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Monthly Leisure Market Report

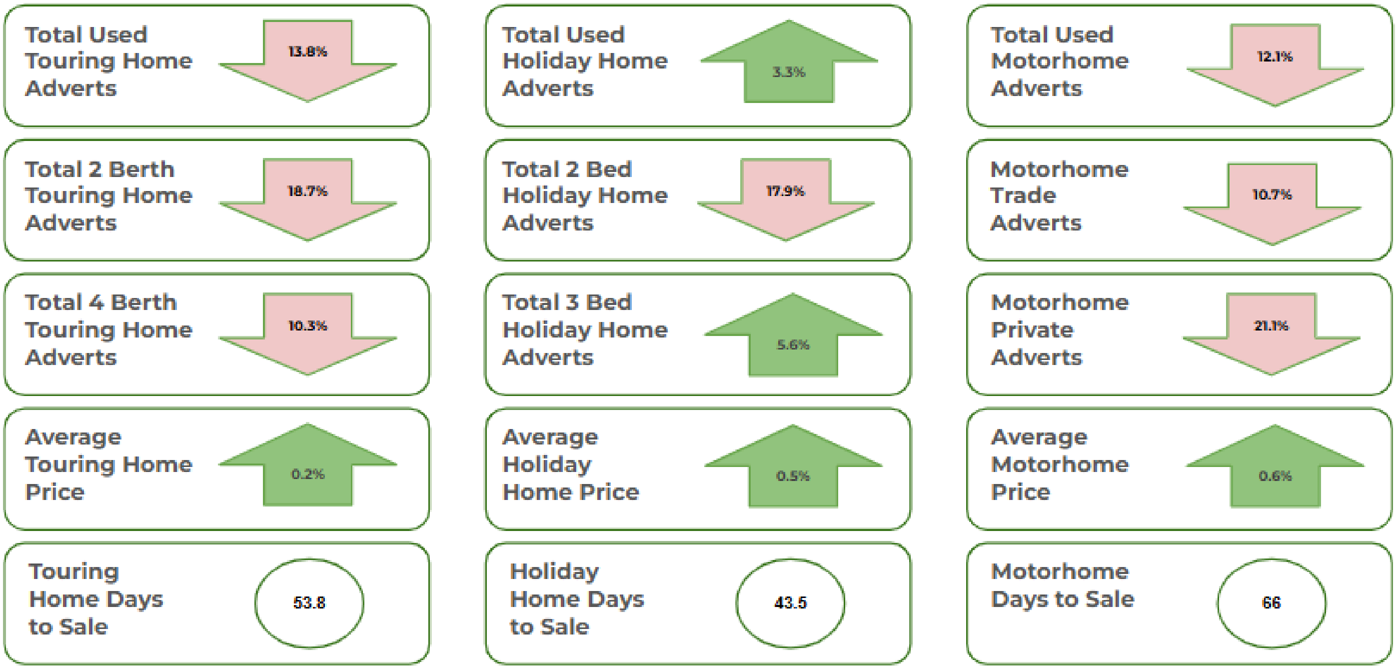
October 2025

October Monthly Leisure Market Insight

The October 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 October when compared with market activity experienced in September:-



Data Powered by Brego Insight

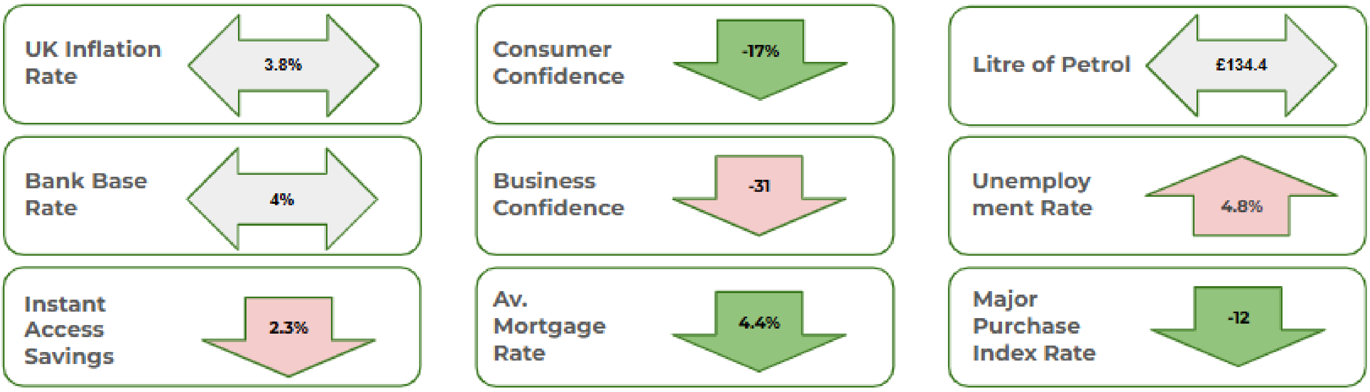
These KPIs reveal activity in the Leisure market during October, and in some ways it is not a positive picture, although one has to consider the nuances of the sector. We are approaching the quieter months of the year when the weather and approaching festive season impacts consumer spending in most retail sectors of the UK economy.

The significant reduction in the volume of adverts in the Touring Home and Motorhome and Camper verticals could suggest significant sales activity. However, the reality is that at this point of the year dealers often reduce their costs by restricting the number of units they advertise. This is less prevalent in the Holiday Home sector hence the slight increase in the number of adverts for that vertical.

However, the devil is in the detail and sales for Touring Homes dropped by just 11.4%, some 2.4% points less than the drop in advertised units, and year on year the difference in sales was -3.2%. For Holiday Homes the decline in sales was 1.9% from September to October and for Motorhomes and Campers it was 8.8%.

This is not to say that there are limited sales in the Leisure market as a whole, and I refer to the recent Motorhome and Caravan show at the NEC in Birmingham which was hailed as an “incredible success” by the NCC (National Caravan Council) . Not only was attendance up on the previous year but most exhibitors reported strong demand. It would be of great benefit to the industry if sales were reported on a monthly rather than an annual basis by the NCC, bringing the Leisure industry in line with the majority of other retail sectors.

Key UK Economic Indicators



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

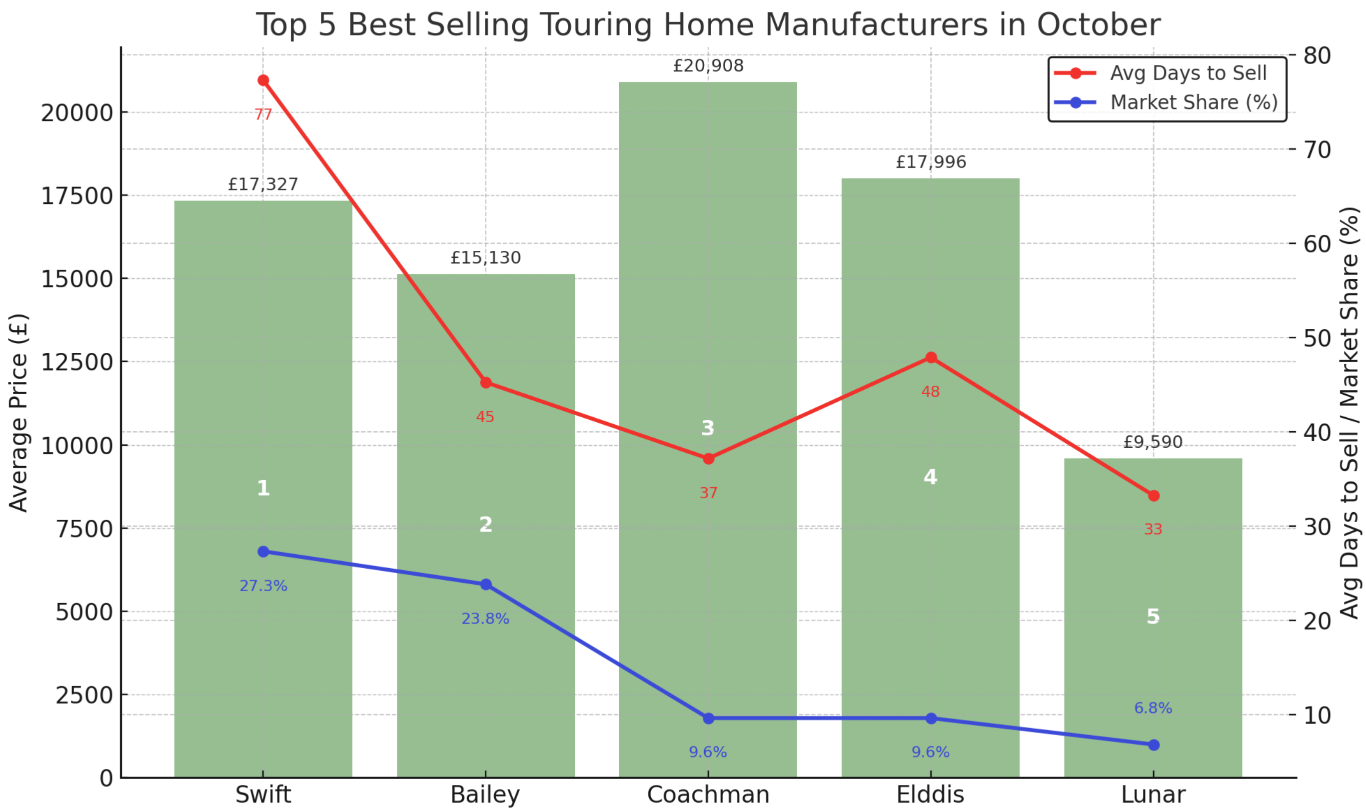
Looking at the KPIs above one would be forgiven for thinking the economy looks fairly settled. At the time of writing, the Bank of England has just announced that the base rate will remain at 4%. However it is now rumoured that there will be another drop before the end of the year which had previously been ruled out. Apparently despite the fact that the rate of inflation remains at 3.8% there are expectations that the rate will drop in the coming months thus influencing the Bank of England's decision.

Unlike the previous month, consumer confidence has improved by 2 points despite the fear of the now almost guaranteed tax rises in the budget on November 26th. Some reports indicate that this confidence is being driven by the upcoming "Black Friday” sale events, although underlying inflation in certain sectors of the economy has already started to decline and will gather momentum in the coming weeks which would be great news.

The negatives are firstly the drop in business confidence to -31 from -27 although this is in line with forecasts. Expectations are that this will rally during the third quarter to -29 and is set to improve in the coming months and trend at around -18 during 2026. The second negative is the drop in the instant access savings rate which will not encourage saving, although by design may help the economy by encouraging spending. Finally a quick mention of the unemployment rate which grew by 0.1% to 4.8% which was actually lower than predicted and set to be a blip before returning to 4.7% in 2026.

Top 5 Best Selling Touring Home Manufacturers

The chart below shows the Top 5 best selling Touring Home manufacturers in the UK in October 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

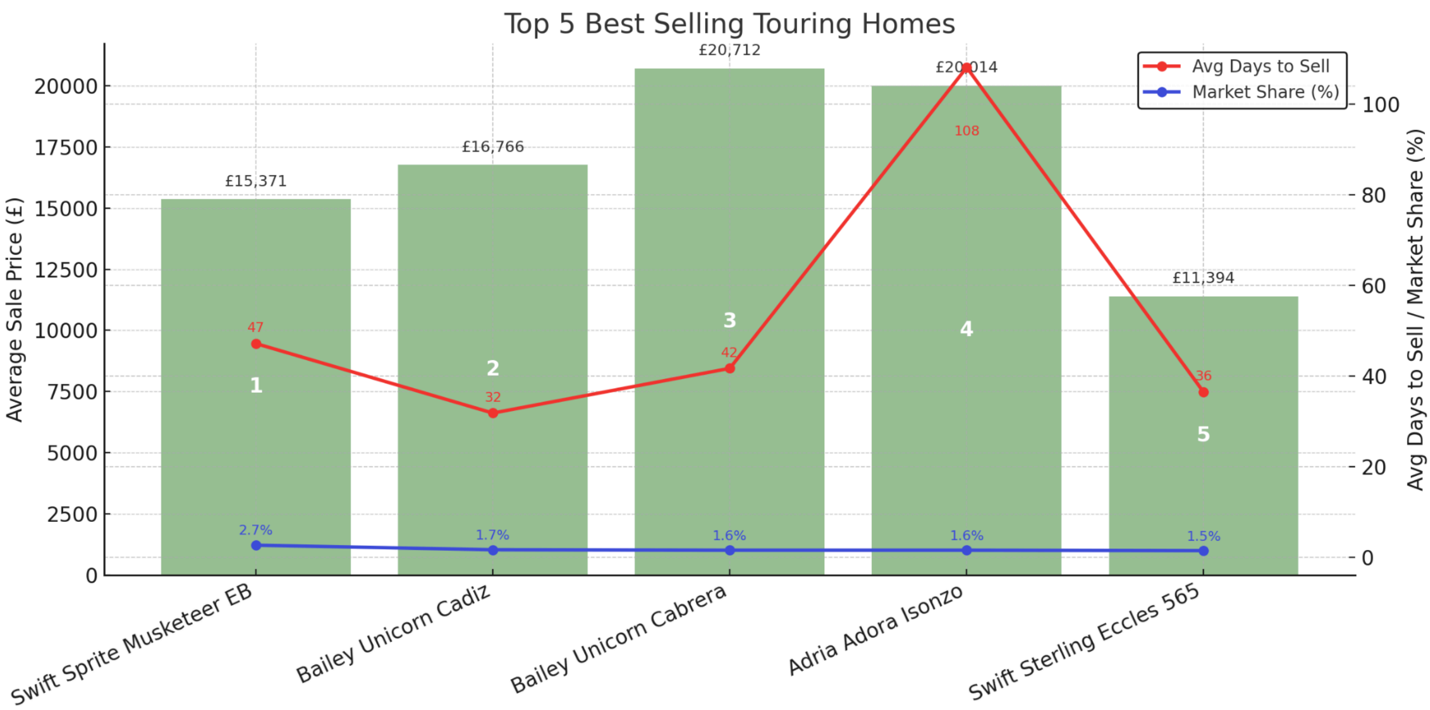
Whilst the Top 5 selling manufacturers remain the same as September, there have been some notable changes in the data. Swift increased market share by 2.2 percentage points to 27.3% edging ahead of Bailey, its closest rival. Whilst the Swift average sale price dropped by just £68 Bailey saw a decline of 1.3 percentage points in market share and also experienced a drop in the average sale price of £1,078. This suggests that older Bailey units made up the bulk of sales during the month.

In third place Coachman models also experienced a slight drop in market share as did Lunar although Elddis increased its share by 1.7 percentage points to 9.6% and also saw an increase in the average sale price by £1,275 to £17,996.

For the second month running Lunar was the fastest selling brand in the UK at 33 days. It is worth highlighting that the Touring Home market experienced an overall increase in the time to sell from 46.8 days in September to 53.8 in October which is symptomatic of the time of year.

Top 5 Best Selling Touring Homes

The chart below shows the Top 5 best selling Touring Homes in September 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

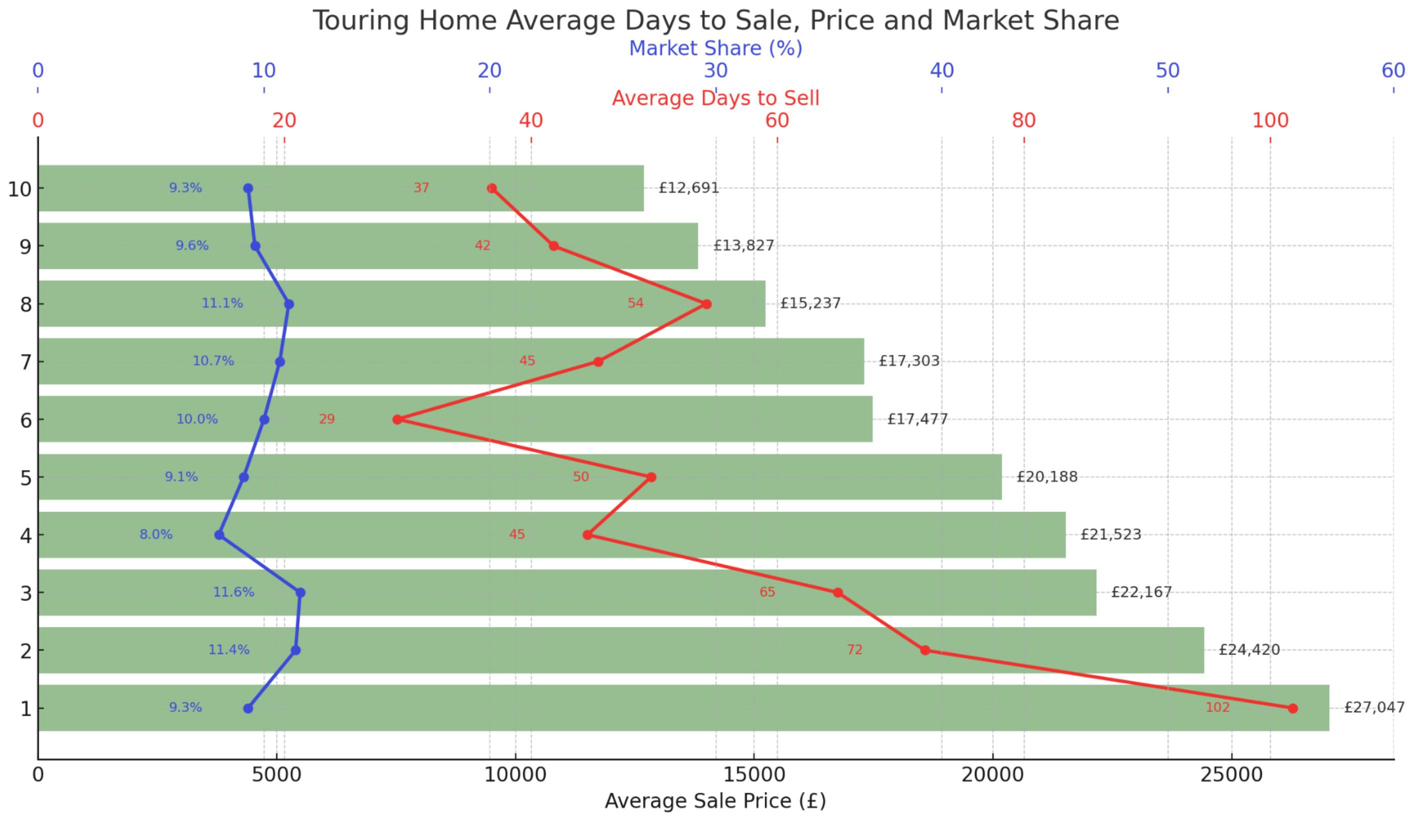
Unlike September, Swift took just two of the Top 5 best selling models slots with Bailey taking 2 spots and Adria the remaining place. All these are single axle caravans but only the Bailey Unicorn Cadiz has the twin single bed option.

Of specific note is the variance in the average days to sale with the second place Bailey Unicorn Cadiz registering just 32 days to sale emphasizing its popularity. Conversely, although in fourth spot, the Adria took on average 108 days to sell which is markedly different and often associated with high sales value models although the Bailey Unicorn Cabrera had a similar average sale price yet sold in just 42 days on average

In market share terms, the Swift Sprite Musketeer EB led the way with 2.7% of the market whilst the remaining models were at least 1 percentage point behind. It is worth remembering that although the % of market share looks low for all these top sellers, there were 177 distinct Touring Home model ranges sold during October.

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

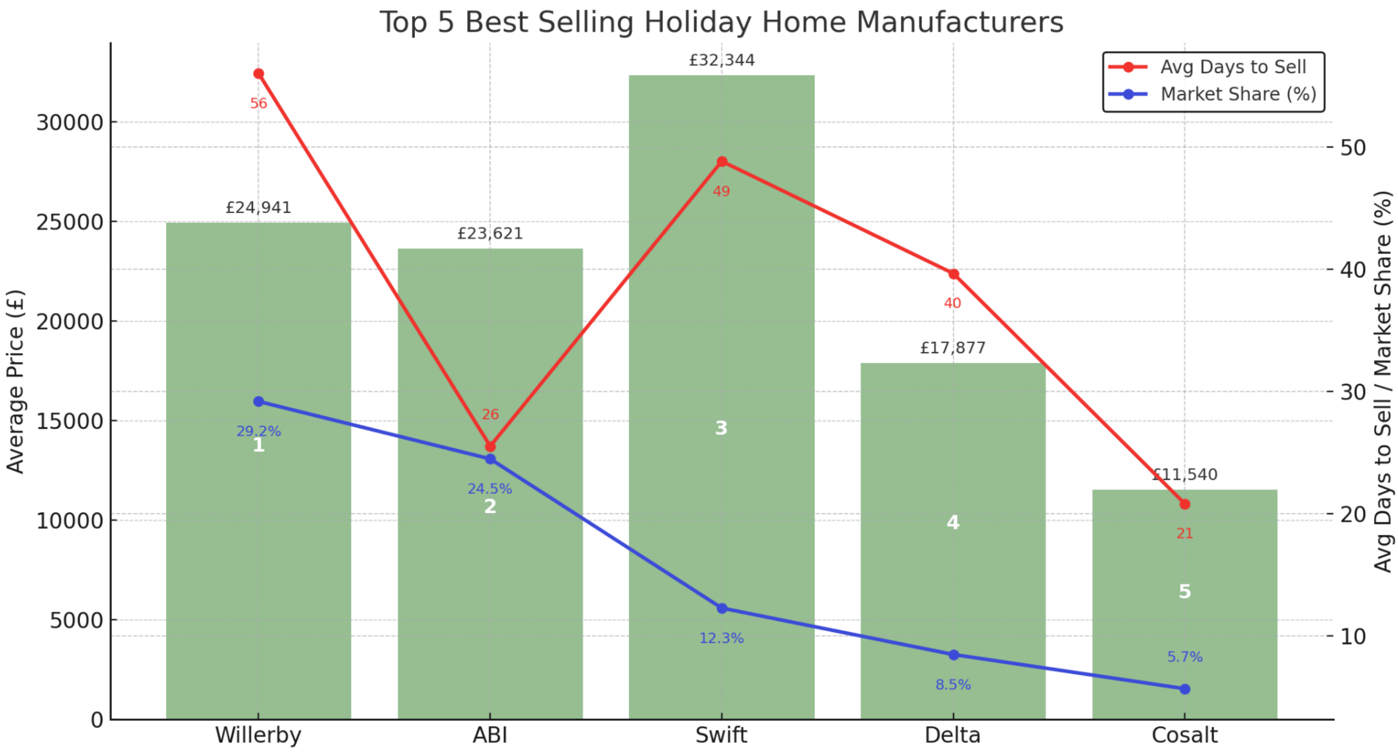
This chart shows Touring Home sales by age during October and the most important thing to acknowledge is the consistency of the drop in average sales price from new homes to the ten year old models, something that is not always consistent in other leisure markets. There is one slight anomaly present in the data and that is for 6 year old Touring Homes where the average price is very close to the 7 year old average.

The average days to sale in October did increase slightly but the chart shows that in comparison to September there has been a little more stability. Of specific note is that 1 year old models took 102 days to sell which is 15 days better than the previous month. It was the 6 year old variants that sold fastest at 29 days which is interesting as this coincides with the average price anomaly previously highlighted

In market share terms in October there was a more consistent split across the age with a banding of 3.5 percentage points covering all years. The lowest market share was held by 4 year old Tourers and the highest at 11.6% held by 3 year old models.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the Top 5 best selling Holiday Home manufacturers in the UK in October 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

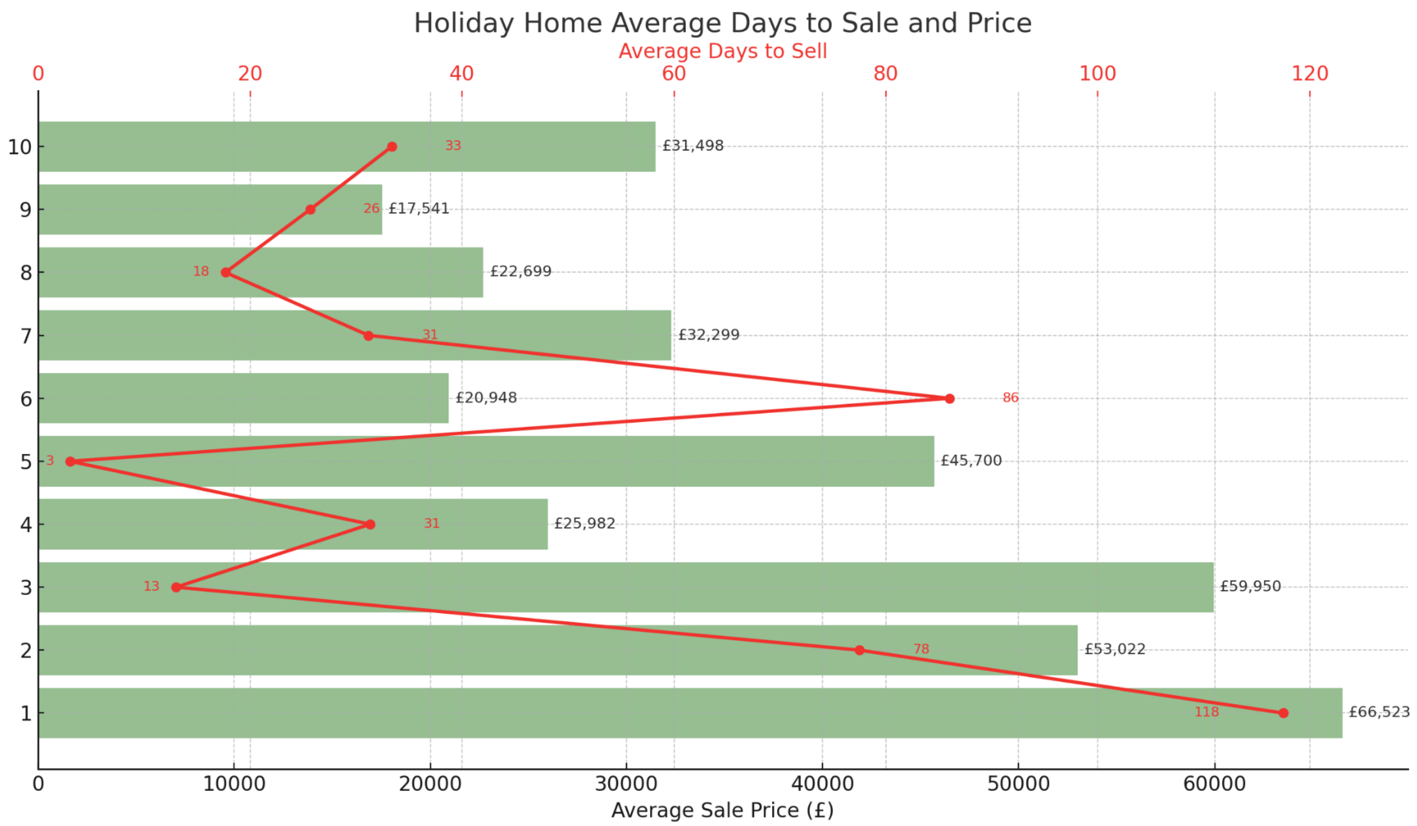
In October, as with September, four of the Top 5 best selling manufacturers were the same with Cosalt replacing Pemberton in fifth place. However there are some interesting changes from the previous month specifically for Willerby who increased market share by 4 percentage points to 29.2%. At the same time the average sale price increased by £5,517. However, the average sale price for Swift increased by £6,050 although market share remained broadly similar at 12.3%

Looking at days to sell, it is clear that all the Top 5 manufacturers improved with the biggest gain going to Delta who improved by a considerable 46 days. However, as with the previous month, it was ABI that sold the quickest at 26 days whilst also increasing market share by 3.8 percentage points which is almost as big a gain as Willerby.

At this time of year the drop in the average time to sell is notable and at odds with the other asset types in the Leisure market. This resilience is usually attributed to the fact that Holiday Homes are more usable all year round.

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

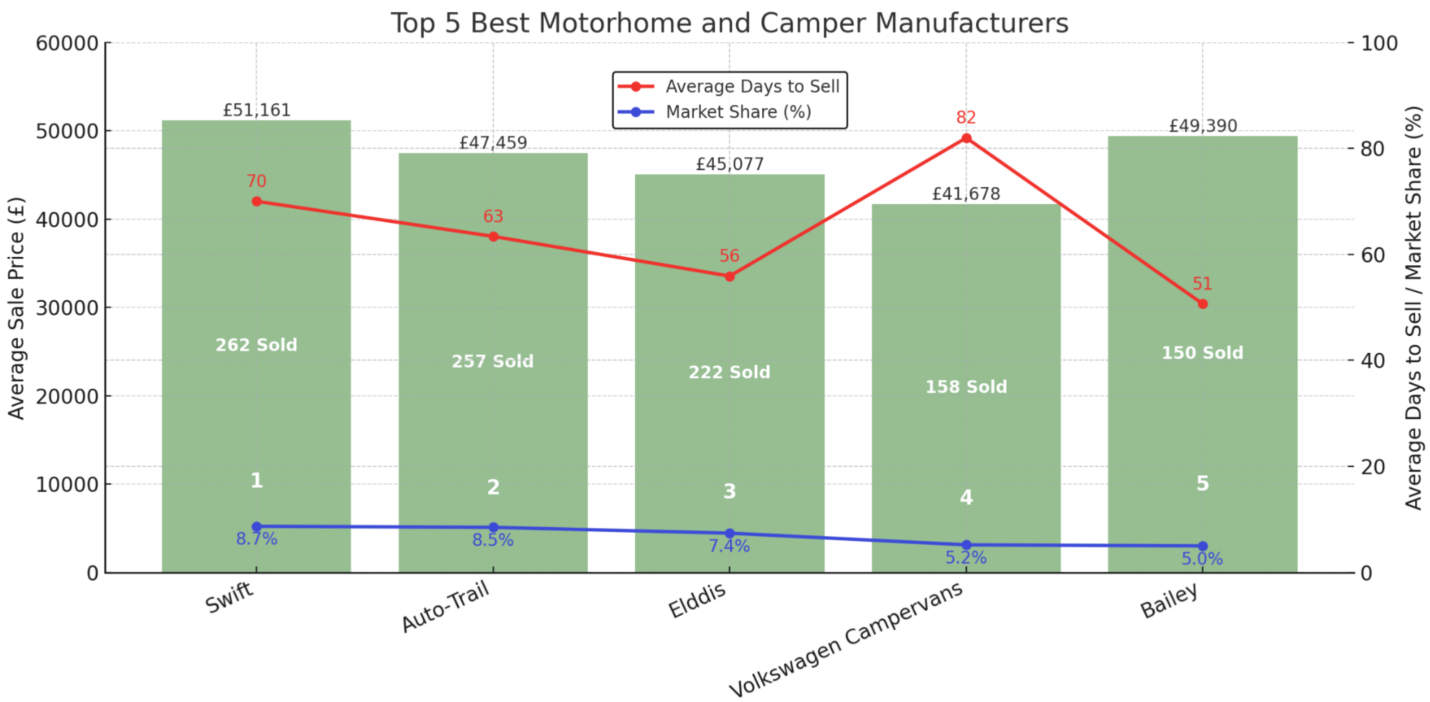
This chart is very interesting by virtue of the fact that the data is somewhat inconsistent and despite the fact that the Holiday Home sector has performed better than Touring Homes and Motorhomes and Campers this demonstrates that looking at the detail is imperative to get a full picture of market demand.

One would normally expect to see a gentle and consistent decline in the average sale price as the age of the models increases. This has not been the case in the October data with some significant peaks for 5, 7 and 10 year old units. This is usually down to the type of models in the market. To be clear this data is not affected by premium pricing associated with Holiday Homes being sold on site as the Brego data is based on off site sales.

The average time to sell is also looking odd in places, specifically for 3 year old and 5 year old units which look exceedingly quick overall. This could be affected by the advertising policies of the dealers and it is only when you analyse the results in more detail that the truth is revealed. Over the course of the full year the average time to sell for 3 and 5 year old Holiday Homes was 20 and 36 days respectively.

Top 5 Motorhome and Camper Manufacturers

The chart below shows the Top 5 best selling Motorhome and Camper manufacturers in the UK in October 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

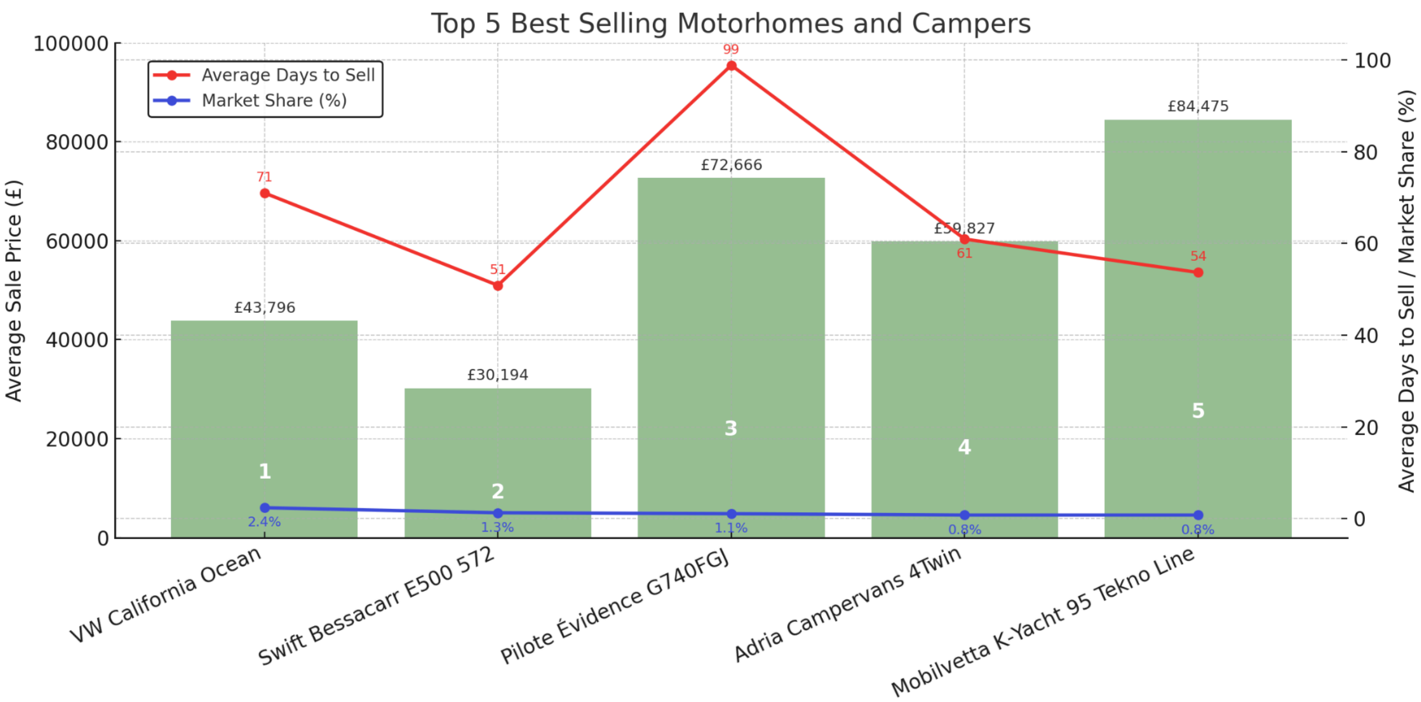
The data in this chart shows a change in the Top 5 best selling manufacturers with Auto Sleeper being knocked out and Volkswagen jumping into 4th spot. It is worth noting that there were 31% more VW's listed for sale in October.

There has also been a change at the top with Swift overtaking last month's best seller Auto-Trail by outselling them by just 5 units. However, market share for both Swift and Auto Trail declined by 1.2 percentage points. Elddis market share was broadly similar to September although Bailey increased by half a percentage point to 5%.

Looking at the Top 5 best selling manufacturers it is interesting to acknowledge that they accounted for 48% of all sales in this sector. This is an increase of 12.1 percentage points which is notable. This is in part due to the fact that there were 21% less privately advertised Motorhomes and Campers in October than the previous month and privately owned adverts tend to be for less well known manufacturers. This is something to watch going forward.

Top 5 Best Selling Motorhomes and Campers

This chart shows the Top 5 best selling Motorhomes and Campers in October 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

Not only did Volkswagen break into the Top 5 best selling manufacturers in October but they also broke into the Top 5 best selling Motorhomes and Campers by taking the top spot with the California Ocean model by knocking the Swift Bessacar E500 down to second spot.

This is in part due to the fact that there were more listed for sale, hence creating more sales opportunities, which is also reflected in the days to sale which jumped from 22 in

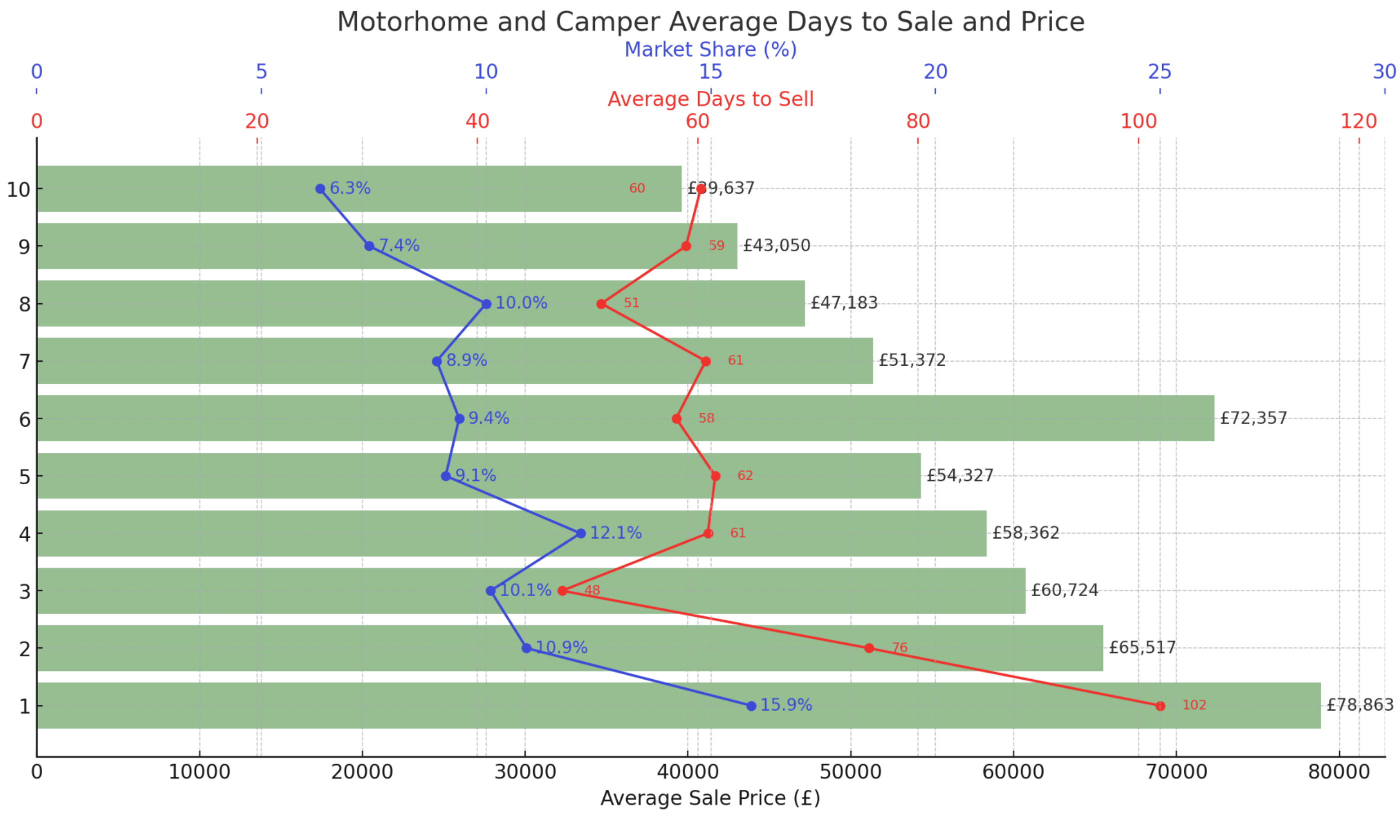
September to 71 in October. It may be that these were forced sales and it is of note that there were more 2022 and 2023 models on sale during October than in September.

The Pilote and Mobilvetta models were also new to the Top 5 and are both A class models with a much higher average sale price than the other 3 in the Top 5. This is likely to be because they are more suitable to owners who want to spend extended time away and need more space and comfort. This is often the case during the winter months.

This is something to monitor in the coming months and is likely to be a seasonal trend. However, it could be a reflection of increased supply in the used market off the back of part exchanges taken at the recent National Motorhome and Caravan Show.

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 is a more consistent chart than we saw with the Holiday Home sector, and all bar 6 year old units show a consistent decline in the average sale price as would be expected. There is also an exaggerated average sale price for one year old units that is skewed due to special deals offered on new units offered as used due to pre-registration activity to clear overage models before the 2026 variants come into stock. Indeed one year old units have the lion's share of the market at 15.9%, although this is actually 4.9 percentage points lower than in September.

The quickest sellers are three year old units which took an average of 48 days to sell which was down from 82 days in September. The overall average time to sale for the month was 66, down from 74.4 in September which is a bit of a surprise.

Summary

October's Leisure market was probably slightly better than many expected given the time of year, with consistent if lower consumer demand than in the previous month. However, on a positive note the National Motorhome and Caravan Show was considered a great success by almost all involved and gave the sector a welcome boost.

Going forward, the month of November is likely to see a further decline in consumer demand for seasonal reasons, but it will also be very interesting to see what impact the forthcoming budget will have on demand and subsequently used pricing. The question is, will dealers and parks hold firm or feel the need to drop prices to generate sales.

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.