



JM Leisure

Touring Caravan Needs Assessment

April 2022

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Report title: JM Leisure

Prepared by: Harry Bailey

Status: Planning & Development Researcher

Draft date: 7 April 2022

Prepared by: Martin Taylor MRTPI MIED MTS

Status: Principal, Leisure Planning & Development

Draft date: 9 June 2022

For and on behalf of Avison Young (UK) Limited

Executive Summary

- This is a Needs Assessment to inform a Full Planning application for the proposed change of use of land at Thorneydown Farm to enable the siting of touring caravans and tents.
- The site is located on the eastern edge of the City of Southampton with good access from the M27 and 50m from a bus stop that provides an hourly bus service to both Southampton city centre and Eastleigh town centre facilities.
- In the decade or more up to 2020, the UK has experienced low steady inflation, rising disposable incomes, and a poor exchange rate all leading to a growing national domestic tourism market.
- The Covid-19 pandemic since early 2020, coupled most recently with the Russian invasion of Ukraine has brought complete lockdowns followed by staycation booms in each of the last two years, rising fuel prices and inflationary pressures, and a lowering of consumer confidence.
- These long, and shorter term trends are all factors pointing to further staycations and demand for cheaper touring and camping holidays in Great Britain.
- The touring caravan and camping sector already accounts for more than 6 million trips with overnight stays in England (2019).
- City/town breaks make up the largest proportion (46%) of holidays taken in the UK.
- As one such city, Southampton has a wide range of popular tourist, cultural and visitor attractions including the largest shopping centre on the South Coast of England, as well as hosting a large number of annual events including Southampton International Boat Show, International and Premiership Football, International and Domestic Cricket, and providing car ferry service to the Isle of Wight.
- Southampton is the most popular location for in-bound (overseas) staying visitor's trips in Hampshire, a position likely to be replicated for domestic (British) tourists.
- Therefore, there is a strong local market for tourist accommodation within which there is a strong market of touring and camping pitches.
- This is evidenced by a survey of local touring caravan parks which demonstrated that all four local touring caravan parks were either booked out, or, expected to be booked out by the Easter Weekend.
- Where vacant pitches were available, these were solely grass pitches, and we were told that these would either be gone by Easter, or they would not be suitable for touring caravans at this time.
- Given the strength of demand so early in the season, there is clearly strong demand for hardstanding touring pitches together with firm free draining grass pitches where this might be possible.
- In weighing this demand with the location of the applicant site, in relation to the city centre and bus network, the national highway network and ferry port, we arrive at the unequivocal conclusion that there is demand for additional touring pitches at Thorneydown Farm.

1. Introduction

1.1 JM Leisure are proposing to change the use of land at Thorneydown Farm to a touring caravan park. Avison Young's specialist Leisure development consulting team have been instructed by JM Leisure to undertake an in-depth Touring Caravan Needs Assessment to inform a Full Planning application for the proposed change of use of the existing site to enable the siting of touring caravans. Pre-application advice with the Council dated 22 December 2021 identified the requirement of evidence to demonstrate the need for any tourism proposal, in accordance with local planning policy which has now been superseded.

1.2 The need for this assessment stemmed from planning policy 160.TA of the Eastleigh Borough Local Plan (2001 – 2022) and the Officer's application of this policy addressed in the pre-application advice dated 22 December 2021. However, this plan has now been superseded and policy 160.TA has not passed on to the recently adopted Eastleigh Borough Local Plan (2016 – 2036). The new plan does not include any policy dealing directly with touring caravan and camping sites or in general visitor accommodation. Only policy S5 makes reference to tourist and visitor uses in the countryside and states that;

1. Planning permission will be granted for new development in the countryside provided it is related to:

(...)

c. community, tourist, or visitor uses through the re-use of buildings including facilities for the interpretation of heritage assets (policies DM12)

d. outdoor recreation and open space (policies DM32 and DM33)

(...)

1.3 The requirement for the need of tourism facilities to be tested has been removed but the pre-application advice received in relation to a previous proposal for holiday lodges stated that a test of need would be required to justify and support any application for tourism facilities.

1.4 Therefore, this report explores the demand for and supply of touring caravan sites within the local area, following a methodology specifically tailored for this study. The report commences by analysing the site context, followed by national economic, tourism and caravan market trends, and then a full critique of the demand and supply of touring caravans within the catchment area.

Avison Young

- 1.5 Avison Young creates real economic, social and environment value as a global real estate advisor, powered by people. As a private company, our clients collaborate with an empowered partner who is invested in their success. Our integrated talent realises the full potential of a real estate by using global intelligence platform that provide clients with insights and advantage. Together, we can create healthy, productive workplaces for employees, cities that are centres for prosperity for their citizens, and built spaces and places that create a net benefit to the economy, the environment and the community.
- 1.6 Avison Young Leisure is the specialist tourism and leisure advisory arm of Avison Young. Our specialist planning and development team has extensive experience of providing viability, need assessments and development consultancy, planning advice, applications, appeals and expert witness evidence at planning inquiries for development in tourism, leisure and the retirement sector. We are retained as national advisors to the British Holiday & Home Parks Association, the industry body representing caravan park owners and operators.

1.7 About the authors:

Martin Taylor is a chartered town planner and development consultant with more than 30-years' professional experience. A member of Royal Town Planning Institute, Institute of Economic Development, and of the Tourism Society; he has worked on an extensive range of projects specialising in tourism and leisure planning & development and is one of the country's leading experts on planning, development and demand for caravan parks.

Harry Bailey is a specialist tourism, sport and leisure need researcher at Avison Young having graduated with an MSc in Spatial Planning from University College London's Bartlett School of Planning. He is continuing to study at the Bartlett for a PhD, exploring the relationship between the planning system, leisure, sport and physical activity.

- 1.8 Harry and Martin have completed this study in discussion with other members of the Avison Young Leisure team including **John Mitchell MRICS** the Director in charge of the Holiday Property team who has more than 30 years knowledge and experience in the valuation and marketing of caravan parks and other holiday property across the UK. There are few people with more caravan market knowledge in the industry.

Recognition of Risk

- 1.9 Our assessment has been prepared on the basis of information relating to the Property and the Scheme, furnished to us by JM Leisure, upon which we have relied, alongside plans and reports prepared by various other consultants within the project team, and our own knowledge of the leisure property demand and trends at the time of our research in February and March 2022. We have made no provision for any unforeseen events that could impact on leisure demand and trends in England.
- 1.10 This report is provided for the stated purpose agreed with our client and is for the use only of the parties to whom it is addressed, or their appointees, or Council officers in connection with the planning application for the development that this study has assessed. It is not suitable for any other use or any other persons. As per our standard practice, neither the whole nor part of this report, or any reference thereto, may be included in any document, circular or statement without prior approval of the form and context in which it will appear. As is customary with market studies and needs assessments, our findings should be regarded as temporal (valid for a limited period - c. 18 months) and should be subject to examination at regular intervals.

2. Site Context

- 2.1 The site is located in the south-east England, on the urban fringe of Southampton. **Figure 1** shows the location of the site on the eastern edge of the city with good access from the M27. Administratively, the site just falls within the spatial boundary of Eastleigh Borough Council.



Figure 1 – Location of the site in relation to the city of Southampton (highlighted by red star)

- 2.2 The site is associated with an existing tourism and leisure cluster including the Ageas Bowl (home of Hampshire Cricket Club), Boundary Lakes golf course, a large David Lloyd tennis, health and fitness club, and a Holiday Inn Express hotel – see **Figure 2**.
- 2.3 To the east, the adjoining field is currently being relandscaped as an extension to the golf course. Meanwhile, the edge of the defined, patterned urban form falls to the west of the site running along Moorhill Road and then Telegraph Road.
- 2.4 The proposed touring caravan site is in a highly accessible location close to the M27, residential areas of Southampton and the strategic retail and industrial sites of Hedge End further east. An existing, defined access on to the single-carriageway Moorhill Road (also the A27) provides access to the urban area and facilities to the immediate west of the site, whilst also enabling access to the wider road network including the M27 which sits approximately 600m to the east of the site, thereby placing the site within a convenient and functional location for any potential touring caravan guests. Additionally, a bus stop is located 50m from the site that provides an hourly bus service to both Southampton city centre and Eastleigh town centre facilities.

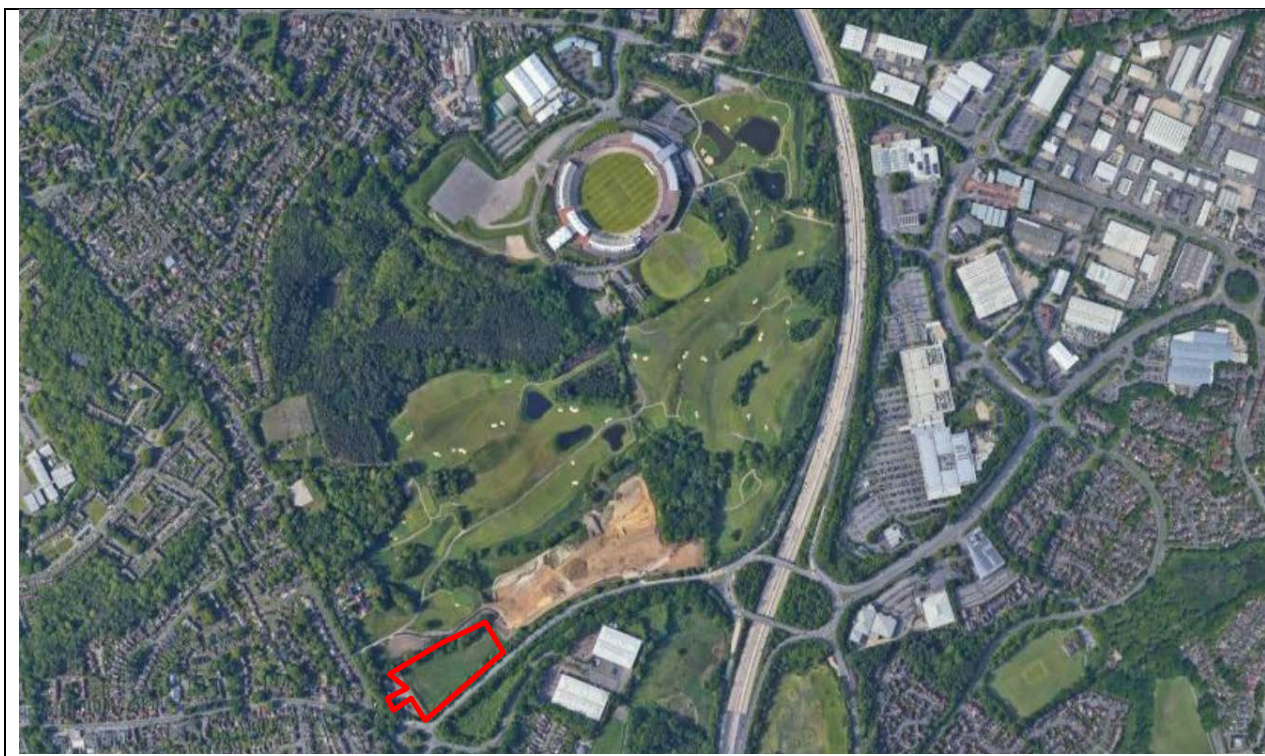


Figure 2 – Indicative red line boundary of the site within its immediate surroundings

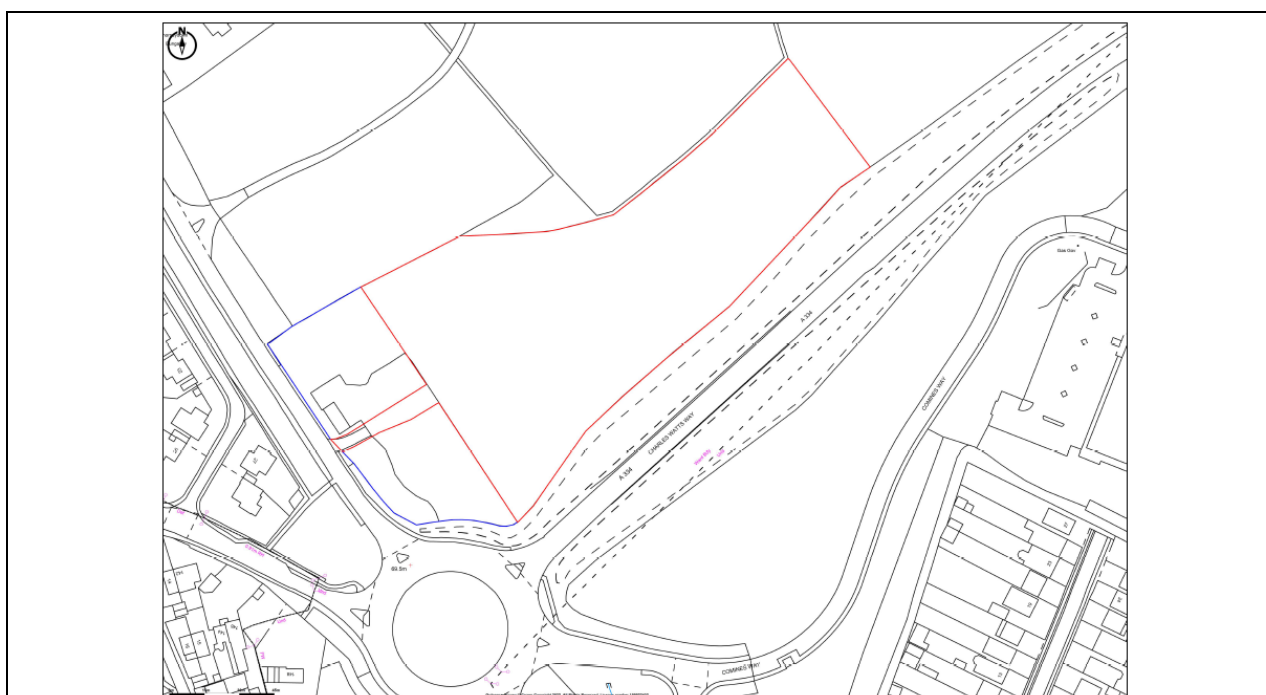


Figure 3 – Application site (red line boundary)

2.5 Southampton is a nationally recognised city for tourism, sport, arts, culture, shopping and leisure, boasting a plethora of attractions, activities and events throughout the year. The city has the largest international boat show in the UK, the largest shopping centre on the south coast and hosts a long-

established Premiership Football Team. Additionally, the city serves as a natural stopping point for tourists to the Isle of Wight with daily ferries transporting cars and caravans across to the nearby island. Alongside the tourist attractions, the City serves as a major regional economic centre for business, manufacturing and trade.

- 2.6 Notably, the adjacent Ageas Bowl multi-sport complex provides a wide range of facilities and activities for local residents and tourists alike. The 'Bowl' (stadium) itself hosts a busy fixture of international and county cricket fixtures throughout the summer, attracting people from both across the country and the world.

Defining the Study Catchment Area

- 2.7 The spatial boundaries of the study area is a fundamental aspect of the assessment. A catchment area based on travel by car/motor vehicle is an important element as all touring caravans exclusively rely on this mode of transport, essentially nulling the option to use other modes of transport. A 20-minute car/private motor vehicle travel time catchment area around has been used as, in our experience, this is the most appropriate catchment area for access to a wide range of leisure uses that any staying guest would normally wish to reach and the furthest distance most people will stretch from their preferred location in search of the right accommodation to meet their needs.
- 2.8 Further specificity was placed on this spatial area to remove the influence of the two nearby National Parks (New Forest and South Downs). Here, the aim was to remove any influence of touring caravan parks sited in these two tourist destinations, as the tourist use of these parks would differ to that of the proposed city cultural, sporting and leisure tourist function of the application site. We consider touring caravan pitches located in the National Parks to predominantly serve tourist interested in countryside holidays to the respective Parks, rather than towards the urban city breaks market. Given its geographical relationship with Southampton, the application site would serve as a base for city breaks to, and/or specific event in, Southampton and as a functional and convenient stopping point for tourists using the ferry service from Southampton. **Figure 4** shows the resultant study catchment area (full copy at **Appendix 2**).

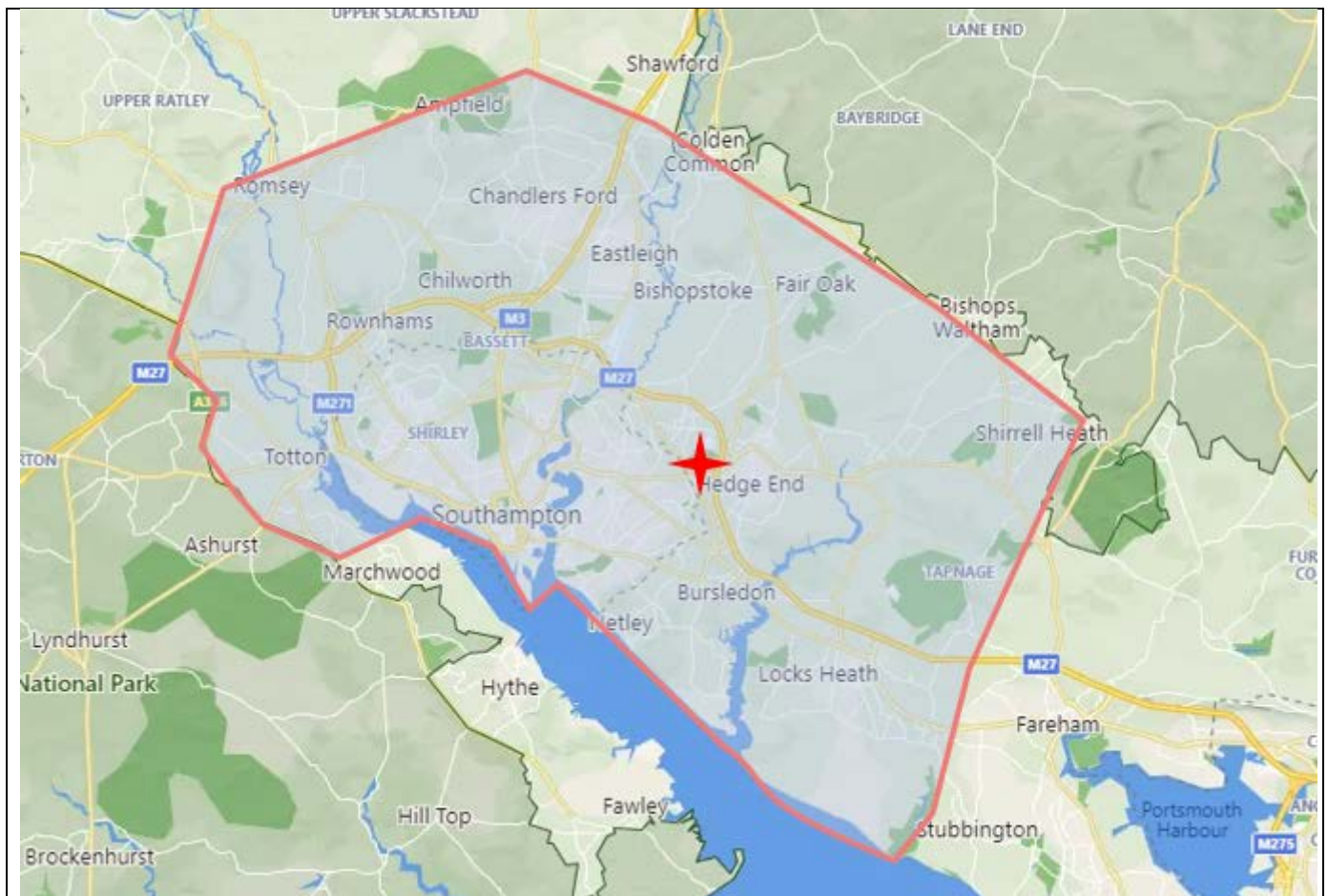


Figure 4 – Indicative Southampton visitor accommodation catchment area (red line area)

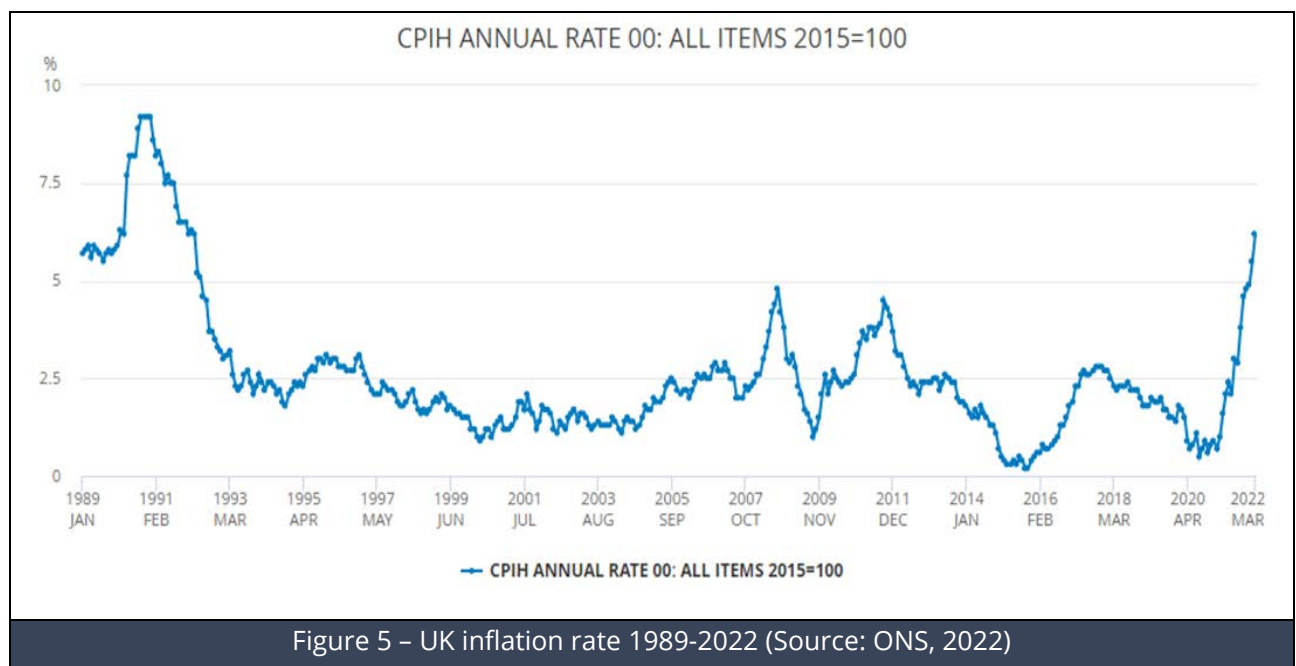
3. National Tourism and Caravan Trends

National Economic Trends

- 3.1 The tourism sector is affected by a number of interconnected, national economic trends including inflation, disposable incomes, exchange rates, and consumer confidence, all of which have been affected by the Covid-19 outbreak, Russian invasion of the Ukraine and the Government's and the economy's response to these health, social and economic shocks.

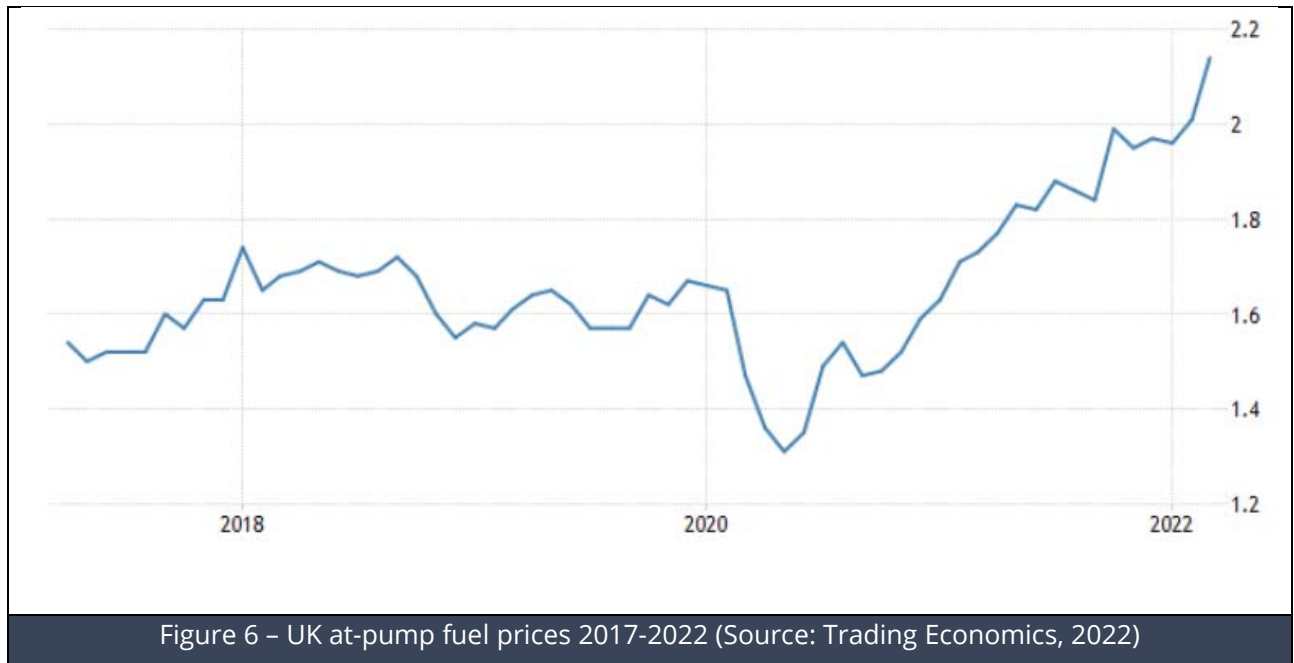
Inflationary Pressures

- 3.2 There has been a lot of recent focus in the press about a recent rise in the UK inflation rate. **Figure 5**, below, shows how the inflation rate in the UK has remain fairly steady fluctuating around 2% for the last 29 years. However, since mid-2021 inflation has steadily risen above 2% to a rate of 6% recorded in March this year, which is projected to rise further still to 7% in April and that is expected to reach approximately 8%, as reported by the Bank of England. These are rates of inflation that have not been witnessed in the UK since early 1992 when the country was in a deep financial recession.



- 3.3 A major part of the explanation for this sudden rise in inflation has been the increasing cost of (and continued reliance upon) fossil fuels. **Figure 6** illustrates a steady increase in the price of fuel since mid-2020. Pre-2020, fuel prices fluctuated around the 1.6 USD/litre area, until 2020 saw a sharp fall to approximately 1.3 USD/litre. Since reaching its trough in mid-2020, prices have continued to rise strongly, and now greatly exceed pre-2020 price levels, with a price (March 2022) of 2.14 USD/litre.

This fuel price rise was initially explained by rising demand as various countries eased Covid lockdowns, coupled with the earlier disruption to supplies caused by the lockdowns themselves. It has now risen even higher than shown in the graph below due to the interruption of supplies caused by the Russian invasion of Ukraine.

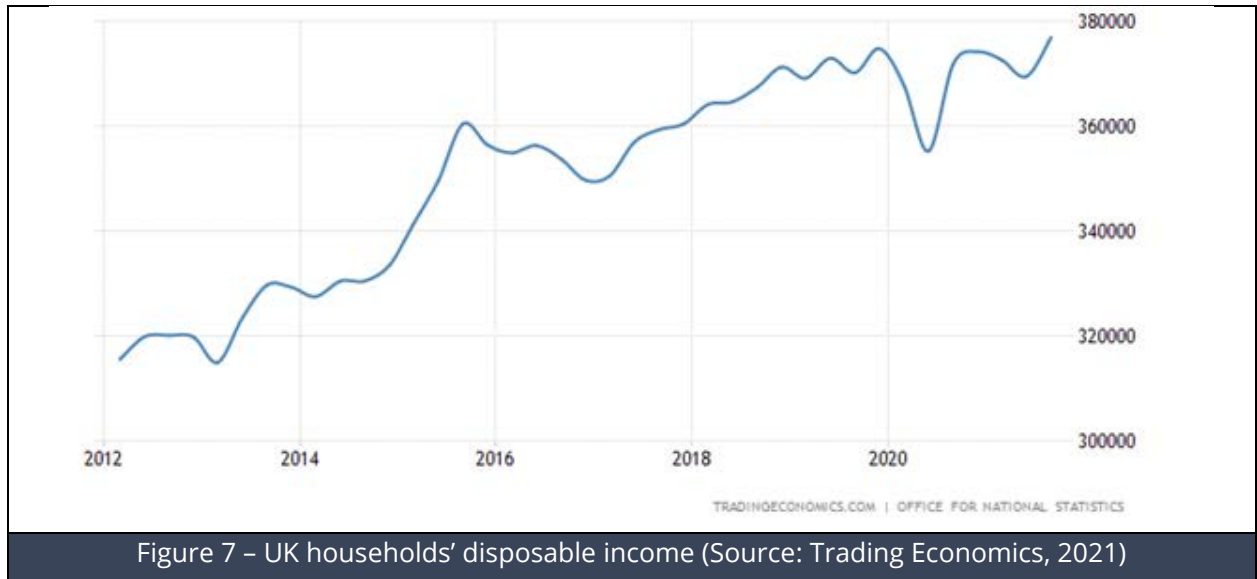


- 3.4 Other reasons for rising prices have been disruption to the manufacture and transportation of goods caused by Covid lockdowns, coupled with rising demand from the majority of the population who have increased savings due to being unable to spend during the lockdowns.
- 3.5 Rising inflation and particularly the high price of fuel has negative implications for overseas travel increasing the cost of flights, and increasing the cost of long-distance travel by road, for example taking a touring caravan or dormobile abroad. People are therefore more likely to choose domestic holidays to destinations closer to home. For touring caravan holidays, this puts Southampton in strong position, due to its proximity to the two largest and most prosperous markets for domestic tourists, coming from Greater London and the rest of the South-East. With rising prices, people are also likely to reduce their spending in the short term on eating out, which again provides an advantage for the self-catering led touring caravan and camping market.

Disposable Incomes

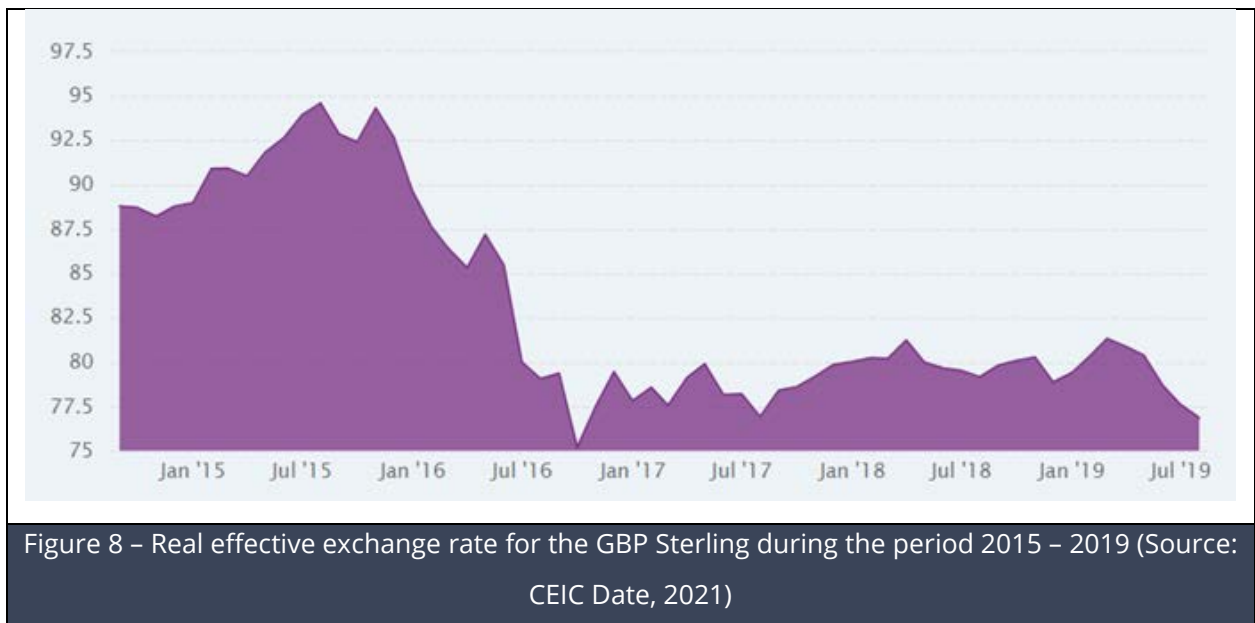
- 3.6 The sharp rise in inflation is expected to lead to a squeeze on household disposable incomes during 2022. However, these headlines ignore the fact that the UK has seen a steady rise in the level of real disposable income over the last 10-years as shown in **Figure 7**. However, it is expected that these inflationary pressures caused by recent market 'shocks' will be smoothed out as markets return to

normal, and a brief period of inflation is unlikely to wipe out the material gains of the last ten years. The Bank of England (BoE) consider this inflation is reaching its peak (at time of writing April 2022), which will result in an anticipated considerable fall in inflation by 2024, with the BoE setting a target of 2% inflation. This longer-term growth in disposable incomes signals a positive driver for the touring caravan and camping sector over the medium-term; we do not consider the impact of current inflation to significantly counter the rise in disposable income witnessed in the last ten years.



Cost of Holiday's Abroad

- 3.7 **Figure 8** illustrates the real effective exchange rate (REER) of GBP Sterling from 2015 to 2019, a measure that essentially shows the value of sterling in relation to other currencies. The strong decline from mid-2015 to 2016 set has sealed the price of the REER below 81, with several fluctuations in price, but no significant growth or decline to 2019. This demonstrates a low REER, setting market conditions at a point where foreign holidays are less affordable; therefore, UK residents are more inclined to look to domestic holiday alternatives, which would include purchasing a touring caravan.



Unsettled Consumer Confidence

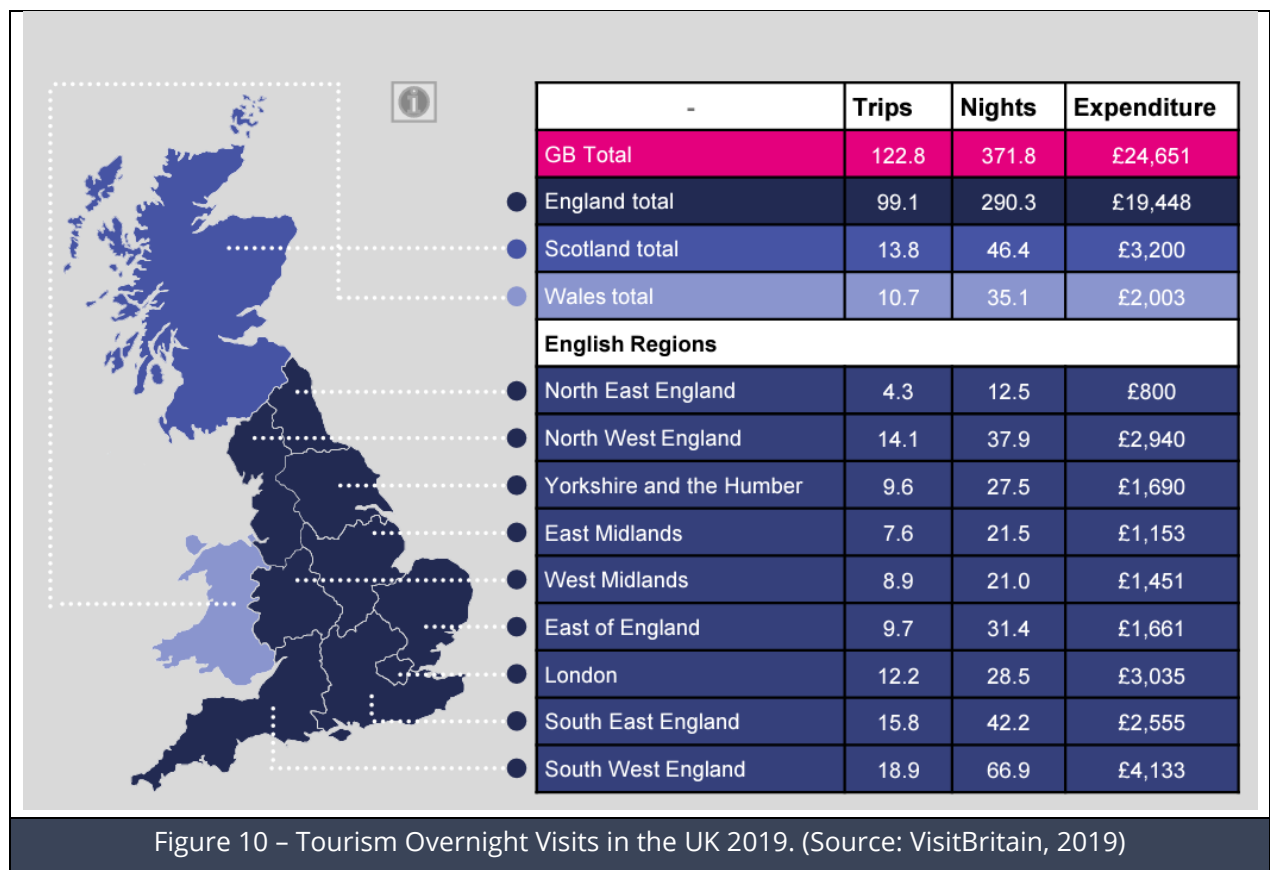
- 3.8 Consumer Confidence Index (CCI) gauges consumer certainty - optimism and pessimism – in regard to individuals' financial circumstance and wider economy. **Figure 9** shows that for a 5-year period the level of consumer confidence has been permanently below 0, signalling an overall low level of confidence. The index sees small, but frequent in fluctuations from 2017 to the beginning of 2020, until the index plummets to below 35. Recovery is slow from this position, with the index not returning to pre-2020 levels until mid-2021. A further decline is seen in the latter half of 2021 and into 2022. The implication of this general lowering on consumer confidence is likely attributed to consumers being less likely to take a more expensive overseas holiday, and more likely to take a cheaper domestic holiday, such as in a touring caravan.



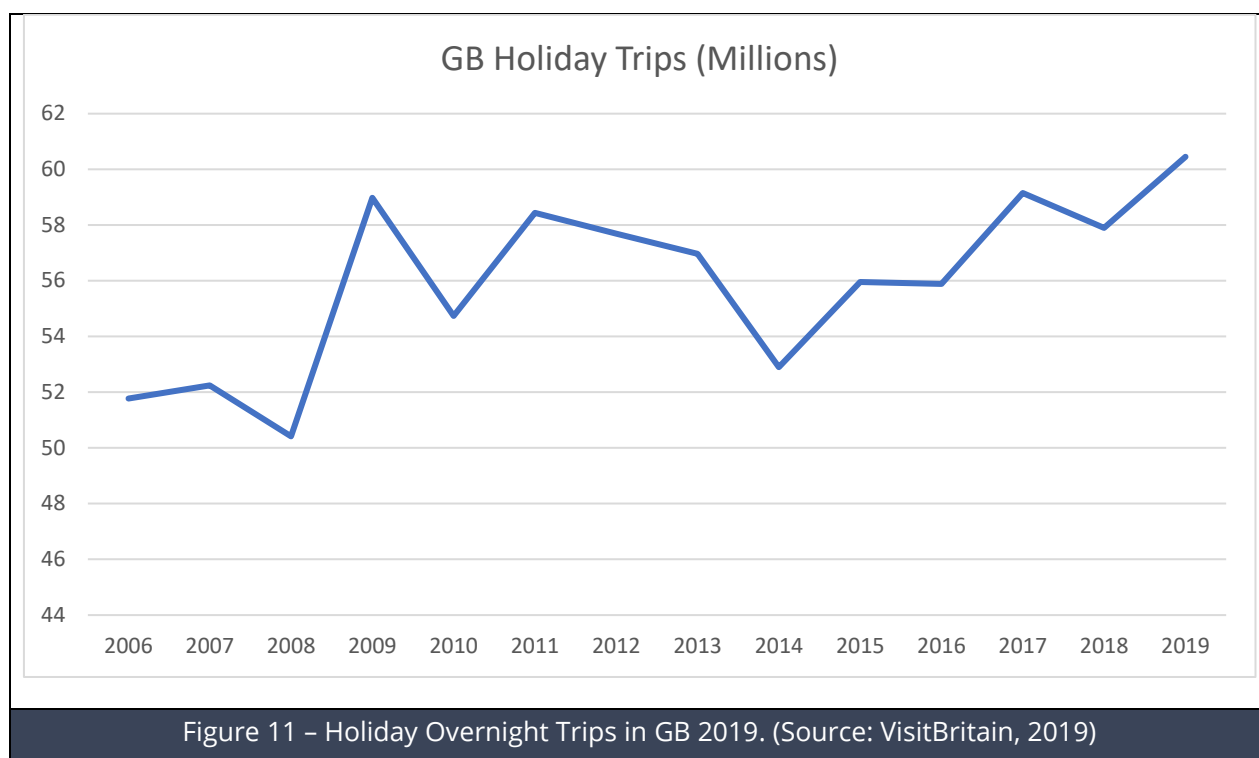
National Tourism Trends

A Growing Sector

- 3.9 Tourism is one of the UK's largest and fastest growing industries contributing approximately £100 billion to British GDP and providing 2.6 million jobs. This is forecast to grow to 3.8 million jobs by 2025 (VisitBritain, 2019). In terms of overnight tourists, there were 123 million overnight staying visitor trips in Great Britain in 2019 equating to 372 million nights and contributing £24.6 billion to the national economy (see **Figure 10**).

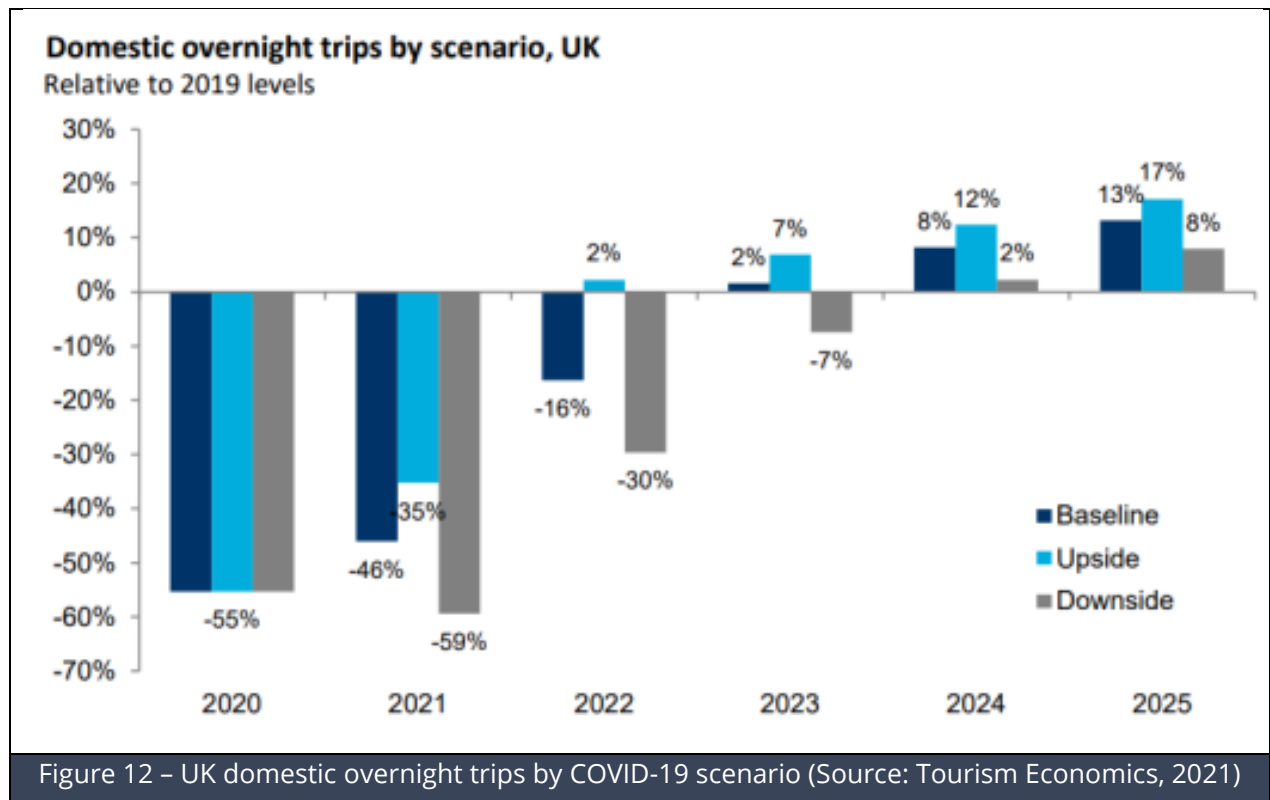


- 3.10 Holidays accounted for 60.5 million of these trips and £14.5 billion of spend an increase from 51.7 million in 2006, Meanwhile nights stayed have increased from 192.3 million in 2006, to a total of 198.1 million in 2019. **Figure 11** illustrates this growth stemming from the 2009 staycation boom as more people stayed in Britain for their holidays due to the economic recession at that time, with trips falling only slightly to 2014 and then picking up again from 2015 onwards. This graph does not include the effects of the recently reported staycation effect of Covid during 2020 and 2021 as figures are not yet available. These statistics emphasise the enormous value of UK domestic tourism to the wider economy, with forecasts below suggesting an increase in this value over the coming years.



Impact of COVID

- 3.11 COVID-19 substantially halted tourism all together for several months in each of the early part of the years 2020 and 2021, followed by a substantial rebound 'staycation' effect in the latter part of each year which has drastically skewed these previously consistent figures.
- 3.12 A report prepared for the Department for Digital, Culture, Media and Sport (DCMS) by Tourism Economics adopts a set of predictions (**Figure 12**) that considers differing scenarios of COVID-19 restrictions, namely "upside" and "downside", for domestic overnight trips in the UK relative to 2019 statistics. They predict a substantial decline for all scenarios in 2020 and 2021, with recovery commencing in 2022. Even in 2022, they are not certain as to how much the sector will return to 2019 levels, but still predict significant recovery from the two years prior. From 2023, they predict a return to 2019 levels, with 2024 and 2025 reinforcing this and suggesting a positive outlook for overnight trips relative to 2019 data. Interestingly, the predictions for 2021 and 2022 show much greater disparity between COVID-19 scenarios (32% difference in 2022) which implies greater uncertainty. As opposed to 2025 that evidences a 9% difference between the scenarios.



- 3.13 Reporting on the impact of Covid, IBISWorld (2021) state that the re-opening of the industry following the impacts of COVID-19 is expected to bring significant revenue and demand, and the low value of the pound since 2016 has made UK holidays more affordable for its residents. Consequentially, the UK is likely experiencing an overall increase in demand for shorter, yet more frequent holidays that are beginning to supersede long-haul, expensive holidays (Aspin, n.d.).

Looking for Value

- 3.14 Statistics show that British residents are looking for greater value when planning their holidays. Prior to COVID-19, Britons would plan to spend an average of £1,211.48 on holidays, whereas currently data suggests planned expenditure has fallen to £855.35 on average (Parkdean Resorts, 2021). This represents a significant fall in planned holiday spending by approximately a third meaning that domestic holidays are likely to continue to increase at the expense of overseas holidays.

Leading to... Staycations

- 3.15 Reinforcing this trend, there is widespread reporting amongst online news sources that the market for 'Staycations' will continue into summer 2022 and potentially continuing into the succeeding years (Express, 2021; The Sun, 2022). With multiple, independent sources making similar positive predictions regarding Staycations, it is implied that this is likely a strongly anticipated trend for the

coming years. A report from Parkdean Resorts (2021) (**Figure 13**) reinforces this staycation trend, highlighting the significant proportion of UK holidays in comparison to European and US holidays.



Figure 13 – Holiday regional decisions for Britons for 2021/22 (Parkdean Resorts, 2021)

3.16 In this connection, several recent mainstream newspapers point to a touring caravan ‘sales boom’ in the last 9 months, proceeding to attribute this trend partly to young people (under 40s). Younger generations are now driving demand to purchase touring caravans amidst the existing strong growth of the staycation effect (iNews; The Telegraph, 2021). A higher younger person’s unemployment rate in the wake of COVID-19, in conjunction with the rising expensive and time-consuming logistics of foreign holidays, has shifted attitudes towards an affordable option in caravanning. Younger generations, especially millennials (The Telegraph, 2021) are likely to drive a strong trend for purchasing and travelling locally (i.e. nationally) during their leisure time.

The National Caravan Market

Our Agents’ View

3.17 Avison Young are one of the leading property advisors to the caravan park sector, buying, selling and valuing many caravan parks each year. Our specialist holiday property agents are therefore in a good position to advise on the caravan park market.

3.18 Our Agents consider that while the lifting of most pandemic restrictions in the UK this year has eased the path towards normality in the market, the repercussions of the pandemic and now the War in

Ukraine are continuing to disrupt the economic outlook and are likely to curtail the level of individuals disposable income in the short to medium term with increasing inflation and interest rates together with higher taxes all kicking in at this time. The virus continues to affect all our lives with relatively high infection levels which continue to cause havoc in both the business and service sectors, and in particular, has caused an unprecedented delay in the supply chain.

- 3.19 The package of measures which have been used to sustain the UK economy during the pandemic were generally regarded as successful for the overall UK holiday parks markets and, when combined with the restrictions to foreign travel, it is considered that the UK holiday market enjoyed a record holiday season in 2021 with bookings again for 2022 reaching a high volume, well in excess of 2019 season levels (pre-pandemic). The UK, with its temperate and unreliable weather patterns during the summer season, has historically had a strong foreign package holiday sector and this is expected to take time to re-emerge following the pandemic due to a continued risk of Covid disruption and increased costs of fuel / operating costs which will all increase the cost of foreign travel.
- 3.20 The UK economy had GDP growth last year at 7.5% following the severe fall in 2020 due to Covid-19 and 1% growth in the first quarter of 2022 is predicted. However, the 'tiger in the room' is the fast rise and continuing growth in inflation in the UK and around the world due to increasing fuel costs, logistical issues and labour shortages and business disruption. As a result, it is expected that interest rates in the UK will continue to increase and it will be a fine balance for the Government and Bank of England between growth or recession for the economy in the coming year.
- 3.21 Since the outset of the pandemic, there has been a substantial level of corporate activity, most notably the sale of a majority interest in Bourne Leisure Ltd in 2021 for an undisclosed sum rumoured to value the overall business in the order of £3bn to The Blackstone Group. Bourne Leisure Ltd includes the 38 coastal Haven Holiday Parks with about 30,000 pitches, Butlins (3 large holiday sites) and Warners Leisure Hotels with 14 outlets. This deal represents a major transaction in the sector and provides a degree of confidence in the UK holiday industry and market for parks. There has also been the sale of Bridge Leisure Ltd with 9 parks owned by Phoenix Equity Partners to Park Holidays UK Ltd which has since been sold to Sun Communities in a deal rumoured at £950m who in turn have recently purchased Park Leisure 2000 in a deal worth £182m for 11 parks. In the late spring of 2021 Away Resorts were sold to CVC Capital Partners in a deal at a reported £300m who quickly also purchased Aria Resorts and Coppergreen Resorts to add to the overall group. Verdant Leisure was sold to Pears Partnership Capital, a family owned private equity group at around the same time. Cove Communities have purchased Gwel An Mor, a large holiday letting lodge park on the north coast of Cornwall and Sykes, the holiday Cottage group have just announced a purchase of Forest Holidays.

Finally Largo Leisure Parks a privately owned group has been sold to Limerston Capital for an undisclosed price which will be headed by Andrew Howe, formerly of Bridge Leisure.

- 3.22 These newly owned groups, along with existing major operators, have all been seeking opportunities to further add parks to their portfolios. We are likely to find that they seek expansion through the purchase of family groups of parks as well as individual parks over the next few years given the relatively low volumes of large individual parks entering the market. There may also be some further consolidation in the industry at the upper end with further mergers between existing groups. Many of the largely static caravan holiday parks in these portfolios include a significant proportion of touring caravan pitches which their new owners often seek to convert to static caravans to satisfy the increased demand for this form of holiday accommodation and extend the number of holidaymakers on site all-year to justify investment in revenue earning central facilities. This activity, in turn, is creating increased demand for touring caravan pitches to accommodate both the displaced and increasing demand for touring caravan pitches.
- 3.23 Holiday caravan parks generally had a record trading season in 2021 despite the lockdown at the start of the year. There were multiple reasons for this record trading year including:-
- The pent-up demand for holidays as a result of lockdowns in the previous year.
 - The difficulty of foreign travel with increased regulations due to Covid-19 and constantly changing regulations and lockdowns in foreign countries.
 - The reduction in VAT and commercial rates increased margins particularly on holiday bookings.
 - The savings which individuals had made during lockdowns and the continuing low interest rates providing little incentive to save.
- 3.24 Our holiday property agents and valuers identify a number of issues which are likely to affect the market for the rest of 2022 and into 2023:-
- The avoidance of further lockdowns and Covid-19 disruption.
 - The rate of inflation and rise in interest rates, together with a slowdown in the rate of economic growth. The squeeze on people's income is likely to reduce their expenditure on expensive holidays.
 - Whilst the Brexit negotiations on the UK's future trading relationship with the EU were resolved in 2020, there remain issues and clearly the 'seamless' borders which were envisaged are not the

current reality. Caravan manufacturers report severe delays in the delivery of raw materials as a result which has reduced productivity and greatly increased waiting times for new units.

- The 'Staycation' effect on the UK holiday market has provided a positive boost to many businesses with bookings for 2021 far exceeding previous years despite a lockdown for the first 3.5 months of the year and demand for 2022 holidays remains at a very high level. It is expected that this staycation effect will gradually reduce, if and when, things return to 'normal' – whatever that may be in years to come.
- The reduced level of VAT to 5% in the holiday and hospitality market and a reduction in commercial rates added a disproportional boost to holiday revenue/profit on parks last year and it is evident that this will not be repeated in 2022, albeit demand for holidays is well ahead of pre-pandemic levels and is likely to easily surpass the 2019 season.
- The availability of new funds for the acquisition of parks appears likely to shift in balance from mainstream banks to Private Equity and similar funds who recognise the resilience of the industry generally during the pandemic and are seeking to invest in well managed sites and portfolios.

3.25 Demand for holidays in 2022 has remained extremely strong with high levels of early booking, possibly as a result of some disappointment in 2021 for those seeking a late deal and the continued uncertainty around foreign travel. This early and increased interest in UK holidays is likely to benefit operators as they will not need to discount to gain late bookings. Those operators able to operate on a dynamic pricing basis (where prices for holidays alter according to demand) have benefitted considerably during the pandemic.

3.26 Furthermore, sales of holiday caravans, both static and touring, are reported throughout the industry to have held up reasonably well in 2021 and the start of 2022. However, the difficulty for some static caravan park operators, particularly smaller individual operators, will be sourcing new stock for sale as manufacturers continue to be affected by a shortage of raw materials and disruption due to Covid-19 outbreaks. As a result, the price for new stock has increased substantially and there has been a steep increase in prices for secondhand stock throughout the country. It must be expected that demand is likely to reduce for the purchase of holiday homes with the squeeze on income and we expect the profit margin on sales to reduce during this year. It is therefore likely that there will be an increased demand for smaller cheaper touring caravans as operators are unable to deliver static caravans in both numbers and at a price to satisfy increased demand for more affordable domestic holidays.

- 3.27 At the smaller parks/private operator end of the market, within a price range of approximately £1m - £5m, our agents have witnessed a number of sales going through on parks over the last few years including several parks in secondary areas which had previously been sticking in the market. Generally, premium prices are being paid and our agents have also witnessed an increase in willingness by purchasers to value and pay a premium for trading potential in certain locations. Some new small private groups are emerging in this sector, either nationally or regionally, and are fuelling the demand for parks.
- 3.28 Touring caravan and camping in the UK has always been prone to the unpredictability of the British summer. In addition, those parks which are far away from a substantial population catchment, or their customer base can suffer from reduced trading levels. This is less of an issue for touring parks adjacent to large urban areas where the weather is a less important factor in the enjoyment of the destination. Over the last 5 or 6 years, there have also been a number of new innovative products entering the market which are well suited to the touring park such as camping pods, yurts, shepherd huts, tree houses and safari tents. These have proved popular due to the higher level of comfort, despite the uncertainties of the UK weather. These new products have generally performed well and have added a new dimension to many touring businesses, assisting in maintaining profitability particularly for those less accessible parks and extending the season. These trends are, in our agents' opinion, likely to continue and they foresee increasing activity in the touring sector generally.

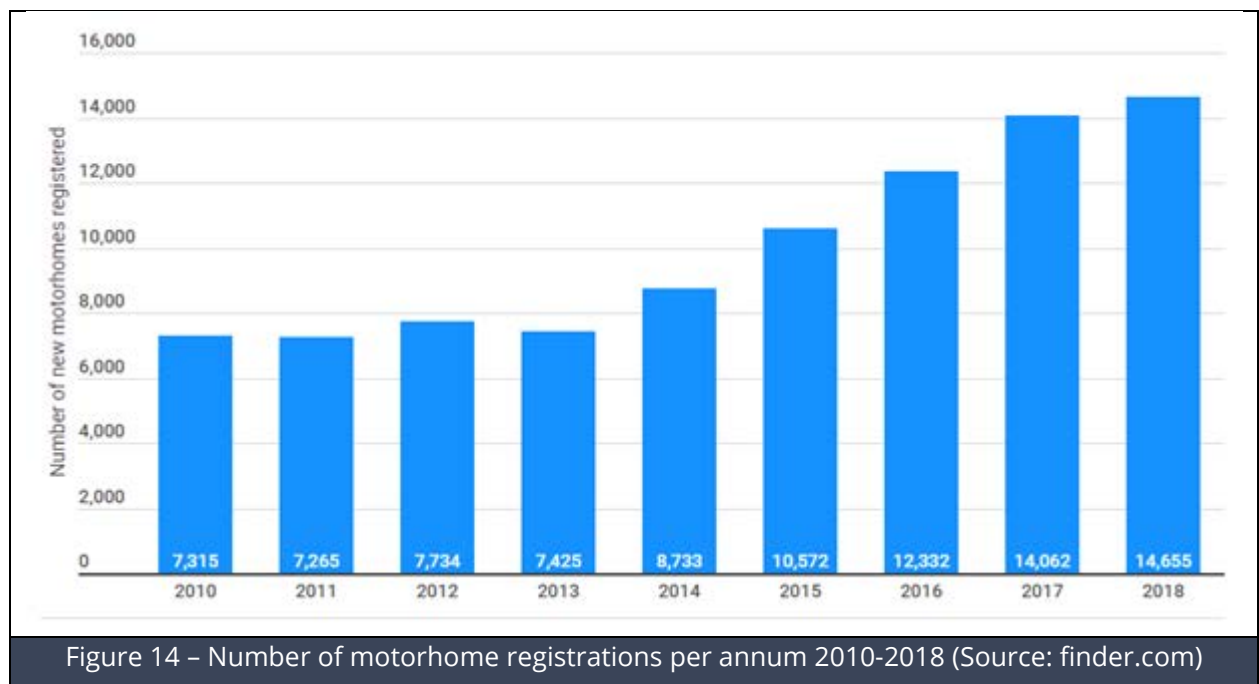
Increasing Internet Searches

- 3.29 In an effort to gauge demand in an approach similar to that used by Parkdean Resorts (2021), key words were inputted into Seomonitor (2022), which processes the amount of Google UK searches for these particular search criteria. The following key words were used:
- "caravan":
 - o Jan 21 = 49.5k searches
 - o Jan 22 = 74k searches
 - "campsite":
 - o Jan 21 = 74k searches
 - o Jan 22 = 201k searches
 - "holiday park":
 - o Jan 21 = 22.2k searches
 - o Jan 22 = 60.5k searches
- 3.30 All three key words/phrases reveal major increases in the number of UK search engine searches for caravans and campsites. Noticeably, an increase of almost 200% for both "campsite" and "holiday

park” within a year period. This signifies a major increase in demand for these domestic holiday alternatives, including touring caravan sites, that is reflective of the economic trends above and their impact on holiday decision making.

Increasing Motorhome Registrations

3.31 An indication of current motorhome trends is shown in **Figure 14**, which evidences the number of motorhomes registered between 2010 and 2018. A motorhome registration is defined by the process of formally registering a private motor vehicle with self-sufficient accommodation, with the implication that the owner either purchased a vehicle or converted an existing vehicle. Whilst motorhomes do not fall under the technical definition of touring caravans, they are used in the same way, as a temporary and highly mobile form of caravan accommodation. Overall, **Figure 14** shows a large increase in the number of registered motorhome vehicles. Consistent numbers between 2010 and 2013 around 7,500 registrations per annum implies a steady market for these years, however from 2014, there is a continual rise to over 14,500 registrations in 2018. With this near doubling of registrations over a five-year period infers strong growing demand for motorhomes throughout this time period.



Size of Caravan and Camping Market

3.32 Statistics from the GB Tourism Survey show that 3 million tourism trips in England were made involving staying in a touring caravans or motorhome in 2019 and a similar 3 million trips were made involving staying on a traditional tent or glamping accommodation (VisitBritain, 2019). This shows the continuing strength of the touring caravan and camping market.

National Caravan Market Summary

- 3.33 Over the last three decades the UK has experienced stable inflation rates of around 2% and rising disposable incomes. This has driven tourist demand for more holidays both at home and abroad. Since mid-2015 the fall in relative value of Sterling has made holiday's abroad more expensive leading to a greater incentive to holiday at home. More recently, the Covid-19 pandemic lockdowns and re-openings have led to disruptions to supply and increased demand that have led to inflationary pressures that have been exacerbated by the Russian invasion of the Ukraine in March 2022 all contriving to bring inflation to rates that have not been seen for thirty years. This inflation is leading to a short-term reduction in disposable incomes, however, this is unlikely to undo the gains of the last decades. Nonetheless, Covid, the Ukrainian War and inflation have all dampened consumer confidence and the amount that people are prepared to spend on their holidays.
- 3.34 All these factors have fed into a 'Staycation' boom in the UK in 2020 and 2021 (outside of lockdown periods) as people have been generally unwilling to expend the extra cost and hassle of travel abroad. This Staycation trend is predicted to continue well into 2023 and 2024, driving demand for domestic holidays, including caravan parks, which have been experiencing a boom period. There have been a large number of transactions in the holiday parks market with many holiday parks becoming owned by larger portfolio groups. Although many of these parks are predominantly static caravan based, they include a significant proportion of touring and camping pitches, which their owners are generally seeking to convert to static caravan pitches to extend the season and number of people on site all-year to generate a return on their investment in upgraded central facilities. This in turn is driving demand for touring and camping pitches to address both the demand displaced from static parks and the general growth in demand for cheaper, touring caravan holidays.
- 3.35 At the same time, the increasing price of fuel is likely to incentivise shorter journeys from home to holiday destination. Touring sites close to urban areas are also less affected by the unpredictable British Weather – if you are looking for accommodation to attend a cultural or sporting event in the city, the weather is much less an issue. All these factor's come together to favour demand for touring pitches adjacent to Southampton which is close to the large conurbation of Greater London, and provides a wide range of tourist, cultural, and sporting events and attractions.

4. Local Demand and Supply

- 4.1 This section explores the demand for and supply of touring caravan sites in and around Southampton within the defined catchment area.

Local Tourism Market

- 4.2 As a major city on the south coast, Southampton is a strong visitor destination. **Table 1** outlines the some of the key tourist, cultural and sporting attractions in the city and surrounding area, their key facilities and the number of visitors where known.

Table 1 – Major local tourist attractions within proximity of the applicant site (N/A indicates data not available)

Name of attraction	Location	Facilities	Visitors p.a.
Ageas Bowl Complex	Southampton	International and County cricket stadium with associated cricket training facilities. Golf course, spa, leisure, conference and wedding facilities within one complex	N/A
Southampton Football Club (St. Mary's Stadium)	Southampton	Regional, Premier League football club with a 32,500-seat stadium in Southampton. Hosting UEFA Women's Euro matches summer of 2022.	N/A
City shopping	Southampton	Extensive and diverse range of shops throughout the city centre, including one of the South Coast's most popular shopping destinations – West Quay	N/A
Mayflower Theatre	Southampton	Biggest theatre on the south coast with c.2,300 seats. Productions, including dance, opera, drama, ballet and comedy	N/A
O2 Guildhall	Southampton	1,749-capacity music, comedy and sports venue in central Southampton	N/A
Royal Victoria Country Park	Southampton	Country Park comprising 200 acres of woodland, parkland, and shingle beach. Former home of Royal Victoria Hospital.	450,000
Mayflower Park	Southampton	Park overlooking Ocean Cruise Terminal and hosting annual Southampton International Boat Show	103,000 (boat show only)
SeaCity Museum	Southampton	Interactive maritime museum exploring the people of Southampton and their connections with the Titanic and the sea	87,797
Southampton City Art Gallery	Southampton	Large art gallery holding special collections and running educational events throughout the year	52,547
Tudor House & Garden	Southampton	Immersive and innovative museum set in 800-year-old Tudor house and gardens in Southampton old town	21,985
Solent Sky (Spitfire) Museum	Southampton	Aviation museum displaying exhibits on local aircraft history through a unique collection of planes	34,000

Medieval Merchants House	Southampton	13 th century Merchant's house notable for surviving predominantly how first built	1,095
The Wool House Museum	Southampton	14 th century, medieval Wool House converted to bar and restaurant with extensive outdoor seating area	N/A
God's House Tower Museum	Southampton	Late 13 th century gatehouse with museum and frequently used for varied exhibitions alongside as a wedding venue	N/A
Eling Tide Mill Experience	Totton Southampton	Unique mill experience with interactive visitors centre and events running throughout the year	N/A

- 4.3 This demonstrates that Southampton has a diverse range of tourist attractions and activities of both regional and national significance that contribute towards a strong local tourism destination market. This array of attractions will appeal to most demographics creating demand for tourist accommodation in the local area. It is also worth highlighting that this is not an exhaustive list of attractions, with further attractions also contributing towards increased tourism.
- 4.4 In addition to the above attractions, Southampton also hosts an array of annual events, including: Southampton Marathon 24 April 2022, Southampton Boat Show 16-25 Sept, South Coast Boat Show 5-8 May, UEFA Women's Euro 2022 7-15 July 2022, International and Domestic Cricket, Southampton Sailing Week, and the Southampton Sporterium. In conjunction with these events, Southampton has been listed as one of four finalists to be named UK City of Culture for 2025.
- 4.5 Figures from the GB Tourism Survey demonstrate that tourism trips to a city or large town made up 45.6% of tourism trips in England in 2009, compared to 20.8% to the seaside, 18.8% to a small town and 15.9% to the countryside (VisitBritain 2019). This shows the primary importance of cities like Southampton as a tourist visitor destination.
- 4.6 Red Funnel, the major ferry operator between Southampton and the Isle of Wight, carry 3.4 million passengers and over 800,000 vehicles annually on their ferry and Red Jet Hi-Speed routes. These figures represent a high number of footfall and demand for travel to the Isle of Wight. Those travelling from Southampton port to the Isle of Wight with a touring caravan/motorhome may require an overnight (transit/intermediatory) location ahead of travelling by ferry. These figures imply high demand for Red Funnel, thereby increasing the likelihood of some passengers requiring an overnight stop in Southampton.
- 4.7 Figures provided by Hampshire County Council show that domestic tourism accounted for an average 3.8 million overnight trips to Hampshire each year between 2015-2017 accounting for £621 million of spending of which 1.4 million trips were for a holiday purpose accounting for £289 million spending each year. We have not been able to obtain separate figures for Southampton alone, however for

inbound tourism (overseas visitors), Southampton is the top city destination in Hampshire, with 694,000 overseas visitors, suggesting that it will also be one of the top visitor destinations for these domestic (i.e. British) visitors to Hampshire. This confirms Southampton as a main destination for British visitors including those wishing to bring their own touring caravans and tents to provide accommodation during their stay.

Local Touring Pitch Supply

- 4.8 Measuring the existing supply of sites that host touring caravan pitches was conducted through an online search. Identified sites falling within the defined catchment area are shown in **Table 2** and on **Figure 15**.

Table 2 – Supply of touring caravans within the defined spatial criteria

Map No.	Site Name	Location	Touring caravan provision	Distance From Site	Approx. driving (D) and bus (B) distance from City Centre
1	Application Site	West End	N/A	N/A	8.35km [D = 12 mins] [B = 27 mins]
2	Sunnydale Farm Caravan Park	Old Netley	41 pitches	3.25km	6.10km [D = 10 mins] [B = 30 mins]
3	Mercury Yacht Harbour and Holiday Park	Hamble-le-Rice	35 pitches	5.25km	9.5km [D = 16 mins] [B = 49 mins]
4	Dibbles Park Caravan Park	Locks Heath	11 pitches	7.5km	14.30km [D = 22 mins] [B = 47 mins]
5	Drove Lea Caravan Site	Titchfield	c.60 pitches	9km	15.6km [D = 20 mins] [B = 65 mins]

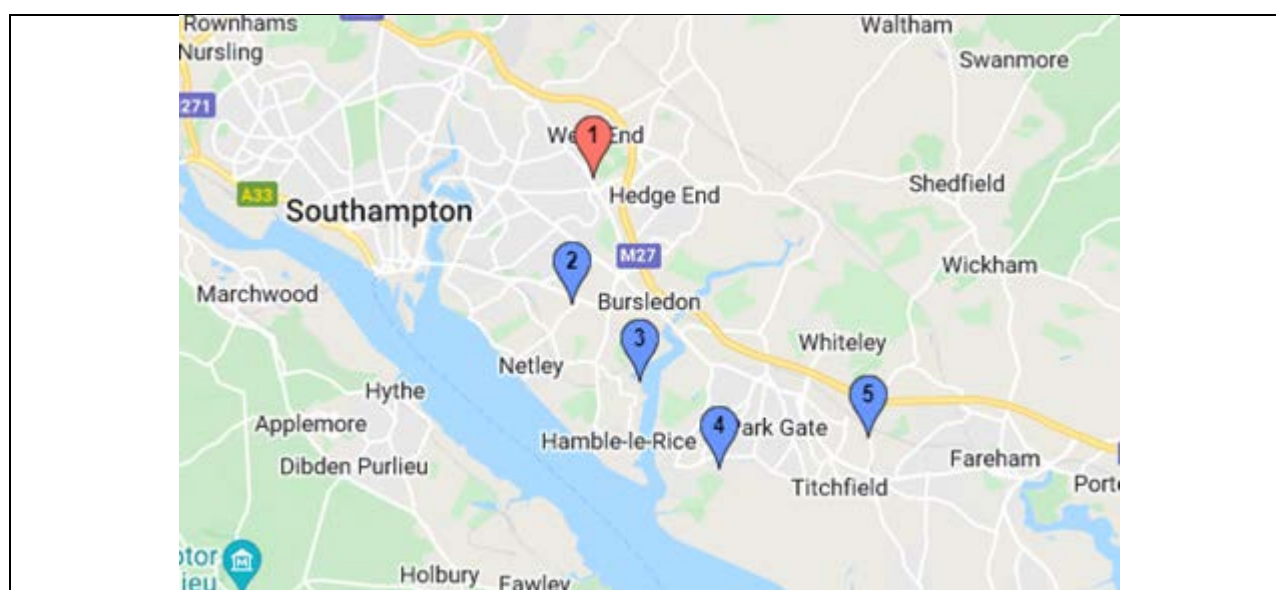


Figure 15 – Map of touring caravan sites within the defined spatial criteria
(numbers relate to Table 2)

- 4.9 Distance from the city centre is considered a key factor, as we anticipate that aside from visitors to sporting and cultural events at the Ageas Bowl these sites will be used for city breaks to Southampton's cultural, heritage, sporting and shopping facilities, clustered in and around the city centre, and those using the ferry port, also adjacent to the city centre. Many of these people will likely travel by bus or taxi so that they can drink as part of their day and/or evening out and avoid long term parking charges during a full day out. As **Table 2** above shows, only the 41 pitch Sunnydale Farm Caravan site at Old Netley offers anything like the convenience for travel to attractions and events in the city centre offered by the proposed site, and even then, Sunnydale cannot beat Thorneydown Farm for access to the sporting facilities and events at the adjoining Ageas Bowl.

Table 3 – Locations of touring caravan sites in close proximity to the catchment area

Site Name	Location	Facilities	Driving distance from City Centre
Paultons Campsite	Wigley/New Forest NP	16 touring pitches mostly with electric hookup	15.3km [18 mins]
Green Pastrues Camping and Touring Park	New Forest NP	48 touring pitches	12.9km [16 mins]
Three Trees Campsite	Ampfield	15 touring pitches	17.9km [20 mins]
Rookesbury Park Caravan Club	South Downs NP	142 touring pitches	23.8km [35 mins]
Marwell Resort	South Downs NP	25 touring pitches	20.1km [26 mins]

- 4.10 In order not to exclude from consideration any sites that fell just outside the catchment boundary, these have been included in **Table 3**. As can be seen, none of these touring sites are located anything like as close to the city centre and the distance and poor availability of buses from these caravan sites would discourage trips to the city. In reality, these caravan and camping sites serve the National Park/countryside markets within which they are located, rather than the city breaks market, with Paulton's being naturally convenient for visitors to the adjoining theme park.
- 4.11 Overall, we have identified 147 touring pitches across four sites within the defined catchment area to serve the Southampton city break market. We consider this a relatively low supply of touring caravan and camping pitches to serve the Southampton city break and events market. This is especially true when assessing the geographical location of these sites in relation to Southampton, where only one site with just 41 pitches falls within a convenient 30-minute bus or 10-minute taxi ride of Southampton City Centre.

Local Touring Pitch Demand

- 4.12 The aim of this section is to gauge the degree of demand for touring caravan pitches in the catchment area, so that, in conjunction with the above supply section, we can consider the need for the use of the application site for touring caravans. There is no direct quantitative data available that states the need for a touring caravan site in Southampton or the surrounding areas. The data that has been found focuses on indirect quantitative data (google searches, national and local statistics) and qualitative approaches, including a telephone survey with local holiday park sites.

Qualitative Survey

- 4.13 A series of mystery shopper style, semi-structured surveys were conducted on 06 and 07 April 2022 on the identified touring caravan parks. The purpose of this was to confirm the existing provision of touring caravan pitches on each site, confirm the cost of a pitch, and gauge the degree of demand for each site. The individual sites were each rung on the 06 April, with no-answer calls chased on 07 April. The results of which are presented in **Table 4**.

Table 4 – Existing Pitch Availability Survey Findings for the Easter Weekend 2022

No. on Map	Site Name	Touring Caravan Provision	Cost	Capacity/Demand
2	Sunnydale Farm Caravan Park	41 (24 hardstanding) touring pitches	£35 per pitch/night for 2 adults	No hardstanding pitches available, very few grass pitches left
3	Mercury Yacht Harbour Holiday Park	35 grass touring pitches	£30 per pitch/night for 2 adults	No pitches available.
4	Dibbles Park Caravan Park	11 hardstanding touring pitches	£26 per pitch/night	Fully booked entire weekend.
5	Drove Lea Caravan Site	Approximately 60 grass touring pitches	£12 per pitch/night	Yes, some available throughout the weekend.

- 4.14 Of the four sites identified within the defined special area, 147 touring pitches were found, constituting 95 grass pitches and 52 hardstanding pitches. The results showed very little availability over the Easter Weekend (four-day Bank Holiday between 15th and 18th April). Sunnydale Farm had no hardstanding pitches available and very few grass pitches left at the time of the survey (also warning that those remaining would likely go quickly), whilst Mercury Yacht Harbour stated that they had no availability due to a few bookings, but predominantly due to poor ground conditions. Despite only 11 hardstanding touring pitches, Dibbles Park was reported to be fully booked. Meanwhile, Drove Lea, the site with the largest capacity, yet the farthest away, of the touring caravan site operators within the catchment area, reported 'some' availability through the weekend for its grass pitches.

- 4.15 When speaking with one of the park operators whilst conducting the surveys, the provision of grass pitches in the local area was reported to be problematic. With no terracing or artificial surfacing, grass pitches are natural and thus the quality of such pitches are sensitive to the geology and weather. As opposed to hardstanding pitches, which are permanent, resilient and remain intact regardless of the weather. It was reported that the condition of grass pitches in the local area were poor, to the extent that such pitches might not be available over the course of the Early Bank Holiday weekend. This represents an overarching problem for grass pitches, a difficulty that hardstanding pitches would not experience. In the widely recognised wake of increased frequency of extreme weather due to climactic change the prevalence impact to grass pitches is anticipated to increase. From this, we draw that the grass pitches bring added risk and variables from external factors to touring caravans (i.e. weather) that is highly likely to reduce the overall supply of available pitches during some months of the years.
- 4.16 Overall, there is a relatively weak supply, yet frequently used number of touring caravan sites in and around Southampton. The telephone survey has revealed a strong level of demand for touring caravans even during an early stage of the touring season (mid-April). This is especially so for pitches closest to the city. Whilst this is not representative of the wider summer touring caravan season, we would expect there to be greater demand in the months following this researched weekend as the weather warms into the summer months. It is also noted that at the time of the survey there was limited availability for the some of the remaining grass pitches, ten days ahead of the Easter Bank Holiday weekend, however, we were warned that this would go if we did not make a booking at the time of the survey. Therefore, on the basis of the number of early bookings for pitches, it is logical to assume that within the local market, there is strong demand for, and an apparent deficit of, touring caravan and camping pitches.

5. Analysis and Conclusion

- 5.1 This study has assessed the need for a touring caravan site on the edge of Southampton.
- 5.2 The proposed site has a close physical relationship with the Ageas Bowl sport and leisure complex that sits adjacent to the north boundary. In addition to the Ageas Bowl, the site is conveniently located in relation to the city centre tourist, cultural and sporting attractions, the Southampton Ferry Port and the national highway network (M27), proving both a uniquely functional and desirable location for a wide range of tourists. Furthermore, locally, there are a few other sites within a similarly convenient location for Southampton city breaks and events, providing positive geographical grounds for added supply within this area.
- 5.3 There are strong grounds for predicting a rise in national demand for touring caravans in the UK. Short-term inflationary pressures, not least increasing in fuel prices, the long-term increase in disposable income coupled with savings made during Covid lockdowns, the persistently weaker pound, and reduced consumer confidence are all factors that are positively influencing the demand for cheaper touring caravan and camping holidays, and to take such holiday nearer to home in the UK.
- 5.4 In conjunction with media outlets reporting an expanse of the touring caravan market to include younger generations, the touring caravan market is in a strong position for continued, long-term growth. Whilst the financial impact of COVID-19 on the tourist market was stark and the beginning of both 2020 and 2021, the bounce back in terms of domestic holidays ('staycations') in the latter part of each year has proved even greater. We believe that holidaymakers discovered, and in some cases re-discovered, the flexibility and mobility of touring caravans, alongside the perks of private and safe self-contained accommodation during a pandemic, that is still with us, even after multiple vaccinations.
- 5.5 Southampton, as a major sporting, cultural and tourism destination close to major population centres of London, the South-East and Midlands is both a financially and functionally viable location for a caravan site for domestic and international tourists using touring caravans for city breaks and to attend the many cultural and sporting events hosted by the city. Overall, Southampton and its surrounding area have a range of diverse attractions for a variety of visiting demographics, which makes it an attractive and well-rounded tourism break destination requiring differing vacation needs.
- 5.6 By conducting a thorough desk-based search, supported by a qualitative telephone survey, we have identified a strong level of demand for touring caravan sites within, and around Southampton, with only 147 touring pitches within the city accommodation catchment area all hardstanding pitches and

most grass pitches were already booked for the Easter Weekend when we phoned each park 10 days earlier. Those with space available said it was either not suitable for the time of year (too soft) or that they fully expected to be booked out by Easter, especially the parks closest to Southampton city centre.

- 5.7 Whilst the supply of touring caravan sites is important, the type and quality of the pitches available is a major consideration. Reports of local grass touring pitches being in such a condition due to weather and ground conditions that would likely prevent use, thereby reducing the overall supply of touring pitches. These circumstances are much less relevant to hardstanding pitches due to their permanent and weather-resilient nature. For the four sites identified in the defined area, there is mix of approximately 30% of hardstanding (Sunnydale Farm and Dibbles Park) and 70% grass (Mercury Yacht Harbour and Drove Lea) pitches. This emphasises potential demand for additional hardstanding (or free draining grass) pitches.
- 5.8 There is a strong demand for a touring caravan site in Southampton. In balancing the overall market picture - post-COVID-19 and economic trend - there are positive signals for a resilient and growing touring caravan site market nationally and locally in Southampton. As it stands, the market is not considered to meet this signalled rise in demand. Furthermore, the identified demand for vehicle ferries (Red Funnel) from Southampton to the Isle of Wight implies a need for a 'transit' touring caravan location within close distance of the port, which we believe to be an important feature of the applicant site in comparison to other identified locations.
- 5.9 In conclusion, we identify a lack of touring caravan sites serving the Southampton destination visitor market. An important distinction is made between the quality of available touring pitches, with grass pitches proving to be much more susceptible to climactic conditions than sturdier hardstanding counterparts, which weighed into our view of local supply. External macroeconomic drivers, national trends for touring caravans, and Southampton's attraction as a diverse holiday destination all signal a strong future demand for touring pitches to serve the broad Southampton area visitor market. In weighing this with the location of the applicant site, in relation to the city centre and bus network, the major highway network and ferry port, we arrive at the unequivocal conclusion that there is demand for additional touring pitches at Thorneydown Farm.

Appendix I

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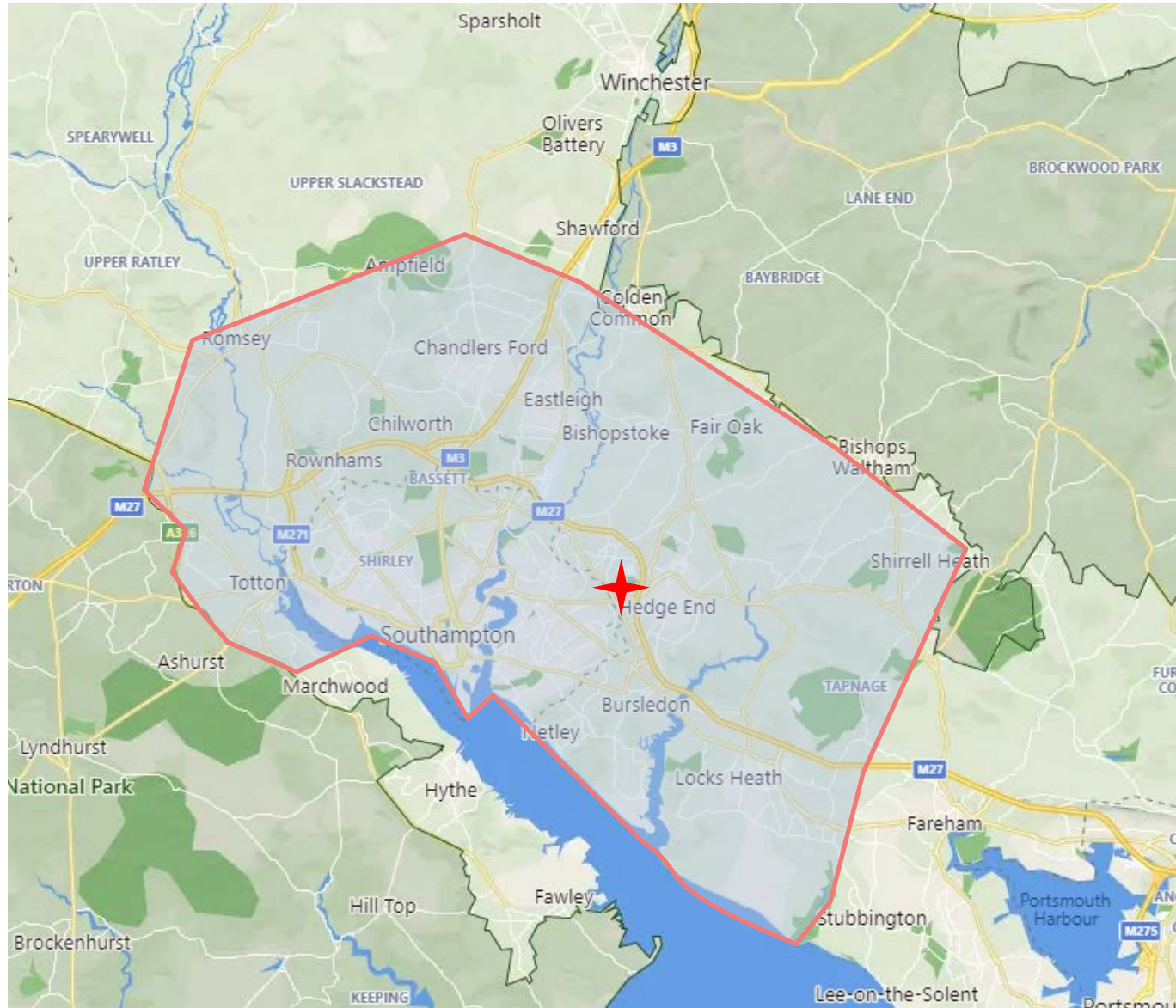
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Appendix II

Defined Search Area



Contact details

Enquiries

Harry Bailey

[REDACTED]

[REDACTED]

Visit us online

avisonyoung.com

Avison Young

65 Gresham Street, London EC2V 7NQ

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