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Monthly Leisure Market Report

August 2025

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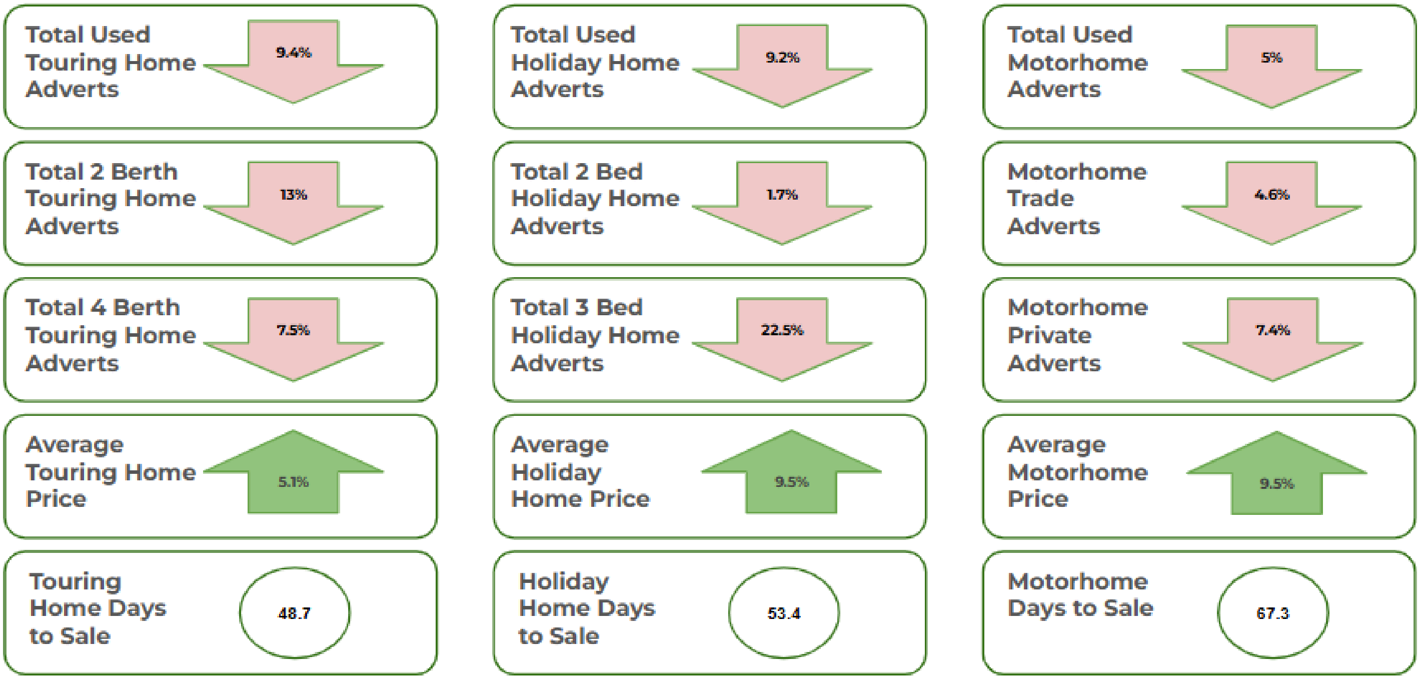
August Monthly Leisure Market Insight

This is the first monthly Leisure Market Report in which we look at what has been happening in the UK Leisure market sectors during the last month and highlight the key areas of the economy that are impacting the Leisure sector and economy as a whole.

Key Used Leisure Home Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of August when compared with market activity experienced in July:-



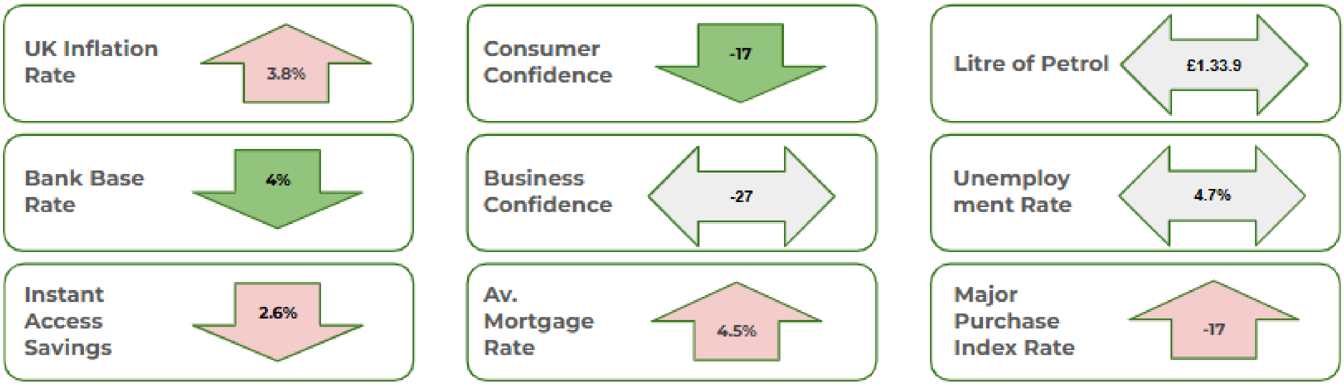
Data Powered by Brego Insight

Looking at the August KPI's it is clear that the sector has seen a good run of sales across all asset types over the month. Notably Touring Homes and Holiday Homes have seen a reduction of around 9% in the volume of advertised units. In all cases the Average prices have increased and this is likely to reflect the type of buyer seeking to buy leisure assets in the summer market, looking for value and perhaps shying away from significant expenditure associated with high end Touring Homes, Holiday Homes, Motorhomes and Campers, thus leaving the more expensive units on sale which pushes the average retail price upwards.

In terms of the time it takes to sell the good news is that this has improved from July to August for Holiday Homes by 17.9 days and Motorhomes and Campers sold 6.4 days quicker. In the Touring Home Market whilst sales have been good the average days to sale slowed by 2.8 days.

Given we are beginning to enter a slower period due to the time of year, the August data looks both robust and positive for all sectors of the leisure market. It will be interesting to see if dealers and parks are able to sustain this level of activity during September.

Key UK Economic Indicators

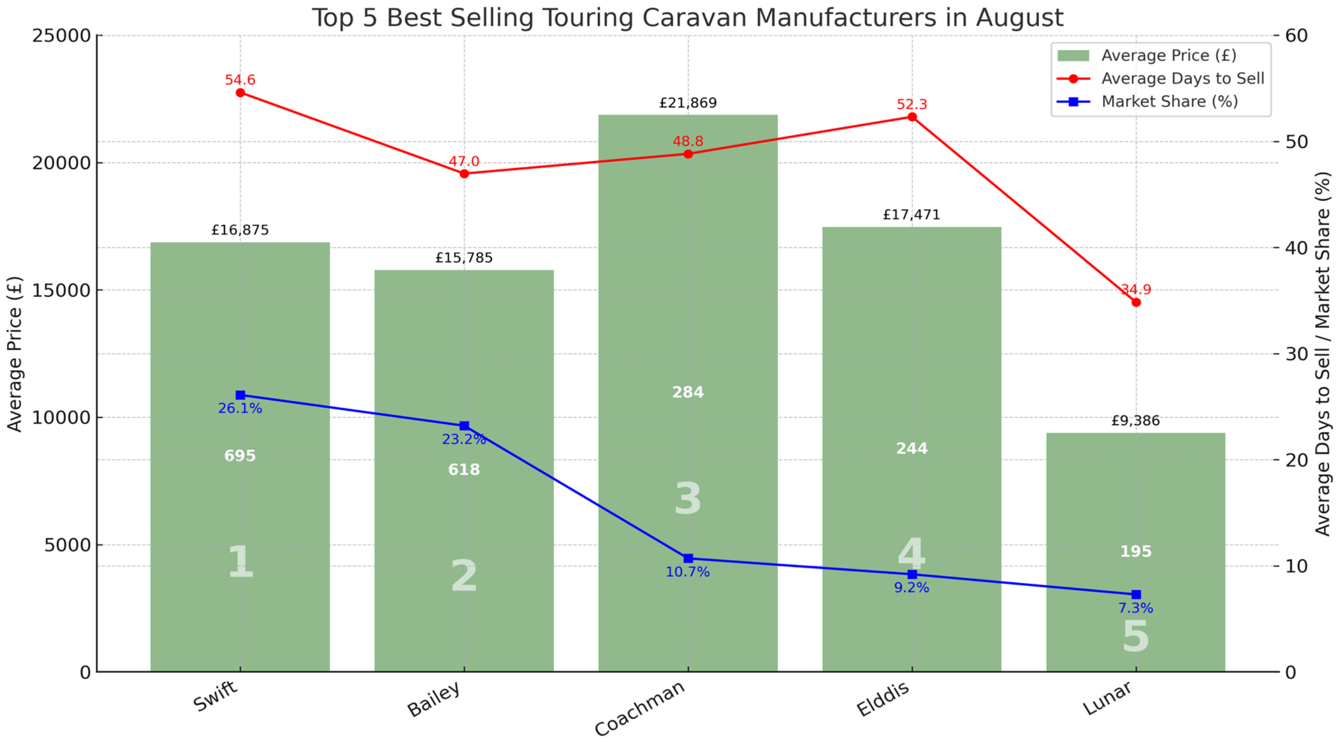


Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

Overall August was a difficult month for the government with a number of bubbling issues causing concern in different sectors. However, the leisure sector was particularly impacted by higher production and inflated labour costs in addition to cost driven competition from foreign holidays.

On a positive note the further increase in inflation to 3.8% does not appear to have damaged either business or consumer confidence which is a welcome surprise. The drop in the bank base rate is probably the driving factor behind this improvement in consumer confidence from -19 to -17. In addition, favourable weather during August also helped focus consumers on leisure activities and spending on last minute UK breaks.

Top 5 Best Selling Touring Home Manufacturers



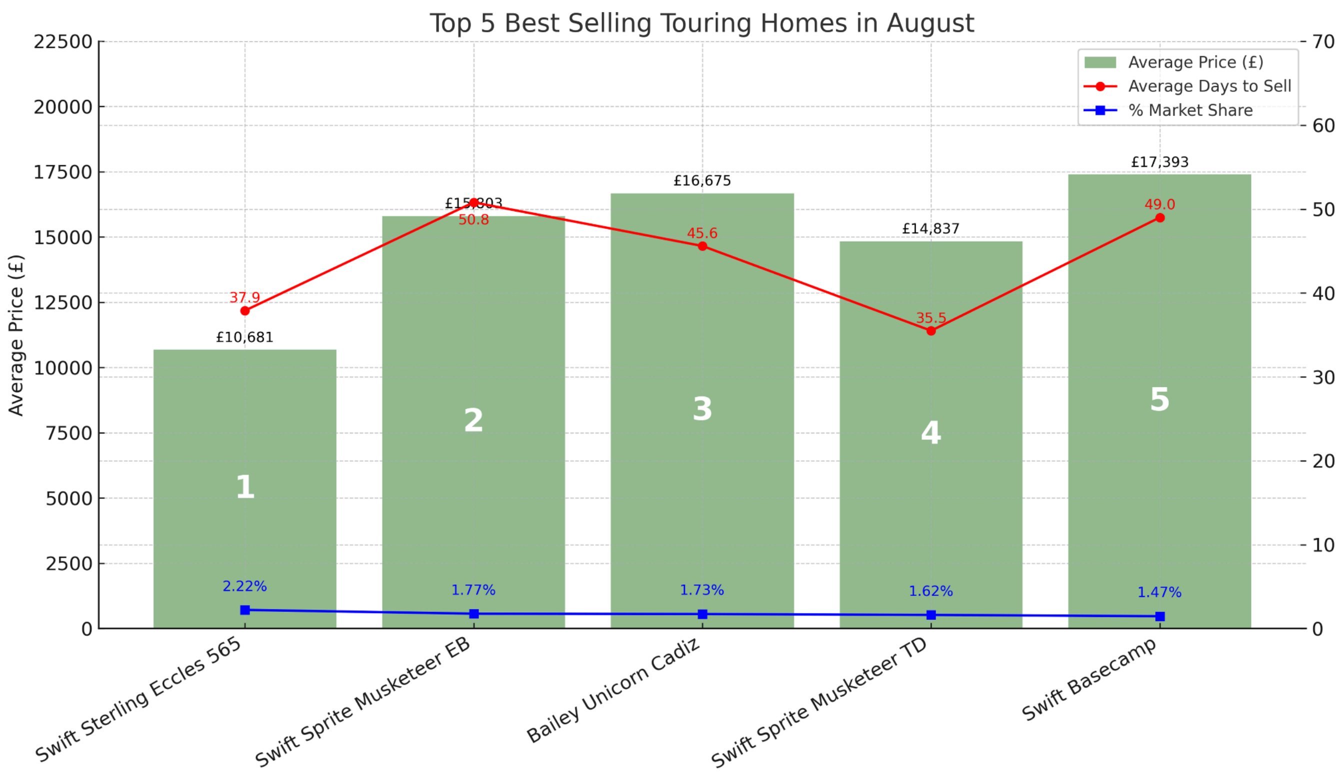
Data Powered by Brego Insight

The previous chart shows the top five best selling Touring Home manufacturers in the UK in August 2025. The volume of units sold is shown in the bar and the average price is above the bar. The average days to sale is shown by the red line and the % of market share is shown by the blue line.

It is interesting to see that the average days to sale for Swift is the highest at 54.6 days despite the fact that it has the third highest average price. It is equally intriguing to see that the average days to sale for the more upmarket Coachman is the third quickest where one might expect it to be the slowest given the highest average price. It is logical that Lunar has the quickest days to sell given its significantly lower and more affordable average sale price.

Top 5 Best Selling Touring Homes

This chart shows the top 5 best selling Touring Homes in August 2025. The average price is shown above the bar and the days to sale shown in red.

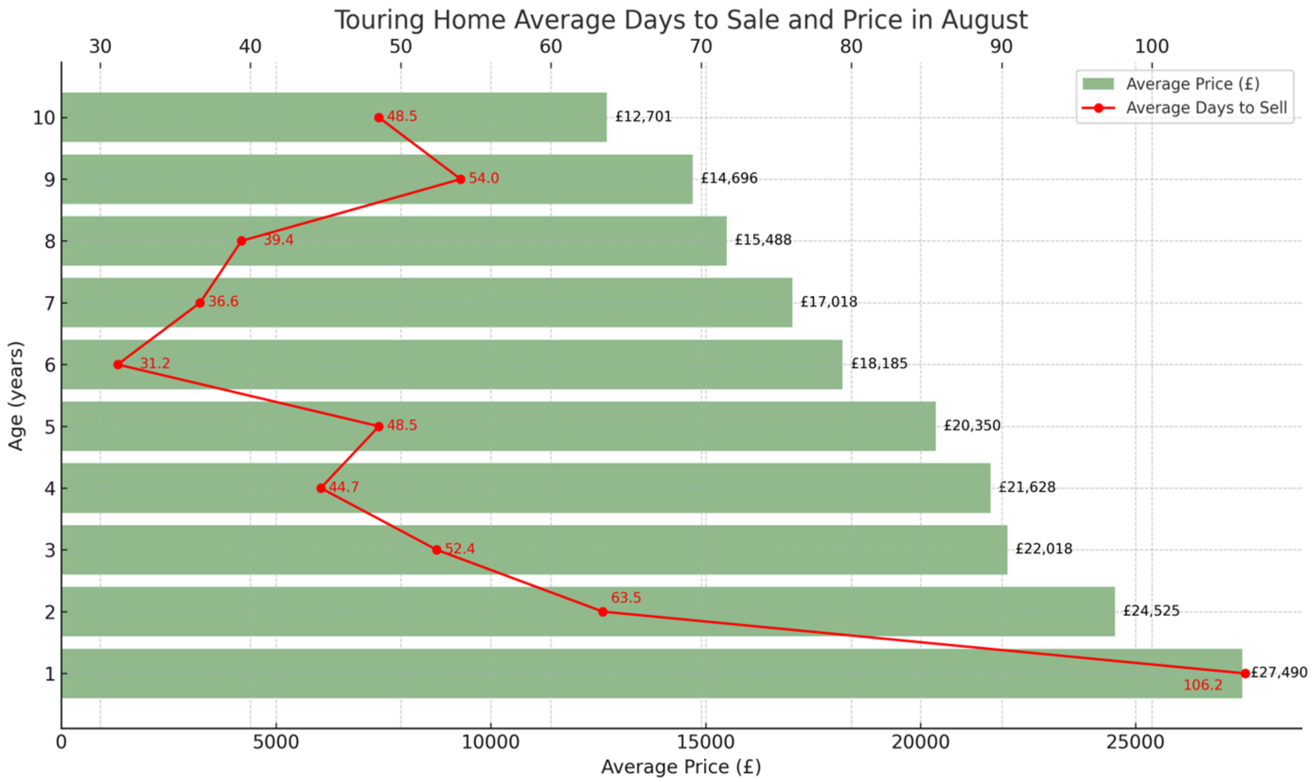


Data Powered by Brego Insight

It is interesting to note that Swift has four of the top five selling Tourers. Of note, and logically, the best selling Tourer has the most affordable price at £10,681 and has two single fixed beds. However, it was not the fastest seller with that honour going to the fourth place Swift Sprite Musketeer. It is pleasing to see that the Swift Basecamp is the fifth best selling Touring Home in August. This “marmite” design is less traditional and is bringing new younger buyers to the Touring Home sector which is essential for the sector.

Touring Home Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line for Touring Homes by age up to 10 years old. This is based on data for all assets up to 10 years old.



Data Powered by Brego Insight

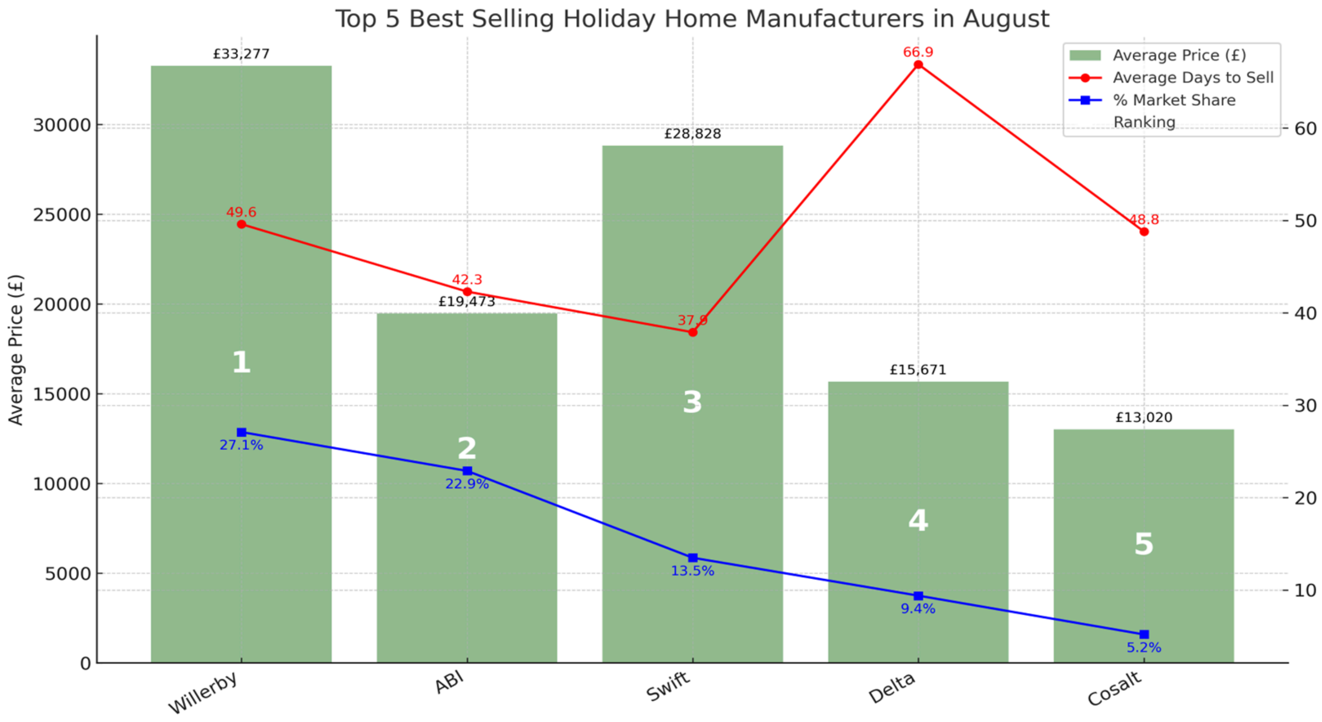
This chart is interesting as it shows that a one year old Touring Home takes a significant 106 days to sell which to some may seem surprising, although it probably reflects a consumer desire to own a new model rather than one that has been used by the previous owner for a short term. The days to sell then fall with age with the optimum speed of sale at six years old and an average price of £18,125.

From six years old, as the unit age increases, there is an uplift in the days to sale which may reflect the time of year or the availability of layouts on offer or indeed the condition of the Tourer. It is reassuring, although not surprising, to see that the average price drops with age, although of note is the minimal decline in average price for units between three and four years old.

The detail in the data is important, and using Brego data will allow users to gain greater insight when looking at length, the number of axles and of course the interior layout to determine what has influenced these headline results.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the top five best selling Holiday Home manufacturers in the UK in August 2025. The average price is above the bar with the average days to sale shown by the red line and the % of market share is shown by the blue line.



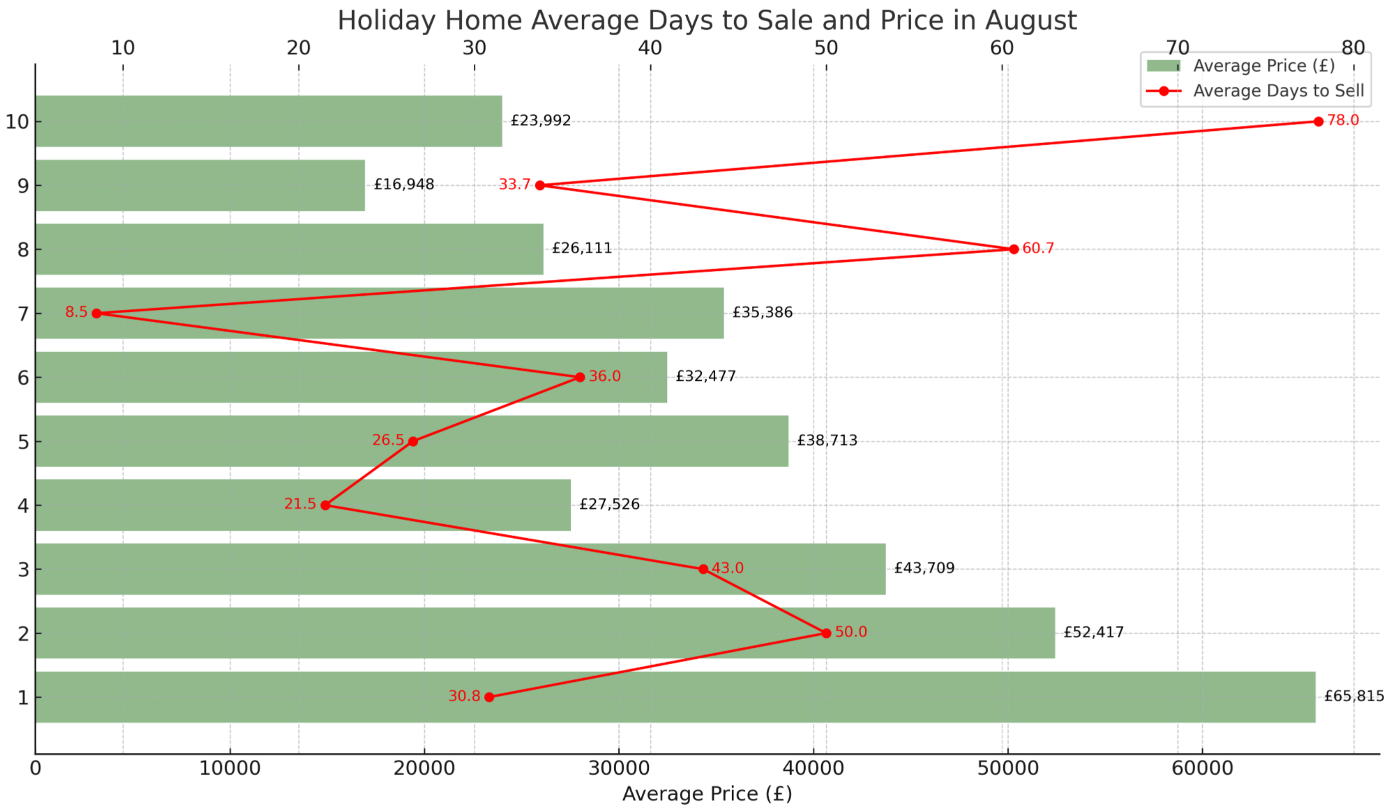
Data Powered by Brego Insight

Willerby takes the top spot for August with not only the largest volume of sales but also the highest average price at £33,277 and a 27.1% of total market share. Of note is the fact that the top 5 best selling Holiday Homes account for 78.1% of the market this month.

It is also interesting to see that Delta units see a jump in the average days to sale to 66.9 days which is quite an increase over the other Holiday Home manufacturers. Looking at the detail of those homes sold will no doubt give an indication of why this has happened. However, one might have expected a longer time to sell for units with a higher average price, which is often the scenario with consumers seeking cost effective holiday solutions, but this is not the case in this instance.

Holiday Home Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line for Holiday Homes by age up to 10 years old. This is based on data for all assets up to 10 years old.



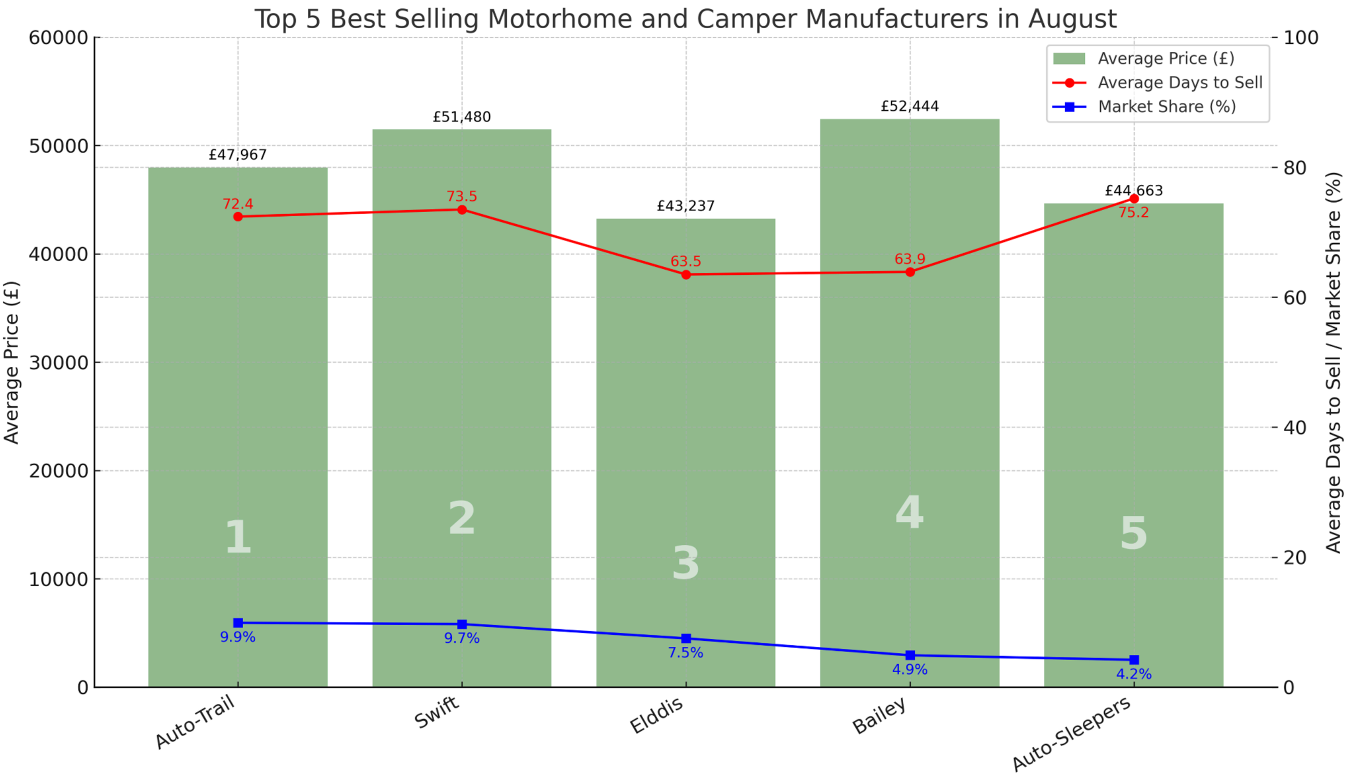
Data Powered by Brego Insight

This chart reveals the difference between the Holiday Home and Touring Home markets. At one year old the average days to sale was an impressive 30.8 days in August and suggests that there may be a shortage of younger homes in the market. However, whilst this is a possibility, the data for two year old Holiday Homes sees an increase in the average days to sell to to 50 and there is considerable inconsistency in the data as the units grow older. This is usually symptomatic of varied stock availability.

It is also interesting to see that the average sale price does not follow a consistent depreciation with age. Less surprising perhaps is the significant increase in days to sale for ten year old Homes as some of these will now be coming overrage for certain parks and will look expensive to off site purchasers.

Top 5 Motorhome and Camper Manufacturers

The chart below shows the top five best selling Motorhome and Camper manufacturers in the UK in August 2025. The average price is above the bar. The average days to sale is shown by the red line and the % of market share is shown by the blue line.



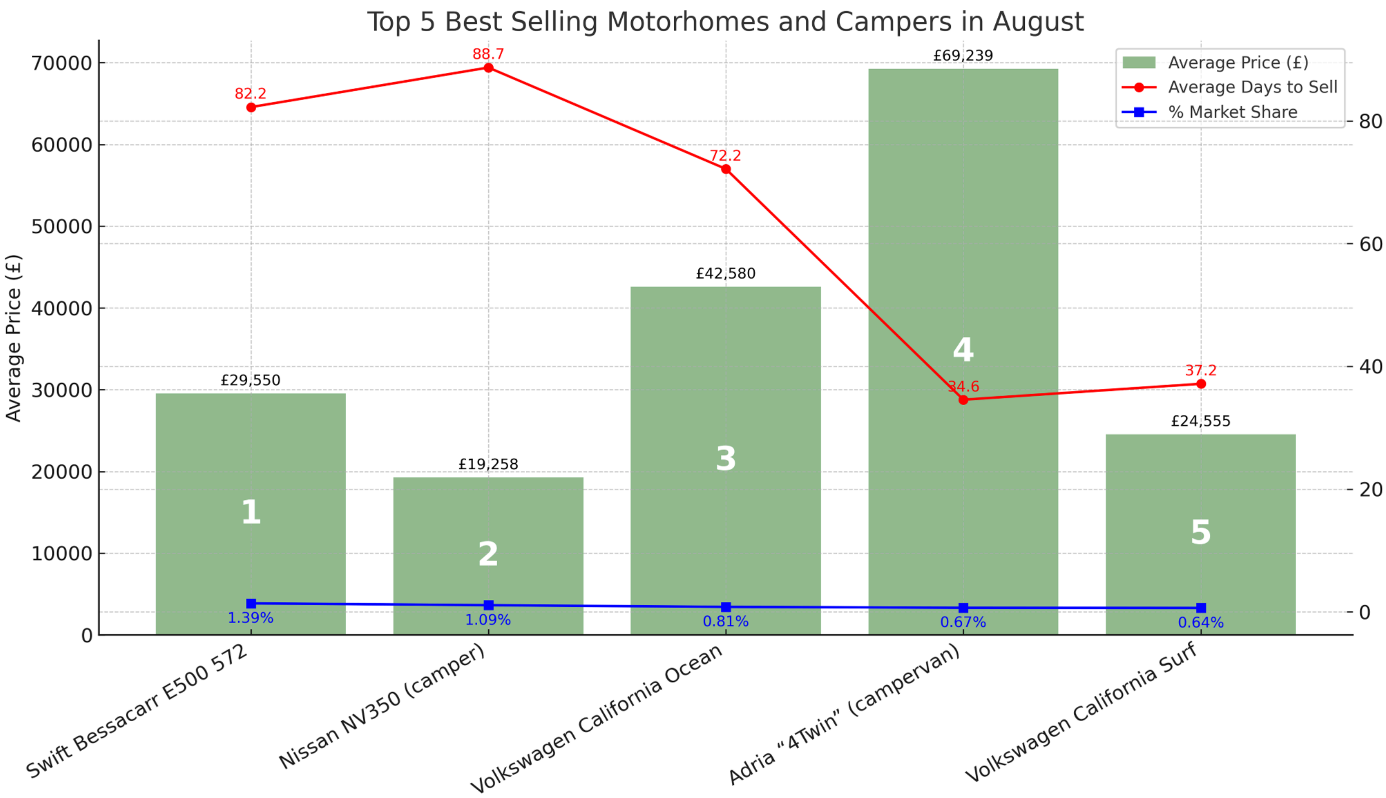
Data Powered by Brego Insight

Whilst Auto-Trail sold the largest volume of units with a 9.9% total market share in August, the data in this chart highlights a level of consistency in the market with the average price spanning a somewhat narrow £9,200 band. It is also important to see that the average days to sale is very consistent across all manufacturers, although somewhat higher than in the other leisure markets. This is perhaps indicative of the higher average sale price.

In this instance, the top 5 best selling manufacturers cover just over 36% of the total market which is much lower than the other leisure markets.

Top 5 Best Selling Motorhomes and Campers

This chart shows the top 5 best selling Motorhomes and Campers in August 2025. The average price is shown above the bar and the days to sale shown on the red line and the % of market share by the blue line.



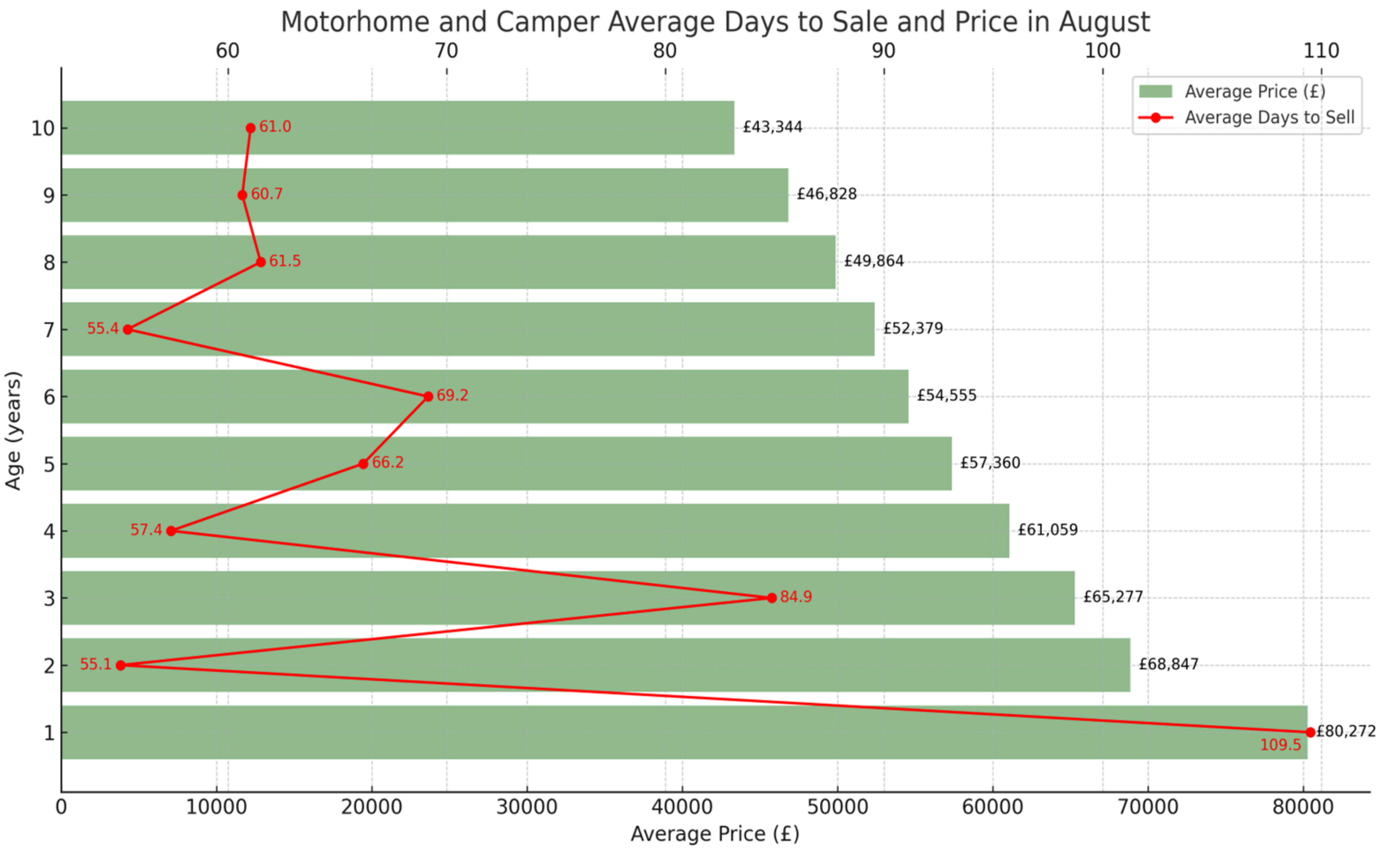
Data Powered by Brego Insight

The data in this chart shows a more varied picture of the market when looking at individual best sellers. The four berth Swift Bessacar with the end bathroom layout is the only motorhome in the top 5. Of the four remaining best sellers, all of which are campers, two are from Volkswagen.

All models have a low % of the whole market which demonstrates the wide variety of models available for sale. This is highlighted by the average sale price which spans a £50,000 price band from the low cost Nissan NV350 to the high value Adria 4 Twin. The other interesting point is that the best selling models take much longer to sell and this is likely to do with market demand, although one might have expected the Swift Bessacar to have sold more quickly than the Adria 4 Twin given its lower average price.

Motorhome and Camper Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line for Motorhomes and Campers by age up to 10 years old. This is based on data for all assets up to 10 years old.



Data Powered by Brego Insight

The first thing to acknowledge whilst looking at the data in the chart is that the average sale price consistently declines with the age of the asset. This is consistent with expectations although different to the Holiday Home marketplace. However, the average price of one year old motorhomes and campers is significantly higher than two year old assets.

The data also highlights the volatility of the market in terms of the time it takes to sell models of different ages. Starting with a high 109.5 days for a one year old unit dropping to an overall low of 55.1 days for a 2 year old unit. The ultimate average days to sale is 68.1 in this market sector.

Summary

The Leisure market in August has been variable with different factors playing in each market sector. The data reveals a more volatile Holiday Home market when compared to Touring Homes and Motorhomes and Campers. With inflation increasing, interest rates reducing and consumer confidence rising despite the wider complexities of the global economy this is perhaps not a surprise.

Let us not forget that we are now heading into a quieter period as the consumer demand will begin to decrease as the holiday season begins to falter. Perhaps in this scenario we will see greater consistency in the Holiday Home sector whilst a drop off for Touring Homes is likely to be more pronounced. As ever the weather in Q3 and Q4 will have a marked impact.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting edge AI driven Insight platform to help bring detail and clarity to the complex UK Leisure market.