

**BRITISH HOLIDAY & HOME PARKS ASSOCIATION LTD**



**MID WALES BRANCH**

**Director**  
Richard Rhodes



Tel: 01654 703338  
[rdr@plasdolguog.co.uk](mailto:rdr@plasdolguog.co.uk)

**Chairman**  
Ivan Warren



Tel: 01654 702054  
[info@warrenparc.co.uk](mailto:info@warrenparc.co.uk)

**Secretary**  
Dylan Roberts



Tel: 01743 282400  
Fax: 01743 282404  
[dylan.roberts@salopleisure.co.uk](mailto:dylan.roberts@salopleisure.co.uk)

August 30, 2011

Dear Lord Elis Thomas,

Thank you for giving the Mid Wales branch of the British Holiday and Home Parks Association (BH and HPA) the opportunity to contribute to the National Assembly for Wales' Environment and Sustainability Committee's inquiry into energy policy and planning in Wales. In addition to this letter, I also attached a supporting letter from BH & HPA Director General Ros Pritchard.

The Mid Wales branch of the BH and HPA resolved, at a recent meeting, to register its total opposition to the proposed industrialisation of Mid Wales with the development of more onshore windfarms and related pylons, overhead cables and substations.

We have a membership of more than 80 across the region - there are a further 80 parks that are not members but benefit from the work of the BH & HPA - comprising owners and managers of park home estates, touring and tenting parks, caravan holiday home parks, chalet parks and all types of self-catering accommodation. They have invested millions of pounds in developing high quality parks that attract thousands of people to the region.

Members are therefore alarmed by the current proposals that could see a further 600 wind turbines covering the uplands of Montgomeryshire and adjoining Radnorshire and Ceredigion. These turbines would be linked to the National Grid in Shropshire via a 19-acre substation either near Abermule, near Newtown or Cefn Coch, near Llanfair Caereinion and high-powered cables carried on 26 metre and 46 metre pylons.

National Grid has said that some of the cables may be buried underground, but the subsequent impact on the landscape of either the Severn or Vyrnwy valley would be considerable.

Of major concern to members is the negative impact that the wind turbines and power infrastructure will have on the tourism industry of Mid Wales, which is the backbone of the region's economy. The industry was valued at £1,228m and supported 24,500 jobs in 2009.

Members believe that not enough consideration has been given to the economic and cumulative impact of the wind turbine and related infrastructure proposals. There is major concern that these proposals will have a hugely detrimental impact on tourism and business in general in Mid Wales, where the existing road network has not been built for one of the largest infrastructure projects ever seen in Wales.

According to a report by Capita Symonds, the proposed wind turbines will require an estimated 401,633 HGV movements over five years. Already the traffic systems in both Newtown and Welshpool are at gridlock at busy times and the addition of windfarm and pylon transport will only worsen the situation. Both towns are key gateways to Mid Wales, as traffic must pass through them to get to the Cambrian Coast.

On a Bank Holiday weekend in May, there were reports that it took four hours for people to drive from the West Midlands to the Cambrian Coast because of the traffic gridlock in Welshpool and Newtown. Will tourists travelling either to or through Mid Wales en route to the Cambrian Coast be prepared to put up with long queues every time they wish to escape for a relaxing break to Mid Wales? Will the appearance of ugly pylons and electricity cables travelling along previously unspoilt countryside encourage visitors to return?

Tourism operators are already receiving the answer to those questions. Mid Wales is renowned for its high quality caravan holiday home parks – the region has 24 five-star parks – and owners have reported the loss of sales because of the wind turbines and power lines proposals. Prospective buyers have opted for caravan holiday homes in other areas away from Wales, which are free from wind turbines and ugly pylons. In addition, and worryingly, some existing owners have told our members that they are contemplating giving up their holiday homes because of the potential delays in travelling to their dream destination.

I stress at this point that BH & HPA members are not against alternative energy production but are opposed to intensive development in a rural area that will have a major impact on tourism. As an Association we encourage green development but what is proposed for Montgomeryshire is not green; it is the industrialisation of a beautiful, unspoilt rural area.

What is proposed will destroy our countryside without any benefit to Mid Wales. Some members have likened the proposals to the building of reservoirs at Lake Vyrnwy, Elan Valley and Tryweryn, where Welsh valleys were flooded to supply water to English cities. These controversial new proposals will scar the uplands and valleys of Mid Wales to supply electricity to England.

Politicians at National Assembly of Wales and Westminster have some very difficult decisions to make. Are you prepared to put at risk the economy of Mid Wales and the livelihoods of thousands of people who live here in your quest for renewable energy? BH & HPA members say the resounding answer must be 'No'.

Many of the points raised in this letter are commercially sensitive and not for wider public consumption. Their release to the media could seriously impact on the Mid Wales tourism industry, which has already been seriously damaged by the windfarm and power connection proposals.

Yours sincerely,

**Richard Rhodes,**

**BH & HPA Director for Mid Wales**

*The representative body of the parks industry including  
caravans, chalets, lodges, park homes, tents and  
all types of self catering accommodation.*



## **BRITISH HOLIDAY & HOME PARKS ASSOCIATION LTD**

Chichester House, 6 Pullman Court,  
Great Western Road, Gloucester GL1 3ND

Telephone: (01452) 526911  
Facsimile: (01452) 508508

Email: [enquiries@bhHPA.org.uk](mailto:enquiries@bhHPA.org.uk)  
BH&HPA Members' Web: [www.bhHPA.org.uk](http://www.bhHPA.org.uk)  
Consumers' Web: [www.ukparks.com](http://www.ukparks.com)

Richard Rhodes  
Director, BH&HPA Mid Wales Branch  
Solstar



19 August 2011

Dear Richard,

### **Rural Development Contribution of Holiday and Touring Parks**

The BH&HPA Board of Directors was concerned by your report of the proposals for intensive wind farm development in Montgomeryshire, to include not only turbines, but also pylons, overhead cables and sub-stations to distribute the energy generated.

Intensive development of an industrial nature in countryside that is attractive to holidaymakers will impact on the economic, social and environmental contribution of Holiday and Touring Parks. This contribution may not be fully recognised and it is important that the detrimental impact is taken into consideration alongside any benefit anticipated from a development proposal.

A Holiday or Touring Park's contribution will be economic, social and environmental. It will include:

- jobs that are sustained, both directly in the park business and indirectly in the locality
- the market created for local goods and services thereby supporting local businesses (shops, pub houses, attractions. ... even bus services) which remain viable through the patronage of park customers
- trade (and employment) for local businesses that work on parks (tradesmen, suppliers, plumbers and electricians: all who trade with the park)
- on-park facilities, such as a shop or swimming pool, which are available for local users and whose absence would be sorely missed
- conservation and biodiversity work on the park and in its surroundings
- involvement in local causes and educational projects
- the wellbeing of park customers and its important role in reinforcing family life
- maintenance of environmental assets, such as footpaths and beaches.

Park owners have a proven track record of protecting and enhancing the natural environment and, equally importantly, they provide a market for local goods and services and facilities that are often extended to their host communities. Parks create jobs in rural communities and their customers' patronage is often fundamental to the viability of marginal local businesses.



President:  
**David Bellamy** OBE

Director General:  
**Ros Pritchard** OBE  
MBA, BA(Hons), DipM, MTS



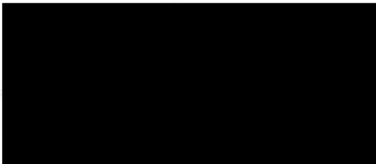
Member, European Federation  
of Campingsite Organisations  
& Holiday Park Association

Registered Office - as above. Registered No 713398 England.

It is important that these essential contributions are taken into consideration by the planning authorities. The following pages provide some facts and figures (and their sources) which it is important that BH&HPA Mid Wales members whose park businesses will be blighted communicate in the consultation on the proposed development.

The attractions of the countryside are the single most important driver in bringing park customers to any area<sup>1</sup>. 81% of park customers enjoy walking, 61% spending time in the countryside, 29% watching wildlife. Any development of an intense, industrial nature which blights the very rural aspect of the countryside will therefore greatly reduce the attractiveness of a park and a region to tourists. Therefore, any impact assessment considering proposals for development needs to take account of the loss of parks' very real contribution to the local economy and community.

With every good wish,



Ros Pritchard OBE  
Director General

## Contribution of Holiday and Touring Parks

### Tourist Statistics

Over 50% of the British population take a park holiday in their lifetime<sup>ii</sup>.

Tourism data are gathered by the United Kingdom Tourism Survey (UKTS<sup>iii</sup>) which recorded that in 2010, the parks industry accounted for:

- 15% of all UK tourism trips (18.1m)
- 21% of all UK tourism nights (77.2m)
- 13% of all tourist spend (£2.674b).

### Economic Contribution

#### Caravan Holiday Homes

A study in Wales indicates that each caravan holiday home generates spending of between £6,721 and £19,138 each year into the local economy<sup>iv</sup>.

2010 research<sup>v</sup> amongst caravan holiday home consumers who participate in the BH&HPA rate-this-park consumer panel indicate that the average spend per night for an occupied caravan holiday home pitch is between £78.62 and £122.42. (The study asked consumers about their spend on items such as accommodation, travel, car parking, groceries, eating and drinking out, activities, attractions, capital items and other shopping.)

The annual economic contribution can be calculated if pitch occupancy is considered:

	Annual economic contribution per caravan holiday home pitch	
Annual pitch occupancy	From £	To £
20 weeks	£11,007	£17,138
25 weeks	£13,759	£21,424
30 weeks	£16,510	£25,708

#### Touring Caravans

The Camping & Caravanning Club places the average daily spend in the local community per touring pitch, **excluding** site fees, as £31.91<sup>vi</sup>.

2010 research<sup>vii</sup> amongst touring consumers who participate in the BH&HPA rate-this-park consumer panel indicates that the average spend per night for an occupied touring pitch is £72.17. (The study asked holidaymakers about their spend on items such as accommodation, travel, car parking, groceries, eating and drinking out, activities, attractions, capital items and other shopping.) The annual economic contribution can be calculated if pitch occupancy is considered.

	Annual economic contribution per touring pitch
Pitch occupancy	£
20 weeks	£10,104
25 weeks	£12,630
30 weeks	£15,156

## Direct Employment

Considering employment across the industry, a 2010 report prepared by Oxford Economics for the British Hospitality Association, 'Economic contribution of UK hospitality industry'<sup>viii</sup>, provided an assessment of the economic contribution of the core UK hospitality industry to the country's wider economy.

Two statistical classifications are particularly relevant to the parks industry:

**SIC 2007 – 5530 - Camping grounds, recreational vehicle parks and trailer parks** – defined as '*provision of accommodation in campgrounds, trailer parks, recreational camps and fishing and hunting camps for short stay visitors, provision of space and facilities for recreational vehicles and accommodation provided by protective shelters or plain bivouac facilities for placing tents and/or sleeping bags*'.

**SIC 2007 – 5520 - Holiday and other short-stay accommodation** – defined as: '*This includes the provision of accommodation, typically on a daily or weekly basis, principally for short stays by visitors, in self-contained space consisting of complete furnished rooms or areas for living/dining and sleeping, with cooking facilities or fully equipped kitchens. This may take the form of apartments or flats in small free-standing multi storey buildings or clusters of buildings, or single storey bungalows, chalets, cottages and cabins. Very minimal complementary services, if any, are provided.*'

'Economic contribution of UK hospitality industry' reported direct UK employment in these classifications as follows:

	Direct employment 1998	Direct employment 2010	% change 1998 to 2010
Camping grounds, recreational vehicle parks and trailer parks	19,000	29,000	+53%
Holiday and other short stay accommodation	45,000	50,000	+11%

Of particular note is the 53% rise in direct employment on holiday parks over the 12 years to 2010.

Research carried out in Wales<sup>ix</sup> has resonance across the UK. Key findings of this research included that average number of staff employed on parks is 20 in low season, with this figure more than doubling in high season



## Indirect Employment

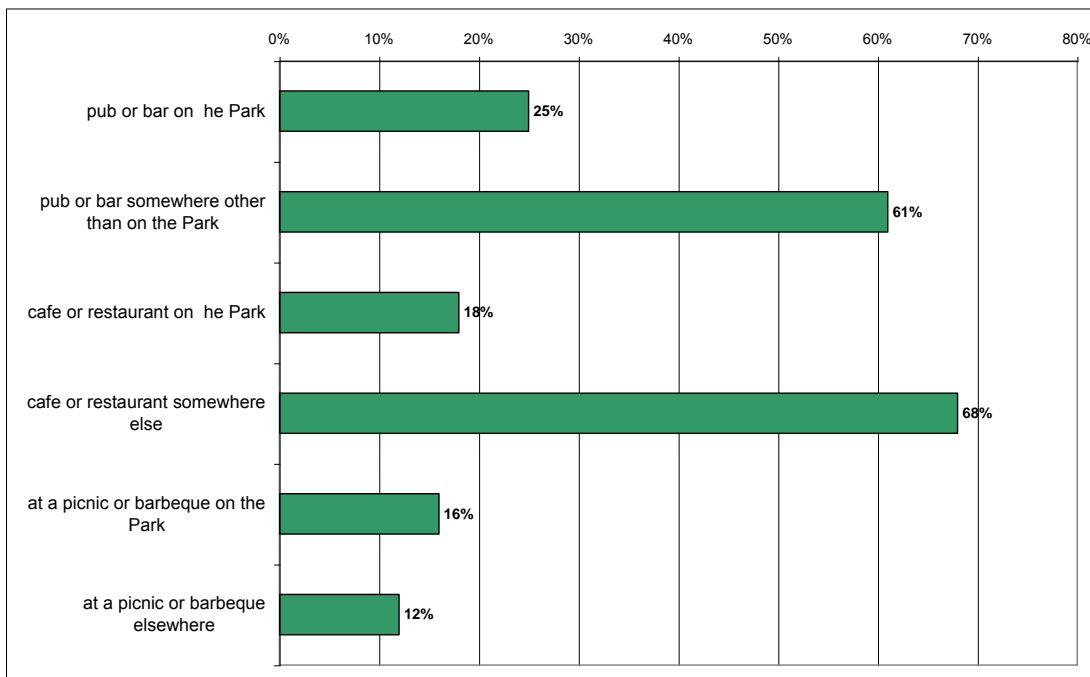
A 2001 study reported that every two caravan holiday home pitches account for one tourism job<sup>x</sup>.

The Camping and Caravanning Club research<sup>xi</sup> confirmed the wide range of activities pursued by visitors surveyed. These included:

- visiting the local pub (58%)
- eating in local restaurants (52%)
- visiting other tourist attractions (68%).

## Park customers eating out

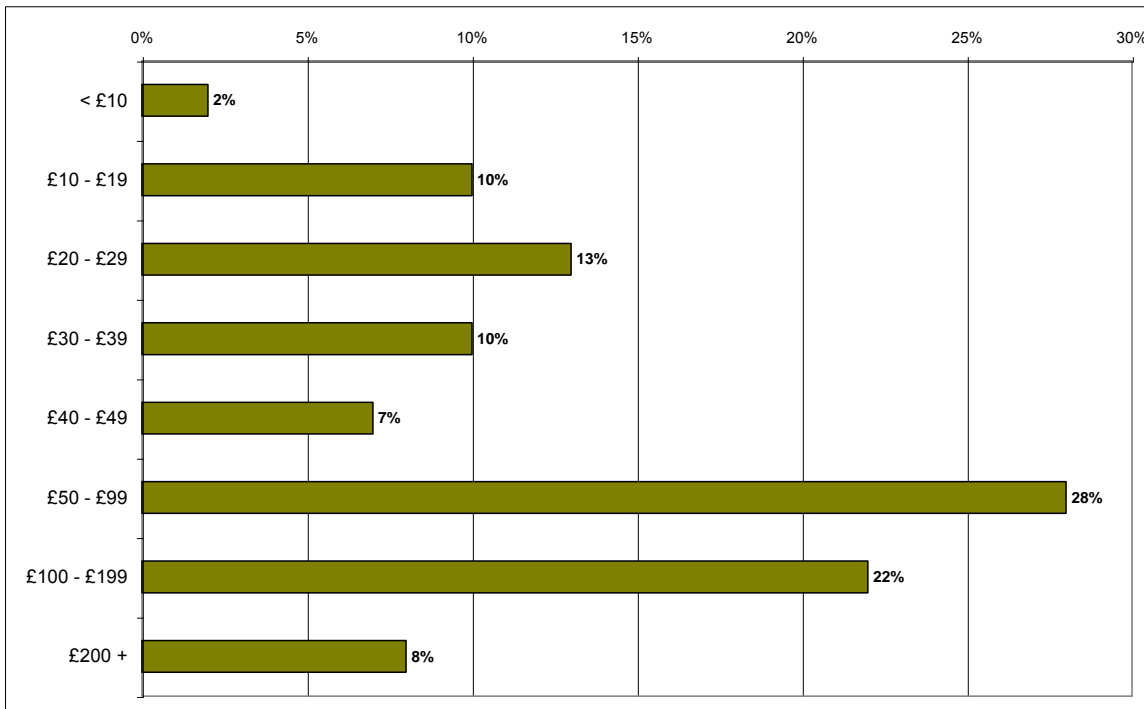
Park consumers who participated in the BH&HPA Consumer Panel in 2010<sup>xii</sup> were asked if they ate out during their park holiday; the majority (68%) had purchased meals from restaurants in the area local to the park.



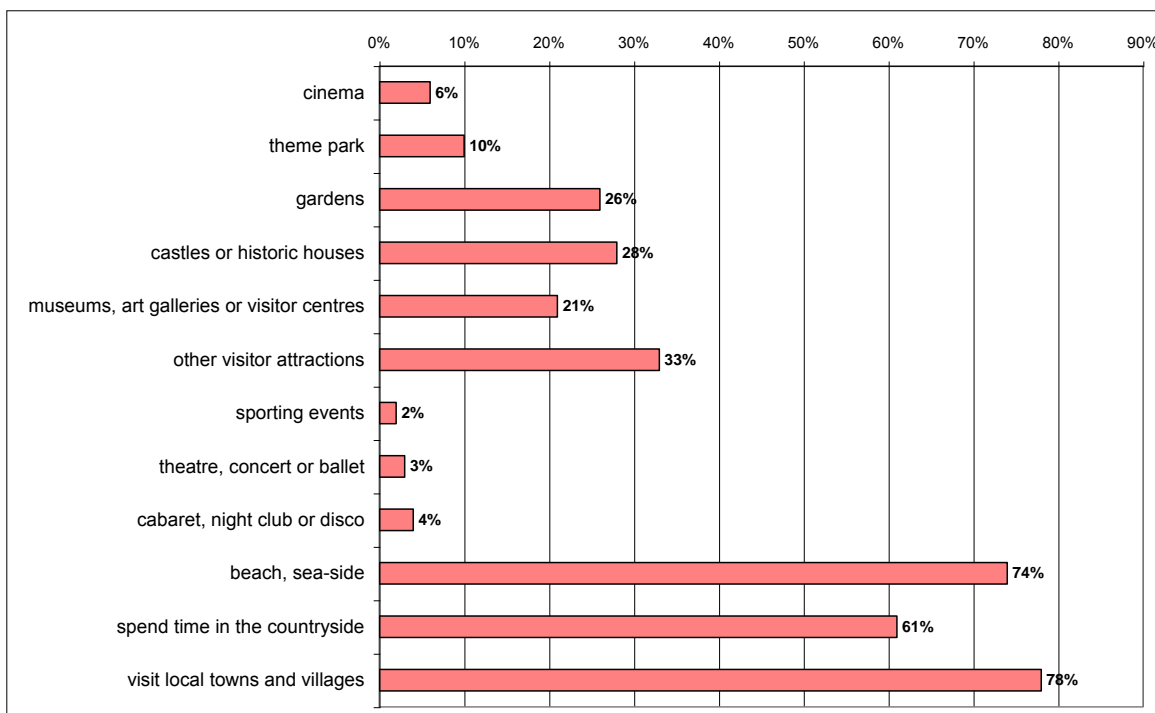


### Spend by park customers on non-food shopping

Nearly two-thirds of park holidaymakers who participated in the BH&HPA Consumer Panel said that they spent money buying clothes, gifts or other shopping during their holiday. Items such as clothes or gifts accounted on average for nearly £45 of each park holiday group's expenditure.



The same study highlighted park customers' support of local attractions.



In addition to park customers' support of local attractions, hospitality and retail businesses, parks employ numerous tradesmen and local businesses to support their work, from plumbers and electricians to construction and horticultural companies, waste contractors to accountants and IT providers.

### **Caravans: a UK manufacturing industry**

It is not only the direct and indirect tourist spend that sustains local economies; caravan holiday home and touring caravan manufacturing businesses, their suppliers and service providers are also important job and wealth creators.

With so few manufacturing industries having survived the economic tribulations of the last 50 years, it is important to emphasize that the parks industry sustains this important manufacturing sector. The overwhelming majority of lodges, caravan holiday homes, touring caravans and motorhomes sold on the domestic market are of UK manufacture.

The National Caravan Council publishes industry production figures from manufacturers' data, confirming production totals for the last three years as follows<sup>xiii</sup>:

#### **UK touring caravan sales**

<b>2008-2009</b>	<b>20,992</b>
<b>2009-2010</b>	<b>24,464</b>
<b>2010-2011</b>	<b>24,548</b>

#### **UK caravan holiday home sales**

<b>2008-2009</b>	<b>13,064</b>
<b>2009-2010</b>	<b>17,063</b>
<b>2010-2011</b>	<b>16,319</b>

#### **UK motorhome registrations**

<b>2008-2009</b>	<b>8,533</b>
<b>2009-2010</b>	<b>7,163</b>
<b>2010-2011</b>	<b>7,630</b>

## Sources

---

<sup>i</sup> 'Economic Contribution' December 2010, BH&HPA Research Report for the Rate-this-park consumer panel

<sup>ii</sup> 59.5% of the UK population stated that they had 'ever spent' a camping/caravanning holiday. 'Camping & Caravanning' research conducted for the European Commission by GFK Marktforschung GMBH & Co.kg (1989)

<sup>iii</sup> United Kingdom Tourist Statistics 2010. [www.visitengland.org](http://www.visitengland.org)

TRIPS		
	%	No.
Holiday camp/village self-catering	1.24	1,480,000
Camping	3.91	4,670,000
Touring caravan/motorhome	3.98	4,750,000
CHH Letting	3.21	3,830,000
CHH privately owned	2.83	3,380,000
<b>TOTAL</b>	<b>15.16</b>	<b>18,110,000</b>

NIGHTS		
	%	No.
Holiday camp/village self-catering	1.70	6,350,000
Camping	4.26	15,900,000
Touring caravan/motorhome	5.78	21,580,000
CHH Letting	5.18	19,350,000
CHH privately owned	3.76	14,040,000
<b>TOTAL</b>	<b>20.68</b>	<b>77,220,000</b>

SPEND		
	UK	
	%	£
Holiday camp/village self-catering	1.58	330,000,000
Camping	2.63	548,000,000
Touring caravan/motorhome	3.15	656,000,000
CHH Letting	3.87	806,000,000
CHH privately owned	1.60	334,000,000
<b>TOTAL</b>	<b>12.83</b>	<b>2,674,000,000</b>

<sup>iv</sup> RPI from October 2003 to October 2009 applied to figures derived from 'Caravan Holiday Homes in Wales', The Tourism Company 2003, Wales Tourist Board and BH&HPA

<sup>v</sup> December 2010, BH&HPA Research amongst the Rate-this-park consumer panel

<sup>vi</sup> RPI from October 2007 to October 2009 applied to figures derived from 'Spend in the Local Community Summary Report', Camping and Caravanning Club - Easter and Summer Results 2007

- 
- vii December 2010, BH&HPA Research amongst the Rate-this-park consumer panel
- viii *'Economic Contribution of UK hospitality industry'*, Oxford Economics, September 2010 [www.bha.org.uk/wp-content/uploads/2010/10/BHA-Economic-Contribution-of-UK-Hospitality-Industry-Final-.pdf](http://www.bha.org.uk/wp-content/uploads/2010/10/BHA-Economic-Contribution-of-UK-Hospitality-Industry-Final-.pdf)
- ix *'Caravan Holiday Homes in Wales'*, The Tourism Company 2003, Wales Tourist Board and BH&HPA
- x *'Holiday Parks - Your value to the local community'*, Ian Butter, BH&HPA Journal, March-April 2001
- xi *'Spend in the Local Community - Summary Report'*, Camping and Caravanning Club - Easter and Summer Results 2007
- xii *'Economic Contribution'* December 2010, BH&HPA Research Report for the Rate-this-park consumer panel
- xiii *'The Business'*, National Caravan Council, Autumn 2011