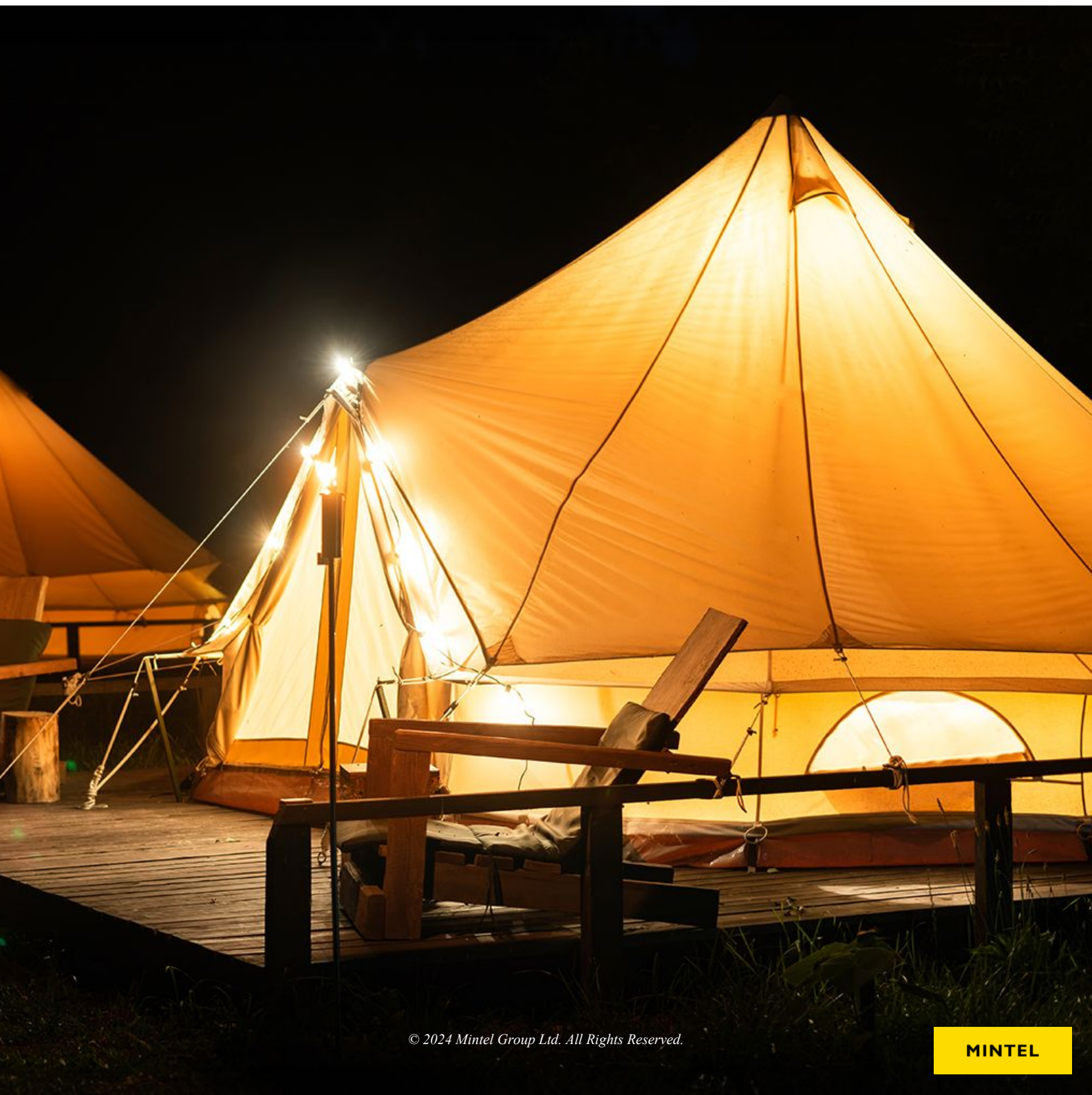


CAMPING AND CARAVANNING – UK – 2024

The ability to connect with nature makes the segment well positioned to benefit from travellers' strong interest in improving their mental and physical wellbeing.



Marloes De Vries, Travel Analyst



Camping And Caravanning - UK - 2024

This report looks at the following areas:

- The outlook for the camping and caravanning market and key trends shaping the next five years
- Consumers' experience of camping and caravanning, destinations visited and future intentions
- The types of camping and caravanning holidays that are showing the strongest growth
- Important features when choosing a camping/caravan site
- Barriers to camping and caravanning



The ability to connect with nature makes the segment well positioned to benefit from travellers' strong interest in improving their mental and physical wellbeing.

Overview

47% of UK adults went on a camping or caravanning holiday in the three years to February 2024, while 63% of adults would be interested in going on one. The low costs associated with camping and caravanning holidays will continue to appeal to budget conscious travellers, while innovations that make the experience more convenient and comfortable will be important to realise this growth potential.

With both warmer and wetter weather expected to become more common, the camping and caravanning market would do well to invest in protecting their experience against extreme weather. Currently, concerns about the weather are already the second biggest barrier to taking a camping and caravanning holiday.

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The biggest opportunities include helping guests improve their mental and physical wellbeing by providing deeper connections to nature, tapping into consumers' desire for unique experiences, such as by promoting glamping and wild camping, and to continue building on the camping and caravanning market's green image.

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Report Content



Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

Opportunities for the camping and caravanning market

- Three big opportunities for the camping and caravanning market

Market dynamics and outlook

- Market size & forecast
- Market predictions
- After a dip in 2023, volume is expected to rise again in 2024
- Inflationary pressures and premiumisation will continue to boost market value
- Nearly a quarter of domestic holidays in Great Britain in 2022 were camping and caravanning holidays
- Financial confidence reached second highest level since January 2022
 - Graph 1: the financial confidence index, 2016-24
- Weather-proofed experiences become more important amid climate change

What consumers want and why

- Nearly half of UK adults went on a camping or caravanning holiday in the past three years
 - Graph 2: experience of camping and caravanning in the past three years, by type of trip, 2024
- The customer base has potential to expand from 47% to 63% of adults
 - Graph 3: camping and caravanning future intentions among UK adults, 2024
- Comfort and convenience will be an important driver for growth
 - Graph 4: important features when choosing a camping/caravan site, 2024
- The need to develop experiences to appeal to both adults and families
 - Graph 5: consumer preferences for a camping/caravanning holiday – child-friendly vs adult-only, 2024
- The ability to connect with nature is a key strength of the camping and caravanning market
 - Graph 6: behaviours and attitudes towards camping and caravanning, 2024
- Sleep discomfort is the biggest barrier to camping and caravanning

Innovation and marketing

- Brands continue to explore unique accommodation options
- Customisable and more efficient designs to appeal to a broader group
- Making holidays more inclusive

MARKET DYNAMICS

Market size

- Domestic trips dipped amid inflationary pressures and strong demand for overseas holidays
 - Graph 7: volume of domestic camping and caravanning holidays, 2018-23
- Value remains above the pre-COVID-19 level
 - Graph 8: value of domestic camping and caravanning holidays, 2018-23
- Overseas camping and caravanning segment remains small

Market forecast

- Volume forecast for domestic camping and caravanning holidays, 2018-28
- Value forecast for domestic camping and caravanning holidays, 2018-28
- Value will continue to grow faster than volume

Market segmentation

- Nearly a quarter of domestic holidays in Great Britain in 2022 were camping and caravanning holidays
- Making camping and caravanning more comfortable in colder months
 - Graph 9: domestic holidays vs camping and caravanning holidays taken by British residents in 2022, by month
- Opportunity to promote urban camping
 - Graph 10: domestic holidays vs camping and caravanning holidays taken by British residents in 2022, by main type of destination

Macro-economic factors

- Inflation rate remained at 4% in January 2024
 - Graph 11: CPI inflation rate, 2021-24
- Financial confidence reached second highest level since January 2022
 - Graph 12: the financial confidence index, 2016-24
- Petrol prices remain relatively high
 - Graph 13: average unleaded petrol fuel pump prices on a weekly basis, 2019-24

Social, environmental and legal factors

- Camping and caravanning market can do more to appeal to a growing group of elderly people
 - Graph 14: population by life stage, mid-2020, mid-2030 and mid-2045
- Weather-proofed experiences become more important amid climate change
- Regulatory and legislative changes

Holiday bookings and booking intentions

- Positive start to the 2024 peak booking season
 - Graph 15: holiday bookings in the last three months, 2018, 2019, 2023 and 2024
- Booking intentions are in line with pre-pandemic levels

- Graph 16: plans to book a holiday in the next three months, 2018, 2019, 2023 and 2024

WHAT CONSUMERS WANT AND WHY

Experience of camping and caravanning

- Participation in camping and caravanning has reached new heights
 - Graph 17: experience of camping and caravanning in the past three years, 2013-24
- Drivers of growth in participation
- Static caravan/mobile homes attract the largest share of campers and caravanners
 - Graph 18: experience of camping and caravanning in the past three years, by type of trip, 2024
- Static caravan/mobile home usage has seen a consistent growth trend
 - Graph 19: experience of camping and caravanning in the past three years, by type of trip, 2016-24
- Glamping has been the fastest growing type of camping and caravanning holiday over the past decade
- Camping and caravanning is popular among families
- Static caravans/mobile homes are in a better position to benefit from the ageing population
 - Graph 20: age profile of UK adults versus campers and caravanners, by type of holiday, 2024
- Glamping offers opportunities to increase revenue
 - Graph 21: household income profile of UK adults versus campers and caravanners, by type of holiday, 2024

Camping and caravanning – destinations visited

- Domestic camping and caravanning has build on the platform achieved during the pandemic
 - Graph 22: camping/caravanning holiday destinations visited, 2018-24
- Recovery in the number of overseas campers and caravanners has halted
- France, Italy and Spain are the leading overseas destinations
 - Graph 23: camping/caravanning holiday destinations visited, 2024
- South East/London region overtakes the South West to become the most popular region
- Opportunities to promote 'secret' camping and caravanning locations

Camping and caravanning – future intentions

- The customer base has potential to expand from 47% to 63% of adults
- Nearly one in ten UK adults are new potentials
- Lapsed campers/caravanners have an older age profile, new potentials are more likely to be middle aged
- Desire among recent campers to camp again is strong

Important features

- Opportunity to increase revenue through offering on-site facilities
- Offering the option to choose the location on a camping/caravan site is a must
 - Graph 24: important features when choosing a camping/caravan site, 2024
- Younger guests are keen on self-serve options

Camping and Caravanning – UK – 2024

- Comfort and convenience will be an important driver for growth
 - Graph 25: important features when choosing a camping/caravan site, by experience and future interest in camping and caravanning, 2024
- Accessibility is important to attract more over-65s

Guest preferences

- The need to develop experiences to appeal to both adults and families
 - Graph 26: consumer preferences for a camping/caravanning holiday – child-friendly vs adult-only, 2024
- 45% of potential campers and caravanners prefer a site with lots of activities/entertainment, while 35% prefer a quiet site
 - Graph 27: consumer preferences for a camping/caravanning holiday – atmosphere, 2024
- Budget remains a big draw
 - Graph 28: consumer preferences for a camping/caravanning holiday – spending, 2024
- Younger campers and caravanners in particular like to try out different brands
 - Graph 29: consumer preferences for a camping/caravanning holiday – loyalty, 2024

Behaviours and attitudes towards camping and caravanning

- The ability to connect with nature is a key strength of the camping and caravanning market
- Nature and wellness travel is a strong combination
- Camping and caravanning sector can build on its green image
 - Graph 30: behaviours and attitudes towards camping and caravanning, 2024
- Consumers expect brands to lead the way on climate-focused progress
- Focus on innovations that go beyond standard eco-friendly efforts
- Engaging with recent guests is the most effective way to extend the season
 - Graph 31: interest in staying on a UK campsite/caravan site during the off-peak season (November-April), by experience and future interest in camping and caravanning, 2024
- Weather-proof experiences are likely to become more important

Barriers to camping and caravanning

- Sleep discomfort is the biggest barrier to camping and caravanning
 - Graph 32: barriers to camping and caravanning, 2024
- Innovations to provide a good sleeping experience are increasingly important
- Many people who have never camped before are put off by a lack of privacy
 - Graph 33: barriers to camping and caravanning, by experience, 2024
- The younger generation can be encouraged to visit during the off-peak season
 - Graph 34: barriers to camping and caravanning, by age, 2024

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Brands continue to explore unique accommodation options

- NEC Group to open glamping resort
- Providers strive to offer a greener experience
- Nature is becoming more accessible
- Customisable and more efficient designs to appeal to a broader group
- Making holidays more inclusive

Camping and caravanning providers

- Parkdean Resorts has the largest number of holiday parks
 - Graph 35: leading holiday park operators, by number of holiday parks, 2024
- Holiday park operators
- Haven Leisure and Parkdean Resorts are the leading holiday park operators in terms of revenue
- Membership organisations
- Aggregators
- A selection of overseas specialists

APPENDIX

Supplementary data

- Participation in camping and caravanning
- Future interest in camping and caravanning among UK adults
 - Graph 36: future interest in camping and caravanning holidays among those who have been in the past three years, 2024
 - Graph 37: future interest in camping and caravanning holidays among those who have not been in the past three years, 2024

Market size and forecast data and methodology

- Market size
- Market forecast and prediction intervals (volume)
- Market forecast and prediction intervals (value)
- Value forecast and prediction intervals at constant prices
- Forecast methodology

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology

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