of the figures and to see to what extent the spending by CHH owners and renters is typical of other holiday-makers in Wales.

Table 27 The following table uses figures from UKTS and from a survey of visitors to Gwynedd. Spend per person per night comparisons

	CHH Survey		**Wales holidays[1]**			**Gwynedd[2]**
	Owners	Renters	Owned caravans	Rented caravans	All hols	Caravan users
Spend per person per trip	£61	£194	£77	£183	£136	£150
Spend per person per night	£13*	£25	£20	£34	£37	£20
Nights/ trip	8.6	7.8	3.9	5.3	3.6	7.5

*Source: CHH Survey, except 1:UKTS 2002 – figures for rented and owned caravans are based on very small samples and should be taken as a guide only. 2: Gwynedd Tourism Survey, 2000, System Three. * includes pitch fees. UKTS figures do not*

The figures from the survey for spend per person trip are broadly in line with the figures from UKTS. For example, the survey suggests that renters spend £194 per trip whilst UKTS estimates that all holiday makers spent £136 per trip (although this includes people staying with friends and relatives) and people in rented caravans spent £183.

In terms of spend per person per night the survey figures are lower than those suggested by UKTS. This is partly due to the fact that our respondents were generally on longer holidays than those in the UKTS sample, (which is all year round). A shorter length of stay would increase the spend per night.

Another factor to consider is that spend per head per night on long holidays is lower than the average for holidays as a whole. For example, spend per head per night in Wales for long self catering holidays is £30, not dissimilar to the figure of £25 for renters. A survey in Gwynedd in 2002 found an average spend per person per night of £20 in caravans.

3.5.3. Expenditure on elements of trip

The following table and comments relate to the proportion of total spending on various elements of the trip (excluding accommodation).

Table 28 Proportion of spend on various elements of trip (excluding accommodation)

Spending area	Owners	Renters
	% of total spend	*% of total spend*
Transport	14%	5%
Meals and Drinks	34%	42%
Entertainment / Attractions	6%	16%
Groceries	33%	23%
Other shopping/gifts	11%	13%
Anything else	2%	2%
Spend per person	**100%**	**100%**

Source: CHH user survey. Respondents were asked to indicate how much they had spent or were likely to spend on various elements of their trip on the day of the interview. The figures for each element have then been converted to a percentage of total spend.

Amongst owners

- Owners spending patterns reflected a more CHH-centred holiday or break with fewer meals out than owners and more eating within the CHH. The fewer children present amongst owners meant that less money was spent.
  - Meals and drinks out were the main items of expenditure but represented a smaller proportion of total spend when compared with renters (34% as compared with 42%).
  - ‘Eating in’ was also more common amongst owners than renters. Groceries accounted for nearly as much spending as meals and drinks out (33% as compared with 34%).
  - Owners spent over four times less on entertainment than renters (£1.42 as compared with £6.16).

- Higher transport costs reflected more touring but the lower expenditure seen in other categories suggested owners pursued free activities such as time in the countryside over paid attractions.

Amongst renters:

- Spending patterns reflected more time spent away from the CHH itself, but not necessarily off-park. Eating out, visiting attractions and enjoying nightlife were much more important than for owners.
  - Nearly half of all expenditure was on meals and drinks out (42%).
  - Groceries accounted for 23% of total spending, 10% less in relative terms when compared with owners.
  - Entertainment and attractions attracted almost three times as much spending as amongst owners.

3.5.4. Local impact

As part of this study we wanted to investigate the extent to which use of CHH benefited both the park on which people stayed and the wider local economy. To tackle the question, we looked at the issue from three viewpoints:

- Proportions of expenditure off-park and on-park.
- The proportion of food brought with them when they arrived. (the assumption that those bringing a higher percentage of food with them were less likely to purchase groceries in the on-park facilities and/or off-park shops).
- Expenditure on major goods (i.e. cars, boats, consumer goods).

<u>On-park and off-park spending (per group)</u>

Table 29 Percentage of expenditure spent off-park / on-park (per group)

Spending area	Owners	Renters
	% of total spend	*% of total spend*
Off-park (per group)	61%	52%
On-park (per group)	39%	48%
Total spend	**100%**	**100%**

Source: CHH user survey

Owners spent 9% more than renters away from the park (61% of total spend compared with 52%). Renters spent more on-park. This was due to more of the parks selected by renters being more likely to have facilities such as shops, bars, restaurants and entertainment complexes.

It is worth noting that the figures above relate to spending on the current holiday. Owners' more frequent use of their CHHs may lead to a different picture emerging of impact on the local economy over a period of a year.

Proportion of food brought on holiday from home

In line with expectations, owners brought a higher proportion of food with them than renters (35% as compared with 26%). This, together with the figures on grocery spend, suggests that they ate in more than renters.

Major purchases

Using CHH holidays as a chance to purchase major items was a pastime almost exclusively carried out by owners rather than renters. Almost half of owners had used CHH holidays as an opportunity to make major purchases (43%) whereas the corresponding figure for renters was just 4%.

Table 30 Items purchased whilst on a CHH holiday (owners)

Item	% of total
TV	17%
Microwave / cooker	9%
Fridge / freezer	8%
Video /DVD	8%
Patio Set / Garden furniture	5%
Other purchase	5%
Toaster / Kettle	4%
Hoover/cleaner	4%
Heaters	3%
Carpets/flooring	3%
Furniture	3%

Source: CHH user survey. Respondents were asked if they had ever bought major items of expenditure e.g. car, boat, furniture, major household appliances etc, whilst staying in/at their caravan. Items shown in table only include those items purchased by 3% or more of owners. Due to low percentages, the table does not include items purchased by renters.

The majority of items purchased by owners were electrical goods for use in the CHH itself. TVs were the most likely purchase (17%). Microwaves, fridge/freezers and video/DVD players the next most common items. There were also other items connected with the CHH including garden furniture, mowers and sheds. There was some evidence of spending on high-ticket items such as cars (2%) and boats (1%).

3.6 Motivations and behaviour of renters

The following tables relate to renters only.

3.6.1. Booking

Table 31 Time before departure of booking current CHH holiday (renters)

Time of booking	% renters
Week or less before	6%
More than a week, up to 2 weeks	5%
More than 2 weeks, up to 1 month	12%
Over 1 month, up to 2 months	14%
Over 2 months, up to 3 months	13%
Over 3 months, up to 6 months	21%
More than 6 months	24%

Source: CHH user survey. Figures relate to renters only.

CHH holidays are planned well in advance with relatively little last-minute booking.

Key findings:

- Almost half (45%) of CHH holidays were booked more than 3 months prior to departure.
- Length of holiday had an impact on time of booking with long holidays booked further ahead than short holidays. 28% of holidays lasting 7 nights or longer were booked more than 6 months in advance, as compared with 13% of 4-6 night holidays and 10% of 1-3 night holidays.
- The logistics involved in organising a family holiday and the need to secure availability during peak season counted against last minute bookings and meant families looked to book holidays well ahead. Almost half (48%) were booked more than 3 months in advance.
- Pre-family groups were the most spontaneous, with twice the average number booking with less than a week to go (15%).
- Post-family groups booked well ahead, although there was a sub-section who booked last minute (28% booked more than 6 months ahead, 10% booked with less than 1 week to go).

3.6.2. Information sources

Table 32 Information source for current CHH holiday

Source	% renters
Been before	39%
Word of mouth	26%
Advert in newspaper/magazine	13%
Holiday brochure	11%
Other internet site	3%
Visitwales.com website	2%
Tourist information centre	2%
Through place of work	1%
Passing / In area	1%
Travel agent	1%
Through Disabled Association	1%
Advert in supermarket	1%
Other	1%
Sealink deal	1%
DK/NA	1%

Source: CHH user survey, Multiple answers means percentages add up to more than 100%

The CHH is very traditional and informal market in terms of how it accesses information and books.

Key findings

- The market for CHH holidays was largely self-generated. A high percentage had been before (39%) or had found out through word of mouth (26%).

- This type of knowledge exerted the strongest influence in Mid-Wales (73% and 27% respectively), reflecting a finding from the operators' survey that parks in Mid Wales don't promote themselves aggressively but preferred people to 'find' them.

- Pre-families were the most likely to have been before (50%) reflecting that facilities available on-park were a major influence.

- More informal information sources out-performed traditional marketing methods, with only two of these, adverts in local newspapers and holiday brochures, scoring above 10%.

- Adverts were much more important in short holiday promotion (38% of 1-3 nights as compared with 11% for 7+ night holidays).

- Brochures were only a significant marketing tool for long holidays (13%) and in particular those renting through a company (27%).

- The impact of the internet in this market was relatively small. Only families extensively used the technology (18%), whilst the trend was non-existent amongst post-family groups (0%). Visitwales.com was the most popular individual site but other all other sites added together were a greater source of information.

3.6.3. Type of rental arrangement

The following table re-presents information on the different types of renters included in our survey. It provides a pointer as to the relative size of the constituents of the non-owing CHH market.

Table 33 Type of rental/hire/borrowing of CHH

User Type	Total (Respondents)
	%
Renting from private owner	40%
Renting through an agency/ holiday company	19%
Renting direct from the park owner	17%
Renting from friend/family	14%
Borrowing from friend / family	10%

Source: CHH User Survey. Percentages relate to those renting. Figures do not include those who provided no answer or offered don't know as a response.

Key findings:

- CHH owners were the main provider of rented CHHs (40%). Renting from an agency or holiday company accounted for just under a fifth of those renting (19%).

- More informal rental arrangements, involving hiring or borrowing from friends, represented almost a quarter of the rental market.

3.6.4. Motivations

<u>Holiday choice</u>

We asked people what factor mainly influenced their choice of holiday. The responses are set out in the following table. Scores ranged from 1-5 with 1 being 'not important at all' and 5 indicating 'very important.'

Table 34 Motivation for choosing current CHH holiday amongst renters (prompted)

Motivation	% quite/very important	Av. Score
Wanted a value for money holiday	90%	4.66
Wanted to stay on a caravan park	87%	4.54
Wanted to holiday in this part of Wales	83%	4.37
Wanted a holiday in Wales	80%	4.32

Source: CHH user survey. Motivations were given to respondents and the percentages therefore reflect the number of respondents agreeing with the motivation. Results relate only to renters

Key findings:

- Value for money was the most important motivator (90% rated it as quite or very important).
- The decision to choose a CHH holiday was more important than which area or country it was in. As has been found elsewhere, caravan holiday homes were a definite accommodation choice.
- Renters selected specific parts of Wales to go on holiday rather than have a more general idea of wanting a holiday in Wales. This regional level of product knowledge chimes with findings elsewhere in this report showing that repeat visits were high amongst CHH renters.
- Family renters were the least likely to specifically want a holiday in Wales, with post-families the most likely to be drawn by the country.

Choice of park

We asked for the reasons why non-owning respondents had selected this particular CHH park.

Table 35 Motivations for choosing current CHH holiday amongst renters (unprompted)

Motivation	Total (renters)	Pre-family	Family	Post-family
Been / visited before	34%	32%	36%	21%
Good for kids / kids love	13%	-	18%	
Family/friends owns	11%	17%	8%	10%
Good location/like the area	11%	8%	9%	21%
Recommended by friend / family	10%	7%	12%	10%
Wide range of facilities	9%	13%	8%	-
By the sea / sea view	9%	13%	7%	10%
Easy to get to / near to home	7%	12%	6%	10%
Lots of entertainment	7%	3%	9%	-
Always come here	6%	3%	6%	14%

Motivations with more than 5% are shown. Percentages relate to unprompted reasons given for choice of park. Multiple reasons given means percentages do not add up to 100%. Results relate only to renters.

Renters were risk averse in their holiday choice and preferred to go somewhere they had been before or which was recommended by a friend/family.

Key findings:

- Many parks were a "tried and tested" choice. A large percentage of renters had either visited before or had "always come here" (34% and 6% respectively).

- Families were the most likely to be returning to a park, signalling a desire to ensure that the holiday lives up to expectations.

- The facilities available on-park were important and this was particularly so for those with children (18% of families cited this reason).

- Location played a big part in decision making with the quality of the area and proximity the sea widely mentioned. Post-family members were the most interested in the location of the park, a fact that can be put down a greater interest in activities such as touring, the natural environment and wildlife watching.

- 11% of the sample were choosing a park based on the fact that the CHH was owned by a friend or family member.

Appeal of caravan holiday home

Table 36 Appeal of CHH holidays amongst renters

Appeal	Total % (renters)	Pre-family	Family	Post-family
Flexibility / Freedom	42%	45%	40%	41%
Good for kids	21%	-	30%	3%
Relaxing	14%	21%	11%	25%
Cheap break / holiday	8%	10%	8%	7%
Home from home	8%	15%	10%	6%
Like / enjoy CHH	6%	2%	8%	7%
Good facilities available	6%	3%	5%	7%
DK/NA	6%	5%	6%	7%

Source: CHH user survey. Motivations with more than 5% are shown. Results relate only to renters.

- Flexibility and freedom were the strongest appeals of caravan holidays amongst renters. CHH holidays enabled people to be self-sufficient if they wished and "do their own thing".

- The relatively self-enclosed nature of parks meant that different CHH parks were able to cater for differing markets. Those with facilities were clearly doing a good job at providing a product that appealed to children and the parents of children. For those looking for peace and quiet, CHH parks with fewer or no facilities were able to provide this.

- CHH holidays also offered a feeling of 'home from home', something which was particularly important to pre-family groups.

- Value for money again came out strongly although it was, by no means, the main appeal.

3.6.5. Knowledge and impact of grading

Table 37 Knowledge of park grade

Whether know which grade park is	% total (renters)
Yes	5%
No	94%
DK/NA	1%

Source: CHH user survey. Results relate only to renters.

- Overall, the grade of a particular caravan holiday park had little effect on people's decisions to choose a particular park. Only 5% knew the grading of the park they were staying on and of those just over half said it made any difference to their decision. These results concur with the ambivalent views of operators regarding the importance of grading that were expressed in Chapter 2.

- Only those renting caravans from a company showed any significant awareness of gradings (12% as compared with the sample average of 5%). This may be due to the greater prominence given to gradings by companies promoting CHH holidays.

- Although low across the board, awareness of gradings was higher for those parks with a 4 or 5 star rating.

3.6.6. Satisfaction

We asked people to rate their satisfaction with four specific aspects of their holiday. The response is set out in the table below. Scores ranged from 1-5 with 1 being 'very dissatisfied' and 5 indicating 'very satisfied'.

Table 38 Satisfaction of renters with elements of CHH holiday

Element	% quite/very satisfied	Av. Score
Location and the surrounding area	94%	4.70
The look of the park and the way laid out	88%	4.54
Caravan holiday home itself	85%	4.49
Facilities on the park	78%	4.31
Average	86%	4.51

Source: CHH user survey. Results relate only to renters.

Key findings:

- Satisfaction rates across all four aspects were very high (86% rated very or quite satisfied overall). As has been inferred in other parts of this survey, CHH holidays are delivering a product with strong appeal to the market.

- The location of parks had the highest overall satisfaction rating, a figure that was even higher in Mid Wales.

- In general, efforts made by park operators to provide a good quality environment seemed to pay-off, with high approval ratings under the measure “the look of the park and the way laid out”. The only “fly in the ointment” was the lower rating given on this factor by those renting from companies (4.29). Indeed, those renting from companies had lower satisfaction levels than other non-owners across three of four elements. The satisfaction rate was lowest for rating of the caravan holiday home itself. In an attempt to look at whether it was something specific about renting from a company that was the cause of lower satisfaction levels or whether the patterns were actually caused by another factor such as the size of park, we analysed satisfaction across all types of non-owners, based on this criteria (see table below).

Table 39 Satisfaction of types of renters with elements of CHH holiday

Element	Av. Score		
	Renting from company	Renting from owner	Other arrangement
Location and the surrounding area	4.57	4.71	4.93
The look of the park and the way laid out	4.29	4.63	4.69
Caravan holiday home itself	4.04	4.64	4.79
Facilities on the park	4.14	4.41	4.00
Average	4.26	4.60	4.60

Source: CHH Survey

Table 40 Satisfaction with elements of CHH holiday (taking into account park size)

Element	**Park Size**			
	V small	Small	Medium	Large
Location and the surrounding area	4.84	4.89	4.77	4.63
The look of the park and the way laid out	4.42	4.89	4.83	4.37
Caravan holiday home itself	4.63	4.81	4.73	4.31
Facilities on the park	3.68	3.80	4.46	4.37
Average	4.39	4.60	4.70	4.42

Source: CHH. Park size categories are as follows (very small<100 pitches; small 101-250; medium 251 – 500; large more than 500). Small sample sizes mean that results should be interpreted with caution.

There were some interesting variations in satisfaction levels by type and size of park *(Table 39 /Table 40)*

On average, people renting from companies showed lower levels of satisfaction than other renters. For people renting from companies, the caravan holiday home itself had the lowest score followed by facilities on the park. It is not clear why this is the case.

It may be that people renting from companies have higher expectations than those who are borrowing caravans from friends/family or renting direct from owners. Another explanation is that the lower satisfaction rates are not directly linked to the fact that a CHH is rented from a company but are due to the larger size of park that those renting from companies tend to be located on. We can see from Table 39 that there is some evidence for this assertion, with average satisfaction levels on large parks the second lowest (after very small parks).

More research is required to identify which, if any, of the above explanations is the most relevant.

Other key findings

- Respondents on small and medium-sized parks showed the greatest satisfaction levels. As already mentioned, those on very small and large parks were the least satisfied and this difference is quite marked. This was broadly true for all the four elements examined.

- The main dissatisfaction with small and very small parks concerns facilities. These parks are least likely to have sophisticated facilities.

- Satisfaction with facilities is much higher on medium and large parks, although medium parks score better than large parks.

- A surprising result is the lower level of satisfaction with the caravan holiday home of very large parks.

3.6.7. Alternatives / competition

We asked what other locations and accommodation types CHH renters would consider for a holiday or break.

Table 41 Alternative destinations renters would consider

Destination	%
Elsewhere in Wales	34%
Other UK	21%
Nowhere	14%
Abroad	12%
DK/Not sure	20%

Source: CHH user survey. Multiple answers were allowed so percentages do not add up to 100%. Results relate only to renters.

Table 42 Alternative accommodation types renters would consider

Accommodation type	%
Other caravan park	46%
Other self catering	15%
Serviced accommodation	8%
Nowhere	4%
DK / Not sure	29%

Source: CHH user survey. Multiple answers were allowed so percentages do not add up to 100%. Results relate only to renters.

Key findings:

- Renters had a considerable loyalty to Wales. Over one third (34%) said they would holiday elsewhere in the country if they had to choose another holiday.

- ‘Other UK destinations’ were almost twice as important as competitors as those abroad (21% as compared with 12%), although this dominance decreased considerably when considering long holidays. Families were most to stay in the UK, whilst the post-family groups were the least likely.

- Over one quarter (29%) of renters had no clear alternative in mind. This group are likely to be open to influence from marketing promotions to increase loyalty to Wales.

- 14% would go nowhere else. This figure can partly be attributed to loyalty towards Wales but there also seems to be other factors at play. The fact that 20% of those hiring from owners and 28% of renters hiring or borrowing from friends would go nowhere else suggests that the destination choice for some may, in part, be decided by the location of the owners’ or friends’ CHH.

- In terms of accommodation caravan holiday homes were a definite accommodation choice with high satisfaction with what they offer. Nearly half (46%) of renters said they would consider another park rather than an alternative type of accommodation.

- Renters were more likely to contemplate other accommodation types for holidays of 4 or more nights rather than shorter breaks. Those taking short breaks of 1- 3 nights were more likely to use another CH than those taking 4-6 night holidays and long holidays (62% as compared with 45%).

- Families were the most loyal to caravan holiday homes, being almost 3 times more likely to look for another CHH than consider the next most favoured option, other forms of self catering (51% as compared with 18%). Families' strong presence in the market that rents from companies was partly attributable for the high loyalty of this segment to CHH (64%).

- Where alternative accommodation was considered, other forms of self-catering were much more likely to be used than serviced accommodation such as hotels.

<u>Likelihood of return</u>

We asked renters how likely for certain scenarios to be true. These scenarios related to future holiday-taking behaviour.

Table 43 Likelihood of various scenarios taking place

Scenario	% quite/very likely	Av. Score
Coming back to Wales for another holiday/break	90%	4.68
Having another CHH (in Wales or elsewhere)	86%	4.51
Still having CHH holidays / breaks in 5 years' time	85%	4.54
Coming back to this particular park	79%	4.30

Source: CHH user survey. Results relate only to renters.

- Wales exerted a strong pull for a large majority, 90% of whom said it was very or quite likely they would return for another holiday or break. The pre and family groups were the most likely to return to Wales (93% and 90% respectively).

- Caravan holiday homes offered distinctive accommodation which people were set to return to time and time again. For instance, 85% said it was very or quite likely that they would still be taking CHH holidays in 5 years time.

- The high likelihood of use of CHH did not translate to quite as high likelihood of return to a particular park. Return was least likely from those renting from companies, a result which can in part be explained by the lower ratings reported earlier in relation to this groups' satisfaction with park layout and facilities.

3.7 The behaviour and motivations of owners

The following tables relate only to owners.

3.7.1. Experience / involvement

Length of time owned a caravan holiday home?

Table 44 Length of time owners had owned a CHH on this park or elsewhere

Length of time	On this park	Elsewhere
	%	%
Only this year	12%	0%
1-2 years	16%	6%
3-5 years	26%	6%
6- 9 years	13%	5%
10 + years	29%	8%
DK / NA	5%	75%

Source: CHH user survey. Percentages are rounded.

Key findings:

- The CHH selling/ buying market was very active with a good percentage of people entering the owned market each year. 12% of owners had owned a CHH on the particular park for less than a year. NE Wales was the most active market with 16% purchasing in the same year, as compared with 14% in Mid-Wales and 6% in SW Wales. Sales activity levels were partly a product of supply, as NE Wales had more pitches than the other two areas.

- Families were the most likely to have purchased this year, suggesting that CHH ownership starts whilst children are still at home rather than being a purchase that is made after children have grown up, or that is done in preparation for having a family.

- The majority of owners had owned on a particular park for 5 years or less (54%) although there was a good percentage who had been owners on the park for 10 years or more (29%). As one might expect, length of ownership varied with age - older couples without children were the most likely to have owned for 10 years or more.

- Owners stayed put on a particular park rather than move around, although 25% had owned a CHH elsewhere. Evidence from the operator survey suggested the decision to move park could be due to both the owner (i.e. moving to a park with more / less facilities) and/or park policies (i.e. park closures and park buyouts).

Involvement of family / fiends

The decision to own a CHH was influenced by the presence of friends or family on park as well as the decision of friends and family to buy a CHH elsewhere.

Table 45 Extent to which owners have friends / family on park or elsewhere

Friends or family on-park	On this park	Elsewhere
	%	%
Yes	32%	16%
No	63%	67%
DK / NA	5%	17%

Source: CHH User Survey. Results relate only to owners.

Key findings:

- Caravan owners are friendly with other caravan owners. 32% had friends or family on the same park and 16% elsewhere.

- Childrens' desires for the company of other children and parents' desires for support from family and friends whilst on holiday was reflected in the results. Families were the most likely to have friends or family on the same park (34%). Those yet to have children were the most likely to have friends or family owning but on other parks (21%).

3.7.2. Motivation

Appeal of ownership

Table 46 Appeal of CHH ownership

Appeal	%
Relaxing	28%
Freedom	23%
Escape / get away from it all	22%
Able to use for short breaks	19%
Peace and quiet	9%
Good for children	6%

Source: CHH User Survey. Those with more than 5% are shown. Results relate only to owners and answers were unprompted and percentages show amount of people stating a particular appeal.

Key findings

- Relaxation was the most important appeal for owners (28%), with freedom considered the second most important attribute (23%).
- Older couples with no children were the most appreciative of the freedoms and lack of hassles that came with Caravan holiday home ownership.
- Owners greatly valued the ability to be able to use their CHH for short breaks. This was particularly the case amongst the pre-family owners whose holiday taking behaviour (reported earlier) was shown to reflect this desire (32% as compared with 22% for families and 14% for post-family groups).

Park choice

We asked for the reasons why respondents had selected a particular CHH park.

Table 47 Motivations for choosing current CHH holiday amongst owners

Motivation	Total (owners)	Pre-family	Family	Post-family
Peace and quiet	21%	32%	12%	24%
Good location/like the area	14%	14%	12%	18%
Recommended by friend / family	12%	12%	17%	9%
Really nice park	12%	5%	12%	14%
Family/friend also has CHH	10%	14%	12%	7%
Good views / beautiful scenery	9%	11%	6%	12%
Easy to get to / near to home	8%	5%	9%	7%
Clean and tidy	7%	9%	8%	6%
Wide range of facilities	6%	7%	9%	4%
Been / visited before	5%	2%	4%	5%
Good for kids / kids love	5%	-	12%	1%
Best park in area	5%	4%	5%	5%
By the sea/ sea view	5%	7%	5%	5%
Well maintained grounds	5%	7%	4%	6%

Source: CHH user survey. Results relate only to owners.

Key findings:

- Location was the over-riding consideration in selection of a park. The presence of beautiful scenery and/or sea views was important in this respect.

- The quality of the park played a much greater part in owners' consideration of than it did in the case of renters. Factors such as a 'clean and tidy park', 'well maintained grounds' and the fact that it is 'the best park in the area' all feature.
- The desire for peace and quiet was much higher up the list of considerations for owners than it was for renters, and no where was it higher than in Mid-Wales where parks tended to have no or few facilities and had a higher percentage of owned caravan holiday homes. Pre-family members were the family group who rated peace and quiet the highest (32%), this perhaps a reaction to more stressful lifestyles 'back home.'

3.7.3. Satisfaction

We asked people to rate their satisfaction with four specific aspects of their holiday. The response is set out in the table below. Scores ranged from 1-5 with 1 being 'very dissatisfied' and 5 indicating 'very satisfied'.

Table 48 Satisfaction of owners with elements of CHH holiday

Element	% quite/very satisfied	Av. Score
Location and the surrounding area	93%	4.84
Caravan holiday home itself	93%	4.81
The look of the park and the way laid out	86%	4.62
Facilities on the park	65%	4.07

Source: CHH User Survey

Owners were highly satisfied with all aspects of CHH ownership. Highest ratings were given to the location of the park with those owning in Mid-Wales rating highest on this factor (4.90).

The area in which owners were least satisfied was in the provision of facilities on the park (e.g. shop, swimming pool, club/ bar etc). In order to discover whether this was due to the quality of existing facilities or a dissatisfaction with the number of facilities, we analysed satisfaction levels according to whether the park had facilities or not. The table shows the results.

Table 49 Satisfaction of owners with elements of CHH holiday according to whether park has facilities or not

Element	Av. Score	Av. Score
	Park with facilities	Park without facilities
Facilities on the park	4.24	3.91

Source: CHH Survey

The table shows that when rating facilities on park scores differed between owners staying on parks with facilities and those on parks without facilities. Owners on parks without facilities rated their satisfaction much lower in this case (3.91 as compared with 4.24). This suggests that owners would like more facilities provided on parks that currently do not have such facilities.

3.7.4. Usage Patterns

The survey looked at the usage of owned CHH by the owners themselves and by friends and family.

Table 50 Whether friends or relatives use CHH

Friends or relative use the CHH	%
Yes	53%
No	41%
DK / NA	6%

Source: CHH user survey.

Table 51 Frequency of CHH use by owners/ friends & family

Frequency of use	Owners	Friends / family
Almost every week	49%	5%
Once or twice a month	31%	6%
Every couple of months	9%	21%
2-3 times a year	4%	48%
DK/ NA	7%	3%

Source: CHH user survey.

Key findings:

- Not surprisingly, owners were prolific users of their caravan holiday homes. Half are using it virtually on a weekly basis and 80% more than 12 times a year.
- Amounts of available leisure time had a strong influence on usage rates amongst owners, although the presence of children over-rode the lack of leisure time as the main influencing factor. Usage was highest amongst post-family groups, many of who were retired (52%), although families had almost as much usage (50%). Lack of leisure time and the pressures of work may have been the cause of low usage of CHH amongst pre-family owners (11% use them 2-3 times a year).
- Results from the operator survey (see Chapter 2) indicated that the decision about whether to offer use by friends and family was

influenced not only by owners but by park rules which could, in many cases, only allow CHH to be used by family members.

- The majority of owned caravan holiday homes were used by friends or family (53%) but not that regularly. Almost half let family and friend use the CHH two or three times a year.

- As one would expect, the more owners used the CHH themselves the less use was made by friends and family. Pre-family owners, who used CHH less than other life-stage groups, were the most likely to offer usage to friends / family (60%) and allowed the most frequent usage by them (21% offer use once a month or more often as compared with 14% for families and 5% for post-family group.

- Park rules as well as the decision of owners may well have had a bearing on whether or not charges could be applied. Only 7% of owners charged for use of the CHH by friends or family, a figure which dropped to 1% in Mid Wales where the smaller, owner-dominated parks that typify the area often did not allow commercial renting of CHH.

3.8 Profile of CHH users

This section provides a summary profile of owners and renters. The profile is not intended to be exhaustive but rather to give a flavour of the two main types of user and some of their distinguishing characteristics.

OWNERS profile

- Older, half aged 55+
- CHH owners show a slightly greater tendency to be from ABC1 socio-economic groups than Wales holiday makers as a whole
- Couples and families
- Prolific holiday takers
- Quality of park environment is very important
- Looking for sedate pace and peace and quiet
- Enjoy time on park but also enjoy the surrounding countryside
- Value freedom of CHH
- Main provider of rented CHH
- Average length of stay is twice that of Wales holiday-taker

RENTERS profile

- Younger profile
- Lower socio-economic groups
- Dominated by families (80%)
- Take caravan holiday as main holiday
- Kids' needs drive park choice
- On-park facilities important although sea/beach is also a major draw
- High satisfaction with Welsh CHH parks leads to high repeat business
- As active as Wales holiday-takers as a whole
- Overseas destinations are nearest competitor for long holidays
- Past experience and recommendations are main reasons for holiday choice
- Renting from owners is most popular

4 IMPACTS AND OTHER POLICY IMPLICATIONS

This chapter draws on the research findings summarised in the previous chapters, explores the economic and social impacts of the CHH sector, and highlights some implications for marketing and policy making.

4.1 Economic impacts

4.1.1. Impact on the Welsh economy

It is not possible to estimate the economic impact of CHHs from our survey results alone. We do not know how many people in total were staying in CHHs on the days we interviewed, we have no reliable figures for the total number of caravans in Wales, and no detailed occupancy information.

We have therefore adopted the following methodology.

- The UK Tourism Survey (UKTS) provides an estimate of how many holiday trips take place in CHHs in Wales each year. This is based on a small sample and there are fluctuations form year to year, so we have taken an average of the past three years.

- The UKTS also provides information on spending but this is likely to be less reliable than trip information so we have taken figures on spend per holiday trip per head from our user survey. These figures include spend on accommodation, food, entertainment and transport but not pitch fees.

- We have then multiplied these figures together to give a total spend on CHH holidays in Wales.

Table 52 Spend on CHH holidays in Wales

	Wales holiday trips Avr '00-'02 (1)	**Total spend per trip per person** (2)	**Estimated spend on CHH holidays in Wales** (3)
	(m)	£	£m
Owned CHHs	1.2	61 (4)	73.2
Non- owned CHHs	0.7	194	135.8
Total			209

Sources: (1) UKTS; (2) CHH user survey (includes expenditure by adults on the trip both for themselves and for other people for whom the adults paid, i.e. children) (3) 2003 prices (column 2 x column 1). (4) This doesn't take account of pitch fees.

This gives an annual total of £209m spent in Wales by owners and renters, with renters accounting for about 65% of the total. (Renters spend more than owners per trip because of the accommodation element but there are more owner trips). To put this in perspective, this is 17% of all holiday spending in Wales. This is a slightly higher estimate than that provided by UKTS (15%).

4.1.2. Impact on the local economy

Table 53 shows where this money goes. Note that it percolates throughout the local economy with a particular impact on food shops, pubs and restaurants, as well as other sectors such as garages, visitor attractions and entertainment.

Table 53 Spend per person per holiday/break

	Owners	Renters
Accommodation	-	£351
Subsistence	£184	£466
- Transport	£16.37	£41.46
-Meals/drinks	£71.20	£180.32
-Entertainment/attns	£21.35	£54.08
-Groceries	£50.15	£127.02
-Other shopping	£21.48	£54.39
-Other	£3.45	£8.73

Source: CHH user survey: Figures for subsistence areas are based on the percentages of total daily spend applied to the subsistence figure for the holiday as a whole.

Impacts on the wider local economy are also affected by where this spending takes place.

- The survey suggest that about half (52%) of spending on subsistence (i.e. non accommodation spend) took place on park. Owners spent more off park (61%) than renters (52%). This indicates that CHH users do bring benefits to the wider area.

- Just under a third (31%) of people brought some of their food with them which means they spend less than they might do in local food shops. Owners are more prone to do this than renters. However, it is not the case that CHH users are self sufficient in terms of food.

There is clear evidence that owners of CHHs use CHH holidays/breaks as an opportunity to make purchases of major items of household expenditure. 43% of owners said they did so on occasion (not necessarily on current CHH holiday) with purchases including white goods, electrical goods, garden furniture and even on occasion cars and boats.

4.1.3. The impact of a caravan park

Using the figures from the research, we can make an estimate of the value of spending generated by a typical caravan park. We have taken two notional examples: a small park of 100 CHHs exclusively owned, and a larger park of 500 units with 200 units for letting and 300 owned units.

Table 54 Impact of Caravan Holiday Home Parks – 2 Scenarios

	Small park	Large park
Owned CHHs	**100**	**300**
Purchase of CHH depreciated over 10 years	£150,000	£450,000
Pitch Fees	£180,000	£540,000
Nights occupied	10,000	30,000
Other spend (@£21.40 per night)	£214,000	£642,000
Sub total	£544,000	£1,632,000
Rented CHHs	**0**	**200**
Nights occupied (@ 150 per pitch)	-	30,000
Accommodation charge (@£305 per wk)		£1,307,150
Other spend (@ £59.70 per night)	-	£1,791,000
Sub total		£3,098,150
Grand total	**£544,000**	**£4,730,150**

Source: CHH user survey and CHH operator's survey. Figures for owners do not include costs of utilities on the park such as electricity, gas and water.

Our assumptions are as follows:

- Based on results from the survey we estimate that on average owners or their friends /families will visit their caravans 25 times a year. We have assumed an average all-year round length of stay of 4.0 nights (UKTS – average for owned caravans in Wales) giving occupancy of 100 nights and an average spend per night per group of £21.40 (i.e. spend per group per trip (£184) divided by length of stay on current holiday (8.6)). Pitch fees are based on the average annual charges levied by park owners from our survey (£1800). The purchase price of a CHH has been set at £15,000 with an assumed depreciation of 10 years and hence a yearly cost of £1,500. (It should be noted that the calculations for owners do not include expenditure on utilities such as rates, gas, electricity and water)
- For rentals we have assumed an average occupancy of 70% over a season of 7 months (30 weeks) giving 150 nights occupancy per

pitch over the year. (This assumption is based on the WTB occupancy survey). We have assumed an average subsistence spend per group per night of £59.70 (i.e. spend per group per trip £466 divided by length of stay on current holiday 7.8 nights). Accommodation charges are based on the operators survey and are an average of high/low season rates (£305)

This suggests that a small park (100 units) could generate an income of around £0.5m per year in the local area and a large park a spend of £4.7m . This is spending introduced into the local economy although it does not mean it is necessarily retained within the local economy.

Another way of looking at this is that each 'owned' caravan injects an income into the local economy of £5,440 pa and each rented caravan injects an income of £15,490. The difference in economic impact is accounted for by the fact that rented caravans are used more intensively and spend per night per group is higher. This is an over simplification, however, as a number of owned caravans are also sublet which increases the potential income generation associated with owned units.

Note that although rented caravans appear to have a much greater potential impact on the local economy that owned vans, there is a much stronger incentive for park owners to favour owned caravans. These generate profits from sales of new caravans, a steady up-front income from pitch fees whilst rented caravans require initial investment, maintenance and cleaning and have to be marketed. Rented caravans are also more demanding in terms of site management.

These figures need to be treated with a great deal caution. The research was not designed primarily as an economic impact study. The above estimates are based on a large number of assumptions and there will be very considerable variations between individual sites and situations.

4.2 Employment generation

Caravan holiday parks are making a useful contribution to local employment generation. The operator interviews indicated that the average number of staff employed (both full-time and part-time) was 20. In high season, staffing levels tended to more than double with the recruitment of seasonal staff, reaching an average of 48 full-time and part-time. Jobs tended to be connected with on-park facilities such as shops and entertainment venues, but there was also a core of staff devoted to maintenance and management. With the exception of entertainment staff, most posts were filled from the local population.

Smaller parks showed a tendency to use sub-contractors for work such as grounds maintenance. The predominance of these parks in rural areas suggests that parks are making an important contribution to the viability of a range of small and medium-sized rural businesses.

Although quantification of the wider employment impacts of CHH parks lies outside the scope of this study, it is worth pointing out that, in addition to direct employment, there is a wide range of employment sectors that benefit from the presence of CHH parks. Amongst this are businesses supplying goods and services. (e.g. electricians, plumbers, breweries etc) and businesses who receive the parks' visitors (e.g. shops, pubs, attractions etc).

4.3 Social impacts

Caravan holidays have little appeal to ethnic groups in the UK. In our sample only 1% were of non white origin.

Owners of CHHs have a different social profile to renters; not surprisingly given they can afford to purchase a caravan. Owners are more up-market, two thirds of them are classed as ABC1, with a strong following amongst the C1 group. Average household income was £25,000pa.

Renters by contrast are predominantly from the C2DE groups (71%). This profile is quite markedly skewed. The DE groups account for half the UK population and only 44% of holidays to Wales. The average household income was £20,000pa.

CHH's can be seen as a socially inclusive form of holiday accommodation. They provide modern, high quality accommodation at a budget price which is affordable by a section of the population which might otherwise struggle to take holidays.

Those renting CHHs, record very high levels of satisfaction with the product (86% quite or very satisfied) and rate them highly for value for money. They are a loyal market and the product delivers what they want.

- It was the main or only holiday for half of our respondents.
- For 46%, the alternative to this holiday was another caravan park.
- Only 30% of the sample had been abroad for a holiday in 2002, 55% had been to Wales.

A further point worth noting is that owned CHHs are second homes which offer most of the advantages to their owners with few of the social problems resulting from the distortion of the local housing market that stems from traditional second homes.

4.4 Tourism impacts

4.4.1. An important strand of tourism in Wales

In terms of volume and value it accounts for 22% of trips and an estimated 17% of all domestic holiday spend. In some areas, of course, it accounts for a much large proportion of the total accommodation stock.

4.4.2. Delivers a high degree of satisfaction

The survey showed very high levels of satisfaction with the CHH product from both owners and renters. This is true across all aspects of the park and location, although the level of facilities on park came in for some criticism, particularly from owners. Interestingly, the area that is most often criticised by non caravanners, the landscaping and layout of parks, provoked few complaints from caravan holiday takers with only 3% of owners and renters expressing any dissatisfaction.

The CHH product is unique in the accommodation sector in that the living accommodation is replaced and renewed at regular intervals which means it can readily adapt to changing tastes and requirements.

4.4.3. Perceived to be good value for money

90% of renters choose the holiday because it was good value. This was the most important motivation, slightly more important than visiting Wales. Value for money also featured strongly in the appeal of a caravan holiday although other factors are also important. Owners didn't specifically mention value for money as a motivation for owning a CHH although this perhaps implicit in the fact that they use it to take multiple holidays and breaks.

4.4.4. A captive market for Wales

It is a very loyal market with a high propensity for repeat visits. Owners were spending 74% of their long holidays and 91% of short holidays in Wales and very few were going abroad or to the rest of the UK. A similar, though not so marked pattern is apparent with renters who were taking 55% and 44% of their long and short holidays in Wales. 78% of renters said they would be very likely to return for another holiday to Wales and 70% said it was very likely they would be taking caravan holidays in 5 years time.

4.4.5. Developing the sector's tourism potential

On paper, prospects for the CHH sector look good. The Park Managers were very optimistic about the future and see the desire for more holidays and the continued improvement in caravan design as stimulating further growth. The caravan users appear to be very satisfied with the product, show a high level of repeat business and a majority expect to continue to use CHHs in the foreseeable future. Caravan holidays seem to be meeting many of the requirements identified as key tourism drivers over the next decade such as value for money, informality, quality accommodation, flexibility, relaxation and the ability to cater for different elements within the same group. This augurs well for the future.

However, CHHs are not like other sectors of tourism.

- First, because of planning constraints the number of parks is more or less fixed. In fact the overall number of units has probably decreased in recent years as larger caravans require more space.

- Second, the majority of park owners and managers don't necessarily see themselves as engaging in marketing in the same way that many parts of the tourism industry do. This is because owned pitches predominate and the majority of parks have no letting units. Caravan sales and pitch fees drive the economics and as such the promotion of this aspect is often uppermost in park owners' marketing priorities. Once a CHH has been sold the park owner has little interest in how often or when the caravan is used. Our survey suggests that there is also a trend for park owners to convert rented units into owned.

There are various options for developing the tourism benefits.

- Expand the number of parks and pitches. For the reasons mentioned above this doesn't seem a very promising option although planners may be more receptive to low key parks in the countryside or to parks which are perceived to set new standards in terms of environmental quality. This research may help to provide a more convincing case to local authorities.

- Accept that the number of parks and pitches is more or less fixed and concentrate on improving the quality of facilities, setting and management to add value and ensure that the market is still thriving in ten years time. Despite the high levels of satisfaction measured in the survey it is worth noting that 11% of renters and 9% of owners were dissatisfied or lukewarm about landscaping and layout, whilst 19% of renters and 27% of owners felt the same about park facilities. The satisfaction ratings also suggest that particular attention needs to be focused on larger parks and in particular on the quality of the park layout and the quality of the CHH themselves.

- Encourage operators to provide more units for rent. Our survey found a trend for park owners to convert rented units to owned because it was less hassle and they could make more money from sales. Hire fleets seem to be increasingly concentrated on larger parks which is a pity. Increasing rented accommodation would generate more economic benefits.

- Encourage operators to allow more owners to sub-let their CHHs. Most of the larger parks allow this but many parks do not, although it clearly takes place on a clandestine and informal level. This would increase occupancy but there is no incentive for park owners to do this and indeed some disincentive as some park operator respondents suggested that mixing owners and renters could cause problems and wasn't liked by other owners. A way forward might be for more park operators to take an active part in the sub-letting of owners' CHHs and in return take a percentage on revenues raised.

- Increase local economic spin-of by encouraging CHH users to explore and make use of facilities in the surrounding area. Many parks already display leaflets of nearby attractions but there is less evidence of active link-ups with pubs and restaurants in order to create promotions and discounts.

- More work needs to be undertaken on grading schemes. Our survey shows only a very small percentage (5%) of CHH users were aware of the grading of their park. This is not out of line with other surveys which show that gradings are a secondary rather than primary factor. This is even the case for hotels and serviced accommodation. This finding is backed up by operators who see little marketing benefit from their participation in various grading schemes. However, it is recommended that further research is undertaken in order to establish the exact interplay between awareness and relevance to consumers.

- Our survey suggests that 40% of the CHH rental market is made up of people booking CHHs direct with CHH owners. This means that the market is informal in nature, a fact which has a number of implications. Firstly such a pre-dominance of owners sub-letting (either with or without the permission of park owners) makes it very difficult to identify the stock that is available to rent. Secondly, a market with a large number of CHH owners promoting their own CHHs means that it is difficult to co-ordinate marketing campaigns and develop new services such as centralised or on-line booking. This also has implications if rented CHHs are to be included in any proposal for statutory registration.

- A possible way forward would be to encourage a more formal market by offering incentives and encouragement to park operators to assist owners in sub-letting CHHs.

APPENDIX 1 RESEARCH METHODOLOGY

Park operator survey

The BH&HPA drew up a list of 41 caravan parks that were felt to provide a good cross-section of parks in BH&HPA membership in Wales. We contacted most of these and obtained an agreement to interview 26 of them. Three parks were visited in person to pilot the questionnaire and the remainder were interviewed over the phone, an appointment having previously been made. A structured questionnaire was used as a prompt but in practice operators were encouraged to digress where they had something to say. A list of people interviewed is given at the end of this appendix.

The user survey

From the 41 parks previously identified we selected 9 parks clustered in three areas of Wales – NE Wales, Mid Wales, and SW Wales. The parks were chosen to reflect a cross-section of all BH&HPA parks with the aim of achieving a representative sample of caravan holiday-takers. Interviews took place in three distinct periods – July (pre school holidays), August, September (post school holidays).

Interviews were carried out by a professional market research company using trained staff. They were conducted from 2pm to 8pm. Interviewers walked around the parks and selected people at random. People not staying on the park or not staying in a CHH were screened out. Interviews were conducted with party leaders or organisers (self defined) because they were best placed to answer questions about booking and motivations. Information was collected, however, on all members of the group to build up a picture of all users.

After the first round of interviews it was clear that it would be difficult to achieve the target of 1000 interviews. This was partly due to the length of the questionnaire but primarily due to the limited number of people on smaller parks. After discussion with the client we agreed to introduced more parks for the subsequent phases to provide a larger pool of potential interviewees. The additional parks were selected on the same principles as before.

The parks chosen and numbers of interviews achieved are shown in Table A.1 overleaf.

Table A1 Interview locations

Park	CHHs	Letting CHHs	Facilities *	Graded park	Interviews
North East					
Presthaven	1168	559	Y	Y	139
Golden Sands	317	228	Y	N	123
Tree Tops	120	0	N	Y	23
Mounds	200	0	N	N	33
Pen y Glol	60	3	N	N	5
Mid Wales					
Bryn Uchel	100	0	N	N	36
Garth	60	0	Y	N	29
Hidden Valley	125	0	Y	Y	62
Valley View	125	0	Y	N	16
Cefn Coch	60	0	N	Y	49
Carmel	60	0	N	Y	
South West					
Kiln Park	629	450	Y	Y	131
Saundersfoot Bay	170	37	N	Y	52
New Minnerton	164	0	Y	N	36
Woodland Vale	80	2	N	N	18
Park Farms	70	0	N	N	18
Caerfai Bay	32	7	N	Y	6

*Source: BH&HPA database; CHH user survey. * Note: parks with facilities are defined as those with any of the following – bar, club, restaurant, cafe or swimming pool.*

Tables A2- A3 look at how representative our sample is. Assuming that the number of people on a park is broadly proportional to the number of CHHs then Table A2 suggests that our sample contains both the right size distribution of BH&HPA parks and the right proportion of parks with facilities and grading. In other words 24% of all CHHs in Wales are on parks of up to 100 units and 28% of our interviews took place on these small parks.

Table A.2 Comparison of sample with all BH&HPA parks

Size of park	% of BH&HPA pitches	% of interviews
0-100	28%	24%
101-250	29%	28%
251-500	18%	15%
500+	25%	33%
Parks with facilities*	63%	66%
Graded parks	56%	57%

*Source: BH&HPA. CHH user survey. * Note: parks with facilities are defined as those with any of the following – bar, club, restaurant, cafe or swimming pool.*

Table A3 Seasonal spread

	Caravan holiday trips to Wales	**% of interviews**
July	31%	16%
August	**46%**	64%
September	23%	**20%**
	100%	100%

Source: UKTS. User survey

The situation in terms of seasonal spread (Table A3) is less good because of the difficulty in finding enough people to interview. In Wales, the UK Tourism Survey indicates that 46% of all summer caravan holiday trips took place in August and 54% in July and September. In our sample the figures are 64% and 36% respectively, so we are slightly over representing the peak and under-representing the off-peak. This means that the sample is likely to report a higher proportion of long holidays.

We have considered whether it is worthwhile weighting the data to adjust for this seasonal disparity. However, if we did this then the good fit in terms of park profile could well be lost. The discrepancy is relatively small and the sample is only representing the summer three months not the year as a whole. On balance we have decided to leave the data unweighted but in the main analysis we highlight differences between the peak and off-peak periods where they are relevant.

Table A4 List of Caravan holiday home parks whose managers/owners were interviewed

Park details			Number of pitches				Characteristics		
Park Name	**Town**	**County**	**Touring pitches**	**Owned CHH**	**Let CHH**	**Total CHH**	**Grading**	**Awards**	**On-park facilities?**
Aberconwy Park & Country Club	Conwy	Conwy	0	282	0	**282**	5		Yes
Beachdean Leisure Park	Saundersfoot	Pembrokeshire	0	35	10	**45**	4	Dragon	Yes
Bryn Uchel Caravan Park	Machynlleth	Powys	0	100	0	**100**	Ungraded		No
Caerfai Bay Caravan & Tent Park	St David's	Pembrokeshire	105	25	7	**32**	4		No
Dinlle Caravan Park	Caernarfon	Gwynedd	178	160	18	**178**	4		Yes
Fontygary Leisure Park	Barry	Vale Of Glamorgan	0	420	40	**460**	3	Bronze	Yes
Garth Holiday Park	Machynlleth	Powys	0	99	0	**99**	Ungraded	Gold	Yes
Golden Sands Holiday Park	Rhyl	Conwy	0	35	282	**317**	Ungraded		Yes
Gwernydd Hall Holiday Home Park	Newtown	Powys	0	181	0	**181**	Ungraded		Yes
Henllan Caravan Park	Welshpool	Powys	12	65	0	**65**	Ungraded		Yes
Kiln Park Holiday Centre	Tenby	Pembrokeshire	302	179	450	**629**	4	Gold	Yes
Kingsbridge Caravan Park	Beaumaris	Isle of Anglesey	98	26	2	**28**	3	Silver	No
Lydstep Beach Holiday Park	Tenby	Pembrokeshire	0	436	77	**513**	4	Gold	Yes
Lyons Robin Hood Holiday Park	Rhyl	Denbighshire	0	900	50	**950**	Ungraded		Yes
Pen Y Glol Caravan Park	Holywell	Flintshire	0	57	3	**60**	Ungraded		No
Presthaven Sands Holiday Park	Prestatyn	Denbighshire	119	609	559	**1168**	3	Silver	Yes
Rhinog Park	Dyffryn Ardudwy	Gwynedd	0	25	0	**25**	4	Bronze	No
Saundersfoot Bay Leisure Park	Saundersfoot	Pembrokeshire	0	133	37	**170**	5	Silver	No

Park details			Number of pitches				Characteristics		
Park Name	**Town**	**County**	**Touring pitches**	**Owned CHH**	**Let CHH**	**Total CHH**	**Grading**	**Awards**	**On-park facilities?**
Scamford Caravan Park	Haverfordwest	Pembrokeshire	5	0	25	**25**	4	Bronze	No
Silver Birch Caravan Park	Holywell	Flintshire	0	101	4	**105**	4	Silver	No
Sunnyvale Holiday Park	Tenby	Pembrokeshire	50	0	53	**53**	4		Yes
Talacre Beach Caravan & Leisure Park	Talacre	Flintshire	0	632	37	**669**	5	Silver	Yes
Tan Y Bryn	Llandudno	Conwy	0	0	24	**24**	Ungraded		No
Trecco Bay Holiday Park	Porthcawl	Bridgend	0	1606	245	**1851**	3		Yes
Tree Tops Caravan Park	Holywell	Flintshire	0	120	0	**120**	5	Gold	No
Valley View Holiday Home Park	Welshpool	Powys	0	113	0	**113**	Ungraded	Silver	Yes

Source: BH&HPA database

APPENDIX 2 USER SURVEY QUESTIONNAIRE

INTERVIEWING SERVICES LTD
10 HIGH STREET, BUNTINGFORD, HERTS, SG9 9AG TEL: 01763 272746 FAX: 01763 272788

JN5491 : WALES CARAVAN PARKS SURVEY

INFORMANT'S NAME:	
ADDRESS: PLEASE OBTAIN FULL ADDRESS AND POSTCODE	
POSTCODE:	
TELEPHONE NUMBER:	

OCCUPATION OF HEAD OF HOUSEHOLD/CHIEF WAGE EARNER:

……………………………………………………………………………………………

SOCIAL CLASS	**10**	**AGE GROUP**	**11**	**SEX**	**12**
AB	1	16-24	1	MALE	1
C1	2	25-34	2	FEMALE	2
C2	3	35-44	3		
DE	4	45-54	4		
		55-64	5		
		65+	6		
CARS IN HOUSEHOLD	**13**	**ACCOMMODATION**	**14**	**DAY OF WEEK**	**16**
ONE	1	OWNED	1	MONDAY	1
TWO OR MORE	2	RENTED	2	TUESDAY	2
NONE	3	RENT FREE	3	WEDNESDAY	3
		REFUSED/NOT STATED	4	THURSDAY	4
MONTH OF INTERVIEW	**17**			FRIDAY	5
JULY	1			SATURDAY	6
AUGUST	2			SUNDAY	7
SEPTEMBER	3				

Interviewer declaration: I declare that this is an interview carried out in accordance with your instructions with a person unknown to me.

Signed : ……………………………………………………………………
Name: ……………………………………………………………………..
Date of interview : …………………………………………………….

Good morning/afternoon/evening, I am from Interviewing Services Ltd and we are conducting a market research survey here today, on behalf of The Wales Tourist Board and The British Holiday and Home Parks Association to help them get a better understanding of caravan holidays in Wales. Please could you spare me a few minutes to answer some questions?

Q.A Can I just check, were you involved in booking, initiating or organising this holiday or trip? (20)

YES	1	**Q. 1**
NO	2	**CLOSE**

ALL TO BE CODED 1 AT Q.A. OTHERS THANK AND CLOSE. DO NOT COUNT TOWARDS QUOTA

Q.B Are you staying in a touring caravan on this site? (21)

YES	1	**CLOSE**
NO	2	**Q.1**

ALL TO BE CODED 2 AT Q.B. OTHERS THANK AND CLOSE. DO NOT COUNT TOWARDS QUOTA

Q.C Do you/your immediate family own the caravan you are staying in? (22)

YES	1	**Q.1**
NO	2	**Q.D**

Q.D **IF NO: SHOW CARD A**: Are you…? (23)

BORROWING FROM A FRIEND/FAMILY (NOT PAYING)	1
RENTING FROM A FRIEND/FAMILY	2
RENTING FROM A PRIVATE OWNER	3
RENTING THROUGH AN AGENCY/HOLIDAY COMPANY	4
RENTING FROM DIRECT FROM THE PARK OWNER	5

INTERVIEWER PLEASE WRITE BELOW THE NAME OF THE SITE YOU ARE INTERVIEWING IN**: (24)**

Q.1 Who is in your party on this particular trip/holiday? (25

ALONE	1	
WITH HUSBAND / WIFE / PARTNER	2	
WITH OTHER ADULTS 16+ FROM HOUSEHOLD	3	
WITH CHILDREN UNDER 15 FROM HOUSEHOLD	4	
WITH ADULTS 16+ FROM OTHER HOUSEHOLD	5	
WITH CHILDREN AGED 15 AND UNDER FROM OTHER HOUSEHOLD	6	
		Q.2

Q.2 Are you all staying in the same caravan? (26)

SAME CARAVAN	1	
TWO CARAVANS	2	
MORE THAN TWO CARAVANS	3	
		Q.3

Q.3 How many people are in your group altogether and what ages are they (including yourself)?

27-38	MALE	FEMALE
ADULTS 16-34		
ADULTS 35-54		
ADULTS 55+		
CHILDREN 0-4		
CHILDREN 5-10		
CHILDREN 11-15		

HOLIDAY PATTERNS

Q.4 Can you tell me something about the holidays you personally took last year (2002) thinking both about holidays taken in the UK and abroad?

First of all, I'd like to ask you about your holidays you took of a week (7 nights) or more.

a) How many nights did you have away?
b) Where did you go?
c) **SHOW CARD B:** What sort of accommodation did you use?

7 NIGHTS OR MORE (41 - 55)		HOLIDAY 1	HOLIDAY 2	HOLIDAY 3	HOLIDAY 4	HOLIDAY 5
A) Number of nights away *WRITE IN NUMBER OF NIGHTS*						
B) Destination	WALES	1	1	1	1	1
	OTHER UK	2	2	2	2	2
	ABROAD	3	3	3	3	3
C) Accommodation	STATIC VAN	1	1	1	1	1
	TOURING VAN/ CAMPER/ TENT	2	2	2	2	2
	OTHER SELF CATERING	3	3	3	3	3
	HOTEL	4	4	4	4	4
	OTHER SERVICED	5	5	5	5	5
	FRIENDS/ RELATIVES HOME	6	6	6	6	6
	OTHER	7	7	7	7	7

Now, what about short breaks or holidays of less than a week (up to 6 nights).

d) How many nights did you have away?
e) Where did you go?
f) **SHOW CARD B:** What sort of accommodation did you use?

UP TO 6 NIGHTS (61 – 75)		HOLIDAY 1	HOLIDAY 2	HOLIDAY 3	HOLIDAY 4	HOLIDAY 5
D) Number of nights away *WRITE IN NUMBER OF NIGHTS*						
E) Destination	WALES	1	1	1	1	1
	OTHER UK	2	2	2	2	2
	ABROAD	3	3	3	3	3
F) Accommodation	STATIC VAN	1	1	1	1	1
	TOURING VAN/ CAMPER/ TENT	2	2	2	2	2
	OTHER SELF CATERING	3	3	3	3	3
	HOTEL	4	4	4	4	4
	OTHER SERVICED	5	5	5	5	5
	FRIENDS/ RELATIVES HOME	6	6	6	6	6
	OTHER	7	7	7	7	7

Q.5 In the past 5 years, how many caravan holidays/breaks have you had…?
PLEASE WRITE IN NUMBER FOR EACH

a) In Wales?
b) In other UK?
c) Abroad?

(80-82)

WALES	
OTHER UK	
ABROAD	

Q.6 Did you go on caravaning/camping holidays as a child? (83)

NEVER	1
ONCE OR TWICE	2
FREQUENTLY	3

THIS HOLIDAY

Q.7 **SHOW CARD C:** How would you personally classify this holiday? (90)

YOUR ONLY HOLIDAY OF 2003	1
YOUR MAIN HOLIDAY OF 2003	2
ONE OF SEVERAL MAIN HOLIDAYS IN 2003	3
A SECONDARY/ADDITIONAL HOLIDAY	4
DON'T KNOW/NOT SURE	5

Q.8 How many nights, in total will you be away from home on this trip? **WRITE IN NUMBER** (91)

Q.9 What form of transport did you use on the longest (distance) part of your journey from home, to this the site? (92)

TRAIN	1
REGULAR BUS/COACH	2
ORGANISED COACH TOUR	3
CAR (OWN/FRIENDS)	4
HIRE CAR	5
OTHER (WRITE IN)	

Q.10 Do you have access to a car whilst here on site? (93)

YES	1
NO	2

ACTIVITIES WHILST ON HOLIDAY

Q.11 On this holiday or trip, which of the following activities have members of your immediate party done, or are likely to do? Were these done/ where will these be done on or off site, or both?

101-112	ON SITE	OFF SITE	BOTH
SWIMMING	1	2	3
SAILING, WINDSURFING, CANOEING, JETSKI-ING ETC	1	2	3
FISHING	1	2	3
WALKING (2 MILES OR MORE)	1	2	3
CYCLING/MOUNTAIN BIKING	1	2	3
CLIMBING	1	2	3
HORSE RIDING	1	2	3
18 HOLE GOLF (Not crazy golf/Pitch N Putting)	1	2	3
TENNIS	1	2	3
OTHER SPORTS	1	2	3
WILDLIFE WATCHING/NATURE STUDY	1	2	3

Q.12 **SHOW CARD D:** On this holiday, are you or any members of your party likely to visit any of the following attractions? (113

CINEMA	1
THEME PARK	2
HERITAGE SITES (e.g. Castles, historic houses)	3
MUSEUMS/ART GALLERIES/VISITOR CENTRE	4
OTHER VISITOR ATTRACTIONS	5
SPORTING EVENTS	6
PERFORMING ARTS (e.g. Theatre, concert, ballet)	7
CABARET/NIGHT CLUB/DISCO	8
BEACH/SEASIDE	9
SPENDING TIME IN THE COUNTRYSIDE	10
VISITING LOCAL TOWNS AND VILLAGES	11

EXPENDITURE

I would like to get an idea of roughly how much you and the people you are with, will have spent/ will spend **TODAY** as a **group**.

Q.13 How much will you spend/have spent **TODAY** as a **group** on…? **WRITE IN AMOUNT FOR EACH SECTION**

114-119	£
TRANSPORT/PETROL/PARKING	
MEALS AND DRINKS	
ENTERTAINMENT/ATTRACTIONS	
GROCERIES AND OTHER FOOD	
OTHER SHOPPING/GIFTS	
ANYTHING ELSE	

Q.14a How many adults does this include? **WRITE IN NUMBER**
Q.14b And how many children does this include? **WRITE IN NUMBER**

(120-121)

Q.14a ADULTS	Q.14b CHILDREN

Q.15 Roughly, how much will you have spent on hiring/renting the caravan for this holiday? **WRITE IN AMOUNT**
(122

NOTHING/OWN CARAVAN 1

£__________________________________

Q.16 Excluding accommodation, roughly, how much will you spend in total on this holiday, for the group as a whole. On transport, entertainment, food and drink etc. **WRITE IN FULL AMOUNT** (123

£__________________________________

Q.17a Can you estimate, roughly what proportion of this amount … (**READ OUT AMOUNT STATED AT Q.16**) , might be spent off site?
Q.17b And what proportion of this amount might be spent on site?

(125-126)

Q.17a OFF SITE	Q.17b ON SITE
£	£

Q.17 Thinking about the food and drink you have had on this holiday, could you please tell me roughly what proportion of this did you bring with you when you first arrived? **PLEASE WRITE IN PERCENTAGE TO NEAREST 5%**

(124

ASK Q.18a IF OWNER: (CODE 1 AT Q.C), IF NOT GO TO Q.18c

Q.18a Have you ever bought major items of expenditure e.g. car, boat, furniture, Major household appliances etc, whilst staying in/at your caravan? (127

YES	1	**Q.18b**
NO	2	**Q.19**

Q.18b **IF YES:** What was it and when did you buy it? **PLEASE WRITE IN WHAT RESPONDENT BOUGHT AND IF POSSIBLE WHEN THEY BOUGHT** (128**)**

ASK Q.18ca IF NON- OWNER: (CODE 2 AT Q.C), IF NOT GO TO Q.19

Q.18c Have you ever bought major items of expenditure e.g. car, boat, furniture, Major household appliances etc, whilst on holiday? (129

YES	1	**Q.18d**
NO	2	**Q.19**

Q.18d **IF YES**: What was it and when did you buy it**? PLEASE WRITE IN WHAT RESPONDENT BOUGHT AND IF POSSIBLE WHEN THEY BOUGHT** (130)

NON- OWNERS : PLEASE CHECK BACK TO Q.C – (CODE 2 – NO, AT Q.C), OWNERS GO TO Q.34

Q.19 **SHOW CARD E:** How long before you travelled, did you make the booking for this holiday? (131

A WEEK OR LESS BEFORE DEPARTURE	1
MORE THAN A WEEK, UP TO 2 WEEKS	2
MORE THAN 2 WEEKS, UP TO ONE MONTH	3
OVER ONE MONTH, UP TO 2 MONTHS	4
OVER 2 MONTHS, UP TO 3 MONTHS BEFORE DEPARTURE	5
OVER 3 MONTHS, UP TO 6 MONTHS BEFORE DEPARTURE	6
MORE THAN 6 MONTHS	7
DON'T KNOW	8

Q.20 **SHOW CARD F:** Where did you find out about this site/holiday? (132

WORD OF MOUTH	1
BEEN BEFORE	2
"*VISIT WALES.COM*" WEB SITE (Wales tourist board web site)	3
OTHER INTERNET/WEB SITES	4
ADVERT IN NEWSPAPER OR MAGAZINE	5
HOLIDAY BROCHURE	6
TOURIST INFORMATION CENTRE	7
OTHER (WRITE IN)	

Q.21 **SHOW CARD G:** How did you book this holiday? (133

VIA TRAVEL AGENT	1
DIRECT THROUGH A TOUR OPERATOR/HOLIDAY COMPANY	2
DIRECT WITH THE SITE	3
DIRECT WITH THE CARAVAN OWNER	4

Q.22 **SHOW CARD H:** Did you book this holiday…? (134

BY PHONE	1
BY POST	2
VIA THE "VISIT WALES.COM" WEB SITE	3
OTHER INTERNET/ WEB SITES	4
VIA E-MAIL	5
IN SOME OTHER WAY	6
DON'T KNOW	7

Q.23 **SHOW CARD I:** In picking this holiday, how important were the following factors. On a scale of 1 to 5, where 5 is very important and 1 is not at all important.

135-138	NOT AT ALL IMPORTANT				VERY IMPORTANT
I WANTED TO HOLIDAY IN WALES	1	2	3	4	5
I WANTED TO HOLIDAY IN THIS PART OF WALES	1	2	3	4	5
I WANTED TO STAY ON A CARAVAN PARK	1	2	3	4	5
I WANTED A VALUE FOR MONEY HOLIDAY	1	2	3	4	5

Q.24 What made you choose this particular site? **PROMPT**: What else? **PROBE FULLY** (140

Q.25 If you hadn't come here for your holiday/break, where else might you have gone? (141

ELSEWHERE IN WALES	1
OTHER UK	2
ABROAD	3
NOWHERE	4
DON' T KNOW/NOT SURE	5

Q.26 **SHOW CARD J:** And what accommodation might you have used? (142

OTHER CARAVAN PARK	1
OTHER SELF CATERING	2
SERVICED ACCOMMODATION	3
NOWHERE	4
DON'T KNOW/NOT SURE	5

Q.27 What appeals to you about a caravan holiday/break? **PROMPT**: What else? **PROBE FULLY**(143

Q.28 **SHOW CARD K:** How satisfied are you with the ……? On a scale of 1 to 5, where 5 is very satisfied and 1 is very dissatisfied.

144-147	VERY DISSATISFIED				VERY SATISFIED
CARAVAN ITSELF	1	2	3	4	5
THE LOOK OF THE SITE AND THE WAY IT IS LAID OUT	1	2	3	4	5
FACILITIES ON SITE	1	2	3	4	5
LOCATION AND THE SURROUNDING AREA	1	2	3	4	5

Q.29 Do you know what grade this site is? (148

YES	1
NO	2

Q.30 **IF YES**: What grade is it? **WRITE IN GRADE** (149

Q.31 Did the grading of this site influence your choice? (150

YES	1
NO	2
NOT SURE/DON'T KNOW	3

Q.32 **SHOW CARD L:** How likely are you to …..? On a scale of 1 to 5, where 5 is very likely and 1 is very unlikely?

151-154	VERY UNLIKELY				VERY LIKELY
COME BACK TO WALES FOR ANY HOLIDAY/BREAK	1	2	3	4	5
HAVE ANOTHER CARAVAN HOLIDAY (IN WALES OR ANYWHERE ELSE)	1	2	3	4	5
COME BACK TO THIS PARTICULAR SITE	1	2	3	4	5
STILL HAVE CARAVAN HOLIDAYS/BREAKS IN 5 YEARS TIME	1	2	3	4	5

Q.33 Have you ever considered purchasing a caravan holiday home of your own? (155

YES	1
NO	2

FOR OWNERS ONLY: YES AT Q.C (CODE 1 AT Q.C), RENTERS GO TO Q.45

Q.34a How long have you owned a caravan holiday home on this site?
Q.34b How long have you owned a caravan holiday home elsewhere?

160-161	Q.34a This site	Q.34b Elsewhere
ONLY THIS YEAR	1	1
1 – 2 YEARS	2	2
3 – 5 YEARS	3	3
6 – 9 YEARS	4	4
10 + YEARS	5	5

Q.35a Do other members of you family/friends own caravan holiday homes on this site?
Q.35b Do other members of your family/friends own caravan holiday homes elsewhere?

162-163	Q.35a This site	Q.35b Elsewhere
YES	1	1
NO	2	2

Q.36 What is the appeal of owning a caravan holiday home, what made you want to buy one?
PROMPT: What else? **PROBE FULLY**

(164

Q.37 Had you had any previous experience of holidays in caravans or tents? (165

YES	1
OCCASIONAL HOLIDAY	2
MANY HOLIDAYS	3

Q.38 Why did you choose this particular site? **PROMPT**: Anything else? **PROBE FULLY** (166

Q.39 **SHOW CARD M:** How satisfied are you with the ….? On a scale of 1 to 5 where 5 is very satisfied and 1 is very dissatisfied.

167-170	VERY DISSATISFIED		VERY SATISFIED

CARAVAN ITSELF	1	2	3	4	5
THE LOOK OF THE SITE AND THE WAY IT IS LAID OUT	1	2	3	4	5
FACILITIES ON SITE	1	2	3	4	5
LOCATION AND THE SURROUNDING AREA	1	2	3	4	5

THERE IS NO Q.40 ON THIS QUESTIONNAIRE **(171**

Q.41 Do you think you will still be caravanning in 5 years time? (172

YES – PROBABLY	1	
NO – NOT LIKELY	2	
DON'T KNOW/NOT SURE	3	

Q.42 On average, how often do you use it over the course of a year? (173

ALMOST EVERY WEEK	1	
ONCE OR TWICE A MONTH	2	
EVERY COUPLE OF MONTHS	3	
2 - 3 TIMES A YEAR	4	
LESS OFTEN	5	

Q.43a Do you let friends and relatives use the caravan. (174

YES	1	Q.43b
NO	2	Q.44

Q.43b IF YES: How many times a year, on average do your friends/relatives use the caravan? (175

ALMOST EVERY WEEK	1	
ONCE OR TWICE A MONTH	2	
EVERY COUPLE OF MONTHS	3	
2 - 3 TIMES A YEAR	4	
LESS OFTEN	5	

Q.44 Do you charge you friends/relatives for using your caravan? (176

YES	1	
NO	2	

ASK ALL

Q.45 **SHOW CARD N:** We would like to collect Ethnic Group data to assist in the planning of appropriate programmes and services for all visitors. We welcome your assistance by indicating on this card the group that best represents the ethnic group to which you feel you belong. (21)

BLACK CARIBBEAN	1
BLACK AFRICAN	2
BLACK OTHER	3
INDIAN	4
PAKISTANI	5
BANGLADESHI	6
CHINESE	7
OTHER ASIAN	8
WHITE	9
OTHER (WRITE IN)	

Q.46 **SHOW CARD O:** Finally I have a question about household income. Please don't feel you have to answer this if it makes you feel uncomfortable but we have included it so that we can get a better idea of the type of households that take caravan holidays?

Could you tell me, using a letter from this card, your annual household income? (177

E) UP TO £5,000	1
Y) £5,001 - £10,000	2
O) £10,001 – £15,000	3
W) £15,001 - £20,000	4
S) £20,001 - £30,000	5
G) 30,001 - £40,000	6
K) 40,001 - £50,000	7
X) 50,001 - £60,000	8
B) 60,001 - £70,000	9
Q) 70,001 - £80,000	10
R) £80,001 +	11
REFUSED	12
DON'T KNOW	13

THANK RESPONDENT AND CLOSE INTERVIEW