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Leisure Market Insight

November 2025

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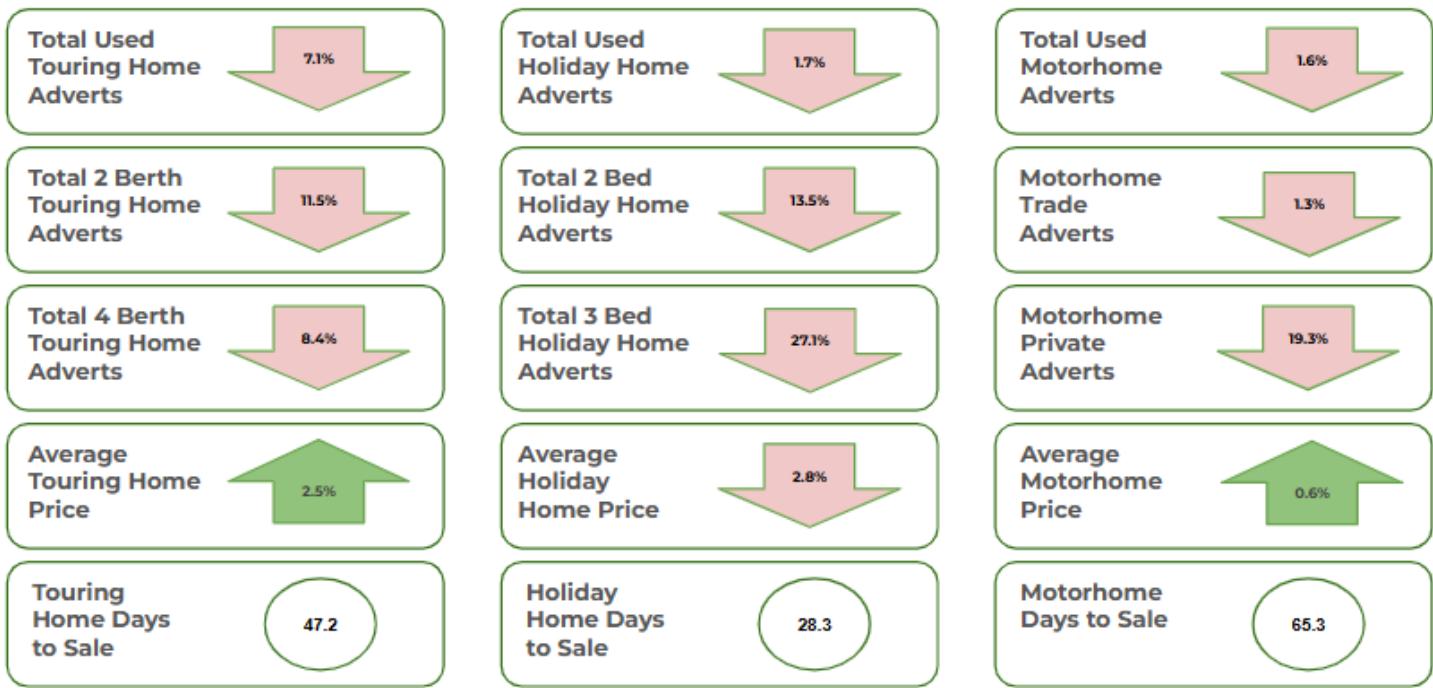
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November Monthly Leisure Market Insight

The November 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.

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 November when compared with market activity experienced in October:-



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The November KPIs give an interesting message that could be read as a positive market, although the reality is quite the opposite. With advert listings declining across all three verticals the implication is that sales are good, but this is merely a reflection of dealers and park operators reducing advertising commitments for cost reasons.

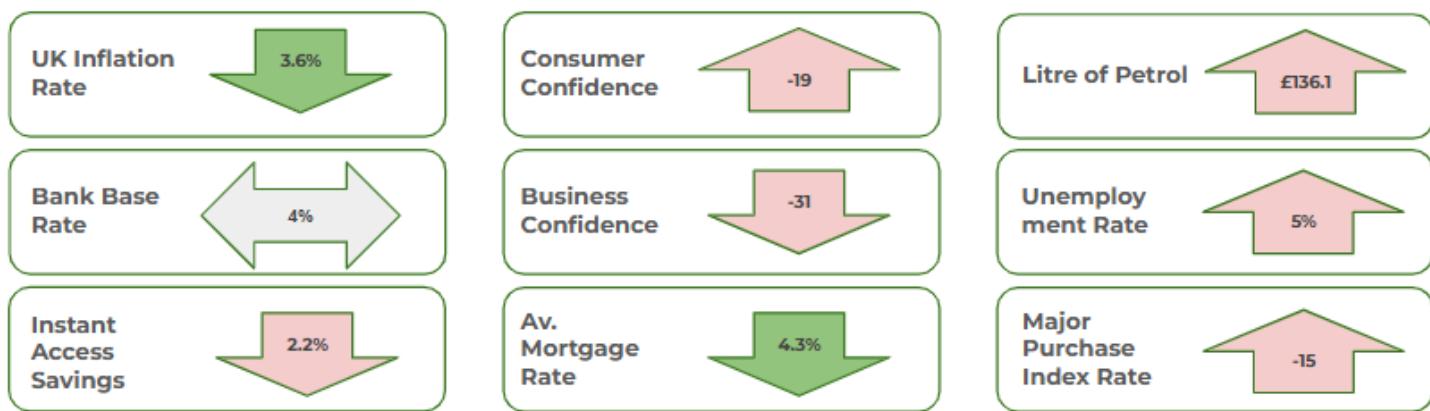
The reality is that Touring Home Sales are down by 28.8% in comparison to October and are 6.1% lower than the same period last year. The average days to sale are better though having improved by 6.6 days compared to October which is interesting and may be skewed by the reduction in advertising rather than by actual sales.

For the Holiday Home vertical, sales are down 23.2% compared to October and 17.4% when looking at November 2024. Neither of these are positive for the industry, although as with Touring Homes the days to sell have improved by a notable 15 days.

The Motorhome and Camper data shows a softer drop of 18% in sales compared with October and just 1% lower than November 2025. The average time to sell dropped by just 1 day. This headline data highlights the difference between the asset types.

All said, we should not be surprised as November is the quietest part of the year for all UK retail markets nationwide although this part of the Leisure Sector is always slower than others, particularly given the economic position that is covered in the next section.

Key UK Economic Indicators



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

From an economic point of view last month was a very tricky period overall. The lateness of the budget impacted so much of the economy in a negative way it is hard to pinpoint the positives. There were high expectations that the government would break not only their own fiscal rules but also taxation promises given at last year's budget around increased personal taxation. The Chancellor even paved the way for this with a pre-budget speech indicating tax rises would be necessary.

The reality was a U-turn that surprised all those that accessed the budget details, released by the OBR, half an hour before the Chancellor took to the floor. However, there was little good news overall. Although the Chancellor was eager to say that no personal tax increases were implemented, the freeze on tax thresholds is a stealth tax that many won't understand properly quite yet.

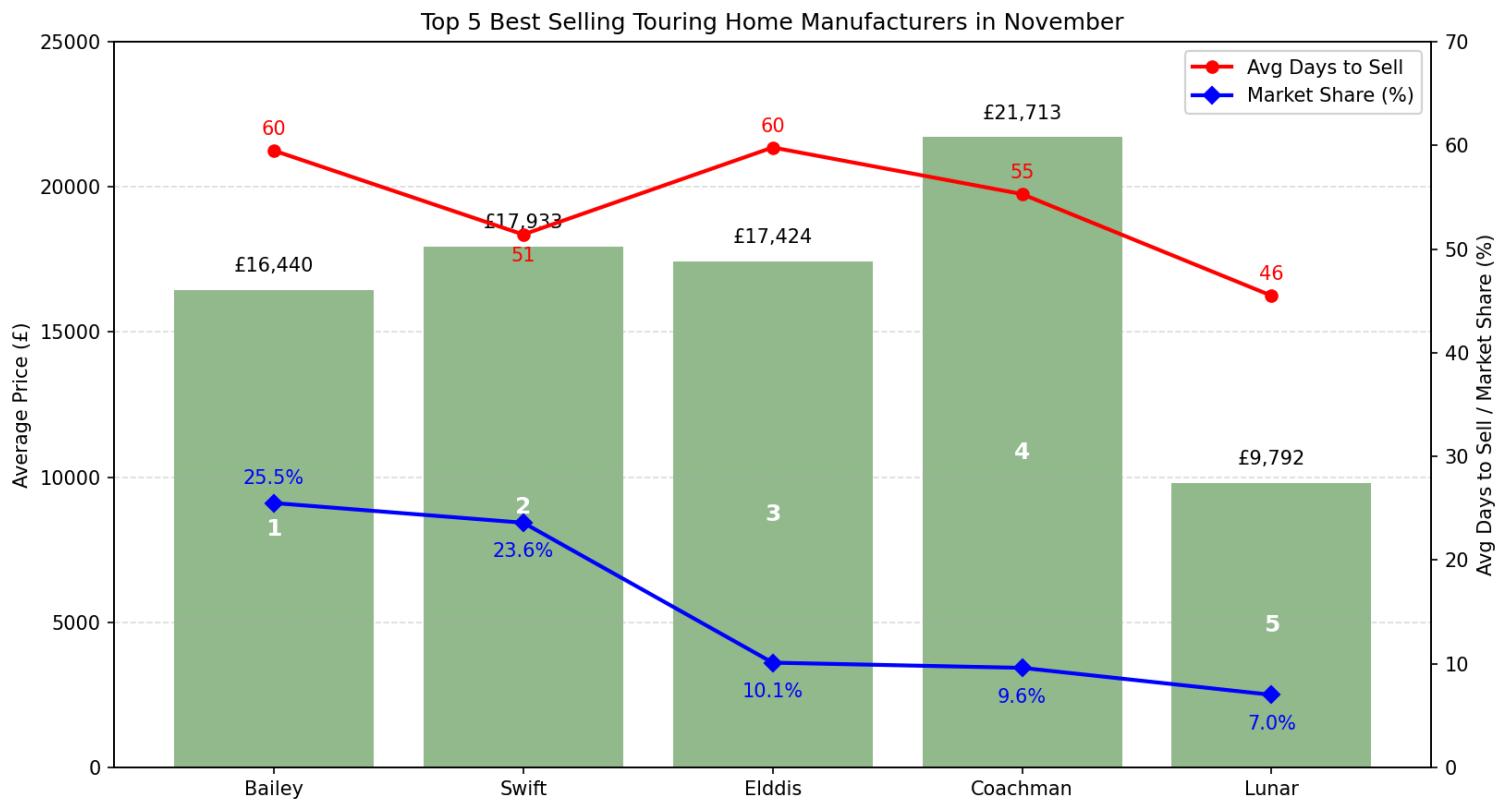
From a leisure market perspective there were punitive property tax changes introduced and due to come into effect from April 2027 and although these are primarily aimed at individual property investors they may affect owners who let out their Holiday Homes. The overnight Visitor Levy or

Tourism Tax is also likely to impact Holiday Homes and the BH&HPA has warned of the impact this will have on domestic holiday costs potentially damaging the sector. In addition immediate changes to Capital Gains Tax sees the relief on qualifying disposals of EOT's drop from 100% to 50% which will impact succession planning for family owned holiday parks.

However, for the Motorhome and Camper sector the big kick came from the announcement of a new pay-per-mile tax for EV and PHEV drivers. Essentially this new tax is designed to replace falling road tax revenue on ICE vehicles and reduced income from tax on fuel. Unfortunately, this does not encourage consumers to swap to EVs and Hybrids and in an already difficult landscape this will hinder this part of the leisure sector.

Top 5 Best Selling Touring Home Manufacturers

The chart below shows the Top 5 best selling Touring Home manufacturers in the UK in November 2025. The average price is above the bar and the average days to sale is shown by the red line and the percent of market share is shown by the blue line.



Data Powered by Brego Insight

Whilst the Top 5 selling manufacturers remain the same as October, there have been some notable changes in the data. Swift lost the top spot and in doing so their market share dropped by 3.7 percentage points to 23.6%, although days to sale also dropped notably to 51. Conversely

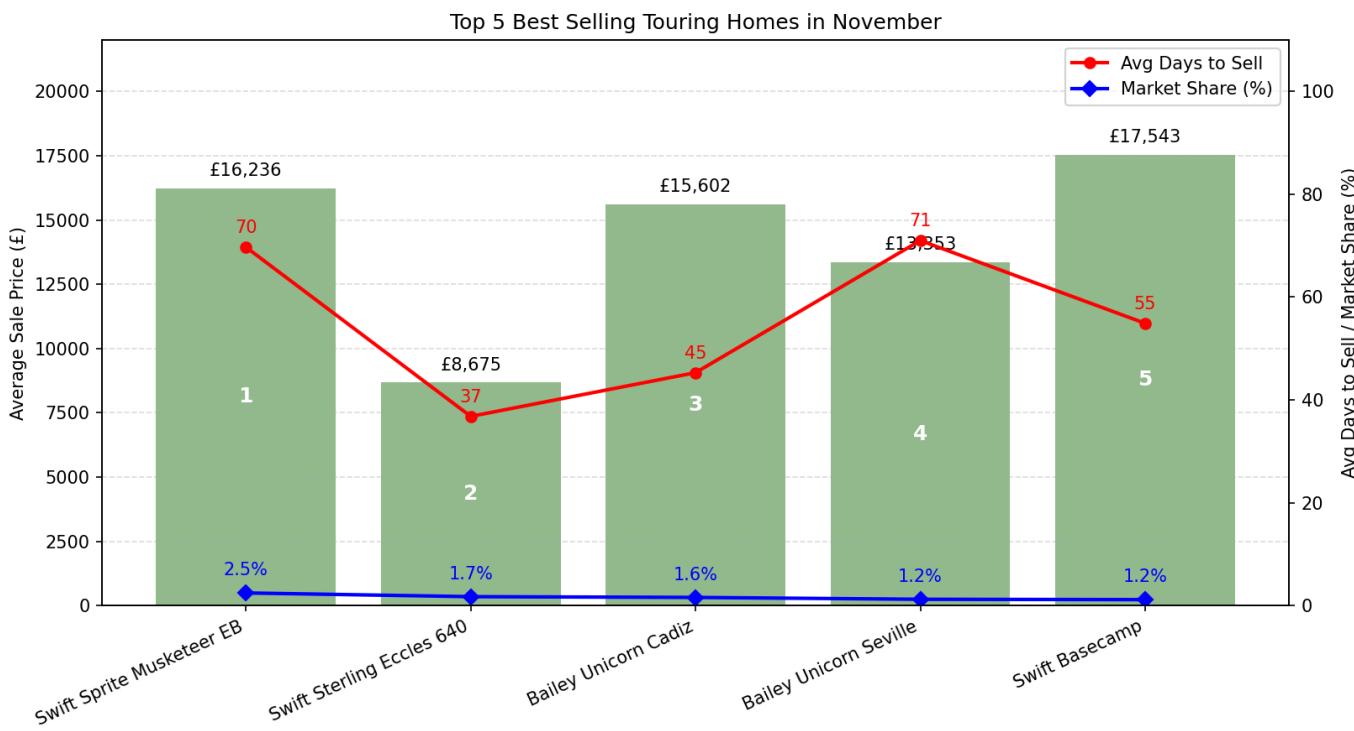
Bailey increased market share by 1.7 percentage points although days to sell for the brand increased from 45 to 60 days.

Elddis overtook Coachman to take third place although market share remained pretty close to October and edged up just 0.5 of a percentage point. Market share for Coachman remained the same and Lunar showed a nominal gain of 0.2 of a percentage point.

The average sale price for the Top 5 selling brands moved upwards by 4% to £16,660 which suggests that it was the cheaper units that were more popular during November. By Manufacturer it was Bailey that saw the largest increase in average price of £1,310, whilst Coachman retained the highest average price at £21,713 reflecting the premium nature of their caravans.

Top 5 Best Selling Touring Homes

The chart below shows the Top 5 best selling Touring Homes in November 2025. The average price is shown above the bar and the days to sale shown on the red line with the percent of market share on the blue line.



Data Powered by Brego Insight

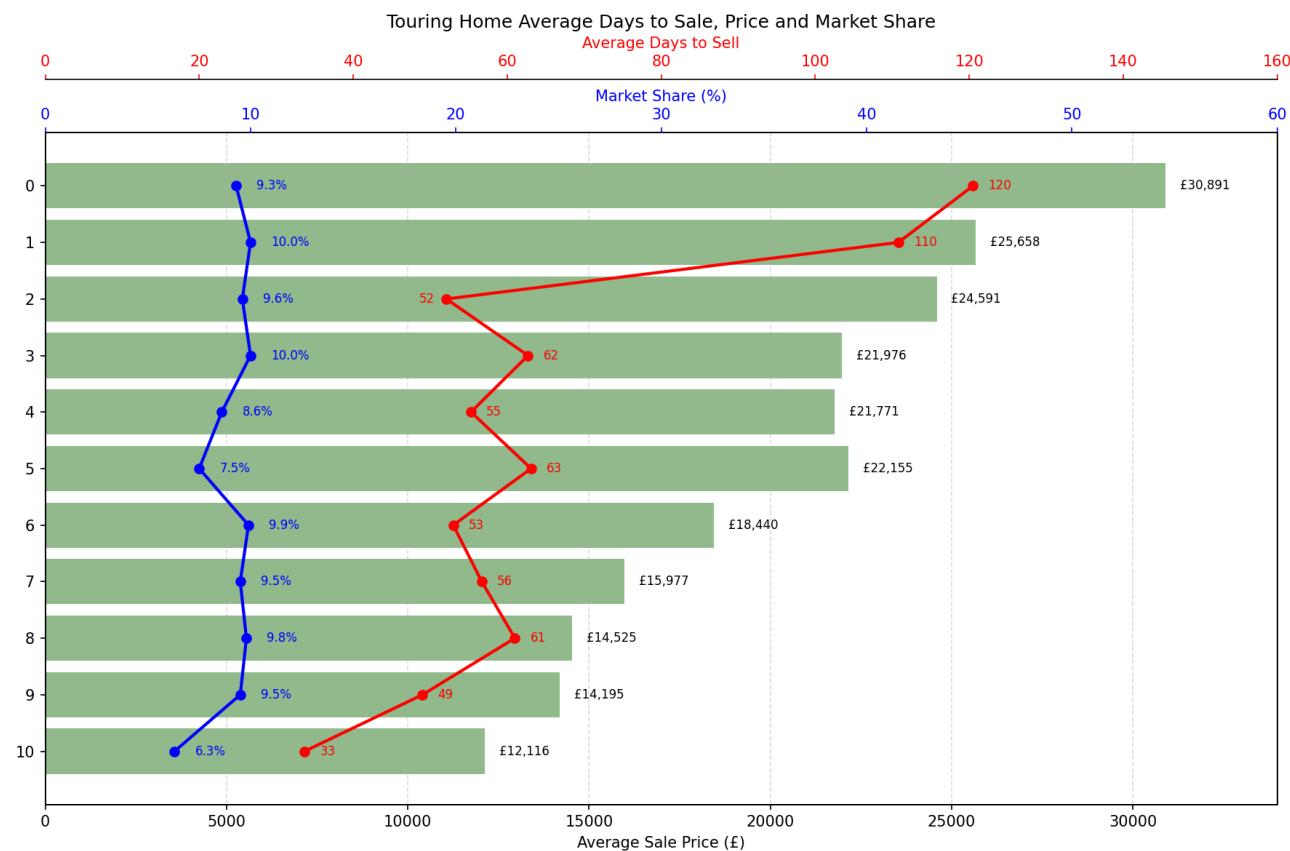
During November, individual Swift models took 3 of the top 5 spots leaving Bailey to take the remaining places. The ever popular Sprite Musketeer EB held the best selling spot as it has done for the past few months reflecting both its popularity and the volume on sale in the market. Sales

represented 2.5% of the total market which was down 0.2 of a percentage point on the October figure.

It is also interesting to see the Sterling Eccles 640 took 2nd place and this is the only twin axle caravan in the Top 5. Equally, it is also the only 6 berth model in the list too. Of note is that the average selling price would suggest that it was older models that were sold and it also scored the lowest days to sale at just 35.

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



Data Powered by Brego Insight

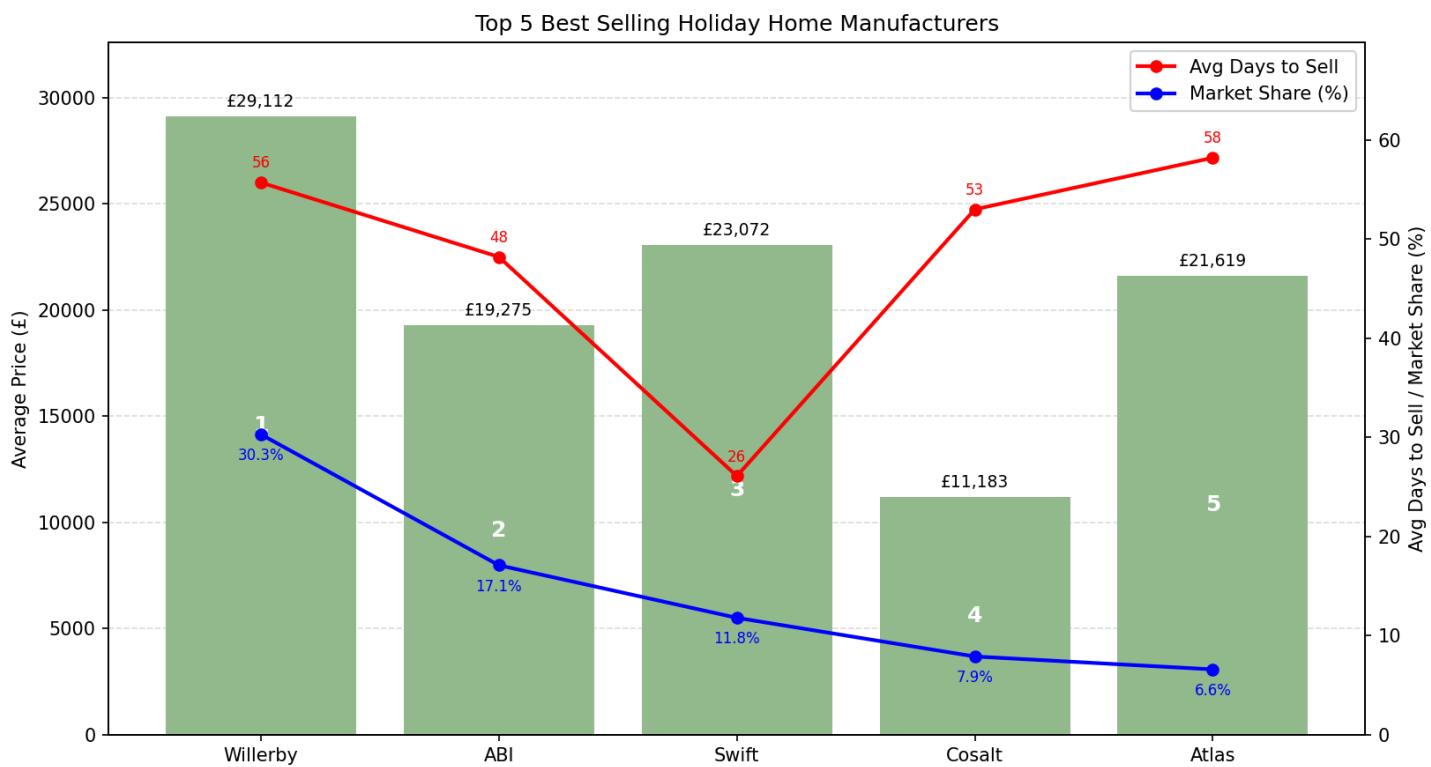
The data in this chart gives a clear indication of market activity by age of Touring Home during November. The nature of the chart means that its immediate appearance will always be fairly similar, although the detail gives key indications of nuances in the market. Of immediate note is the fact that the average sale price, highlighted by the green bars, has not declined by age in the way one normally expects. Sale data for 3 to 5 year old units is very similar, in fact the average sale price of a 5 year old Touring Home is £384 higher than a 4 year old example. This is an

uncommon occurrence that seems to happen during quieter periods when consumer demand is more sporadic.

The other significant change in the November data when compared to October is the marked drop in sales of 10 year old Tourers. The market share shrank by 3 percentage points to 6.3% and this will be something to watch over the next couple of months.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the Top 5 best selling Holiday Home manufacturers in the UK in November 2025. The average price is above the bar with the average days to sale shown by the red line and the percent of market share is shown by the blue line.



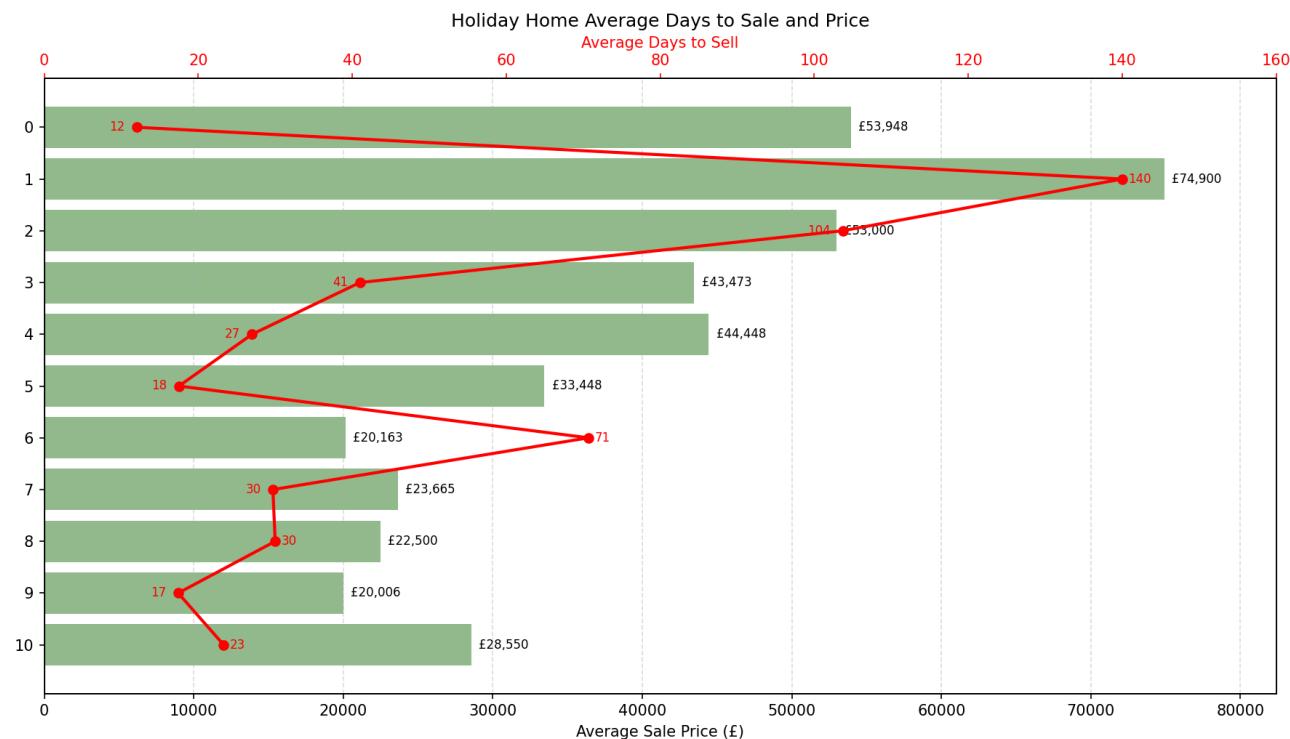
Data Powered by Brego Insight

A slight change in the Top 5 best selling manufacturers in November with Delta being replaced by Atlas and Cosalt shifting from fifth to fourth place. Whilst Willerby remained at the top of the chart with very consistent market share and average price in comparison to October, ABI experienced some significant changes. Market share dropped by 7.4 percentage points and the average price dropped by £4,346 to £19,275 signalling that cheaper units were more popular for cost conscious retail buyers. In fact the overall average sale price for the Top 5 dropped by 4.5% to £20,852 although the overall average days to sale increased by 10 days to 48.2.

Swift saw the largest improvement in days to sale dropping by 23 days to an impressive 26 days which given the time of year is quite remarkable. In addition, the average sale price for Swift dropped by £9,272. This could indicate that there was some tactical activity to get older Homes sold and clear the pitches before the quiet weeks of December.

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



Data Powered by Brego Insight

This is always an interesting view of the market and the November data is generally speaking more consistent than we saw for October. Of significant note is the average days to sale for 1 year old Holiday Homes which has peaked at 140 days which is 22 days longer than in October. It was sub 1 year old Homes that sold quickest at 12 days which is somewhat surprising given the time of year and also suggests that there may be a shortage of these in the market. This is a possible scenario as dealers wait for the new model year Homes to arrive from the factories.

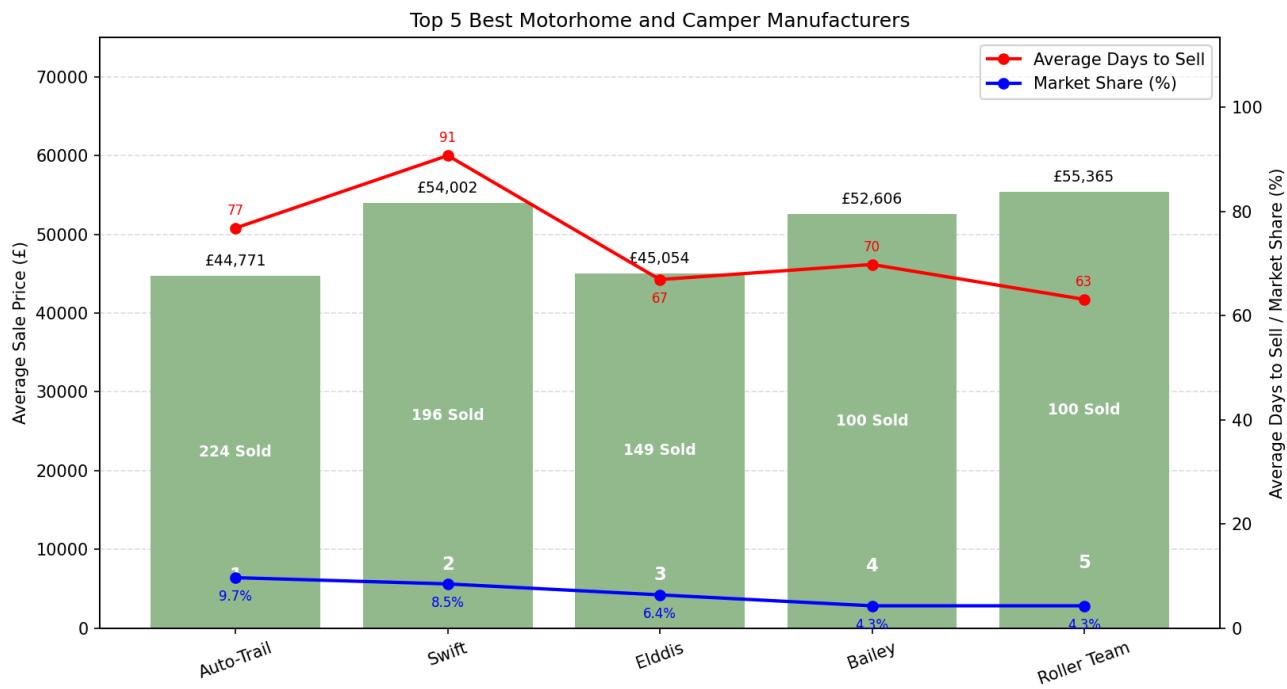
The other specific anomaly in this data is the average sale price for 10 year old units which is quite a bit higher than that of 6, 7, 8 and 9 year old homes. This would indicate that there may

have been lower stock levels of older budget priced units or maybe tactical activity to clear higher value examples.

The answer to these anomalies can be found using the unique AI driven Brego Insight tool in the dealer platform.

Top 5 Motorhome and Camper Manufacturers

The chart below shows the Top 5 best selling Motorhome and Camper manufacturers in the UK in November 2025. The average price is above the bar. The average days to sale is shown by the red line and the percent of market share is shown by the blue line.



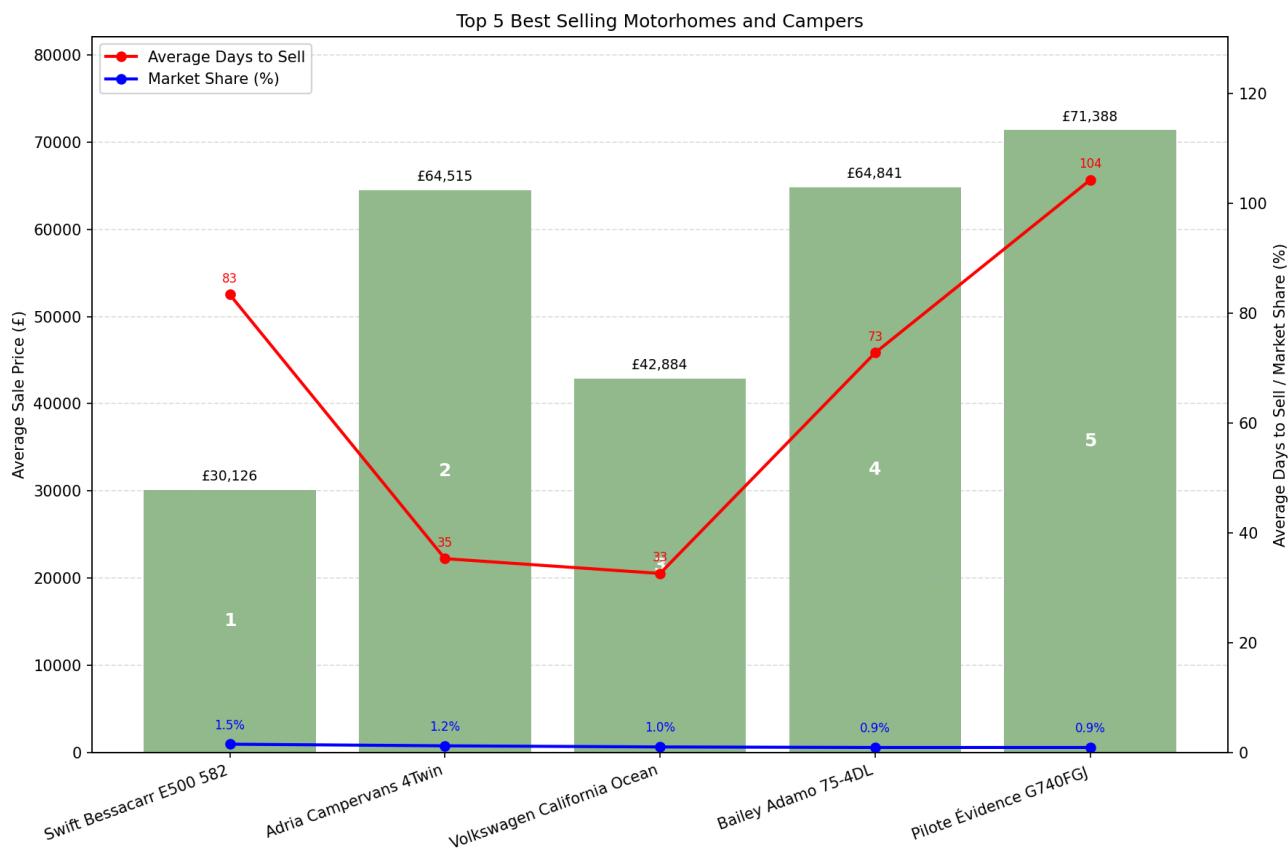
Data Powered by Brego Insight

The latest data sees a new entrant into the Top 5 with Roller Team replacing Volkswagen. There was clearly some specific demand for Volkswagen in October as they performed specifically well taking a 5.2% share of the market, a figure that if replicated this month would have seen them maintain their previous fourth spot.

Auto-Trail switched from second to first place and improved their market share of sales by 1.2 percentage points to 9.7%, whilst Swifts largely consistent market share saw them slip to second place. However Elddis lost 1 percent of share but maintained third spot. Overall market share for the Top 5 dropped by 1.6 percentage points to 33.2% of total sales for the month. The average days to sale also declined moving to 73.5 overall which was largely driven by Swift sales that averaged 91 days which was 21 days longer than during October.

Top 5 Best Selling Motorhomes and Campers

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



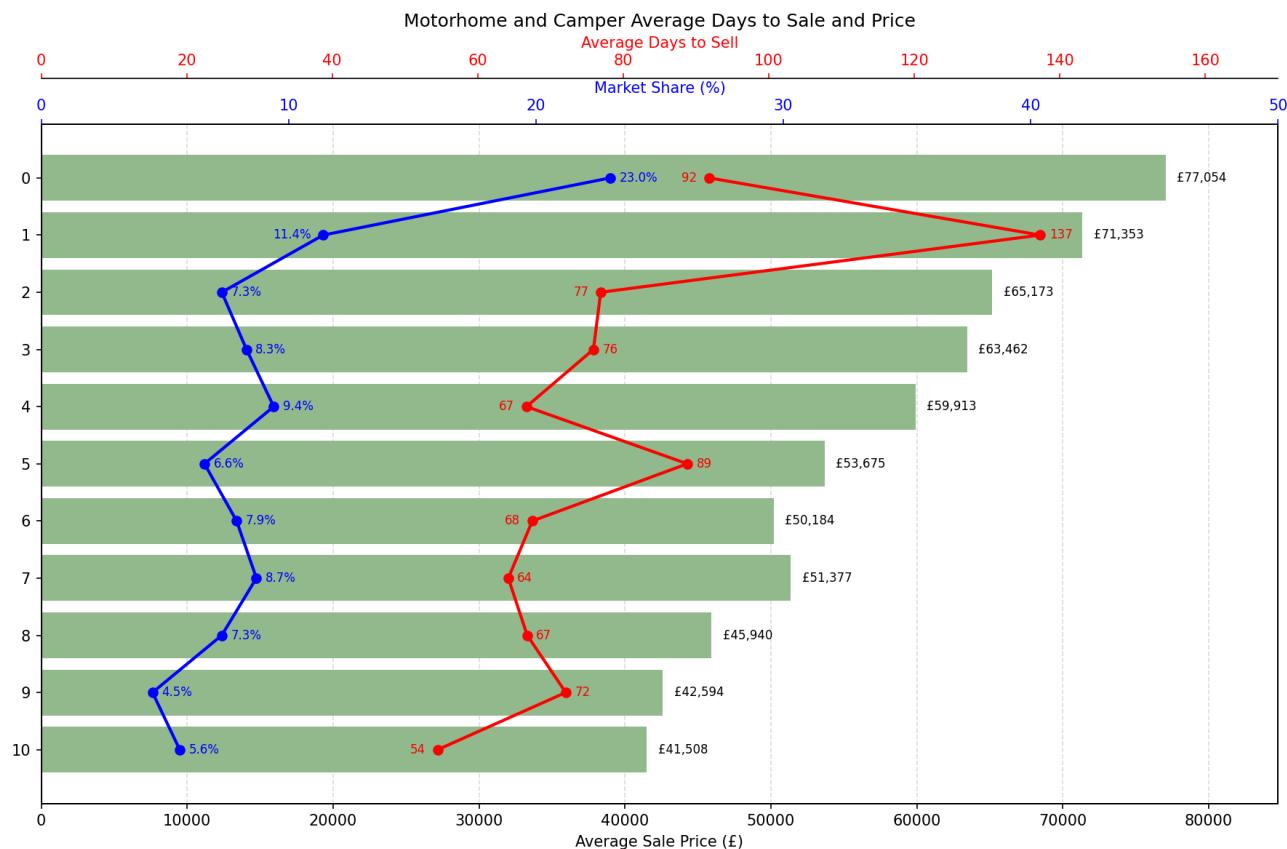
Data Powered by Brego Insight

Looking at individual sales success in November there were 2 new entrants joining the Volkswagen California Ocean, Pilote Evidence and Adria 4Twin that took first, third and fourth place respectively last month. The Swift Bessacarr and Bailey Adamo are both popular models, the former with a good sized end washroom and the latter with a spacious and comfortable layout for 4 adults.

Overall market share for the Top 5 dropped by 0.9 of a percentage point to 5.5% of total sales for the month and the biggest loss was experienced by the Volkswagen California that dipped to 1% from 2.5% in October. Days to sale were particularly good for the Adria and Volkswagen Campers whilst the more expensive Motorhomes were much slower. One might have expected this to be driven by average price but the Adria was the third most expensive of the Top 5 and almost identical in price to the second most expensive Bailey.

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



Data Powered by Brego Insight

This chart shows a greater level of stability and consistency than in October which is in some ways reassuring. Of specific interest is the data for the sub 1 year old market which shows that nearly new sales took 23% of market share which is significant and may suggest tactical activity to get late plate low mileage models into the market, perhaps by way of pre-registration activity to clear old models ready for the new variants.

There is a good level of consistency in the average selling price with just the 7 year old versions making a higher average sale price than those a year younger whilst it is clear that as with October the average time to sell newer Motorhomes and Campers is longer the younger they are. There is also an interesting spike of 132 days to sell for 1 year old units up from 102 in October.

Summary

The November Leisure market performed as expected by virtue of the fact it was not particularly active overall. The economic position did not help retail consumer confidence and generally speaking enquiries and footfall were down in all verticals making closing deals more difficult and time consuming.

The reality is that it is unlikely to improve during December as consumers focus on the festive season rather than on holiday pursuits although this will change at the end of the month. As such margins will remain tight and profitability is likely to be squeezed.

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.