



Brego
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Leisure Market Insight

February 2026

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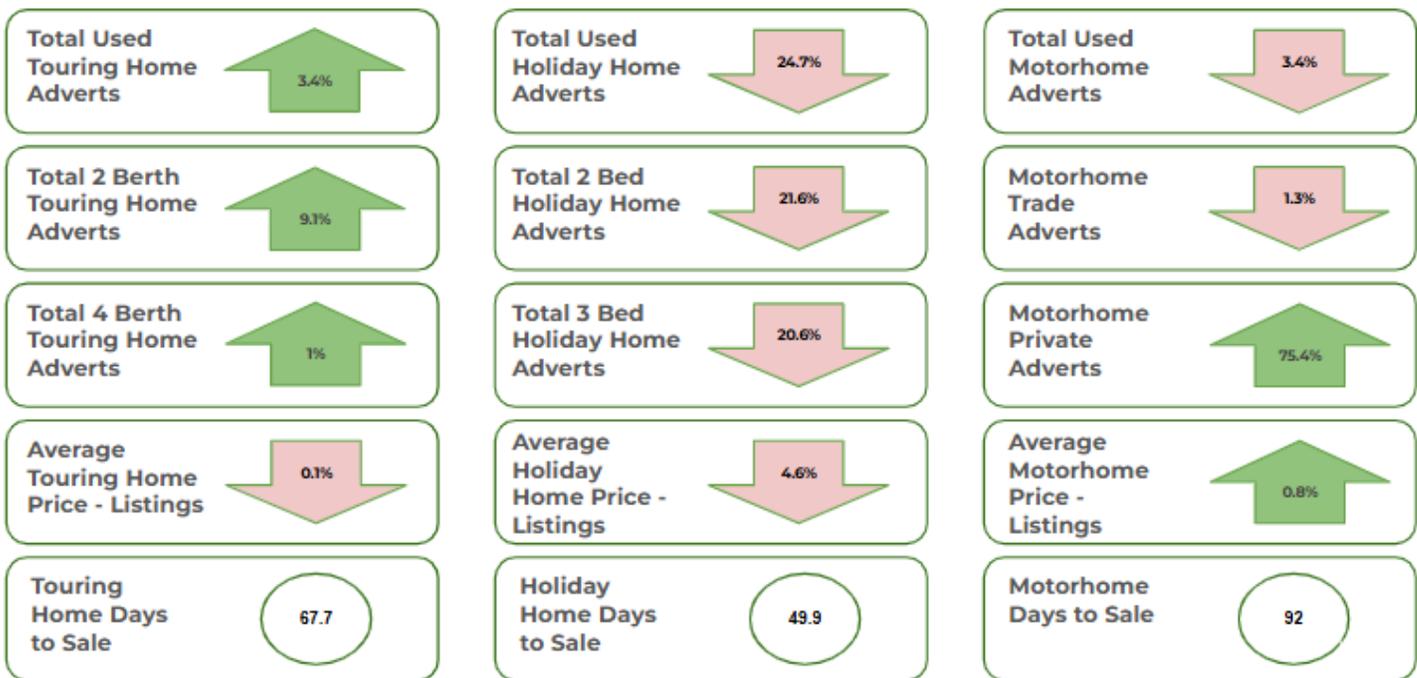
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February Monthly Leisure Market Insight

The February Leisure Market Report reviews what happened in the UK Leisure market sectors compared to the previous month and highlights the key areas of the economy that impacted the Leisure sector and economy as a whole during the month.

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 February when compared with market activity experienced in January:-

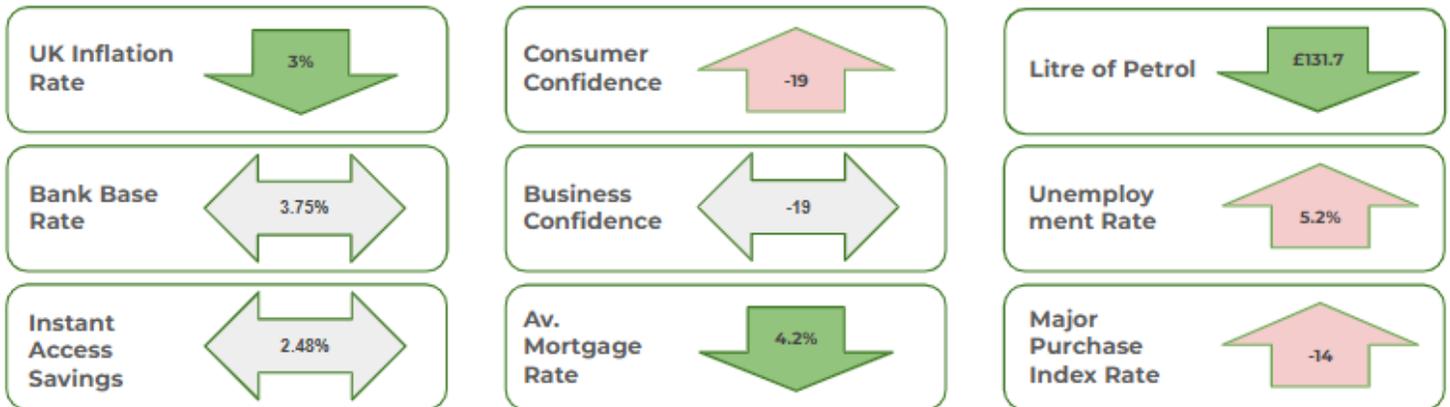


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February appeared to have been a diverse month for the Leisure sector with performance varying depending on the market verticals. Touring Homes enjoyed an increase in both advert listings and sales, the latter recording an increase of 11.5% over the previous month. Holiday Homes saw a more challenging market with a significant drop in the number of adverts and a marked 47% decline in sales which came as a surprise. The Motorhome and Camper vertical experienced an increase in adverts but also a fall of 3.8% in sales which is uncommon at this time of year.

The only thing that may have impacted interest in Holiday Homes and Motorhomes may have been the success of new product sales at the Caravan, Camping and Motorhome Show at the NEC at the end of February.

Key UK Economic Indicators



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

The economic forecast for February had been varied, but the reality was more positive than expected as consumers returned to the leisure retail sector with a little more cash in their pockets. The increase in digital activity coupled with improved footfall at the Touring Home dealers was encouraging and defied the fact that the consumer confidence index increased by 3 points to -19 for the month. There was additional good news as the rate of inflation came down to 3% along with a reduction in the cost of fuel and slightly lower mortgage rates, all of which helped to give a positive feel for the consumer to work with.

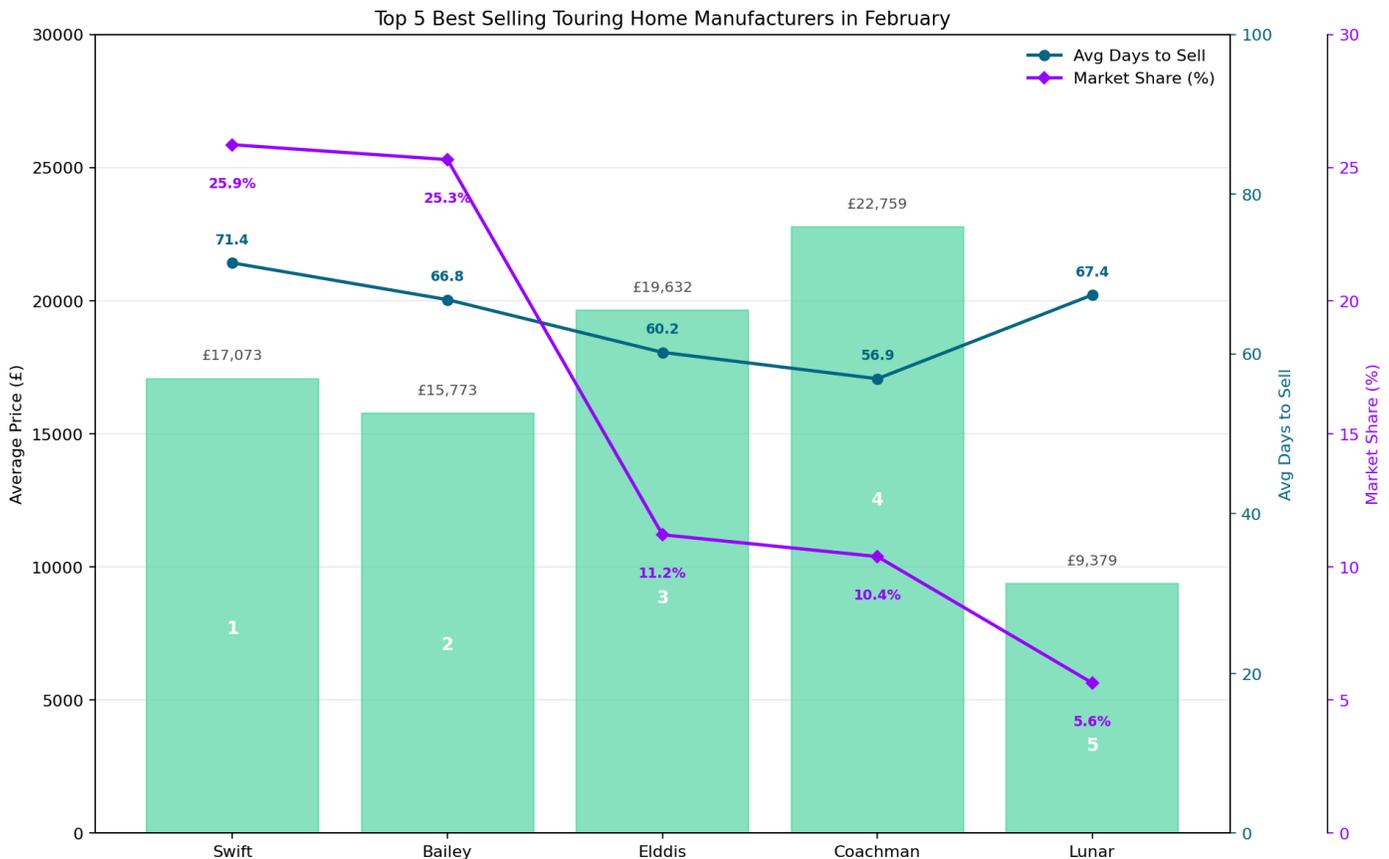
This kind of optimism was mildly tempered by an increase in the unemployment rate, although this was widely expected, along with a decline in the major purchase index rate. However, there were clouds on the horizon and the first cloud was the continued harm the government and prime minister were doing to their reputation post the Mandelson and Epstein debacles.

On February 28th matters took an ugly turn when the US and Israel threw the global economy into a potential meltdown by taking military action against Iran. Their actions, which are perhaps illegal, have subsequently resulted in chaos in the Middle East. Whilst the loss of human life and infrastructure damage has been horrific, the wider global impact will not be known for some weeks.

As it stands today, very little oil is coming out of the region which provides around 20% of the worlds oil supply, and the immediate impact on the world economy has seen a 10% increase in the cost of oil, 20% increase in the cost of gas and an expectation of perhaps a 0.6% headline global increase in inflation. The next few months may well see the UK impacted more heavily, and of course this kind of global unrest will probably mean there will be no further decrease in the inflation rate and it is unlikely that the Bank of England will vote for further base rate reductions for the foreseeable future. For both humanitarian and economic reasons an early cessation of the military action is essential.

Top 5 Best Selling Touring Home Manufacturers

The chart below shows the Top 5 best selling Touring Home manufacturers in the UK in February 2026. The average price is above the bar and the average days to sale is shown by the blue line and the percent of market share is shown by the purple line.



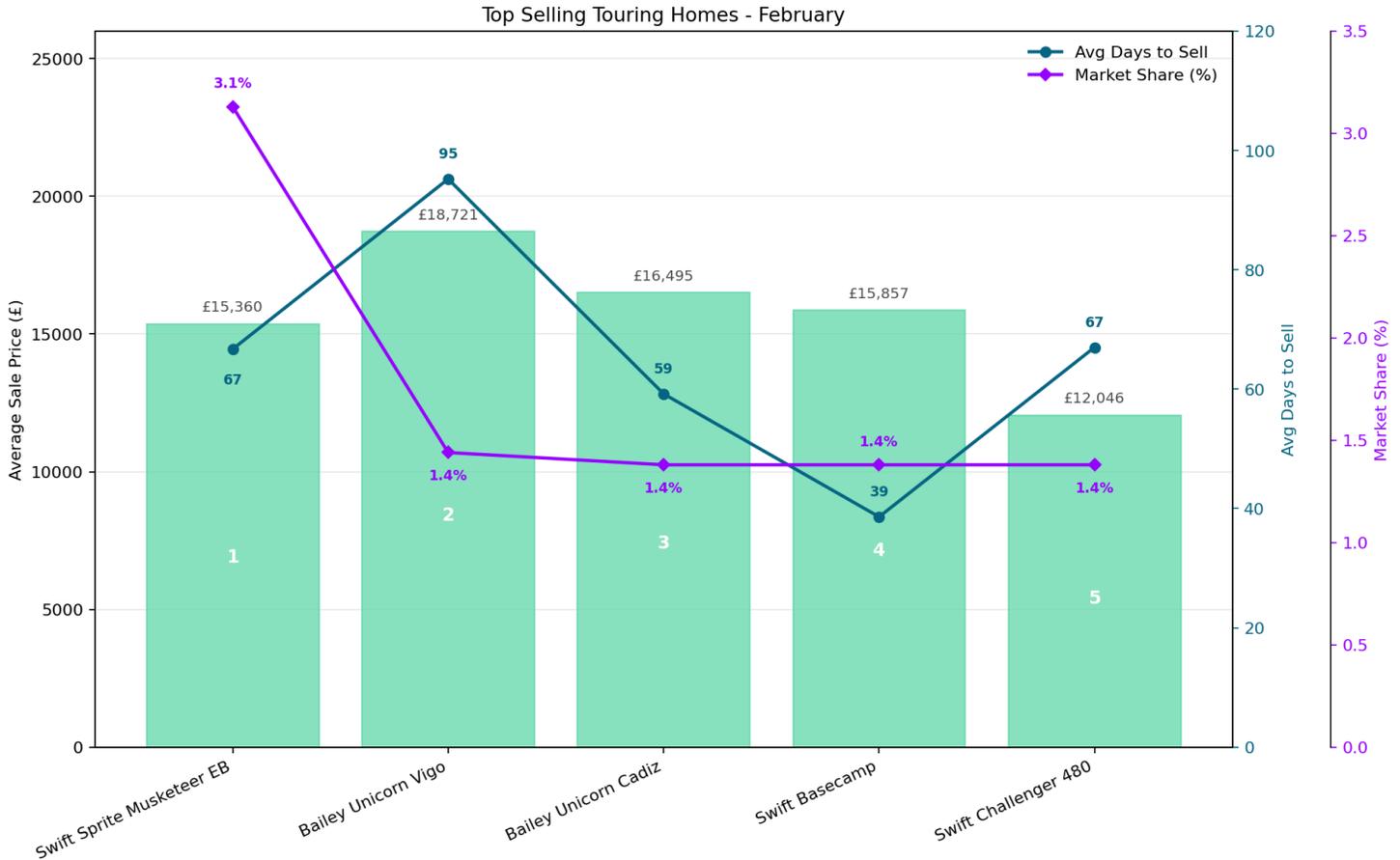
Data Powered by Brego Insight

Data for February showed that the Top 5 Best Selling Manufacturers remained in exactly the same order as they were in January but it was a close call. Looking at a high level sales increased by 9.9% which was slightly lower than the whole market whilst the average days to sale improved by 5.7 and fell to 64.5 perhaps reflecting early year “Sales” activity. However, the average sale price showed a slight fall of 2.9% to £16,923.

Looking in more detail, the chart highlights the fact that the difference between first and second spot was very close with Bailey lifting their market share to 25.3% which was 1.9 percentage points higher than in January and just 0.6 of a percentage point behind Swift. This gain was primarily at the expense of Elddis who lost 0.6 of a percentage point, although they retained third spot. The biggest winner in the average days to sale was Bailey that improved by 14.3 days to 66.8. Only Lunar saw an increase in days to sale.

Top 5 Best Selling Touring Homes

The chart below shows the Top 5 best selling Touring Homes in February 2026. The average price is shown above the bar and the days to sale shown on the blue line with the percent of market share on the purple line.



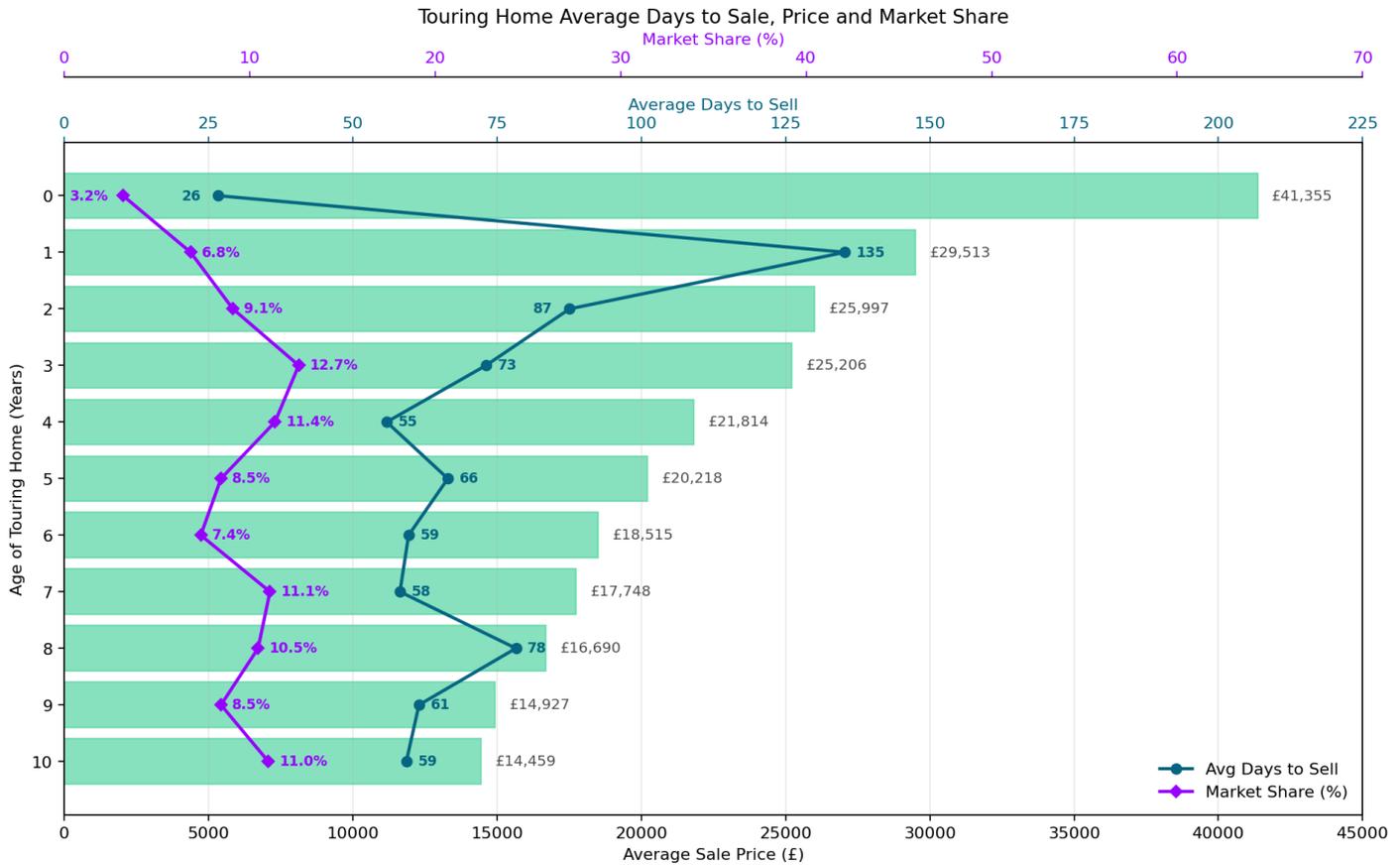
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The February data reveals that there has been a change in the Top 5 with the Swift Basecamp and the Swift Challenger 480 replacing the Swift Sterling Eccles 565 and the Swift Challenger 580 that were in second and fourth spot respectively in January. The Sprite remains in the top spot, a place it has held since Brego started reporting in October 2025, and in doing so this month increased market share by 0.7 of a percentage point to 3.1%. All the remaining Top 5 share a market share of 1.4% which is rare to see.

Overall for the Top 5, sales increased by 16.8% which is higher than the total market increase of 11.5% and the big winner in this was the Sprite that saw a 0.7% increase in volume. From a days to sale perspective the Bailey Unicorn Vigo saw the biggest improvement reducing by 12.9 days to 95.2 but it was the Swift Basecamp that sold the quickest at 38.6 days.

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 sale on the blue line with a percent of market share on the purple line. The data covers Touring Homes by age up to 10 years old.



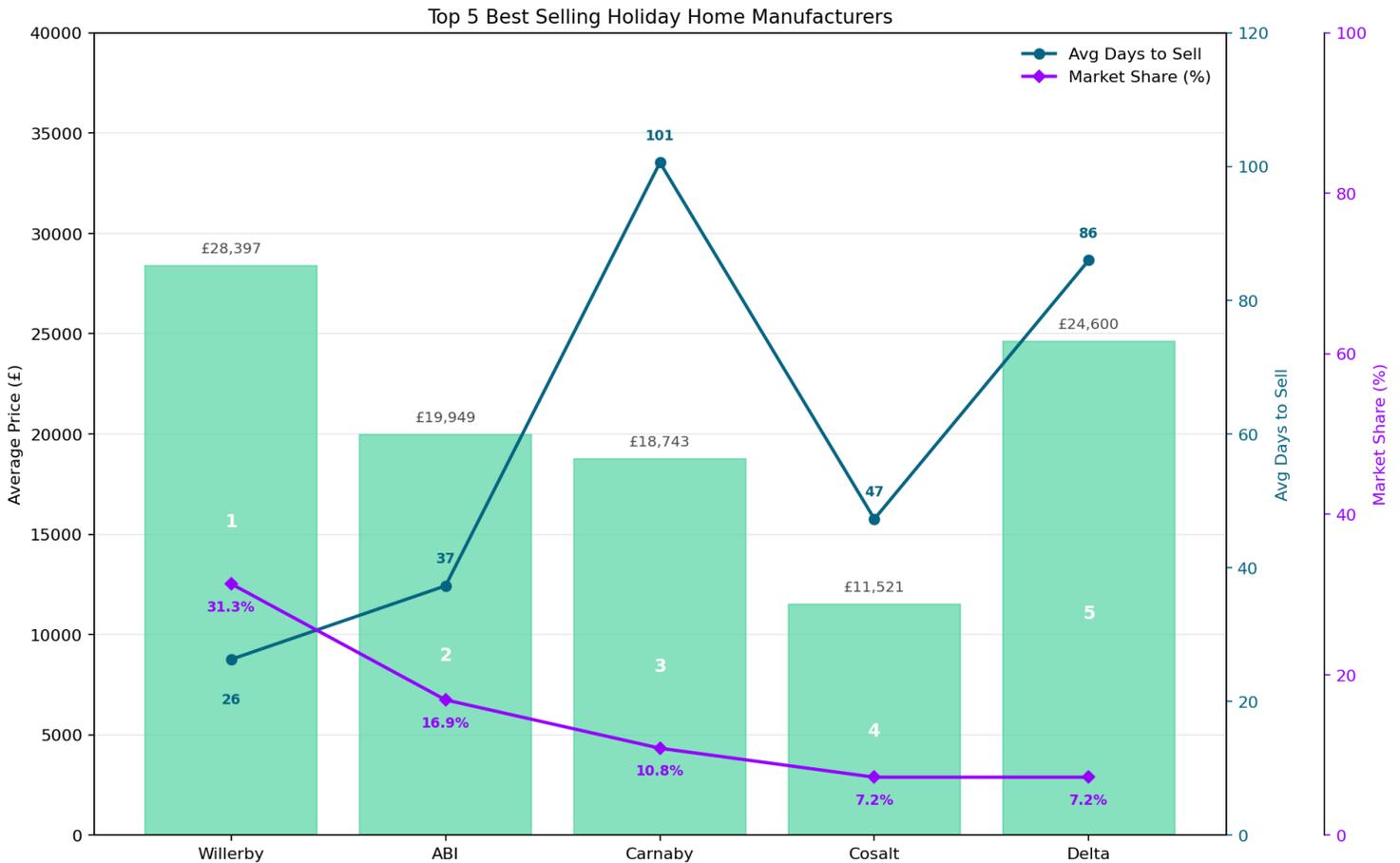
Data Powered by Breggo Insight

This chart surfaces the activity in the market by age of the Touring Home and in February the average price by age has declined each year as would normally be expected, but is not always the case. Overall, the average price has decreased by 2.7% to £22,404 after a chunky 14.4% increase last month. Looking at individual age it was the six year old category that showed the biggest change in price with a decrease of 12.8% to £18,515.

Looking at market share, the biggest changes came for nine year old Touring Homes which declined by 3.3 percentage points whereas the biggest gains came for three year old Tourers that increased by 3 percentage points. In sales volume terms this data tranche shows an increase of just 5% which is 6.5 percentage points behind the whole market figure and suggests older Touring Caravans sold well during the month.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the Top 5 best selling Holiday Home manufacturers in the UK in February 2026. The average price is above the bar with the average days to sale shown by the blue line and the percent of market share is shown by the purple line.



Data Powered by Brego Insight

In February there was a change in the Top 5 with Willerby and ABI retaining first and second place whilst Carnaby replaced Swift in third place and Cosalt moved to fourth pushing Delta to fifth spot.

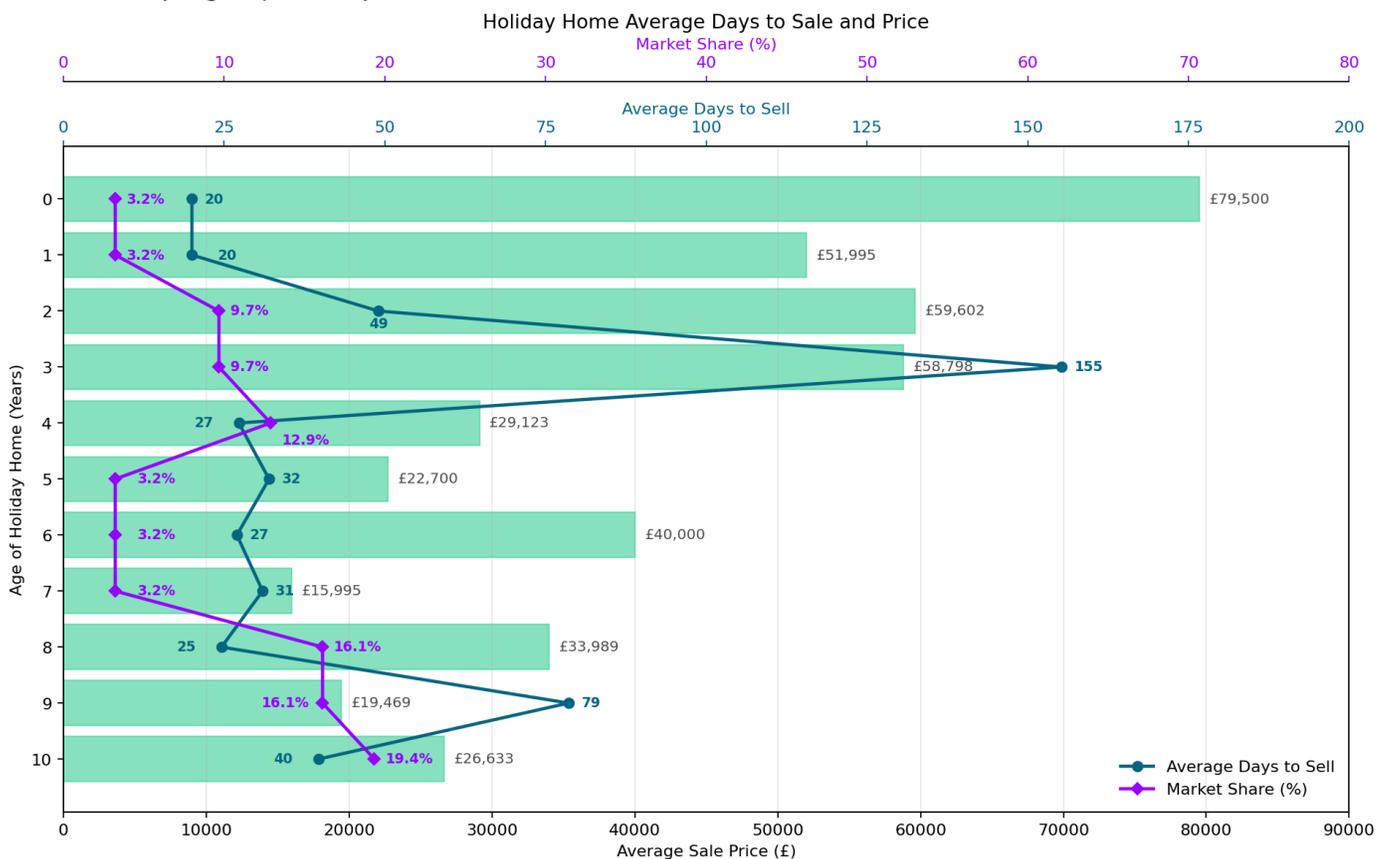
Looking at a high level and the stats are not encouraging as the data shows a reduction in sales of 53% when compared with January which is quite a fall and in many ways hard to understand. Those customers with the Brego platform will be able to find more detail by using the Brego Insight tool.

Those Holiday Homes that did sell sold at a quicker rate with the average days to sale dropping by 25 to 59.5 which is more in line with expectations for this time of year. The average price also dropped to £20,624 which equates to 21.5% and highlights that older Holiday Homes were most popular.

It is also worth noting that the total market share for the Top 5 also fell by 8.1% and this was at the expense of Willerby and ABI that lost 4.9 and 5.8 percentage points respectively.

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 blue line with the percent of market share on the purple line. This data is for Holiday Homes by age up to 10 years old.



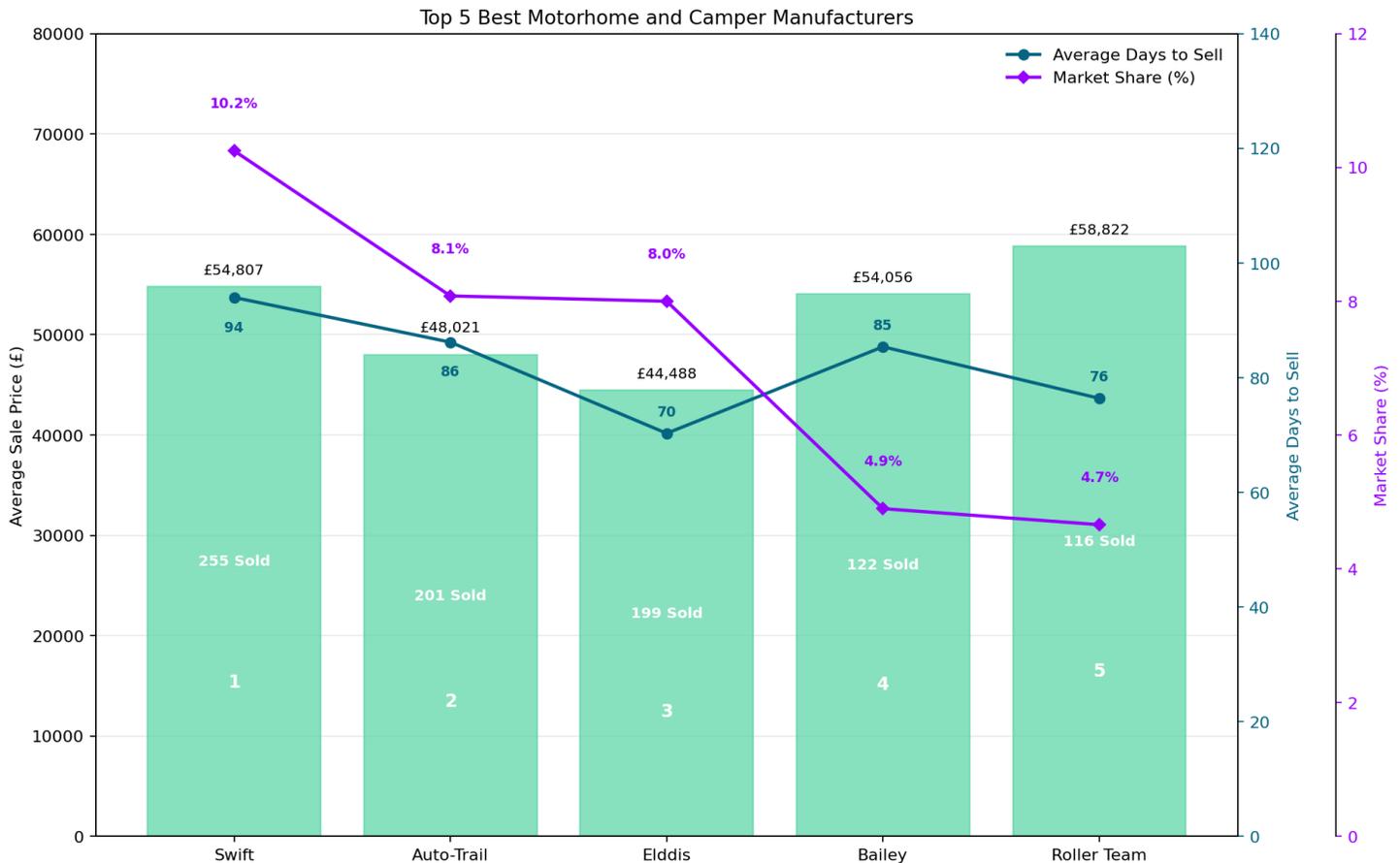
Data Powered by Brego Insight

Once again the February data highlights that in the quieter months of the year the market trends can look somewhat strange. Under normal circumstances the bars should reflect a gentle decrease in the average sale price year on year but it is clear that this is not the case this month. There were surprise troughs for years one, four, five, seven and nine and a slightly high average price for six year old Homes.

The positives are that overall the average sale price showed stability with an increase of 3.4% and average days to sale showed a positive reduction of 6.6 days, despite peaks for three and nine year old Homes.

Top 5 Motorhome and Camper Manufacturers

The chart below shows the Top 5 best selling Motorhome and Camper manufacturers in the UK in February 2026. The average price is above the bar. The average days to sale is shown by the blue line and the percent of market share is shown by the purple line.



Data Powered by Brego Insight

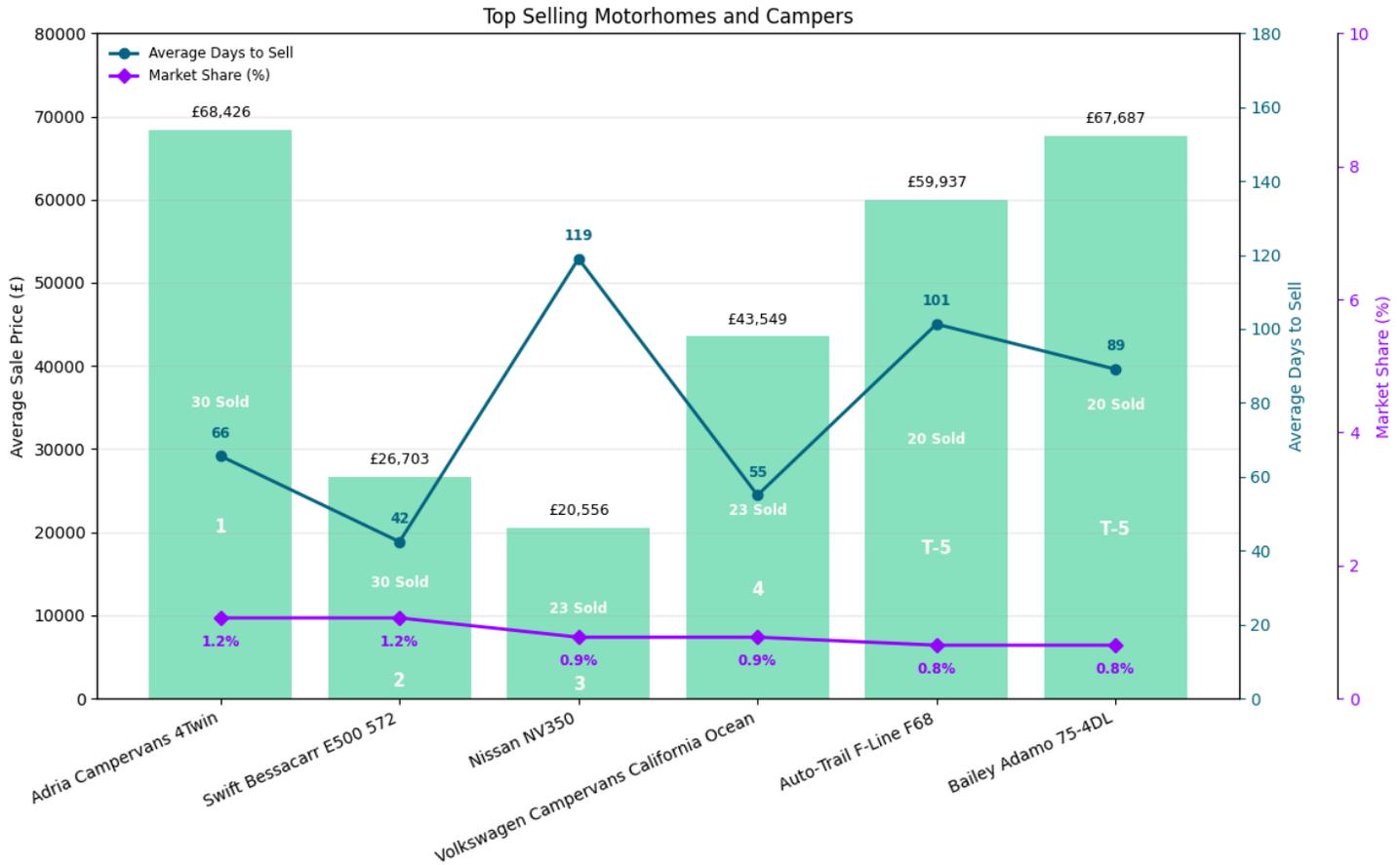
In February the Top 5 looked very similar to January with the top four spots remaining the same and fifth spot was taken by Roller Team at the expense of Auto-Sleepers. Strangely the % of market share remained almost exactly the same overall at 35.9% although Auto-Trail lost 1.1% dropping to 8.1% and Roller Team entered with 4.7% which was 1.1% higher than Auto-Sleepers previously had.

Looking at a high level and sales decreased by 1.3% which is better than the 3.8% drop for the whole market. From an average days to sale perspective there was an improvement of 8.7 days to 82.5 which is 9.5 days quicker than the whole market and the average sale price increased by 7.9% to £52,039.

Both Auto-Trail and Elddis showed a significant change in average days to sale improving by 25.3 and 8.5 respectively although Swift slowed by 15.2 days and Bailey by 6.3 days.

Top 5 Best Selling Motorhomes and Campers

This chart shows the Top 5 best selling Motorhomes and Campers in February 2026. The average price is shown above the bar and the days to sale shown on the blue line and the percent of market share by the purple line.



Data Powered by Brego Insight

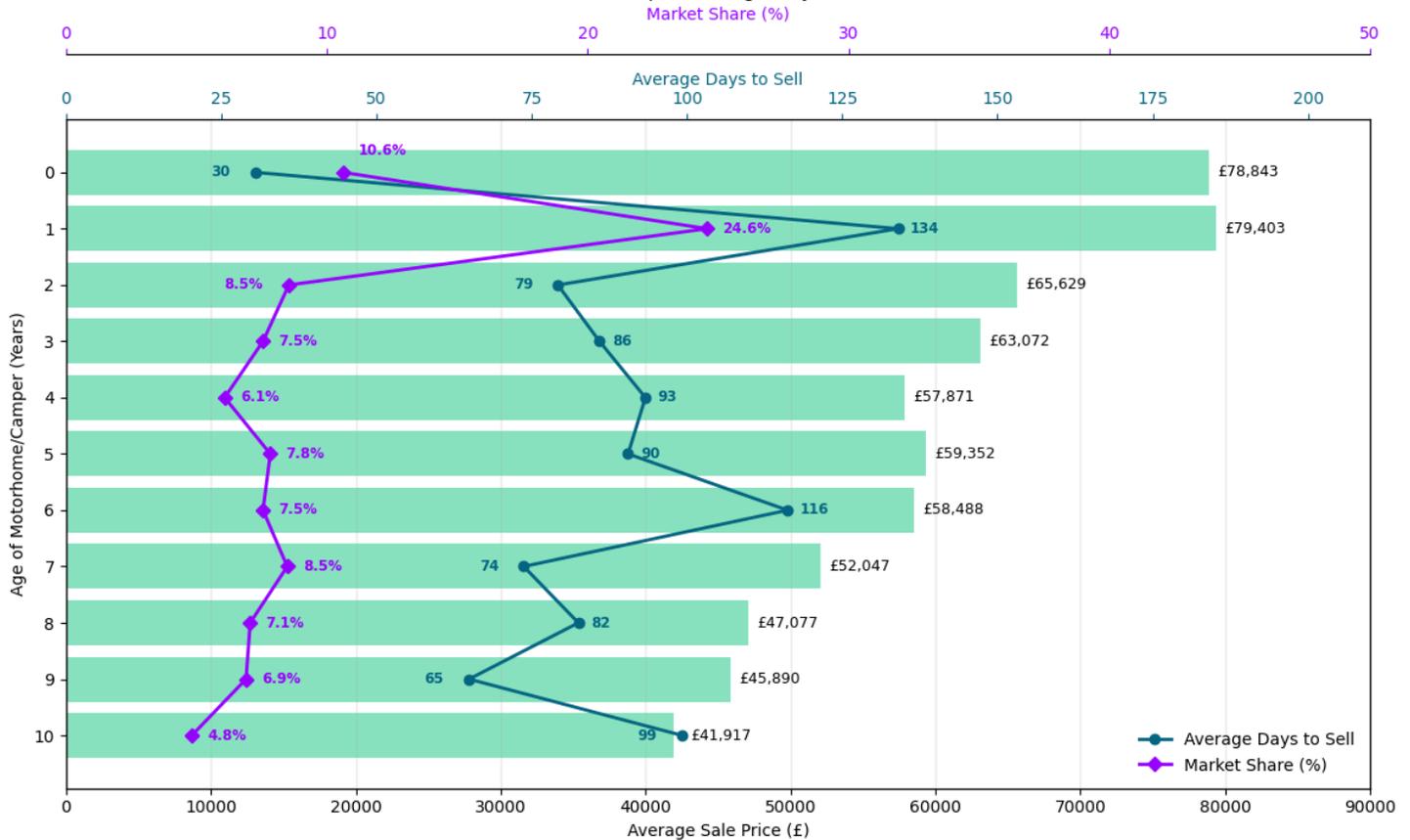
The first important thing to highlight is that for February we have six models showing on the chart as there was a tie for fifth spot with Bailey and Auto-Trail selling the same number of Motorhomes. Of the six in the chart three were Motorhomes and three were Campers. Of the motorhomes the Bailey and the Auto-Trail use the Transit chassis and engine and both have rear lounges whilst the Swift is on the Fiat chassis and engine and features fixed rear single beds.

At a high level sales for the Top 5 increased by a significant 47.5% which is way higher than the whole market and there were three new entries in the form of the Swift Bessacar, Nissan NV350 and Bailey Adamo which replaced an Auto-Sleepers Symbol and a Pilote Evidence. Overall the average sale price dropped by 15.6% to £47,810 and the average days to sale improved by 2 to 78.7. Of note is the fact that the % of market share increased markedly by two percentage points.

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 blue line with the percent of market share on the purple line for Motorhomes and Campers by age up to 10 years old.

Motorhome and Camper Average Days to Sale and Price



Data Powered by Brego Insight

Generally speaking this data view for February 2026 looks to be fairly stable with a consistent drop in average sale price by year from sub one year old units to 10 year old units. However, there is a trough for four year olds and slight peaks for five and six year olds. From a market share perspective the biggest change was for sub one year old units that saw an increase of 4.5 percentage points with the second largest shift being recorded as a two percentage point drop for four year old units.

Looking overall, the average sale price decreased marginally by 1.1% to £59,054 whilst the average days to sale dropped by 3.4 to 86.4 which is positive although there were anomalies for one year, six year and 10 year old units.

Summary

A more patchy market in some respects with differing performance in the individual Leisure Market verticals. Touring Homes saw the best of footfall and enquiries and was generally stable overall with the Motorhome and Camper vertical showing a reasonably fair performance for the time of year, although the drop in sales was a little surprising. It was the Holiday Home sector that was most difficult with a heavy drop in both sales and the volume of adverts and this is a little worrying given the market should really have started to open up.

On a really positive note, the Caravan Camping and Motorhome show at the NEC has been hailed a success with a 12% increase in visitors the previous year. There were over 700 vehicles on display in five halls that covered almost 19 acres and there were 420 exhibitors. Of note Swift relaunched the Ace brand to the market and Auto-Trail Marquis and Auto-Sleepers previewed some exciting new models. In addition, the Fifth Wheel Company returned to the show after a ten year absence with a couple of new high end 5th wheel models. Next year's dates have already been released and the show will return to the NEC on February 16th for a six day run.

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.