Holiday and Residential Park Impact Assessment (2019/20)

Final Report for

Tendring District Council

August 2020

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CONTENTS

1 Introduction

In June 2019, Tendring District Council commissioned Frontline Consultants Ltd to undertake an independent assessment of the economic importance of the holiday park sector to the region and its economy. This included trends and developments and any socio-economic changes that were influencing or are likely to influence the sector going forward.

1.1 Research objectives

The objectives of the study were to:

- comment and advise on the role of, and current state of the holiday park sector at a national, regional and local level and the factors that are influencing or are likely to influence changes in the sector going into the future
- comment and advise on the park homes industry at a national, regional and local level and their potential role in the economy and the provision of housing in light of current proposals to create park homes on existing and proposed holiday parks
- undertake an in-depth review of all of Tendring's holiday parks including their range of accommodation and facilities to establish their importance to the local economy and how well, or otherwise, they fit with modern day requirements, followed by a recommendation as to whether they warrant continued protection, improvement, diversification or release through the Council's planning policies
- undertake a review of the Council's current and emerging planning policies with advice on their robustness and suitability in light of commercial realities
- undertake a review of the recent applications to convert existing and proposed parks into park homes and provide further evidential support for the Council's decision to resist those proposals in the interest of protecting and growing the district's stock of holiday accommodation
- assess the number of people employed and types of employment in Tendring's holiday parks. Following on from this, an appraisal of the opportunities for work related diversification within the core business of caravan parks. This should highlight any gaps in skills and apprenticeships

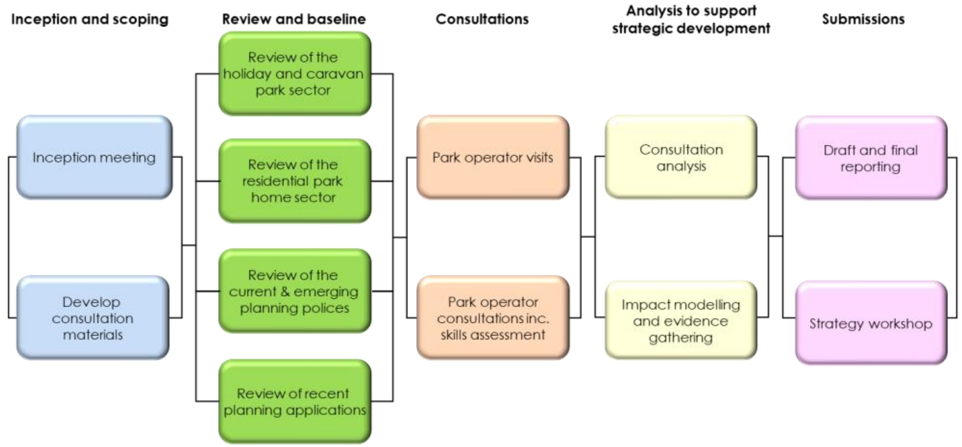
1.2 Research method

The report draws evidence from the following sources:

- information provided by Tendring District Council
- a desk review of secondary data to understand the market and its trends and developments
- consultation with nine stakeholders
- consultation with 15 holiday parks and two residential parks in the Tendring area
- review and consultation align to the emerging Tendring District Local Plan

The method for undertaking this work is outlined in Figure 1.1.

Figure 1.1: Research method[1]



[1] Due to COVID-19 the strategy workshop was replaced with consultation and review of the emerging Tendring District's Local Plan (PP8 - PP11)

All holiday and residential parks across Tendring were invited to participate in the research. Face to face, telephone interviews and e-surveys were conducted with those agreeing.

A list of 48 parks across Tendring was provided by the Council, consisting of holiday parks, residential parks and mixed parks. From this list:

- three parks opted out of participating
- three parks had no contact details and no details were found online

Once we removed those parks, we had a sample size of **32 holiday parks, eight residential parks and two mixed parks**.

15 holiday and two residential parks in Tendring participated in the study. A list of consultees is presented in Appendix 1.

All evidence has been aggregated to develop an economic impact model, following the principles outlined in HM Treasury's *Green Book* appraisal and evaluation guidance.

2 Trends and Developments

2.1 UK tourism

The results of the Great Britain Tourism Survey provide a useful context for the overall health of the British tourism industry. **Since 2010 tourism has been the fastest growing sector in the UK in employment terms**[2]. Britain aims to have a tourism industry worth over £257bn by 2025. This is just under 10% of UK GDP and supports almost 3.8m jobs (around 11% of the total UK jobs[3]).

The Deloitte Tourism: Jobs and Growth Report[4] stated that the marginal revenue required to create a job in UK tourism is estimated to be around £54,000. For every 1% increase in total expenditure in UK tourism, it might be expected that full-time equivalent employment will increase by 0.9%.

Taking into account direct and indirect impacts (e.g. supply chain), in 2016 tourism in England contributed £106bn to the British economy (GDP) and supported 2.6m jobs. Looking at direct impacts only, tourism contributed £48bn and supported 1.4m jobs.

In 2016, £19bn was spent by British residents on 100.6m overnight trips in England, equating to 299.4m nights away from home and £50.9bn on 1.5bn domestic tourism day trips.

Prior to the COVID-19 crisis, **the tourism sector is predicted to grow at an annual rate of 3.8% through to 2025** – faster than the overall UK economy (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail[5].

2.2 The UK holiday park sector

According to research commissioned by the UK Caravan and Camping Alliance in 2019, **the UK holiday park sector** makes a substantial contribution to the tourism economy, generating **£9.3bn in visitor expenditure**, equivalent to £5.3bn GVA and supporting 171,488 FTE jobs.

In **England** it is estimated that the holiday park sector generated a total **visitor expenditure impact of £6.81bn**. This expenditure equates to a GVA impact of £3.88bn and supports 126,098 FTE jobs in the English economy.

This research stated that:

- visitors stay longer on UK holiday parks than the national tourism average
- visitors to UK holiday parks spend more money than the national tourism average
- flexible accommodation and facilities provision support local communities, protect the environment and encourage a healthier lifestyle
- local suppliers also benefit through spend on maintenance by tourers and caravan holiday homeowners
- visitor health and wellbeing are also improved: visitors reported doing more exercise and feeling more relaxed when visiting a holiday park

Some trends driving this sector include[6]:

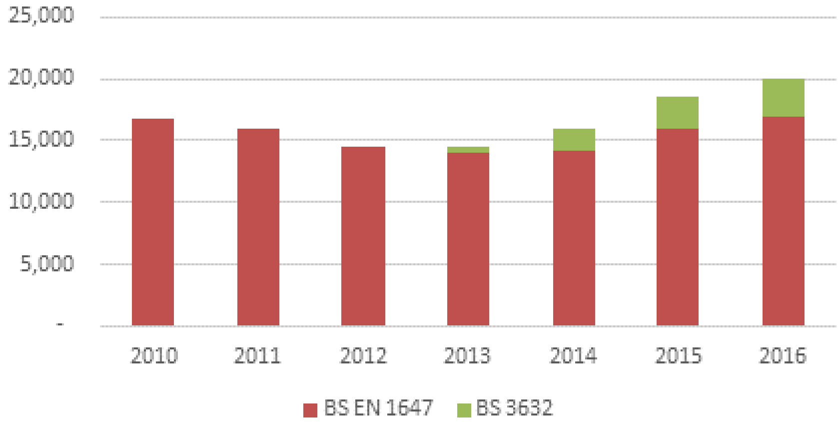
- **brand development** – operators want to improve both the quality of the holiday experience and increase direct sales in order to enhance margins and reduce reliance on third-party booking agents

[2] https://www.visitbritain.org/introducing-great-tourism-campaign
[3] https://www.visitbritain.org/visitor-economy-facts
[4] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf
[5] https://www.visitbritain.org/visitor-economy-facts
[6] https://www.holidayparksmanagement.com/2017/07/18/clearthought-signals-growth-mergers-holiday-parks/

- **premiumisation** – operators are improving the quality of the accommodation and experience. For example, in the UK many parks are increasing the availability of lodges compared to caravans as well as providing various glamping options
- **environmental** – holiday-makers are seeking vacations which are nature-friendly and offer a sense of freedom for families
- **frequency** – consumers are seeking more regular holidays or short breaks. Owning a holiday home or taking more regular holidays is driving demand
- **value for money** – consumers want comfort and quality at reasonable prices and mobile homes and lodges can provide this. For those seeking a holiday home for more frequent holidays, a mobile home or lodge can offer significantly better value than purchasing a property
- **range of services** – sites are increasingly providing a full range of leisure and social activities with demand particularly strong for high-quality swimming pools, water parks and sports facilities. With these facilities on-site, and some included in the cost of the stay, holiday parks are attractive destinations
- **regulation** – while this varies between countries, regulation regarding mobile home installation remains quite flexible across Europe, driving further growth in the market

A core operating model within holiday parks is the sale of static caravans and lodges as holiday homes. There is no centralised market intelligence for the retail of static caravan and lodge holiday homes to consumers. However, as a useful barometer, statistics for factory invoiced dispatches of static caravans to holiday parks that are collated by the National Caravan Council have been considered. Figure 2.1 shows a summary of total dispatches to holiday parks by static caravan, lodge and park home manufacturers.

Figure 2.1: UK dispatches to holiday parks 2010-2016



Source: National Caravan Council

Figure 2.1 illustrates that following a decline in holiday home dispatches between 2010 and 2012, the overall volume has improved to 2016, with a total of 20,055 dispatches recorded that year. There has been a change to the dataset which formerly included just caravans manufactured to BS EN 1647, the holiday home specification; from 2013, the sale to holiday parks of homes manufactured to BS 3632, the residential home specification, have been included and there has been particular growth in this market segment.

These figures include both single and twin unit caravans which are often referred to as lodges but are distinct from those which are constructed on-site and therefore classed as permanent. Instead they are compliant with the statutory definition of a caravan and are fabricated off-site in two parts, each built around a chassis and able to be transported before being connected on-site. They are often favoured over permanent lodges by holiday park operators due to their relatively low cost and ease of assembly on-site.

2.3 The UK residential park sector

Despite the strong economic contribution, **holiday parks, including those in Tendring, face pressure for residential use of holiday homes.** Park operators are generally keen to deter such use, but it can be very difficult to fully control especially on large holiday parks.

Holiday parks typically have planning consent for owners to be there for 10 to 11 months of the year. However, according to the UK Government, there is a continuing problem that residents stay for the whole year[7].

Whilst the local planning authority can extend the planning consent to permanent should they wish; the UK Government does not see redevelopment of holiday homes as a suitable way to provide low cost housing[8].

Residential parks also known as park homes or mobile homes, are single-storey houses that can be moved from place to place. They are installed on park home sites. They are often popular with older people.

Residential parks are typically prefabricated single-storey houses that are manufactured off-site and installed on land owned privately or by a local authority. To be classed as a park home, the house must be capable of being moved in one or two pieces, either on its own wheels or by being towed or transported by another vehicle. It must not be more than 20 metres in length, 6.8 metres in width, and 3.05 metres from floor to the ceiling internally. Most park home residents own their home but rent the pitch on which it stands, paying a pitch fee to the site owner. The pitch fee is usually payable monthly, but on some parks it can be paid weekly or annually.

Park homeowners have certain rights. Most of these only apply if the agreement with the site owner is 'protected' under the Mobile Homes Act 1983. The agreement is protected if both conditions apply:

- you are entitled to station your park home on land forming part of a protected site
- you are entitled to occupy it as your only or main residence

A site is protected if its planning permission or site licence allows both:

- residential use of the site by some, or all, of the residents
- caravans to be stationed on the site all year round

Living on a park home site does differ from living on a traditional estate in a number of ways. Living on a park home site appeals to people for a range of different reasons. For many, moving to a residential park means swapping city or suburban life for a quieter one in the countryside or on the coast. It is also a popular option for people who would like to become part of a like-minded community they can feel secure in.

Park homes are particularly popular among the retired and elderly community, as they are generally easier and more affordable to run and maintain than conventional houses. They also only have one storey which means they can be a practical choice for people who have mobility problems.

Additionally, they are a popular option for people looking to downsize. Park homes can usually be bought for less than a bricks and mortar house and can be built to personal specifications.

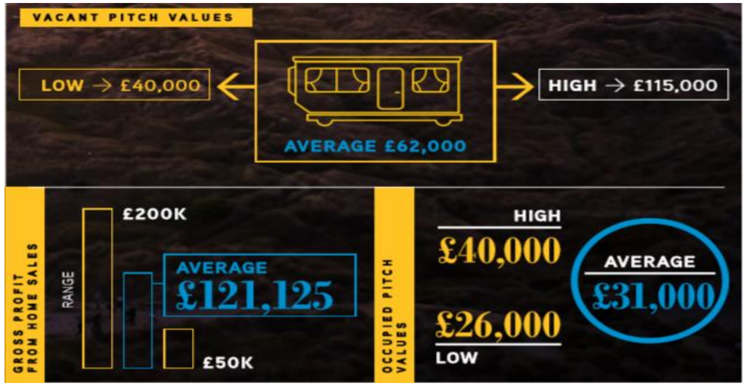
2.4 Financial differences between holiday and residential parks

Figure 2.2 summarises the values associated with residential home parks; this is drawn from Collier's Park Portfolio 2020. It outlines that vacant residential pitch values tend to range from £40k to £115k, with an average pitch value of £62k. Occupied pitch values range from £26k to £40k, with an average pitch value of £31k.

[7] https://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN00988

[8] https://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN00988

Figure 2.2: Vacant residential pitch values



Source: Colliers Park Portfolio, 2020

The cost of buying a residential park home can range from £70k to £300k, depending on the location and specification of the home. In Tendring, based on a review of sites selling residential homes, these cost between £165k and £250k. This is substantially below the average house price in Tendring, according to Zoopla the area had an average price of £453k and Rightmove £473k in 2019 (April 2020).

There are a number of other running costs associated with a residential park, including:

- **utilities** – as with any other home, owners pay for the utilities. These will include gas, water, and electricity. These tend to be paid through the park owner and, to prevent people from paying over the odds, the Office of the Gas and Electricity Market has put rules in place that mean park owners can only charge as much as they paid for the energy; an administration fee is added for water
- **council tax** – park homeowners are required to pay council tax. Most park homes fall into council tax Band A, which is the lowest. However, the cost will depend on the location of your park home. This is below the average banding for housing in Tendring
- **insurance** – there is a specialist park home insurance policy, which will cater to the risks associated with living on a residential site. As park homes are made from marine plywood rather than bricks and mortar, they are typically more expensive to insure; and additional cost compared to a traditional home
- **pitch fees** – when living in a park home, purchasers own the building, but not the land it sits on. They rent this from the site owner and will pay them a pitch fee. The UK average figure tends to be around £3k per annum[9]. When looking at Tendring in particular this was a lower and an average of £2,281 per year[10]

Figure 2.3 highlights that across the UK the pitch fee for holiday/static lodges range from around £1.5k to £6.5k, with an average of £3.5k[11].

Figure 2.3: Holiday/static lodge pitch fees

Source: Colliers Park Portfolio, 2020

Overall, it is more affordable to live in a park home compared to a traditional home; this is why older people and people downsizing are the main purchasers of these homes. Research by www.parkhome.org.uk found that the majority of homeowners are in or near retirement and many parks have rules ensuring they are exclusively for an older community.

[9] https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Viewpoints/HLIN_Viewpoint67_ParkHomes.pdf

[10] This is based on the average pitch fees of 5 residential parks across Tendring

[11] Collier's Park Portfolio 2020

3 Tendring District Council – Policy Context

Tendring District Council is in the process of updating the 2010-2016 Tourism Strategy. The new draft Tourism Strategy has a vision:

> *'To develop tourism as a platform to improve the quality of our environment and the quality of Tendring life.'*

The new strategy will seek:

> *"To grow the volume and value of tourism for the wider benefit of the Tendring economy and increase recognition of our brands. Work with partners to drive improvements to the local tourism offer for our residents and visitors."*

The strategy sets out that the local tourism sector is 'on the up', and is worth almost £402m to Tendring, with the industry responsible for almost 9,000 jobs, equivalent to 17.9% of the District's employment.

Over the last few years, the Council has worked with partners to develop a programme of events that will draw visitors to Tendring and raise the profile of the area. There has been significant investment by both the public and private sector in tourism over recent years. Amongst others, there has been multi-million pound investments into Clacton Pier, Clacton Pavilion and the Pier Hotel, Harwich. In addition to this, in 2014 the Council instigated a £36m coastal defence project stretching from Clacton Pier to Holland on Sea in partnership with the Environment Agency. Not only has this protected the coastline, it has led to the creation of 23 new sandy beaches which provide a major opportunity for tourism development.

The strategy sets out a strategic framework for measuring growth to 2024, which includes increasing visitor numbers, increasing the economic impact of tourism, improving its tourism profile, improving partnership work and creating a strong local pride.

Importantly the holiday park sector, as a core component of the overnight accommodation offer, can play a vital role in continuing to support the tourism vision for Tendring. In its own right it is a valuable economic contributor and is known to play an important role in attracting visits to the region, who then support other tourism activities. Vitally, the holiday park sector can play a role in addressing the stated 'weakness' in the tourism strategy of 'lack of quality bed space'. In supporting the sector to grow and creating the right conditions for investment, tourism can grow further and attract even more visitors to the region and enhance the overall economic value of tourism in Tendring over the period to 2024 and beyond.

Tendring District's Local Plan was adopted in 2007 and as such, some aspects of this are considered to be out of date and do not fully reflect current national planning policy. Until Tendring District Council formally adopt a new Local Plan, the planning policy situation is complex – with policies in both its adopted and emerging Local Plans being applied with varying levels of weight. The Local Plan is currently undergoing public examination, with Section One examination underway and Section Two examination due to commence in 2021. A Planning Inspector has been selected for the Stage Two examination. Elements of the 2007 Local Plan still remain in force and will be used in determining planning applications, where relevant until the new plan is in place. However, as the new Local Plan progresses it will begin to have more 'weight' in deciding planning applications and guiding new development across the District, alongside other 'material considerations', including national planning policy. The Tendring Local Plan includes four policies which relate specifically to holiday parks:

- **Policy ER18 – Protection of Existing Caravan and Chalet Parks** – this policy seeks to safeguard existing caravan and chalet parks from redevelopment for alternative uses. The policy was introduced following the loss of a number of caravan parks and holiday camps over the last 20 years, including some to housing development. This is a recognition of the importance of this type of holiday accommodation for the future development of tourism in the District. The policy seeks to retain the larger parks in prime locations in the main tourist areas in the District (Clacton/Jaywick, St Osyth/Point Clear and Dovercourt) and parks that have been upgraded or that have the potential to be upgraded and developed in the future.

- **Policy ER19 – Extensions to Static Caravan and Holiday Parks** – this policy allows for the extension of existing static caravan and holiday parks where this will result in material improvements to the overall layout, amenity and appearance of sites, provided they are not in an area of high flood risk, and expansion schemes include adequate screening and landscaping.
- **Policy ER20 – Occupancy Timescales** – this policy does not allow the occupation of holiday units, including chalets and caravans between 14 January and 1 March in order to deter permanent residential occupation of such forms of holiday accommodation. The policy allows for occupation to be further restricted to the period 1 March to 31 October where sites lie adjacent to areas designated for their importance for nature conservation or where a flood risk assessment indicates that this is necessary.
- **Policy ER22 – Small Holiday Villages** – this policy allows for the development of 'small holiday villages' in the District provided they are not located in areas of flood risk and areas with special landscape designations, such as the AONBs that fall with the District, the Coastal Protection Belt and SSSIs. The supporting text to the policy defines a small holiday village as a development of well-designed timber chalets preferably set in a predominantly wooded and undulating landscape with water features. Such sites are now more commonly defined as holiday lodge parks.

The 2007 adopted Local Plan does not include any specific policies for the development of new holiday parks or the relocation of caravan and holiday parks that may be adversely affected by coastal flooding in the future.

There is a new Local Plan (with a time frame running to 2033) being developed at present, this is currently in Publication Draft and has reached examination stage. One of the key themes of the emerging Local Plan is 'Prosperous Places' and within this theme is the importance attached to the 'Tourism, Leisure and Hotel' sectors, including holiday parks, camping and caravanning.

The Local Plan further stresses the economic importance of the tourism economy in Tendring. Many of the District's jobs are related in some way to tourism, whether directly in hotels, caravan and chalet parks and tourist attractions or indirectly in shops, cafés and restaurants.

As the nature of tourism has changed so much over the years, Tendring District Council cannot rely purely on the provision of traditional holiday accommodation at seaside holiday parks, hotels, guesthouses, and bed and breakfasts. Increasingly people will be expected to visit Tendring District for short and weekend breaks, to visit friends and family, attend weddings and family functions or for business purposes.

Policies PP8-PP11 in the Council's emerging Local Plan set out the Council's approach to the creation, improvement and the protection of potential loss of different types of visitor accommodation.

PP8 Tourism which states that to attract visitors to the Tendring District and support economic growth in tourism, the Council will generally support proposals that would help to improve the tourism appeal of the District to visitors, subject to other relevant policies in the Local Plan. In particular, the Council will support appropriate proposals for new and improved attractions and leisure activities at the District's pleasure piers, amusement parks and **holiday parks**.

Essentially the emerging policy for tourism seeks to maintain and deliver a range of accommodation that meets the varying needs, demands and expectations of potential visitors to the Tendring District. Proposals that involve the creation, improvement or potential loss of visitor accommodation will be assessed based on policies set out in this Local Plan.

In terms of holiday parks, camping and caravanning, the Local Plan confirms that the area has a lot of static caravan sites, but there **is limited provision of sites for camping and touring caravans/motorhomes.** Supporting the establishment of new camping and caravanning sites and encouraging the provision of camping and caravanning pitches at **existing holiday parks will help to diversify the range of accommodation available to visitors to the area which, in turn, will support growth in the economy**.

The Council has reviewed the District's stock of holiday parks and has identified a number of **'safeguarded sites'** on the Policies Maps which play a significant role in supporting the local tourism economy and will therefore be protected from redevelopment for alternative uses. Currently not all of the District's parks are shown as safeguarded sites, however the draft Local Plan proposes that all sites should be designated safeguarded. The Council recognises changing economic conditions and tourism trends could have a negative effect on some of the smaller sites being able to remain viable and, in some cases, redevelopment for an alternative use might be more beneficial to the local economy.

The publication Draft Local Plan also has a defined policy (PP11) to guard against the loss of holiday accommodation to permanent residential use. This is seen as displacing accommodation intended for tourism use, which has a knock-on effect on the District's economy.

The Council uses planning conditions to ensure this does not occur and for a site to comply with its licence, the site owner/operator is expected to share the responsibility of managing and enforcing this requirement. Due to holiday accommodation frequently being unsuitable for permanent occupation and located in areas which often lack the necessary and appropriate infrastructure and services for longer occupation, the Council will restrict the holiday occupancy period. Additionally, where sites are located in an area vulnerable to flooding, the period of restricted occupancy will be expected to take place during the winter months when there is a greater likelihood of higher tides and severe weather. Change of use to permanent residential and extended periods of holiday occupation can also impact on protected wildlife sites, which are often located close to existing holiday parks.

For these reasons, the publication Draft Local Plan has a distinct policy **(PP11 Holiday Parks)** which states new static caravan/chalet parks will be permitted where it can be demonstrated by the **applicant how the proposal would help strengthen and diversify the District's tourist economy**.

The change of use of caravans and chalets from holiday accommodation to permanent residential **dwellings will not be permitted as this could lead to a loss of valuable tourist accommodation**, poor living conditions and unmanageable impact on the provision of local services and facilities.

To avoid such consequences by ensuring that new caravan and chalet developments are not used for permanent residential dwellings, the Council states it will impose holiday occupancy conditions and limit use to certain periods of the year.

4 Stakeholder Consultations

Nine stakeholders were interviewed with eight representing tourism, planning and enforcement. All had some experience of the holiday and residential park sector in Tendring. A list of consultees is presented in Appendix 1.

The interviews explored:

- trends and developments across the region
- drivers for change
- challenges and how these are being addressed
- SWOT analysis
- future developments

4.1 Trends and developments across the region

All stakeholders stated there had been extensive change across the holiday park sector in Tendring, with a key shift towards residential parks. The latter resulted from the influx of retirees to the region. Other trends included:

- extensive hotel closures to support the increased need for retiral residencies
- increased day trippers reducing the need for overnight stays and later openings of local premises
- loss of ferry and cruise tourism due to route changes
- more parks looking to open all year round to help increase revenue
- reduction in tourists to the area decreasing the demand for all forms of accommodation
- increase in holiday park breaches – people illegally staying all year round
- more investment in some areas across the region leaving other areas behind
- lack of ratified tourism strategy for the region which has led to a lack of promotion of the holiday park sector – although a new strategy is in development
- increased demand for larger and more luxurious caravan units

Some specific comments included:

"What happens is a lot of people come and retire to a holiday park and use this as their main home."

"If someone is living there as a retiree, they are contributing less than holiday markers, then parks lose the staff, they don't need things like swimming pools. Therefore creating unnecessary costs."

"There is no tourism strategy at the moment, and this has negatively impacted on the holiday park sector and the ability to support and promote it."

4.2 Drivers for change

There was consistency across the stakeholders as to the drivers for change across the Tendring region. All agreed that people were looking for cheaper residential accommodation, driven by both increased retiral population and a need for increased affordable housing.

Other drivers included:

- need to improve the holiday park offer, make the parks more attractive, including increased focus on health and wellbeing and environmental sustainability
- number of parks on flood plains impacting on park extension plans
- holiday parks being viewed as a cheaper form of residence leading to a perceived increase in illegal 'residents'
- increased number of parks applying for – extensions, change of use and increased opening – predominately to support increased revenue generation and the changing need of 'visitors'
- ability to cater for an ageing demographic and increase in day trippers – encouraging them to stay longer
- need to have more consistency in holiday park accommodation across the region – currently too much variety in quality

Some specific comments included:

"Opportunity for holiday park sector because of poor hotels. A lot of the parks have taken over the hotel trade and become the lead. Some fantastic parks with lots of facilities, mix of chains and independents."

"Park quality is highly varied; to be attractive to tourists, parks need to have more luxurious accommodation and activities and attractions in the local area to encourage people to explore and spend money!"

"The property price is competitive given proximity to London. This is encouraging people to move to the area, paying over the odds and reducing affordable housing levels which is driving increased demand for residential parks."

4.3 Local challenges and combating approaches

The majority of stakeholders were consistent on the challenges for the sector and specifically mentioned the large number of people living in holiday parks as their permanent homes. This not only breaches rules, it also reduces the availability of holiday accommodation. Stakeholders stated that the 'environment' in holiday parks is not suitable for permanent homes and now this presents challenges for the Council.

Some additional challenges included:

- the Council's preference for limited 12 month opening licences to minimise the ability to stay permanently on the park
- loss of ferry tourists decreasing overseas visitors
- lack of quality camping/glamping and touring accommodation to provide diversity to the holiday park offering i.e. the majority of parks have a high proportion of owner-occupied pitches
- loss of cruise ships reducing overseas tourists
- key tourism destinations closed at night
- shortage of quality accommodation across the holiday park sector
- loss of a wide range of hotels – many closing to support the increased demand for retired accommodation
- poor public transport
- lack of promotion of holiday park facilities by public sector agencies
- parks located in flood zones limiting development opportunities
- varied spending in the local economy as park 'residents' – don't leave the parks!!

Challenges around skills and people development were not highlighted by any respondents.

The Council has responded to the challenges in a number of ways:

- enforcement of fines for breaches when identified
- minimise the number of year round licences
- developing a future tourism strategy – this will include a section on holiday parks
- area based regeneration – Clacton and Harwich

Some specific comments included:

"A lot of local investment in the region. The pier and the pavilion both have multi-million-pound investments. There is also local support for the activities in Harwich to celebrate the 400-year anniversary of the Mayflower."

"Mayflower 400-year anniversary – this could develop links with US tourism creating a foundation for a new tourism market."

4.4 SWOT analysis[12]

The SWOT analysis below summarises the strengths and opportunities of the region it will be important to build these into the emerging tourism strategy to support the development of the sector.

Strengths	Weaknesses
• the coastal environment and diversity of wildlife • the microclimate – dry weather • increasing day trip market • established market (Clacton on Sea) • emerging markets such as the regional heritage – the Mayflower story • local investment – the pier, the pavilion • proximity and transport links to London and Cambridge • lots of green open space within the district • broad array of parks with lots of facilities • good operators with high standard of accommodation • operators developing their parks • proximity to Colchester, Ipswich and Norwich	• parks have high number of retirees staying domestically and they do not contribute as much to the parks as holiday-makers • Tendring isn't an easily marketed/well-known brand • parks tend to be very rural, long distance to towns and transport links are poor • people have a preconceived perception of Clacton-on-Sea being for older people/retirees – this needs to change • town centre parking is often problematic which discourages people to come and stay and use the facilities • limited all weather facilities • available finance
Opportunities	**Threats**
• poor hotels in the area have encouraged holiday parks to expand to provide the visitor option • Sun newspaper holiday vouchers bring more out of season customers – this has supported longer park opening times • local investment – regeneration of beaches lost to coastal erosion • park investment – super lodges/more luxurious caravans • Mayflower 400 and Witchfinder Trail – opportunity to highlight regional heritage and future leverage • events programme – increased the number of event specific tourists who will return if the experience was good; also attracted event organisers • partnership working between holiday parks and the Council to come together on joint ventures to help drive up tourism • costal defence scheme • increased digital marketing presence	• regulatory breaches - some parks not following opening time regulations • turbulence in public sector funding • coastline in Tendring due to environmental factors – flood areas • lack of up to date tourism strategy • local infrastructure doesn't support industry growth • demographics, high proportion of older people presents a certain image and adds pressure on healthcare budgets • losing holiday accommodation to residential use, from a tourism and social point of view • the mis-selling of caravans – 'the owner's package', 25-year licence designed to be flexible for the holiday market, instead people come and retire here • conflicting views of visitors and residents • potential closure of tourism related attractions • crime on the parks

[12] This SWOT was developed pre COVID-19, hence this has not been highlighted.

4.5 Future developments

Stakeholders agreed that it would be important for the new tourism strategy **to create a strong vision for the region while demonstrating the importance of a broad range of accommodation options.** This in the process of being ratified by Tendring District Council. The holiday park sector was viewed as highly varied across the region and if this were to change then more support, marketing and promotion would be required.

Without a strong driver towards increasing visitors, the movement towards increasing residential and multipurpose parks was viewed as going to continue.

Parks want to open longer and provide mixed accommodation to maximise their revenue opportunities, and perhaps this should be allowed.

This would, however, need considerable caveats put in place to ensure the parks stay fit for purpose for both tourists and residents. Stakeholders believed there must be increased diversity across the tourism strategy offering in Tendring and that the holiday park sector was an essential component of this. Therefore, you can't lose too many 'pitches' to residential use or the sector in Tendring will cease to exist!

One specific quote sums up the tourism offering for Tendring:

"The local environment is good, there is: green open space, good beaches, sea and good weather. We have all the elements of a fabulous tourism offering…we just need to capitalise on it!"

5 Supply Assessment in Tendring

5.1 Supply of holiday parks

Information provided by Tendring District Council indicates there are 36[13] holiday parks in the area (as shown in Table 5.1). This includes parks of varying sizes from large Park Resorts owned parks to small independently owned parks including very small parks (parks with five pitches or fewer), typically known as Certificated Locations (CL) and Certificated Sites (CS).

Table 5.1: Holiday parks in Tendring

Park Name	Number of pitches
Ardleigh Caravan and Camping Park	5
Ashley Holiday Park	93
Bentley Country Park	320
Brightlingsea Leisure Park	99
Brokhowse	5
Dovercourt Holiday Park	538
Elm Farm Country Park	36
Firs Caravan Park (combined with Ashley Holiday Park)	227
Fletchers Caravan Site	35
Greenacres Caravan Park	80
Highfield Grange Holiday Park	661
Homestead Lake Country Park	148
Hutleys Caravan Park	740
Lakeside Caravan Park	55
Laurel Cottage	5
Lee Wick Touring Site	5
Leisureglades Park	30
Martello Beach Holiday Park	476
Mill Farm	28
Naze Marine Holiday Park	618
New Hall Lodge Park	60
Oaklands Holiday Park	289
Oakleigh Residential Park and Leisure	58
Orchard Holiday Park/Village	1,259
Pretoria Caravan Park	26
Saddlebrooke Chase	138
Seawick Holiday Park	611
Shore Farm Caravan Park	65
Silver Dawn Holiday Park	40
Southcliffe Trailer Park	39
St Osyth Beach Holiday Park	524
Stone Lane Caravan Site	65
Strangers Home	54
Valley Farm Caravan Park	713
Weeley Bridge Holiday Park	269
Willows Caravan Park	102
Total	**8,516**

When broken down by size and compared to the English average, Table 5.2 shows that Tendring has:

- a **lower** percentage of small parks
- a **higher** percentage of medium and very large parks

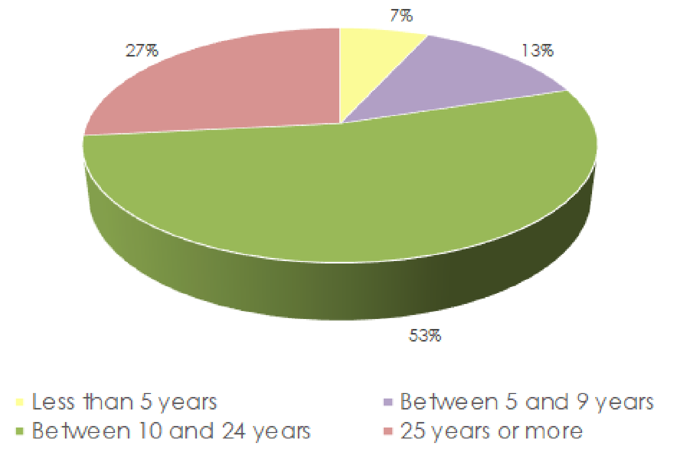
Table 5.2: Size of the holiday parks in Tendring compared to England

Number	% of parks in Tendring	% of Park in England
Small parks (0-50 pitches)	31%	73%
Medium sized parks (51-100 pitches)	25%	9%
Large parks (101-250 pitches)	11%	11%
Very large parks (251 pitches or more)	33%	6%

[13]This includes those classed as mixed parks (3), those that opted out of participating in the study (2) and those where no contact details existed (2)

Data provided by parks participating in the study suggests in the majority of cases, park operators viewed their holiday parks as long-term investments, with the parks owned and operated for at least ten years and frequently longer (80%).

Figure 5.1: Length of time survey participants have owned/operated their holiday parks



Source: Tendring Operator Survey, 2019/20 N=15

Tables 5.3 and 5.4 summarise a breakdown of accommodation type and facilities provided on Tendring holiday parks (where data was available).

Table 5.3: Holiday park facilities

Park Name	Wi-Fi	Toilet block	Laundry	Restaurant/bar /takeaway	Showers	Entertainment	Swimming pool	Retail/ shop	Outdoor play area	Games room	No on-park facilities
Ardleigh Caravan and Camping Park											✓
Ashley Holiday Park						✓					
Bentley Country Park		✓			✓	✓	✓				
Brokhowse								✓			
Dovercourt Holiday Park	✓	✓		✓	✓	✓	✓	✓	✓		
Elm Farm Country Park									✓		
Firs Caravan Park				✓		✓					
Fletchers Caravan Site		✓	✓		✓						
Greenacres Caravan Park											✓
Highfield Grange Holiday Park	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Homestead Lake Country Park	✓	✓	✓	✓	✓			✓			
Hutleys Caravan Park			✓	✓			✓	✓			
Lakeside Caravan Park		✓			✓						
Laurel Cottage											✓
Lee Wick Touring Site	✓	✓	✓								
Martello Beach Holiday Park	✓		✓	✓		✓	✓	✓	✓	✓	
Mill Farm		✓			✓						
Naze Marine Holiday Park	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
New Hall Lodge Park											✓
Oaklands Holiday Park	✓		✓	✓		✓			✓		
Oakleigh Residential Park and Leisure											✓
Orchard Holiday Park/Village		✓		✓		✓	✓	✓	✓		
Pretoria Caravan Park				✓							✓
Saddlebrooke Chase	✓			✓		✓			✓		
Seawick Holiday Park	✓		✓	✓		✓	✓	✓	✓	✓	
Silver Dawn Holiday Park		✓	✓	✓	✓	✓	✓		✓		
Southcliffe Trailer Park											✓
St Osyth Beach Holiday Park	✓		✓	✓		✓	✓	✓	✓	✓	
Stone Lane Caravan Site									✓		
Strangers Home		✓		✓							
Valley Farm Caravan Park	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Weeley Bridge Holiday Park	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Willows Caravan Park	✓		✓	✓		✓					
Total	**39%**	**42%**	**42%**	**54%**	**33%**	**48%**	**36%**	**36%**	**42%**	**21%**	**27%**

Table 5.4: Number and type of pitches

Park Name	Total	Touring *	Glamping	Caravan holiday homes		Lodge/chalet/cottage	
				Privately-owned	Rented	Privately-owned	Rented
Ardleigh Caravan and Camping Park	5	5					
Brokhowse	5	5					
Dovercourt Holiday Park	538	50	2	364	90	2	30
Elm Farm Country Park	36			15		21	
Firs Caravan Park	227			227			
Greenacres Caravan Park	80			80			
Highfield Grange Holiday Park	661	40		394	165	62	
Homestead Lake Country Park	148	54		94			
Hutleys Caravan Park	740			740			
Lakeside Caravan Park	55	55					
Laurel Cottage	5	5					
Lee Wick Touring Site	5	5					
Martello Beach Holiday Park	476	110		275	91		
Mill Farm	28	8		20			
Naze Marine Holiday Park	618	43		490	85		
New Hall Lodge Park	60			60			
Oaklands Holiday Park	289			265		24	
Oakleigh Residential Park and Leisure	58			60			
Orchard Holiday Park/Village	1,259	15		622	622		
Pretoria Caravan Park	26	26					
Saddlebrooke Chase	138			138			
Seawick Holiday Park	611			473	138		
Silver Dawn Holiday Park	40	40					
Southcliffe Trailer Park	39			39			
St Osyth Beach Holiday Park	524			486	38		
Stone Lane Caravan Site	65			65			
Strangers Home	54	35					19
Valley Farm Caravan Park	713			492	104	46	71
Weeley Bridge Holiday Park	269			198	39	14	18
Willows Caravan Park	102			102			
Total	**7,874**	**6% (496)**	**0.02% (2)**	**72% (5,699)**	**17% (1,372)**	**2% (169)**	**2% (138)**

Includes touring caravans, motorhomes/campervans and tents

When compared to the **English average**[14], Tendring has:

- **fewer parks** offering Wi-Fi, toilet and/or shower blocks and on-site entertainment
- **more parks** offering outdoor play areas, restaurant/bar/takeaways and retail/shops
- **a lower proportion** of touring pitches (6% compared to 38%)
- **a higher proportion** of owned caravans/holiday homes (72% compared to 43%)

Park Deans Resort – the UK's largest holiday park operator – has recently announced that it plans to invest £80m into its parks across the country. The investment will be the operators largest ever investment. In Tendring, Park Deans operate four sites, all of which will benefit from this investment to create new swimming facilities, play areas and the introduction of new arcade areas. The investment will also see new state-of-the-art caravans replace ageing fleets and all caravans and lodges upgrading to free high-speed Wi-Fi.

Park owners participating in the study also report investing in new hire/fleet stock and upgrading parks to keep up with the 'staycation' demand. Park operators were asked to provide details of their capital expenditure, operating expenditure, wages and salaries for the last financial year (2018/19).

The total expenditure for respondent holiday parks is presented in Table 5.5.

Table 5.5: Total expenditure by holiday parks

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£1,455,054	£207,865
Operating expenditure	£18,000	£6,000
Wages and salaries	£4,079,940	£679,990
Total expenditure	**£5,552,994**	**£893,855**

Source: Tendring Operator Consultation, 2019/20

[14]The UK Caravan and Camping Alliance in 2019

Park operators were also asked to comment on the top three areas of capital expenditure over the last five years; the following were most frequently cited:

- new hire fleet
- fleet refurbishments
- new technology solution e.g. car number plate recognition
- flood prevention

Looking to the future, holiday parks in Tendring were then asked to provide their planned expenditure for maintenance and/or expansion/improvement of their holiday parks and on-site facilities. The total expenditure is presented in Table 5.6.

Table 5.6: Planned expenditure

	Expenditure	
	Maintenance	**Improvements**
Next financial year	£872,209	£290,736
Next three financial years	£2,616,628	£888,559
Total	**£3,488,837**	**£1,179,295**

Source: Tendring Operator Consultation, 2019/20

5.2 Supply of residential parks

According to Tendring District Council, there are currently 12[15] licensed residential parks in the district, these are summarised in Table 5.7 below.

There were some parks where the number of pitches was unknown.

Table 5.7: Residential parks in Tendring

Park Name	Permanent units
Bel Air Holiday Park *	200
Castle Hill Park	85
Clear Springs	20
Dovercourt Holiday Park	25
Greenlawns	36
Flagship Residential Park	21
Frating Caravan Park	36
Meadowview Residential Home Park	213
Oakleigh Residential Park and Leisure	4
Point Clear Bay Estate*	125
Sacketts Grove Caravan Park	104
Westwood Park	23
Total	**892**

Source: Tendring Operator Consultation, 2019/20

*These are not caravans but closer to very small bungalows, however Tendring District Council regard them as park homes and have therefore been included

Of the 12 parks, two are mixed use so also appear on the list of holiday parks.

Table 5.8 provides a breakdown of facilities provided on Tendring residential parks (where data was available).

Table 5.8: Residential park facilities

Park Name	Facilities
Bel Air Holiday Park	No on-site facilities
Castle Hill Park	WI-FI, pets allowed. No on-park facilities but within walking distance to Clacton town centre
Clear Springs	No on-site facilities
Dovercourt Holiday Park	Restaurant/bar/takeaway, entertainment, swimming pool, retail/shop and outdoor play area
Greenlawns	No on-site facilities
Flagship Residential Park	Restaurant/bar/takeaway
Frating Caravan Park	No on-site facilities
Meadowview Residential Home Park	No on-site facilities
Oakleigh Residential Park and Leisure	No on-site facilities
Point Clear Bay Estate	No on-site facilities
Sacketts Grove Caravan Park	Toilet block, shower block, laundry, on-site bar, on-site restaurant
Westwood Park	No on-site facilities

Source: Tendring Operator Consultation, 2019/20

Residential parks in Tendring have significantly less on-site facilities than holiday parks. Where there were facilities, Dovercourt and Sacketts Grove, this is due to these parks currently or recently being operated as holiday parks.

[15]This includes those classed as mixed parks (4), those that opted out of participating in the study (1) and those where no contact details existed (1)

6 Demand Assessment in Tendring

6.1 Holiday park demand in Tendring

In Tendring 68% of holiday parks operate seasonally with 32% open all year round. When compared to the **English average, more parks operate seasonally in Tendring (68% compared to 52%), with fewer parks open all year round (32% compared to 48%).**

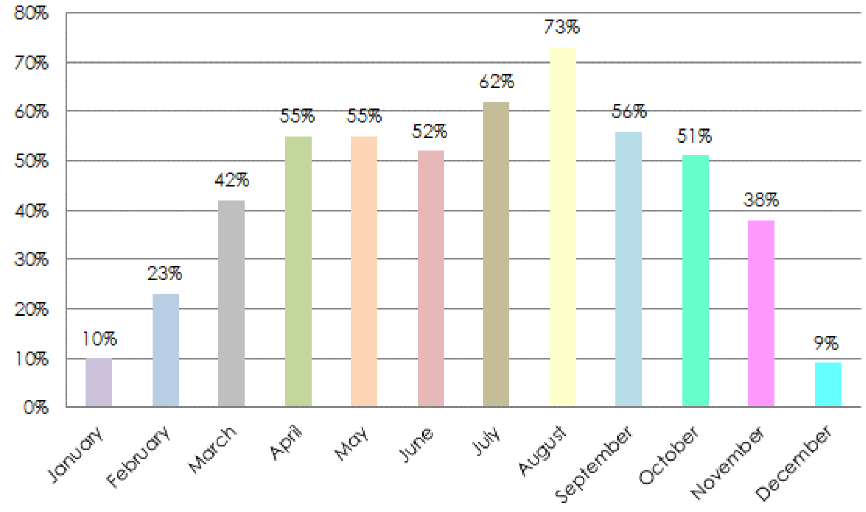
There is increasing demand from park owners to have their parks open all year round. Since 2009 there have been two holiday parks formally applying to the Council to extend their opening times. This is further supported by those participating in the study where a few mentioned the demand for parks to extend their opening times.

Based on a sample of parks in Tendring, annual occupancy rates of holiday parks peaked at 73% in high season (August) to 56% in mid-season (September). Low season average occupancy ranged from a low of 9% in December to a high of 42% in March as presented in Figure 6.1.

Some park operators found this question difficult to answer, particularly those with a high number of owner-occupied caravans where park owners had little idea of the usage patterns of owned caravans on their park.

Occupancy levels in Tendring holiday parks are comparable with the English average.

Figure 6.1: Average occupancy rates on Tendring holiday parks



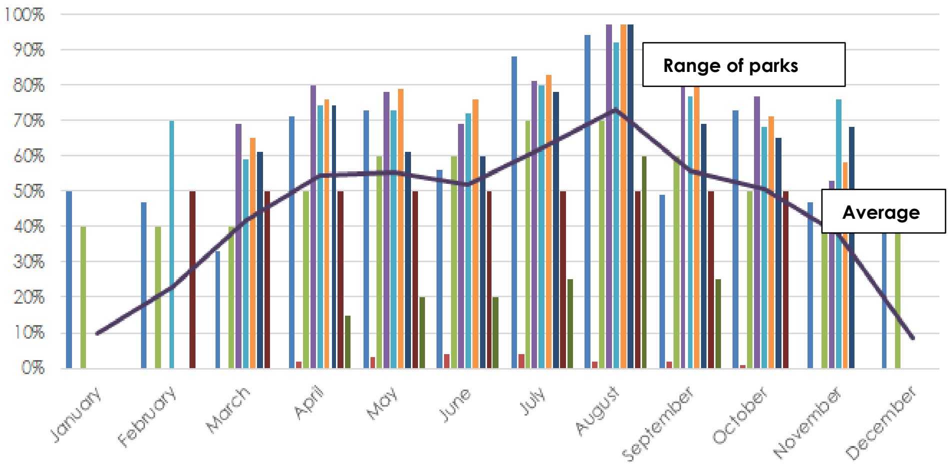
Source: Tendring Operator Consultation, 2019/20 N=9

When broken down further, Figure 6.2 shows that parks occupancy levels vary. More specifically:

- 3 parks have occupancy levels lower than the regional average
- 5 parks have occupancy levels higher than the regional average

Findings suggest that there may be merit in some parks reducing their density/ changing to an alternative use where their current occupancy levels are low. Alternatively, there may also be merit in allowing parks to expand where their occupancy levels are particularly high.

Figure 6.2: Range of occupancy rates on Tendring holiday parks



Source: Tendring Operator Consultation, 2019/20 N=9

The recent economic uncertainty has helped bolster the sector with increasing numbers of holiday-makers choosing to stay in the country rather than head abroad. There is an increasing trend for the 'staycation' which has helped make holidaying in the UK a much more popular choice amongst UK tourists[16].

A small sample of visitors (10) to the Tendring District area were captured as part of the recent research commissioned by the UK Caravan and Camping Alliance in 2019. A summary of key findings is presented below:

- Tendring visitors **spent slightly more on-site[17]** per day than the English and South East average (£54.57 versus £54.51 and £51.75)
- Tendring visitors **spent slightly less off-site[18]** per day than the English and South East average (£41.49 versus £44.14 and £41.53)
- Tendring visitors **stayed slightly longer** than the English and South East average (4.7 nights compared to 4.6 and 4.5)
- the majority of Tendring visitors **owned their own caravan holiday home/lodge, touring caravan, motorhome or tent**
- on average Tendring visitors **spent £294 annually on servicing/maintenance/refurbishment, £189 on insurance and £141 on road tax (for motorhome/campervans)**
- the majority felt **happier, less stressed and more relaxed** when visiting a holiday park
- the majority also noted **doing more exercise** during their visits

A review of the planning applications (over the last ten years) on 'extended use' has been undertaken. This was in terms of extension, where the focus is on creating an extended level of leisure holiday accommodation. Over this period, there have been 35 applications, with four pending consideration, ten refusals (with four overturned at appeal) and 21 approved, suggesting there is demand for holiday parks to extend their level of leisure accommodation (see Appendix 2 for more detail).

When reviewing coastal areas such as Tendring there are a number of unique challenges which negatively impacting on demand. One such challenge is the availability of the area for single day visitors with only 8% of UK day visitors choosing to visit seaside/coastal towns[19].

Other challenges include:

- an increased impact of seasonal factors including recent extreme weather
- local authority cuts
- local transport links
- availability of easily accessible parking
- age demographic of customers

[16]https://s3-eu-west-2.amazonaws.com/sw.co.uk/wp-content/uploads/2020/01/Caravan-Holiday-Park-Market-Report-2020-dbl-page.pdf

[17]This includes cost of holiday accommodation, park facilities (e.g. Wi-Fi, laundry etc), eating/drinking on the park (restaurants, bars, takeaways) and recreation/entertainment on the park

[18]This includes transport to and from your destination, transport spent during your trip i.e. fuel, public transport, taxis, eating/drinking/takeaways in the surrounding area, recreation/entertainment in the surrounding area and visitor attractions

[19]https://www.tourismalliance.com/downloads/TA_408_435.pdf

According to the National Coastal Tourism Academy (NCTA), the key to increasing the impact and success of the sector is to change the opinion of 'millennials' who currently see the coastal resorts as old-fashioned. In a BBC News report, it was found that 30 out of 75 local authorities in England could see a significant decrease in the number of under 30s by the year 2039.

From the report, the biggest declines are in the North of England around seaside towns with projection in under 30s of up to 14%[20]. In contrast, coastal areas in the south of England situated around large cities such as Bristol and Southampton are projected to see increased numbers of young people.

Another factor which is impacting the accessibility of coastal communities for UK tourism is transport connectivity. Inadequate rail connections and poor road access due to the use of single lane carriageways is limiting the potential for investment to these areas. Transport and the community as a whole are extremely vulnerable to extreme weather conditions which will become more varied if carbon emissions keep increasing[21].

A small number of park operators provided insight to the external factors affecting their business. These included:

> *"Seen more people enquiring about buying a caravan to live in. Personally, we would prefer to keep it as a holiday park as we have had bad experiences with residential parks and anti-social behaviour."*
>
> *"Cost of electricity, people wanting bigger caravans but not economical to do so as we need to reduce pitch numbers."*

6.2 Residential park demand in Tendring

The need to build new homes to meet the future needs of a growing population is one of the biggest planning issues facing most local planning authorities and Tendring is no exception. More than ever before, there is pressure on local authorities not only to identify sites for housing development but also to ensure that those sites will realistically deliver the number of homes required to meet objectively assessed needs. This was verified by two of the residential parks participating in the study who noted that the market was growing due to:

> *"Rising house prices driving movement away from London; ageing population wanting homes closer to the sea and at a lower price to allow for money to stretch further."*
>
> *"A lack of housing in the area."*

Seven out of the ten residential parks in Tendring were at or almost at full capacity. Data was not available for the remaining three.

When asked what attracts residents of park sites to Tendring the following responses were given:

- seaside location
- security aligned to the gated community
- a community spirit
- a cheaper location

As a result, **Tendring has seen an increase in the number of planning applications seeking to lift occupancy restrictions on holiday and caravan parks** to either allow year-round occupancy for tourism purposes or to enable use as residential homes.

[20] https://www.bbc.co.uk/news/uk-england-48995925

[21] https://www.independent.co.uk/news/science/uk-weather-forecast-global-warming-climate-change-environment-a8820556.html

The Council is coming under pressure to **allow some parks or proposed extensions to existing parks, to be used for homes with no restrictions on occupancy.** There have been four change of use applications over the period from 2013 to 2018 (see Appendix 3 for more detail). These included demolishing dwellings and existing buildings to allow for the erection of new uses. Of these four applications, two were approved and two were refused, one of which was approved after appeal. One of the approved applications (Martello Caravan Park) was for 216 new residential homes; this was a previous holiday park was granted permission for residential development which is now under construction. The other approved application (Highfield Grange Holiday Park) was only for the removal of one static caravan for a single dwelling house. An appeal on Sacketts Grove Caravan Park has recently been allowed for the residential occupation of caravans proposed as part of extension to the existing holiday park. An application to allow residential occupation at Oakleigh Park in Weeley has however been refused and might be the subject of an appeal in due course.

It is apparent that to date the planning authority has a consistent and thorough planning policy approach to assessing new and park plans and extension application. Their approach to date is consistent with **Paragraph 28 of the National Planning Policy Framework**, which states that Local Plans *'should support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside.'* This has a focus on supporting the *'provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres.'* **This approach confirms the importance of supporting the local tourism economy, as set out in the Tendring Tourism Strategy.**

Policy ER19 of the adopted Tendring District Local Plan 2007 requires extensions to static caravan and holiday parks to secure material improvements to the overall layout, amenity and appearance of the existing site. **This policy highlights the importance attached to design principles, as in keeping with traditional residential developments, and therefore indicates that applications for caravan pitches is subject to the same level of design scrutiny as traditional residential proposals.**

Policy PP11 of the Publication Draft Local Plan June 2017 requires extensions to existing sites to result in improvements to the overall layout, amenity, appearance and quality of accommodation over the whole site. Again, the proposed development did not provide any improvements to the overall layout or appearance of the site beyond just the provision of additional caravan pitches of a similar density and type. **As noted above, there is a raised level of scrutiny attached to design and appearance and this is a material consideration for holiday accommodation as it is for other residential, industrial and commercial applications.**

PP11 also states that proposals for new caravan parks will only be permitted where it can be demonstrated how the proposed scheme would help to strengthen and diversify the district's tourist economy and would improve the range and quality of attractions located at holiday parks. **In the case being reviewed, the type of accommodation was seen to be similar to that provided on the established site and elsewhere in the district on a significant number of static caravan parks. The proposed development did not provide an alternative form of accommodation which would assist in diversifying tourist accommodation either at the site or in the district. The proposed scheme also fails to incorporate any additional attractions of facilities which would improve the amenity and tourism value of the site. This further reiterates Policy ER19 where there is a central policy to support the tourism economy in Tendring and not allocate pitches for residential uses which do not further the tourism product and destination credentials of the local and regional area.**

7 Staff and Skills Assessment

Holiday and residential parks were asked about their staff employment and skills needs.

7.1 Staff employment

Parks were asked to provide staff numbers both part-time and full-time as well as seasonal and all year round.

Table 7.1: Average staff employed per holiday park

Type of Park	Full-time	Part-time
Participating holiday parks (15)	20.2	10.9
Participating residential parks (2)	Ranged from 1 to 9[22]	0

Source: Tendring Operator Consultation, 2019/20 N=17

Results show that on average, holiday parks employ more staff than residential parks although findings for residential parks are based on a very small sample.

Across the responses reviewed, employment is spread across roles as follows:

- park management (26)
- admin/support (14)
- sales (14)
- grounds maintenance (11)
- cleaning (5)
- caravan maintenance (4)
- other, which includes book-keeping, park warden, bar staff, lifeguards and café staff (27)

The two residential parks also employed contractors predominantly for grounds maintenance.

Only one park employed migrant workers, and this was a holiday park. No parks had any apprenticeships.

7.2 Skills needs

Only one of the responding parks (a holiday park) had plans to take on staff over the next three years; this was in the roles of sales, grounds maintenance and the café. There were no anticipated difficulties in filling these roles, in fact one residential park said that while they are not looking to recruit, they are constantly getting enquiries on vacancies.

Participants were finally asked if they were considering developing any new or diversifying/expanding any existing roles on their park. All responding parks said no, some comments included:

"The site is very different from others, running it as a husband and wife, no other staff."

"We are already pretty diverse, just moved into the motorhome sales sector."

[22] Due to the small sample size we were unable to provide an average

8 Economic Impact Assessment – Methodological Approach

One of the objectives of this research was to assess the value of visitor spend attributable to the Tendring holiday park sector and to understand how expenditure compares between holiday and residential parks.

8.1 Holiday parks

For holiday parks, an economic model was developed that took secondary data on average visitor on-site and off-site spend and factored this up to pitch numbers across the Tendring area, taking into account average occupancy rates.

Average spend was taken from the recent research commissioned by the UK Caravan and Camping Alliance in 2019 across three sources:

1. average on-site and off-site spend of visitors to England
2. average on-site and off-site spend of visitors to the South East of England
3. average on-site and off-site spend of visitors to Tendring

These variations in spend are shown in Table 8.1.

Table 8.1: Sources of daily visitor spend data

Spend area	On-site[23]	Off-site[24]
England	£54.51	£44.14
South East England	£51.75	£41.53
Tendring	£54.57	£41.49

The table shows that average spend across the three sources did not vary greatly. For the purpose of this study we used the Tendring specific spend in the modelling.

Table 8.2 provides an illustrative example of how the gross on-site expenditure figures were estimated on Saturday 4 August 2019:

Table 8.2: On-site expenditure of visitors

Total number of touring caravan pitches in Tendring	8,516
Multiplied by:	
Average occupancy rate on 4 August	73%
Number of pitches occupied on 4 August	6,217
Multiplied by:	
Ave. on-site expenditure per day for holiday-makers in Tendring	£54.57
= On-site expenditure of visitors to Tendring on 4 August 2019	**£339,244**

The gross off-site expenditure was measured in exactly the same way. Following the same worked example as above, it was calculated that in Tendring, on Saturday 4 August 2019, total off-site expenditure by touring caravan visitors is presented in Table 8.3.

Table 8.3: Off-site expenditure of visitors

Total number of touring caravan pitches in Tendring	8,516
Multiplied by:	
Average occupancy rate on 4 August	73%
Number of pitches occupied on 4 August	6,217
Multiplied by:	
Ave. off-site expenditure per day for holiday-makers in Tendring	£41.49
= Off-site expenditure of visitors to Tendring on 4 August 2019	**£257,943**

[23]This includes cost of holiday accommodation, park facilities (e.g. Wi-Fi, laundry etc), eating/drinking on the park (restaurants, bars, takeaways) and recreation/entertainment on the park

[24]This includes transport to and from your destination, transport spent during your trip i.e. fuel, public transport, taxis, eating/drinking/takeaways in the surrounding area, recreation/entertainment in the surrounding area and visitor attractions

8.1.1 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted overleaf, the Tendring economy would also have benefited from additional knock-on impacts on this day as a result of:

- **Indirect expenditure**: the knock-on benefits that take place further down the supply chain.
- **Induced expenditure**: the knock-on benefits that take place as a result of employees' expenditure of income.

The most up to date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (March 2019). This publication recommended that the 0.47 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 8.4 presents a worked example for Tendring.

Table 8.4: Indirect and induced effects 4 August 2019

Total on-site expenditure	£339,244
Plus	
Total off-site expenditure	£257,943
Total combined on and off-site expenditure	**£597,187**
Multiplied by:	0.47
= Indirect and induced effects:	**£280,678**

8.1.2 Measuring holiday park visitor impact

For holiday parks gross expenditure impact is equal to the sum of the on-site expenditure, off-site expenditure and multiplier impacts.

Table 8.5 presents a worked example.

Table 8.5: Visitor impact 4 August 2019

Total on-site expenditure	£339,244
Plus	
Total off-site expenditure	£257,943
Indirect and induced effects	£280,678
Visitor impact	**£877,865**

8.1.3 Measuring employment impacts and GVA associated with holiday park visitor

According to research by VisitBritain, every £54,000 spent by tourists in a local economy sustains one full-time equivalent (FTE) job. This proxy was applied in the assessment of the gross and net FTE employment impacts associated with the holiday park visitor expenditure.

According to figures from the most recent ONS's publication, every £100 of turnover generated by Tendring's overnight accommodation sector translates to a GVA impact of £56.92[25]. This proxy was applied to the above turnover figures to produce an estimate of the holiday park sector's contribution to English GVA.

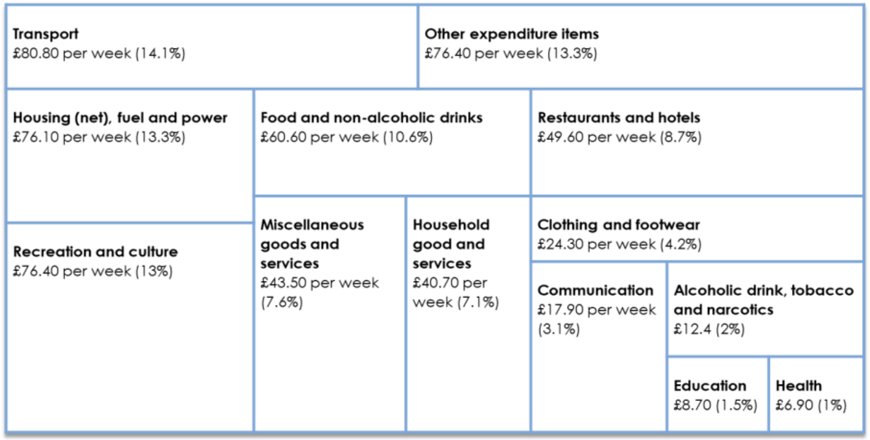
[25]Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks)

8.2 Expenditure impact comparison between holiday and residential parks

In order to compare impact between holiday parks and residential parks, a model had to be developed which allowed a direct comparison to be made. Unlike the holiday park model which looks at expenditure as well as employment impacts and GVA, the comparison model looks at just expenditure. This is because there are not the same equivalent multipliers when looking at converting expenditure from residential parks into employment and GVA.

To compare expenditure only, we looked at the family expenditure survey to determine what a typical family would spend in a residential setting. According to 'Family Spending in the UK[26] a typical household in the UK spends £572 per week. However, as the summary shows below, not all of the expenditure items will directly benefit a local economy.

Table 8.6 Family expenditure



Source: ONS Family Expenditure 2018

[26]https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/expenditure/bulletins/familyspendingintheuk/financialyearending2018

When looking at the benefits to the local economy we have included the following expenditure figures.

Table 8.7: Daily family expenditure figures impacting the local economy

	Spend £
Food and non-alcoholic drinks	8.66
Alcoholic drinks and tobacco	1.77
Health	0.99
Dry cleaners and laundry	0.03
Petrol, diesel and other motor oils	3.03
Transport services	2.81
Recreational and cultural services	2.99
Restaurants and hotels	7.09
Hairdressing, beauty treatment	0.54
Council tax, domestic rates	3.37
Electricity, gas and other fuels	3.21
Rent	*6.79
Total	**41.27**

**This is based on the average pitch fees of 5 residential parks across Tendring (£2,281 per year)*

Expenditure is then factored up to residential pitch numbers across Tendring assuming 100% capacity. Table 8.8 provides an illustrative example of how the expenditure figure was estimated for those staying in a residential park home[27]:

Table 8.8: Expenditure of residential park homeowners

Total number of residential pitches in Tendring	892
Multiplied by:	
Average occupancy rate	100%
Multiplied by:	
Ave. expenditure per day residents in Tendring	£41.27
=	**£36,813**

[27]For residential parks there are limited on-site facilities therefore on-site and off-site has not been separated

9 Economic Impact of Holiday Parks in Tendring

This section presents a summary of the gross visitor expenditure, gross value added (GVA) and full-time equivalent (FTE) employment impacts of the holiday park sector in Tendring along with the difference in expenditure impact between holiday and residential parks and the potential loss of holiday parks to residential.

9.1 Impact of the holiday parks for Tendring

It is estimated that in 2019 visitors to Tendring holiday parks spent a total of **£193m** in the Tendring economy, made up as follows:

- £74.5m on-site spend
- £56.7m off-site spend
- £61.7m of multiplier impacts

This visitor expenditure supports **3,571 FTE jobs** and contributes **£109.8m of GVA** to the Tendring economy.

Table 9.1: Summary economic impacts

	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Tendring	193	3,571	109.8

Source: Tendring Operator Consultation, 2019/20

Table 9.2 provides a breakdown of the detailed impact findings.

Table 9.2: Detailed impact findings

On-site expenditure (£m)	74.5
Off-site expenditure (£m)	56.7
Indirect and induced multiplier impacts (£m)	61.7
Visitor expenditure impact (£m)	193.8
Employment associated with on-site expenditure (FTE jobs)	1,380
Employment associated with off-site expenditure (FTE jobs)	1,049
Employment associated with indirect and induced multiplier impacts (FTE jobs)	1,142
Employment associated with visitor expenditure impact (FTE jobs)	3,571
GVA associated with on-site expenditure (£m)	42.4
GVA associated with off-site expenditure (£m)	32.3
GVA associated with indirect and induced multiplier impacts (£m)	35.1
GVA associated with visitor expenditure impact (£m)	109.8

Source: Tendring Operator Consultation, 2019/20

9.2 Expenditure impact of holiday parks compared to residential

When directly comparing expenditure holiday-makers i.e. those visiting a holiday park, spend on average more than double than those who are residents. This is illustrated in Table 9.3.

Table 9.3: Expenditure of holiday-makers to holiday parks vs residential park homeowners

	Daily spend	Includes
Holiday-makers holiday parks	£96.06	Holiday accommodation Park facilities (e.g. Wi-Fi, laundry etc) Eating/drinking on and off the park Recreation/entertainment on the park and off the park Transport to and from the destination, Transport spent during the trip i.e. fuel, public transport and taxis Visitor attractions
Home-owners residential parks	£41.27	Food and non-alcoholic drinks Alcoholic drinks and tobacco Health Dry cleaners and laundry Petrol, diesel and other motor oils Transport services Recreational and cultural services Restaurants and hotels Hairdressing, beauty treatment Council tax, domestic rates Electricity, gas and other fuels Rent

However, when you consider that residential park homes are occupied 100% of the time versus the fluctuating occupancy levels of holiday parks the potential impact changes. For example, if we were to convert a holiday park in Tendring to a residential park the difference is shown in Table 9.4.

Table 9.4: Summary daily expenditure impacts

	Pitch numbers	Daily spend	Occupancy levels		Daily expenditure	
			Highest	*Lowest*	*Highest*	*Lowest*
Park A as a **holiday park**	200	£96.06	73%	9%	£14,025	£1,729
Park A as a **residential park**	200	£41.27	100%	100%	£8,254	

Findings show that at the average highest occupancy levels, holiday parks generate higher expenditure impacts than residential parks. However, at the lowest level of occupancy residential parks have greater impact. As the occupancy levels vary between holiday parks these findings are based on the averages provided by those participating in the study.

Further sensitivity analysis shows that holiday parks generate more expenditure than residential parks where they have an occupancy level of **43% or more**. On average, this is the case for holiday parks **nine months out of the year** in Tendring.

When this is extrapolated out to the full year, Table 9.5 shows that there is little difference in annual expenditure between an **average holiday park site** and **residential park site**. However, it should also be taken into consideration that **residential parks have less pitch numbers than holiday parks. If holiday parks are requesting a change of use to residential and also reducing their pitch numbers, this would have an impact on the expenditure generated**.

Table 9.5: Summary annual expenditure impacts

	No of Pitches	Daily spend	Average occupancy levels												Total annual spend
			Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec	
Park A as a **holiday park**	200	£96.06	10%	23%	42%	55%	55%	52%	62%	73%	56%	51%	38%	9%	£4,528,829
Park A as a **residential park**	200	£41.27	100%												£4,590,722

9.3 The potential loss of holiday parks to residential park homes

The economic value of the holiday park sector in Tendring is significant. Supporting its sustained growth will ensure it continues to be an important contributor to the area's tourism sector and wider economy. Any loss of the holiday park sites to residential parks and park homes will adversely affect this value. For example:

- residential parks and park homes will not support the tourism economy or the tourism infrastructure in Tendring
- park homes will not encourage tourism visits and will weaken the destination appeal and destination credentials of Tendring
- residential parks and park homes will only benefit the economy in the same ways that housing developments benefit a local economy. However, this role will not be as significant as new housing developments as in many cases the homes are shipped in from outside the area and therefore there are little construction benefits
- park homes are generally smaller and house fewer people than traditional housing
- park homes often do not comply with traditional building standards and open space guidance. In theory they are 'caravans' and therefore any appeal suggesting park homes bring marked economic value is subject to challenge

In terms of economic benefit, park homes can attract new people to the area; however, in most cases, they are bought by older people looking to downsize or reside temporarily in an area. Where new people are attracted to the area the direct benefits with be

- council tax
- new household expenditure – in part will benefit local businesses, such as retail expenditure
- spending on household goods and services

Attracting new people to an area through new housing is also known to support local economic growth and sustain key social infrastructure, such as schools, health provision and open green space provision. However, attracting new people to Tendring is best achieved through building new homes, in line with the Local Plan and Local Housing Supply Policy.

Losing holiday homes to park homes will threaten and undermine the important part they play in supporting the tourism ambitions of the area, especially when considering they bring in over £110m in tourism GVA which is a sizeable proportion of the overall tourism sector, which was measured at £402m in the draft Tourism Strategy.

10 Conclusions and Recommendations

This section presents the conclusions and recommendations from the research.

10.1 The holiday park sector in Tendring makes a substantial impact on the local economy

The UK tourism sector was predicted to grow at an annual rate of 3.8% through to 2025 – faster than the overall UK economy (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail[28].

This impact assessment has demonstrated that the holiday park sector in Tendring makes a substantial contribution to the tourism economy. **In 2019 visitors to holiday parks spent a total of £193m supporting 3,571 FTE jobs and contributing £109.8m of GVA to the Tendring economy.**

This research provides strong evidence to defend the Local Plan's position, and the planning department's decisions, on protecting new and extended sites as 'tourism' assets.

Recommendation: ***the economic value of the holiday park sector in Tendring is substantial. In order to safeguard and grow its value, the emerging Local Plan should retain and strengthen the policies (PP8 – PP11) which safeguard the holiday park sector. Similarly, the draft Tendring Tourism Strategy should demonstrate the strategic importance of the holiday park sector to the tourism economy. The research findings should be endorsed, disseminated and promoted across the sector and through stakeholders in order to provide further confidence to the market that Tendring is an attractive place to visit, revisit and invest in.***

[28] Prior to the COVID-19 crisis

10.2 The Tendring holiday park sector is different from the national average

When compared to the English average[29], Tendring has:

- fewer parks offering amenities such as Wi-Fi, toilet and or shower blocks and on-site entertainment
- more parks offering outdoor play areas, restaurant/bar/takeaway and retail/shops
- a lower proportion of touring pitches – 5% compared to 38%
- a higher proportion of owned holiday homes – 74% compared to 43%

As a result, the holiday parks are limited in their ability to bring new tourists into the region and it minimises the ability to grow the regional economic impact. As noted in the draft Tendring Tourism Strategy the lack of quality bed spaces is a weakness in attracting new visitors and encouraging repeat visits to the region. Suggesting investment in holiday accommodation should be encouraged and supported through the planning system.

Recommendation: ***The Council should consider the type of accommodation to be provided in future holiday park expansion plans and new park plans, with some requirements around the need to have a higher percentage of rented and touring capacity.***

The emerging Local Plan should use this evidence to support and defend policy PP11 to support the growth and sustainability of holiday parks as tourism assets, thereby supporting the draft Tendring Tourism Strategy which seeks to attract even more visitors to the region and maximise the economic value of tourism to the Tendring economy.

[29] The UK Caravan and Camping Alliance in 2019

10.3 Supply within the Tendring holiday park sector is currently meeting demand

Based on the evidence gathered, park occupancy rates are not near full capacity. 73% was the highest occupancy and that is at peak summer period (August) which suggests there is ample supply, and no evidence of unmet demand. When broken down further, some parks had higher or lower than average occupancy levels suggesting that there may be merit in some parks changing to an alternative use where their current occupancy levels are low. Alternatively, there may be value in allowing parks to expand where their occupancy levels become frequently high.

Tendring, when compared to England as a whole, has fewer small parks (less than 50 pitches) and more medium (51-100) and very large parks (251+). Based on the current number of very large parks in the area and the recent investment announcement from Park Dean's it suggests that there is currently not the headroom for new larger parks, especially given that occupancy levels are not at, or near, the required 80%-100% levels to encourage investment attention.

Recommendation: ***The current occupancy levels suggests that the Council should not be actively encouraging the expansion of existing, or creation of new holiday parks in the short to medium term. The Park Dean upgrade scheme that is underway suggests that this will drive retention and new demand to further increase occupancy. The Council should look to monitor current parks occupancy levels to assess on an individual park level whether some parks merit more pitches if there was evidence that their occupancy levels were high, or on the rise. Monitoring on an annual basis is recommended. Or alternatively to allow change of use if occupancy levels were particularly low.***

10.4 Increasing demand from holiday park operators to open all year round

When compared to the English average, fewer parks open all year round in Tendring (32% compared to 48%). This suggests the majority are operating as holiday parks and not infringing on residential status and that the Council is effective in controlling the operating restrictions.

There is increasing demand from holiday park owners to have their parks open all year round. Since 2009 there have been two holiday parks formally applying to the Council to extend their opening times. This is further supported by those participating in the study where a number mentioned the demand for their parks to extend opening times.

The recent economic uncertainty related to Brexit has helped bolster the sector with increasing numbers of holiday-makers choosing to stay in the country rather than head abroad. This position will be heightened as a result of the COVID-19 crisis which would suggest an even greater level of 'staycation' activity once the virus is under control. However, there are also a number of factors impacting demand including:

- the availability of the area for single day visitors, with only 8% of UK day visitors choosing to visit seaside/coastal towns[30]
- an increased impact of seasonal factors, local authority cuts, recent extreme weather, local transport links and availability of easily accessible parking, and the age demographic of customers

Recommendation: ***The Council should continue to monitor seasonality to ensure the current stock remain tourism assets. Currently, on average, occupancy levels do not merit the need for parks to be opened all year. Using the data provided in this report, the Council should continually update activity levels on pitch numbers, opening times, occupancy levels and type of accommodation to further inform policy going forward.***

[30] https://www.tourismalliance.com/downloads/TA_408_435.pdf

10.5 A strong holiday park sector needs good supporting infrastructure

Another factor impacting the accessibility of coastal communities for UK tourism is transport connectivity. Inadequate rail connections and poor road access due to the use of single lane carriageways is limiting the potential for investment to these areas. Transport and the community in Tendring are extremely vulnerable to extreme weather conditions which are projected to become more varied if carbon emissions keep increasing.

The success of the holiday park sector is reliant on good local amenities, strong branding and marketing. There is a view that the local amenities could be improved along with the Tendring brand. Stakeholders noted that tourist attractions close early and there was poor transport links to town centres especially as many of the parks are very rural. There was a need to improve the perception of Tendring as a tourism destination overall.

Recommendation: ***The Council and the holiday park operators need to work together to provide supportive planning of the parks as well as the development of the town centres, transport links, the Tendring brand and overall marketing and communication.***

10.6 Residential parks seem to be in increasing demand

There is increasing demand for residential use of holiday homes due to the influx of retirees to the region. Residential use has the potential to attract new people to the area, and they should therefore generate council tax receipts for the local authority. Similarly, they will generate new household expenditure which in part will benefit local businesses, such as retail expenditure and spending on general household goods and services. However, **evidence has shown that in some cases this is hard to regulate, and some residents are staying on parks illegally.**

The research has shown that park homes support the financial viability of holiday parks and bring economic benefits. While they have a role to play, a mechanism needs to be established to agree the level of park homes that should be built in Tendring.

Changes to the provision should not be to the detriment of retaining and growing the stock of holiday accommodation in the district.

Recommendation: ***The Council should consider allowing (in some cases) mixed use on some holiday park sites. This would permit parks to have a level of stability in revenue and meet the needs of older retired residents that are not currently being met through the land allocations and the adopted and emerging local plans. This would require caveats such as the ability to demonstrate how it would benefit the local community as well as the site, along with ensuring all regulatory requirements are met.***

10.7 There are currently limited opportunities for work related diversification

Parks responding to the study have no plans to diversify their existing roles within the parks. Key staff roles currently employed on the parks include:

- park management
- admin/support
- sales
- grounds maintenance
- cleaning
- caravan maintenance
- other – includes book-keeping, park warden, bar staff, lifeguard, café staff

Only one of the responding parks had plans to take on staff over the next three years and this was in the roles of sales, grounds maintenance and the café. There were no skills shortages noted.

Recommendation: ***The Council should continue to monitor staffing levels on the holiday parks and where parks are looking to expand, they should enquire about the need for recruitment and diversification of staff to support this. Annual monitoring is recommended.***

10.9 Summary

This impact assessment has shown that the **value of tourism spend associated with holiday parks is substantial and growing**. The holiday park sector should be supported and protected, as **its value is greater than that associated with a traditional home,** and even more so than park homes. For this reason, **this report should be used as material consideration in defending the policy position set out in the emerging Local Plan, notably PP8 to PP11.**

Overall, the **research supports the Council's position of supporting and safeguarding holiday parks as a critical component of the area's tourism asset base.** Their value has been demonstrated in this research, and this should be monitored and measured in future years. The draft Tendring Tourism Strategy has ambitious plans to attract more visitors to the region and to grow the economic value of tourism to Tendring. **This research should be endorsed, disseminated and promoted to encourage stakeholders to support the sector and encourage further investment through the planning system.** The development of a **forum of key stakeholders and businesses to help shape the holiday park sector going forward post-COVID-19 should be considered**.

A robust database of holiday park assets now exists, and this database should be used to monitor the level of holiday park homes by type. The database will require ongoing update and review. At present, it shows **there are 36 holiday parks and 12 park home sites**. We recommend the database is updated annually.

Although a high proportion of the holiday park pitches are made up of 'owner-occupied' pitches, this split suggests around 25% of the parks and 10% of pitches in Tendring are residential. This position should be monitored, and it is **recommended that this 75%/25% split is retained as it shows a focus on holiday rather than residential parks.** Similarly, the mix of holiday pitches and park homes on sites which offer both use types should also be monitored with a recommended density level (also in the region of a 75%/25% split) to ensure the focus is firmly on tourism uses, rather than residential uses.

This mechanism would provide a clear and transparent manner in which to assess future planning applications for:

1) new sites
2) where there are changes in use and density on existing mixed use sites

Findings suggest the economic value of holiday parks is significant in 2019 – this of course will be affected in 2020 and possibly into 2021 due to the COVID-19 crisis.

The 75/25 split produces a notable economic value and solid/robust baseline to measure the sector in the future. By retaining this split we would expect this economic value to be sustained in a typical holiday year (with 2019 being a typical year). Therefore, for every residential pitch sought/agreed there should be three holiday park pitches sought/agreed. This would allow the Council to, at best, sustain the considerable economic value of holiday pitches across Tendring.

Frontline
August 2020

Appendix 1: Consultees

Stakeholders:

- Anthony Brindley, Planning Policy
- Billy Ball, Director of Clacton Pier
- Catherine Bicknell, Head of Planning Services
- Chris Stathers, Enforcement Team Leader
- Gary Guiver, Planning Policy Manager
- Gill Burden, Community Projects Manager
- Michael Carran, Head of Sport & Leisure
- Rachel Fryer, Town Centre Coordinator
- Tom Gardiner, Regeneration Manager

Holiday parks:

- Bentley Country Park
- Greenacares
- Highfield Grange Holiday Park
- Homestead
- Lakeside Caravan Park
- Laurel Cottage
- Lee Wick Farm Cottages & Glamping
- Mill Farm Camping
- Naze Marine Holiday Park
- New Hall Lodge Park
- Saddlebrook Chase Park
- Southcliffe Trailer Park
- Valley Farm Caravan Park
- Willows Caravan Park
- Weeley Bridge Holiday Park

Residential/mixed parks:

- Westwood Park
- Oakleigh Park

Appendix 2: Planning Applications (Extensions)

Application no.	Description	Address	Date submitted	Status
09/00026/FUL	Change of use application to relocate displaced caravan pitches from Firs Park on adjacent land with 47 additional pitches in a low density informal layout including the creation of a lake, landscaping and tree and woodland planting allied to the proposed upgrading and restructuring of the existing park (new informal low density layout and landscaping).	Firs Caravan Park 29 - 31 London Road Little Clacton Clacton On Sea Essex CO16 9RN	13/01/2009	Refused
09/00879/FUL	Extension to existing caravan touring park to provide for the siting of 22 additional pitches; and construction of internal roadway.	Homestead Lake Touring Park Thorpe Road Weeley Clacton On Sea Essex CO16 9JN	25/08/2009	Refused
09/00881/FUL	Provision of roads and drainage works and hardstanding for a 50 pitch touring caravan park and the construction of a lake and excavation works of deposits of soil in connection with the lake (Variation of condition 4 of planning permission TEN/91/1368 - to change opening period).	Homestead Lake Touring Park Thorpe Road Weeley Clacton On Sea Essex CO16 9JN	25/08/2009	Approved
09/01170/FUL	Change of use to relocate displaced caravan pitches from Firs Park on adjacent land with 45 additional pitches in a low density informal layout including landscaping and tree and woodland planting allied to the proposed upgrading and restructuring of the existing park (new informal low density layout and landscaping).	Firs Caravan Park 29 - 31 London Road Little Clacton Clacton On Sea Essex CO16 9RN	09/11/2009	Refused
10/00165/FUL	Change of use of site for 50 touring caravans to the siting of 28 static caravans and erection of a bin bay.	Naze Marine Holiday Park Hall Lane Walton On The Naze Essex CO14 8HL	16/02/2010	Approved
10/00427/FUL	Change of use application to relocate displaced caravan pitches from Firs Park on adjacent land, together with 45 additional pitches in a low density informal layout including the creation of a lake, landscaping and tree and woodland planting allied to the proposed upgrading and restructuring of the existing Park (new informal low density layout and landscaping).	Firs Caravan Park 29 - 31 London Road Little Clacton Clacton On Sea Essex CO16 9RN	15/04/2010	Refused
10/00450/FUL	Proposed 18 pitch extension to existing caravan touring park.	Homestead Lake Touring Park Thorpe Road Weeley Clacton On Sea Essex CO16 9JN	20/04/2010	Refused
10/00892/FUL	Variation of condition 3 of planning permission 03/01960/FUL to allow stationing of 58 static caravans.	Naze Marine Holiday Park Hall Lane Walton On The Naze Essex CO14 8HL	30/07/2010	Approved
10/00897/FUL	Application for the siting of 12 static caravans.	Naze Marine Holiday Park Hall Lane Walton On The Naze Essex CO14 8HL	02/08/2010	Approved

Application no.	Description	Address	Date submitted	Status
11/00254/FUL	Proposed upgrade and extension of existing caravan park to allow for the siting of 21 additional static holiday caravans, 40 relocated touring pitches and pitch and putt area together with the siting of 19 additional static holiday caravans within the existing park and overall environmental improvements including significant landscaping at Sacketts Grove Caravan Park.	Sacketts Grove Caravan Park Jaywick Lane Clacton On Sea Essex CO16 7BD	03/03/2011	Approved
11/00897/FUL	Proposed 20 pitch static holiday caravan park with peripheral and supplemental landscape planting.	Starena Lodge Clacton Road Weeley Clacton On Sea Essex CO16 9DH	03/08/2011	Refused - Allowed at Appeal
12/00321/FUL	Continued use of the land to the rear of Strangers Home for the existing 67 touring pitches (caravans or tents) between 1st March and 15th January of the following year. Limit of 50 caravans at any one time (increased from 25) together with the retention of the modified site access and use of part of the land for caravan storage between 15th January and 1st March (Replacement of existing consent TEN/922/76).	Strangers Home The Street Bradfield Manningtree Essex CO11 2US	22/03/2012	Refused - Allowed at Appeal
13/00224/FUL	Change of use of site for 50 touring caravans to the siting of 28 static caravans & erection of a bin bay. (Extension of time for planning permission 10/00165/FUL).	Naze Marine Holiday Park Hall Lane Walton On The Naze Essex CO14 8HL	27/02/2013	Approved
13/00997/FUL	Change of use of paddock land for recreational/leisure purposes to include touring caravans, glamping pods, tents, tipis and associated facilities.	Land adjacent to Kimbolds Heath Road St Osyth Clacton On Sea Essex CO16 9BP	04/09/2013	Approved
13/01037/FUL	Variation of Condition 9 on planning permission 13/00429/FUL to limit the maximum number of static caravans to 290 and touring caravans to 99.	Weeley Bridge Holiday Park Clacton Road Weeley Clacton On Sea Essex CO16 9DH	19/09/2013	Approved
13/01234/FUL	Change of use of land for the extension of the existing park to site 32 static holiday caravans.	Firs Caravan Park 29 - 31 London Road Little Clacton Clacton On Sea Essex CO16 9RN	29/10/2013	Approved
13/01251/FUL	Change of use of land to operate the touring fields for dual use (touring caravan pitches and camping pitches).	Highfield Holiday Park London Road Clacton On Sea Essex CO16 9QY	31/10/2013	Approved
14/00606/FUL	Extension of Homestead caravan park to create an additional 50 chalet homes pitches with additional access tracks, servicing, landscaping and other associated works.	Homestead Caravan Centre Thorpe Road Weeley Essex CO16 9JN	08/05/2014	Refused
14/01815/FUL	Proposed siting of 135 static holiday caravan on the western element of Sacketts Grove Holiday Park in lieu of an approved development of 40 static holiday caravans and 40 touring caravans, together with landscape planting.	Sacketts Grove Caravan Park Jaywick Lane Clacton On Sea Essex CO16 7BD	04/12/2014	Approved

Application no.	Description	Address	Date submitted	Status
14/01852/FUL	Change of use of land for the extension of the existing holiday park to site 38 static holiday lodge caravans.	Ashleys Caravan Park London Road Little Clacton Clacton On Sea Essex CO16 9RN	12/12/2014	Approved
15/00481/FUL	Change of use from agriculture to tourism & leisure for touring caravans/glamping pods & tents.	Grange Farm Station Road Thorpe Le Soken Clacton On Sea Essex CO16 0HG	31/03/2015	Approved
16/00745/OUT	Outline application for the removal of static caravan and erection of one dwelling together with detached garage, access from London Road.	Highfield Grange Holiday Park London Road Clacton On Sea Essex CO16 9QY	11/05/2016	Approved
16/01458/FUL	Change of use of land to a holiday caravan park with associated offices and leisure facilities with use for 11 months from 1st March in any one year to 31st January the next year.	Bentley Country Park Flag Hill Great Bentley Colchester Essex CO7 8RF	09/09/2016	Approved
16/01564/FUL	Change of use of land to site 40 holiday lodge caravans.	Starena Lodge Holiday Park Clacton Road Weeley Clacton On Sea Essex CO16 9DH	29/09/2016	Approved
17/00567/FUL	Change of use of land to site 67 holiday lodge caravans.	Starena Lodge Holiday Park Clacton Road Weeley Clacton On Sea Essex CO16 9DH	03/04/2017	Refused - Allowed at Appeal
17/01931/FUL	Proposed extension to existing Showbar/Arcade building and hard standing car park, and revised internal access arrangements in the car parking area. (Following removal of 2 existing static caravans, 1 shed and 2 existing containers).	Orchards Holiday Village Colne Way Point Clear Bay St Osyth Clacton On Sea Essex CO16 8LJ	08/11/2017	Approved
17/01932/FUL	Installation of 9 caravan bases with associated parking. Proposed new internal access road, pedestrian footpaths, landscaping & new boardwalk with bridge.	Orchards Holiday Village Colne Way Point Clear Bay St Osyth Clacton On Sea Essex CO16 8LJ	08/11/2017	Approved
18/01861/FUL	Proposed 21 additional Static Holiday Caravans with parking spaces adjacent to Caravans (NOT occupied for human habitation between 15th January and 28th February), demolition of existing building and re-arrangement of existing car park to form 29 parking spaces.	Saddlebrook Chase Caravan Park Jaywick Lane Clacton On Sea Essex CO16 7JB	07/11/2018	Approved
19/00646/FUL	Proposed change of use of land to a mixed use of touring caravans/tents and permanent static caravans.	Strangers Home Pub and Camp Site Station Road Bradfield Essex CO11 2US	23/04/2019	Approved
19/00707/FUL	Proposed change of use of land to allow for siting of 16no. additional holiday lodge caravans, new position for 2no. already permitted holiday lodge caravans, regularisation of layout of 58no. existing holiday lodge caravans & siting of 1no. lodge caravan for use as central clubhouse with visitor parking.	Oakleigh Residential Park Clacton Road Weeley Essex CO16 9DH	07/05/2019	Refused – appeal expected.

Application no.	Description	Address	Date submitted	Status
19/01612/FUL	Proposed caravan park for holiday use only	Goodlife Inn Beach Road St Osyth Clacton On Sea Essex CO16 8SD	23/10/2019	Pending Consideration
19/01633/FUL	Extension of existing five pitch touring caravan site to eight pitches for touring caravans with associated parking.	Land at Folkards Lane Brightlingsea Essex CO7 0SJ	30/10/2019	Pending Consideration
19/01688/FUL	Change of use to site touring caravans & Tents, to include Toilet & Shower Block.	Wensley Stud Rectory Road Weeley Heath Clacton On Sea Essex CO16 9BH	07/11/2019	Pending Consideration
14/01440/FUL	Change of use for extension to existing mobile home park for holiday accommodation following demolition of existing dwelling.	The Bungalow Flag Hill Great Bentley Colchester Essex CO7 8RE	26/09/2014	Approved
19/01712/FUL	Proposed 19 additional Static Holiday Caravans with parking spaces adjacent to Caravans (NOT occupied for human habitation between 15th January and 28th February), demolition of existing building and re-arrangement of existing car park to form 29 parking spaces	Sacketts Grove Caravan Park Jaywick Lane Clacton On Sea Essex CO16 7JB	11/11/2019	Refused - Allowed at Appeal

Appendix 3: Planning Applications (Change of Use)

Application no.	Description	Address	Number of dwellings	Date submitted	Status
13/00834/OUT	Outline application for the removal of static caravan and erection of one dwelling together with detached garage, access from London Road.	Highfield Grange Holiday Park London Road Clacton On Sea Essex CO16 9QY	1	26/07/2013	Approved
15/01714/ FUL	Demolition of existing buildings, re-profiling of ground levels and erection of 216 residential dwellings together with associated access, car parking, landscaping and related works.	Martello Caravan Park Kirby Road Walton On The Naze Essex CO14 8QP	Phase 1: 216 dwellings (subsequent phases approved.)	13/11/2015	Approved
17/02055/FUL	Variation of conditions 1,2,3,4,5,6,9 & 10 of planning application 16/00675/FUL to allow for the residential occupation of caravans permitted on the western part of the sit	Sacketts Grove Caravan Park Jaywick Lane Clacton On Sea Essex CO16 7JB	Residential Occupation of existing caravans	28/11/2017	Refused - Appeal In Progress
18/00410/FUL	Removal of condition 3 to approved Planning Application 16/01956/FUL; Removal of condition 5 to approved Planning Application 16/01564/FUL; and Removal of condition 5 of planning permission APP/P1560/W/17/3183981. The condition on each application restricts the respective static caravan permissions to holiday use only. This application proposes the residential use of the approved caravans.	Oakleigh Residential Park Clacton Road Weeley Essex CO16 9DH	Residential Occupation of existing caravans	14/03/2018	Refused