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Leisure Market Insight

August 2026

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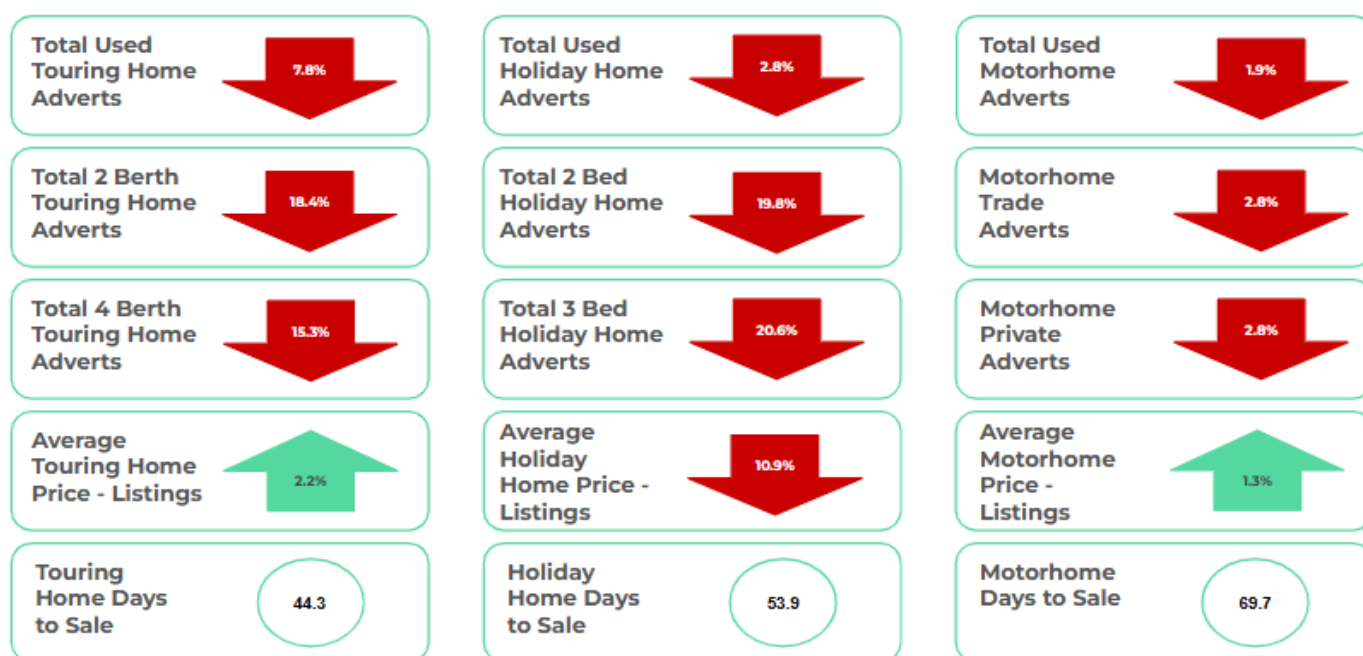
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August Monthly Leisure Market Insight

The August Leisure Market Report reviews activity across the UK Touring Home, Holiday Home, and Motorhome and Camper markets. It compares August with July and highlights the changes in advertised stock, sale prices, days to sale, manufacturer performance, model rankings and age profiles.

Key Used Leisure Home Market Indicators

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



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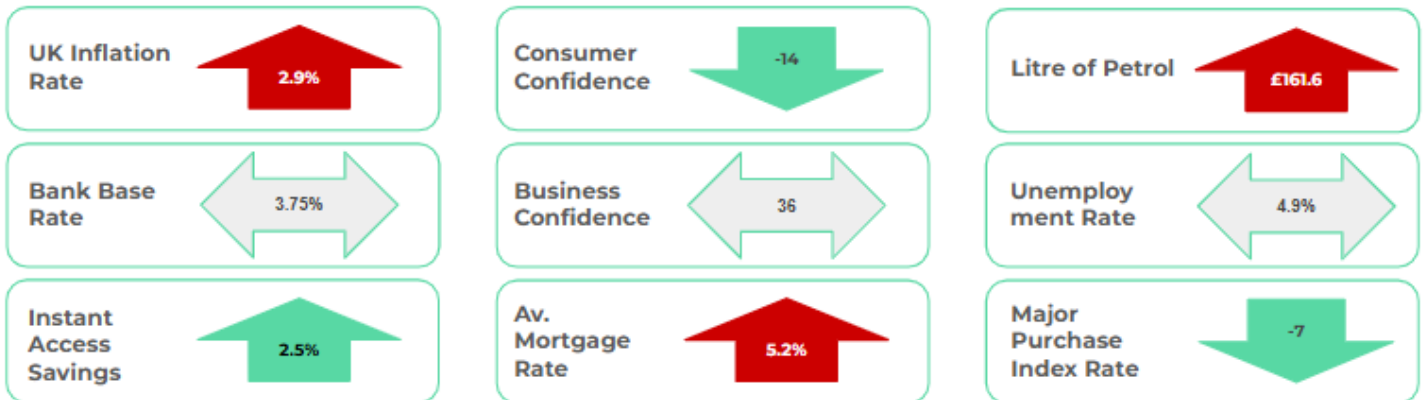
August produced a broad reduction in advertised stock. Total used Touring Home adverts fell by 7.8%, with two-berth and four-berth listings down by 18.4% and 15.3% respectively. Holiday Home adverts decreased by 2.8%, including falls of 19.8% for two-bed models and 20.6% for three-bed models. Motorhome and Camper adverts declined by 1.9%, while both trade and private advertising were 2.8% lower.

Average advertised prices moved in different directions. Touring Homes increased by 2.2% to £18,247 and Motorhomes and Campers rose by 1.3% to £57,541. Holiday Homes fell by 10.9% to £23,078. Average sale prices in the supporting workbook were £16,205 for Touring Homes, £26,869 for Holiday Homes and £57,493 for Motorhomes and Campers.

Touring Homes averaged 44.3 days to sale, Holiday Homes 53.9 days and Motorhomes and Campers 69.7 days. The reduction in advertised stock, particularly within the berth and bedroom

groups, suggests that dealers and operators should monitor supply closely as the market moves out of the main summer selling season.

Key UK Economic Indicators



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

The August economic indicators are interesting and help explain why the Leisure market became a little more measured. Inflation increased from 2.6% to 2.9% which was largely expected and is forecast to increase further in the coming months. However, consumer confidence improved to -14, and the major purchase index also rose to -7. These indicators suggest that consumers became less cautious about larger discretionary purchases.

In addition, the Bank of England base rate remained at 3.75%, and the average instant access savings rate rose to 2.5%, further strengthening a perceived positive economic position. However, the average two-year mortgage rate increased to 5.2%. Higher borrowing costs are not helpful for either household affordability or vehicle finance, even if stronger savings rates offer a small benefit to consumers holding cash. Petrol also increased to £1.62 per litre, adding another pressure point for motorists.

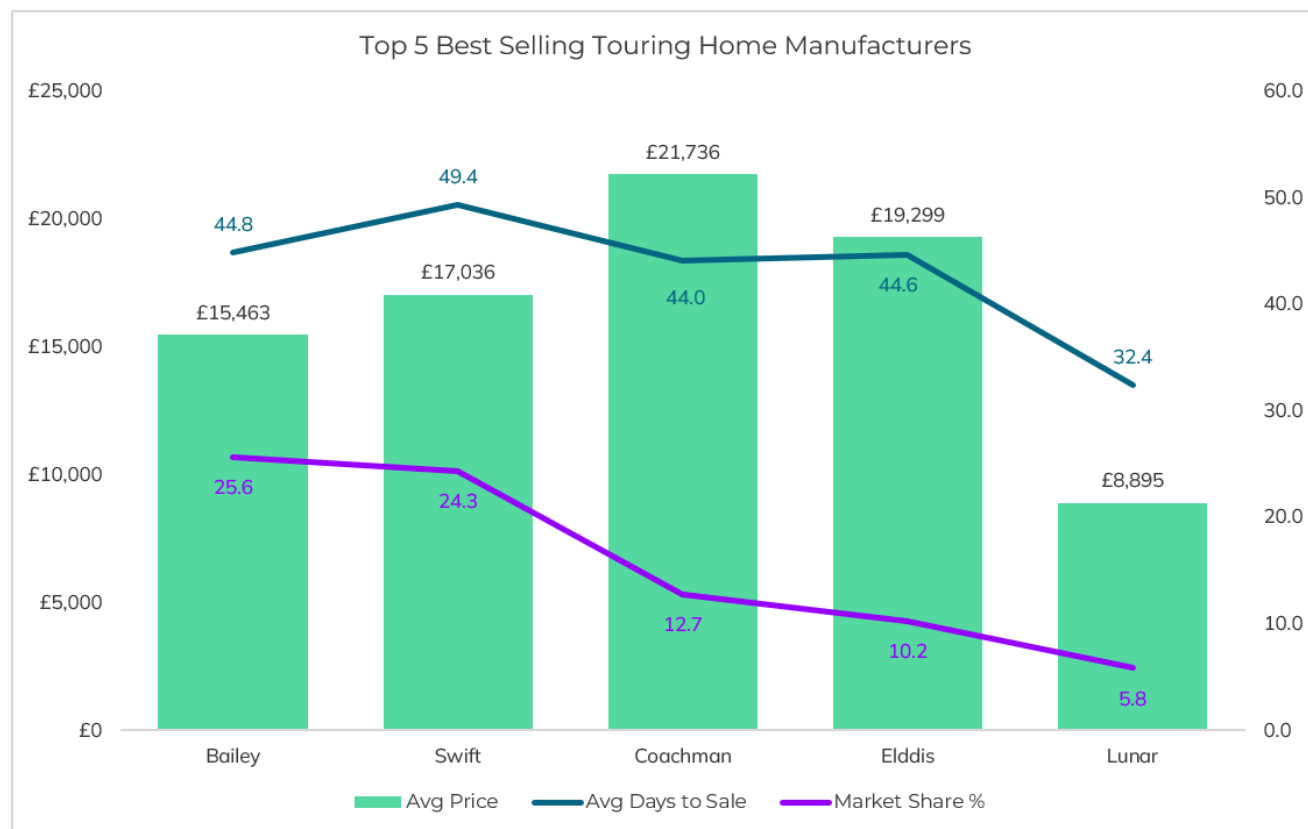
Business confidence remained at 36, although this is a quarterly figure and expected to take a marked downturn when it is updated in December which will reflect what happened in the third quarter. Finally, the unemployment indicator was -4.9%.

In reality, the economic position is perhaps not as good as the data suggests. The war in the Middle East continued to bring concern and instability globally. Indeed, speculation of a third world war began to worry analysts and pundits as Russia started to flex its military presence against those who have supported Ukraine. There was also an increase in the number of thinly veiled threats from the Russian President.

Ultimately, the UK Leisure industry is doing its best to work with somewhat hesitant consumer demand and it is fair to highlight that retail sales have marginally outperformed the national retail sales position as is often the case.

Top 5 Best Selling Touring Home Manufacturers

The chart below shows the Top 5 Best Selling Touring Home manufacturers in the UK in August 2026. The average price is above the bar and the average days to sale are shown by the blue line and the % of market share is shown by the purple line. The rankings run from number 1 on the left to number 5 on the right.



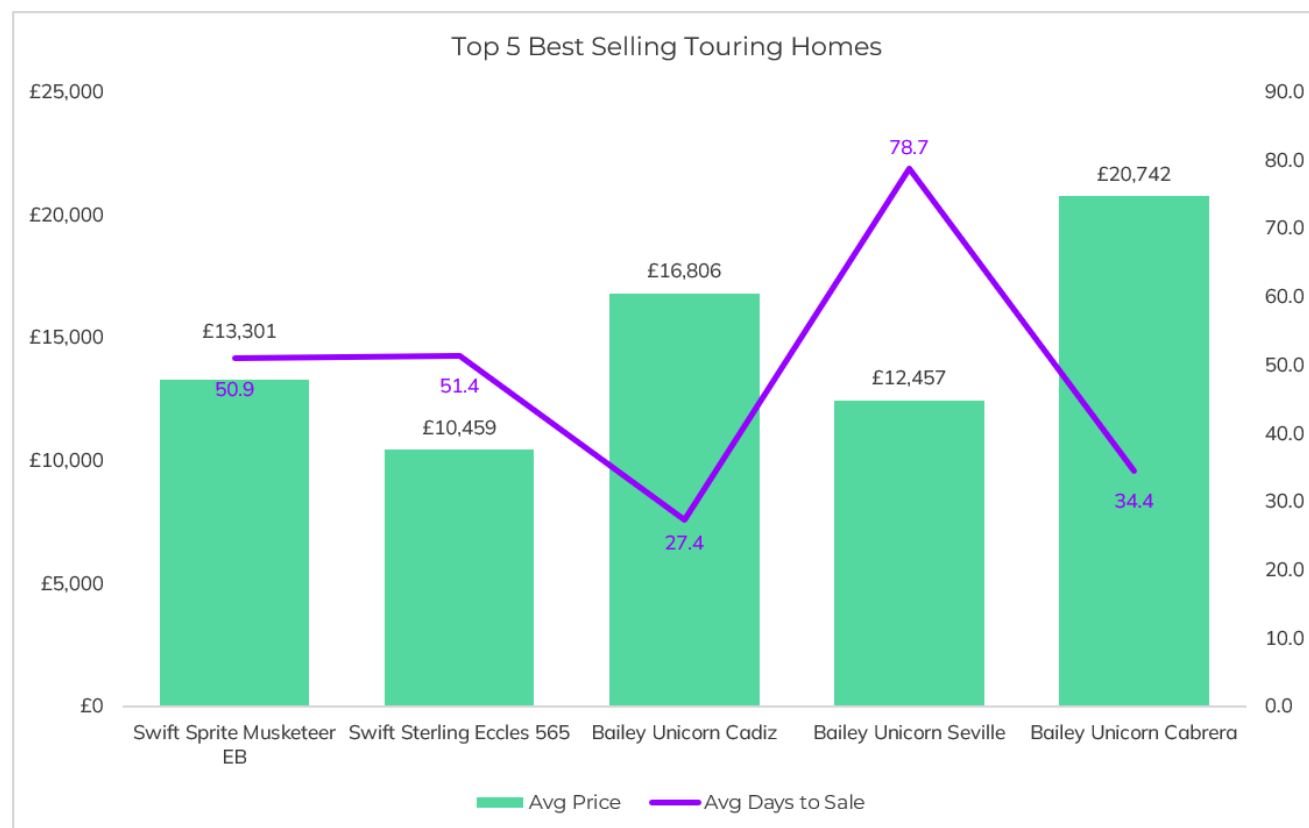
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Bailey moved back into first place in August with 637 sales, ahead of Swift on 604. Coachman, Elddis and Lunar retained third, fourth and fifth positions. Together, the Top 5 sold 1,953 units, down 7.9% from July, although their combined market share increased by 1.2 percentage points to 78.4%. This indicates that the leading manufacturers captured a larger share of a smaller market.

The average price across the five manufacturers fell by 2.8% to £16,486. Elddis recorded the largest individual fall, down 12.4% to £19,299, while Bailey and Swift increased by 3.3% and 2.8% respectively. Average days to sale were almost unchanged at 43 days, with Coachman and Lunar improving by 4.5 and 6.9 days respectively while Bailey, Swift and Elddis took slightly longer to sell.

Top 5 Best Selling Touring Homes

The chart below shows the Top 5 Best Selling Touring Homes in June 2026. The average price is shown above the bars and the days to sale shown on the purple line. The rankings run from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

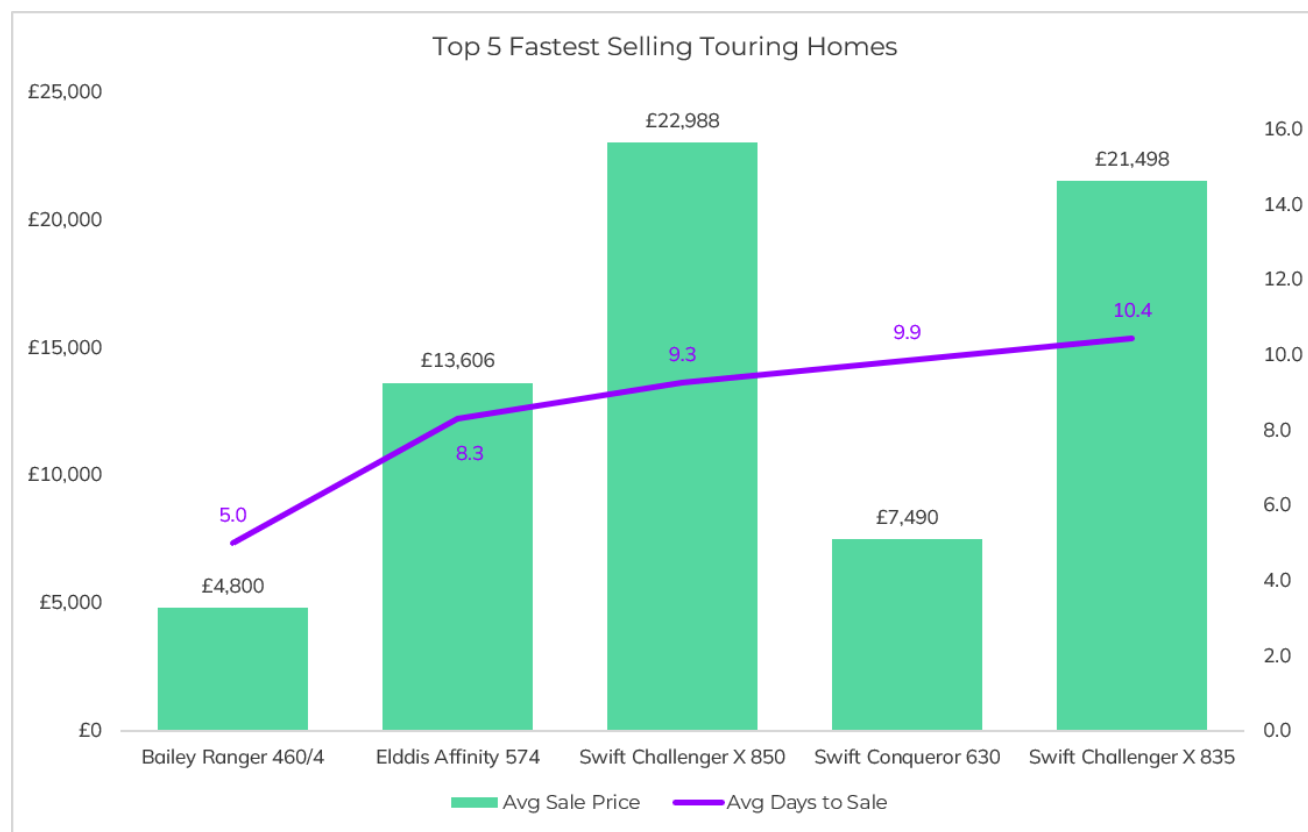
The individual sales performance for August showed that there were two new models in the Top 5 with the Bailey Unicorn Seville taking fourth spot and the Bailey Unicorn Cabrera taking fifth spot at the expense of the Swift Basecamp and the Swift Challenger 480.

The Swift Sprite Musketeer EB remained the best seller, despite a 14.8% fall to 46 units. The Swift Sterling Eccles 565 moved into second place with 44 sales and the Bailey Unicorn Cadiz retained third with 43.

Combined sales slipped by 1.5%, but market share increased by 0.7 percentage points to 8.1% of whole market sales. The average price rose by 12.8% to £14,753, helped by the higher-priced Bailey Unicorn Cabrera. Average days to sale increased by 9.5 days to 48.6, although the Bailey Unicorn Cadiz was a notable exception, improving by 14.2 days to 27.4.

Top 5 Fastest Selling Touring Homes

The chart below shows the Top 5 Fastest Selling Touring Homes in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. The data is based on a minimum of five sales per model and the rankings run from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

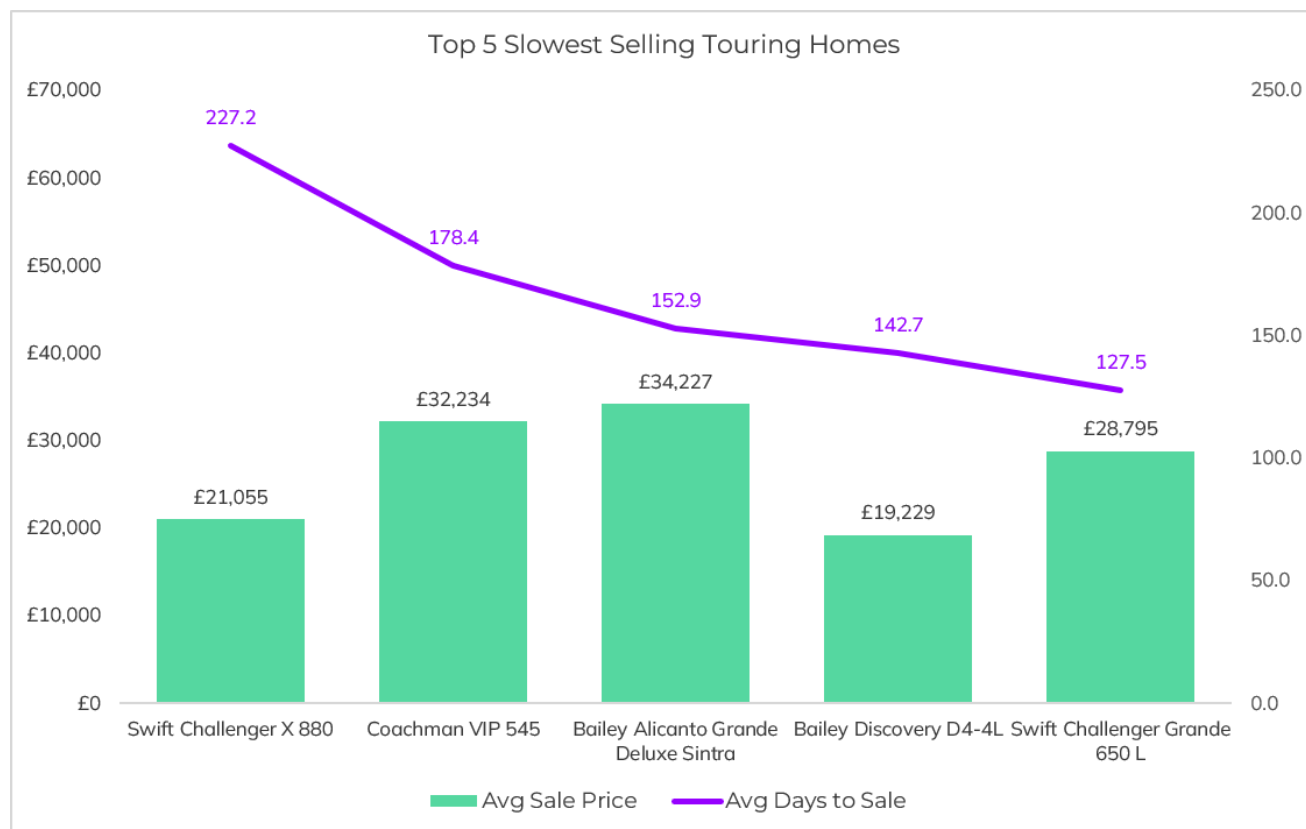
The data looks at all Tourers that sold at least five units during the month, and it is great to see a fresh list of entries when compared to July. There are three manufacturers represented in the list with three Tourers from the Swift group. The Bailey Ranger 460/4 led at 10.9 days, followed closely by the Elddis Affinity 574 at 11 days. Three Swift models completed the Top 5, all selling within 12.7 days.

The five models recorded a total of 32 sales, 8.6% fewer than July, while their combined market share edged up to 1.3%. The average price fell by 20% to £14,076 because the group included the lower-priced Bailey Ranger and Swift Conqueror. Average days to sale increased by 3.2 days but remained very strong at 11.8 days.

Of note is that all the Top 5 were four berth models with three twin axle variants. Two of the twin axles were very similar Challenger X models, both being eight feet wide, although they have different rear bed and bathroom layouts.

Top 5 Slowest Selling Touring Homes

The chart below shows the Top 5 Slowest Selling Touring Homes in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. The data is based on a minimum of five sales per model and the rankings run from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

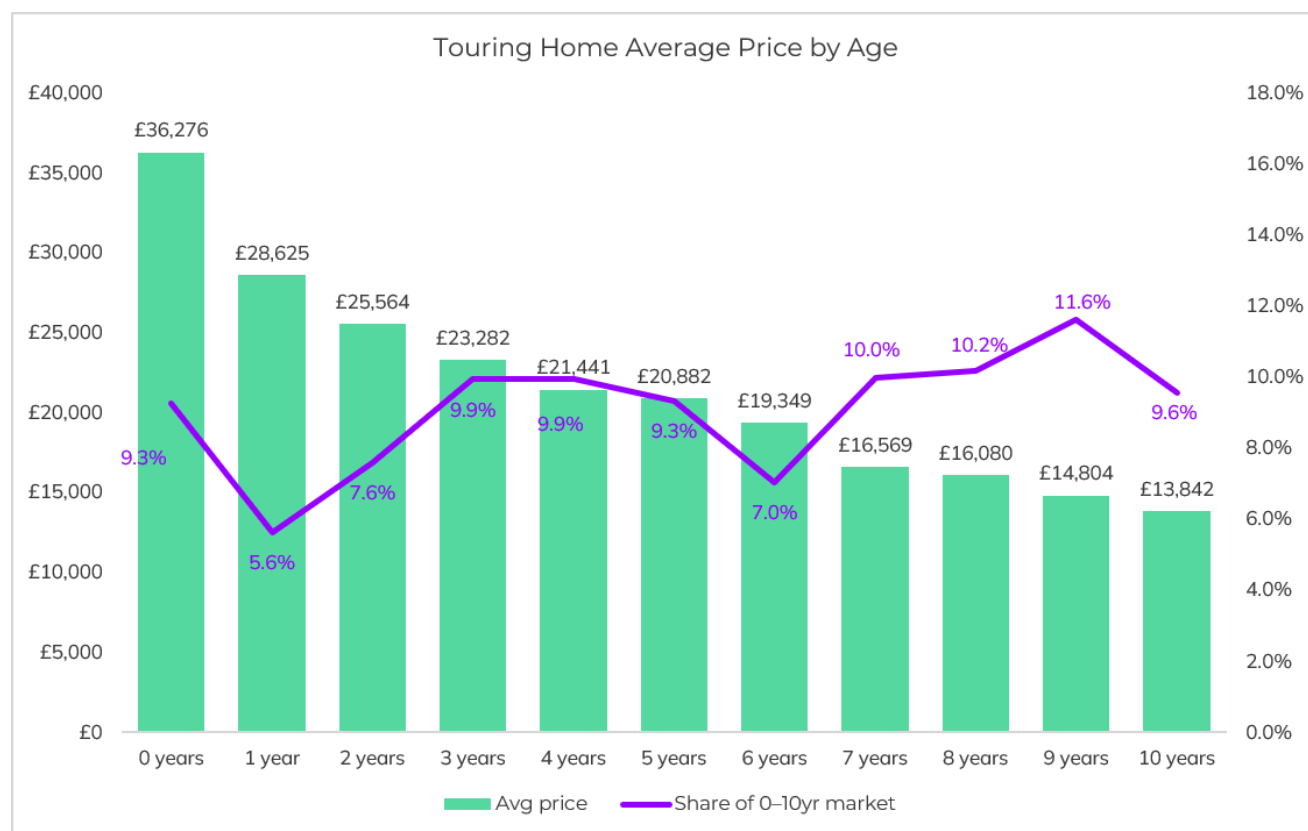
As with the Top 5 Fastest Sellers, this month's data has an almost fresh list of Tourers from three different manufacturers. The Swift Challenger X 880 was the only model carried over from the July list and was the slowest seller at 227.2 days, 62.7 days slower than last month. The Coachman VIP 545 followed at 178.4 days, while the remaining three models ranged from 127.5 to 152.9 days.

The Top 5 generated 36 sales, down 25% from July, and their market share fell by 0.3 percentage points to 1.4%. The average price was broadly stable at £27,108, but average days to sale increased by 4.4 days to 165.7. This suggests that a smaller pool of older stock continued to take a long time to clear.

The Swift Challenger Grande was the only twin axle in the list last month although there were three eight feet wide models. This list has a mix of budget to flagship models which is interesting as the list often reveals a specific type of tourer is less popular in each month.

Touring Home Average Price by Age

The data in this chart shows the average retail price at the end of the bar and the percent of market share on the purple line. The data covers Touring Homes by age up to 10 years old.



Data Powered by Brego Insight

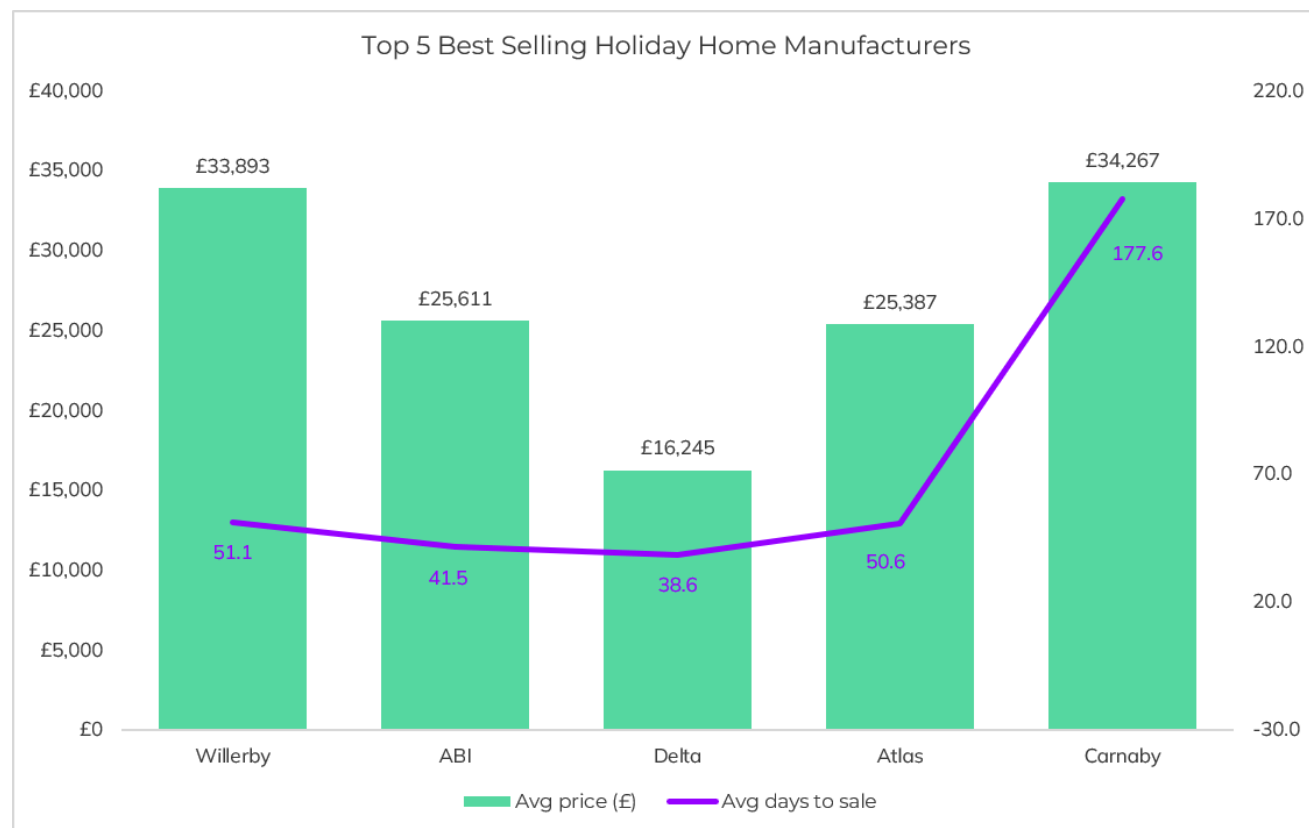
The August price profile remained broadly logical, falling from £36,276 for current-year Touring Homes to £13,842 at ten years old. One-year-old units recorded the largest monthly price fall, down 9.9%, while seven-year-old units fell by 8%. Current-year prices increased slightly and values from eight to ten years old also edged upwards when compared to the July data.

Overall sales within the zero-to-ten-year group fell by 8.9% to 1,621 units. Nine-year-old Touring Homes held the largest share of the market at 11.6%, followed by eight-year-old units at 10.2%.

Average days to sale increased by 1.9 days to 50.6, with current-year stock taking 109.4 days on average and therefore standing out from the otherwise faster profile.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the Top 5 Best Selling Holiday Home manufacturers in the UK in August 2026. The average price is above the bar with the average days to sale shown by the purple line. The rankings run from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

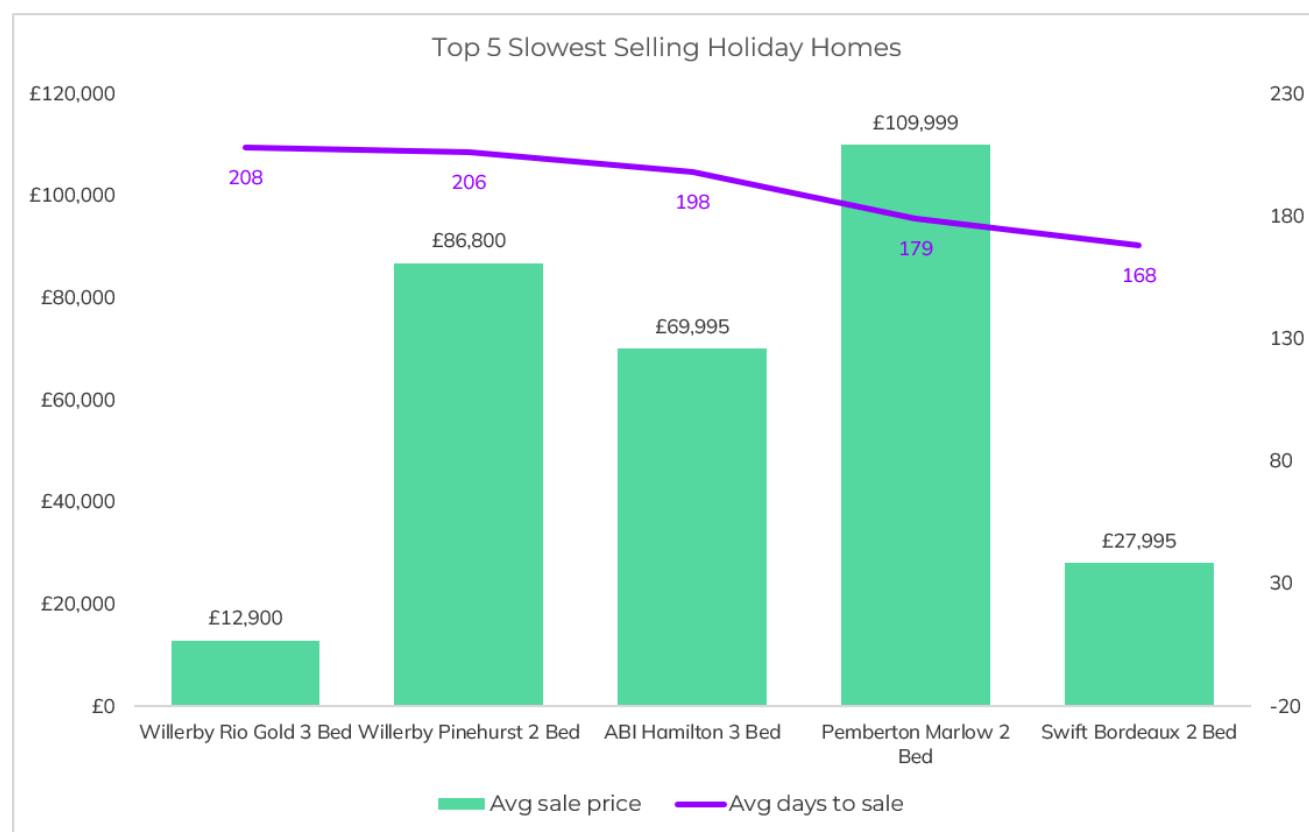
The August data shows a similar Top 5 to July. although it is worth highlighting that the July data showed six manufacturers due to a tie between Cosalt and Delta. Willerby retained first place with 24 sales, followed by ABI with 21. Delta moved into third place, Atlas ranked fourth and Carnaby returned in fifth.

The Top 5 sold 71 units, down 12.7% from July, and their combined market share fell by 5.3 percentage points to 78.9%. This is of note and shows customers are widening their list of choice to other manufacturers and this may be due to a lack of desirable holiday homes from the leading manufacturers.

The average price across the group was £27,080, down 2.8% in July. Willerby prices increased by 17.7%, but ABI fell by 20.2%. Average days to sale rose sharply by 21.9 days to 71.9, driven mainly by Carnaby at 177.6 days. Excluding Carnaby, the other four manufacturers all averaged between 38.6 and 51.1 days.

Top 5 Slowest Selling Holiday Homes

The chart below shows the Top 5 Slowest Selling Holiday Homes in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. There is a 3 sale minimum on all models shown and the ranking runs from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

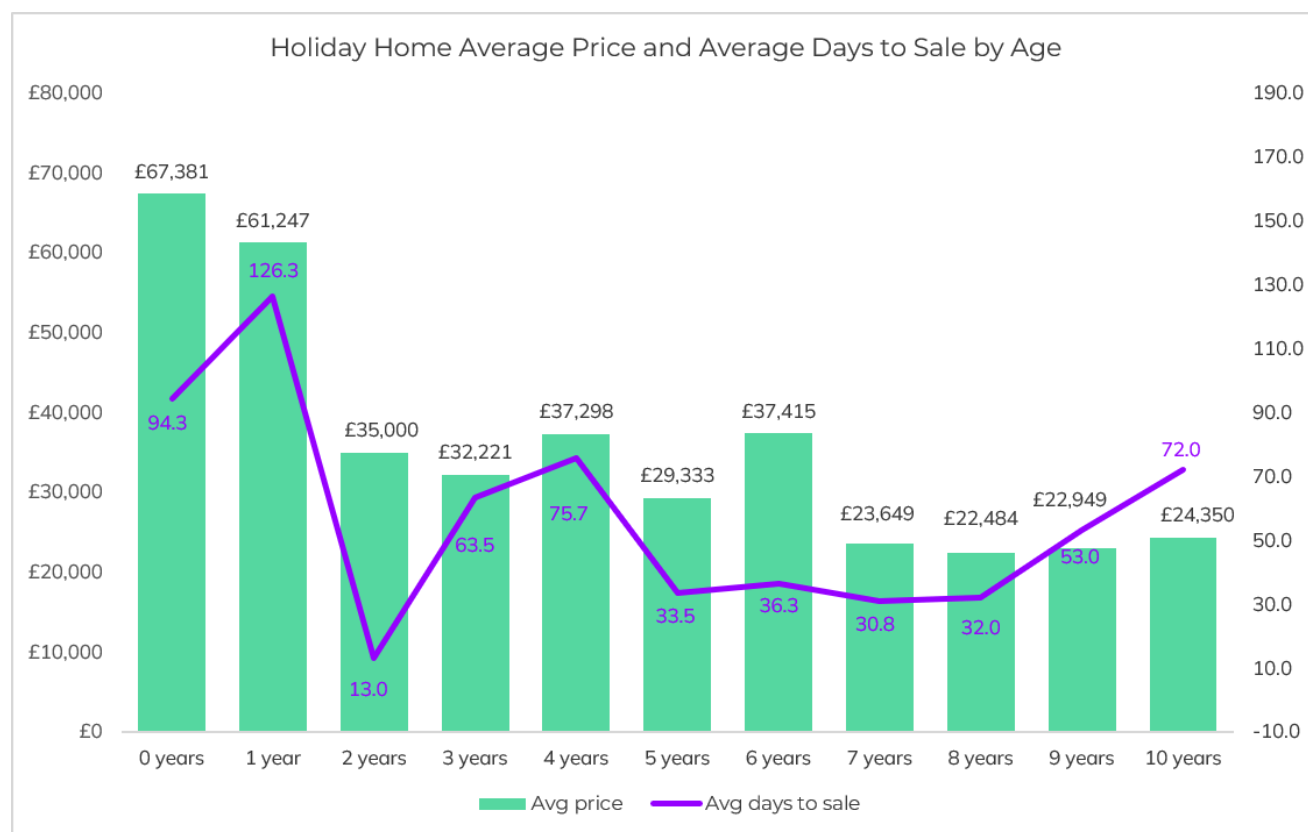
The August data shows a completely new set of Top 5 Slowest Sellers with the Willerby Rio Gold 3 Bed taking 208 days to sell, followed by the Willerby Pinehurst 2 Bed at 206 days and the ABI Hamilton 3 Bed at 198 days. The five models averaged 191.8 days on sale, 60.2 days slower than the July list. It is interesting to see that the fourth slowest selling Willerby Rio in July has been replaced by the better specified Gold model in first spot in August.

Overall, the average price was £61,538, but values ranged from £12,900 to £109,999. It is also important to understand that both the average price and days-to-sale figures are highly sensitive to the specification, condition and pricing history of the individual units.

The volume of sales of the Top 5 remained broadly stable as did the % of Market Share suggesting a consistency in market performance for the slowest sellers. The Average Sale Price also showed a marked change with a 77% increase in price to £61,538.

Holiday Home Average Days to Sale and Average Price by Age

The data in this chart shows the average retail price at the end of the bar and the percent of market share on the purple line. The data covers Holiday Homes by age up to 10 years old.



Data Powered by Brego Insight

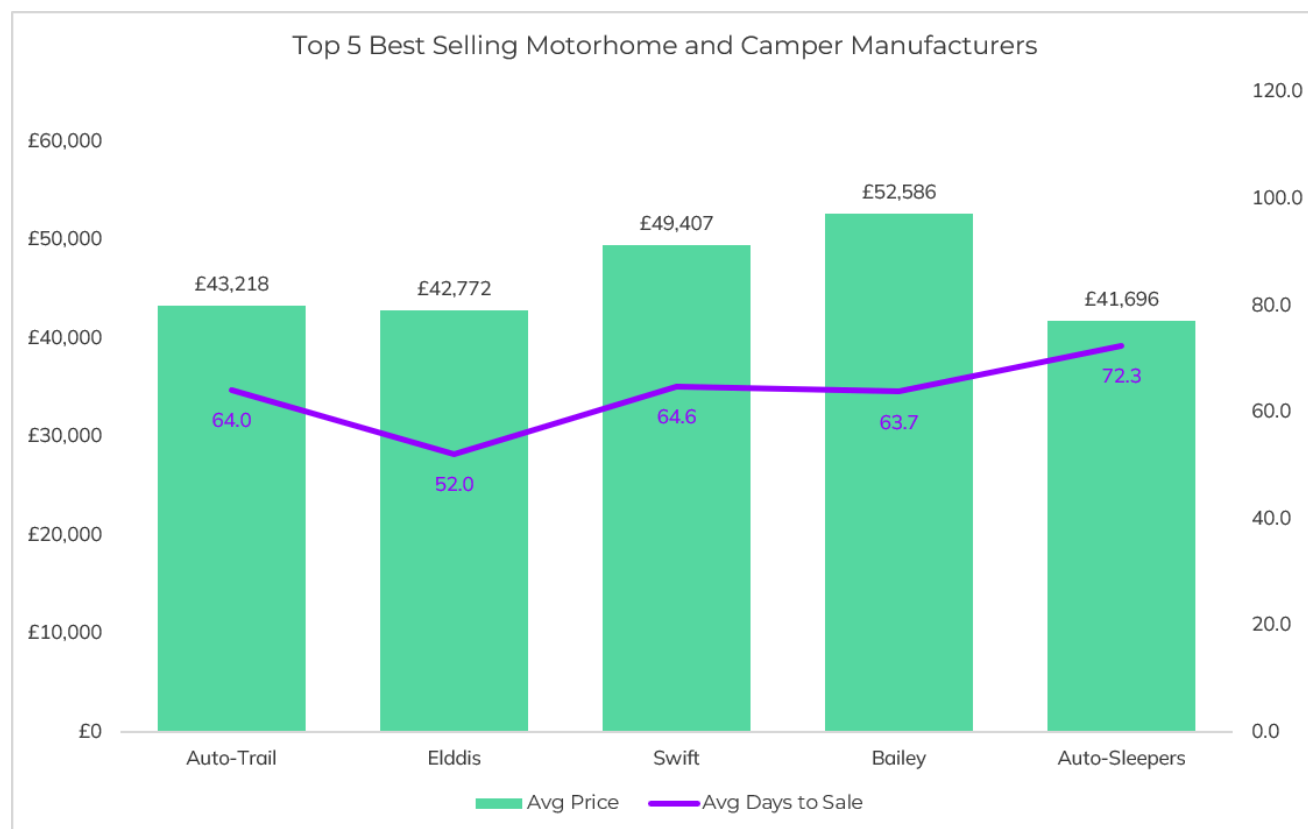
This view of the market in August reveals that Holiday Home sales were still very variable. The pattern of the average sale price by age is shown by the green bars and is not as balanced and consistent as it was with Touring Home vertical.

When compared with July, the total volume of up to ten year old units sold decreased by 14% against a full market increase of 4.9%. This indicates that Holiday Homes over ten years old took a notably larger share of used sales in August when compared to July. The average sale price across the group fell by 2.6% to £36,606. These facts combined support the fact that consumers are cost conscious and are looking to be careful with their expenditure.

Average days to sale improved by 9.5 days to 60.4. Two-year-old units were quickest at 13 days, while one-year-old units averaged 126.3 days.

Top 5 Best Selling Motorhome and Camper Manufacturers

The chart below shows the Top 5 Best Selling Motorhome and Camper manufacturers in the UK in August 2026. The average price is above the bar and the average days to sale is shown by the purple line. The ranking runs from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

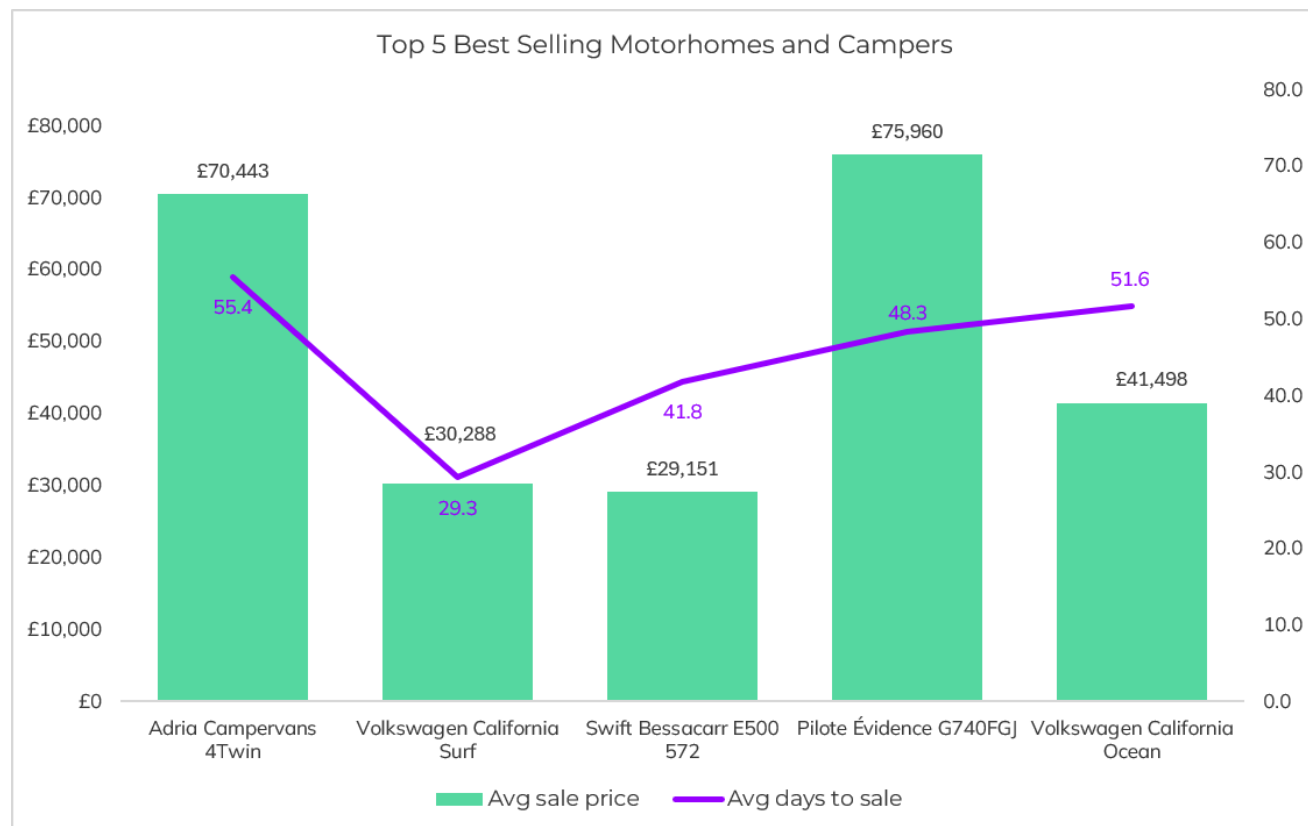
For August the Top 5 list has changed very slightly and Auto-Trail remained the leading manufacturer with 316 sales. Elddis moved ahead of Swift into second place, while Bailey and Auto-Sleepers completed the Top 5. Together they sold 1,198 units, down 25.6% from July, and their combined market share fell by 8.6 percentage points to 34.9%.

The average price across the five brands fell by 8.1% to £45,936 and every manufacturer recorded a lower figure than in July. Average days to sale improved by seven days to 63.3. Elddis was quickest at 52 days, while Auto-Sleepers was slowest at 72.3 days.

With sales for the sector dropping by 4% and adverts by 1.9% the Top 5 have not performed as well as expected by quite a way. This is worthy of deeper analysis and those customers using the Brego platform will have the benefit of being able to do so using the Brego Insight tool.

Top 5 Best Selling Motorhomes and Campers

This chart shows the Top 5 Best Selling Motorhomes and Campers in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. The ranking runs from number 1 on the left to number 5 on the right.



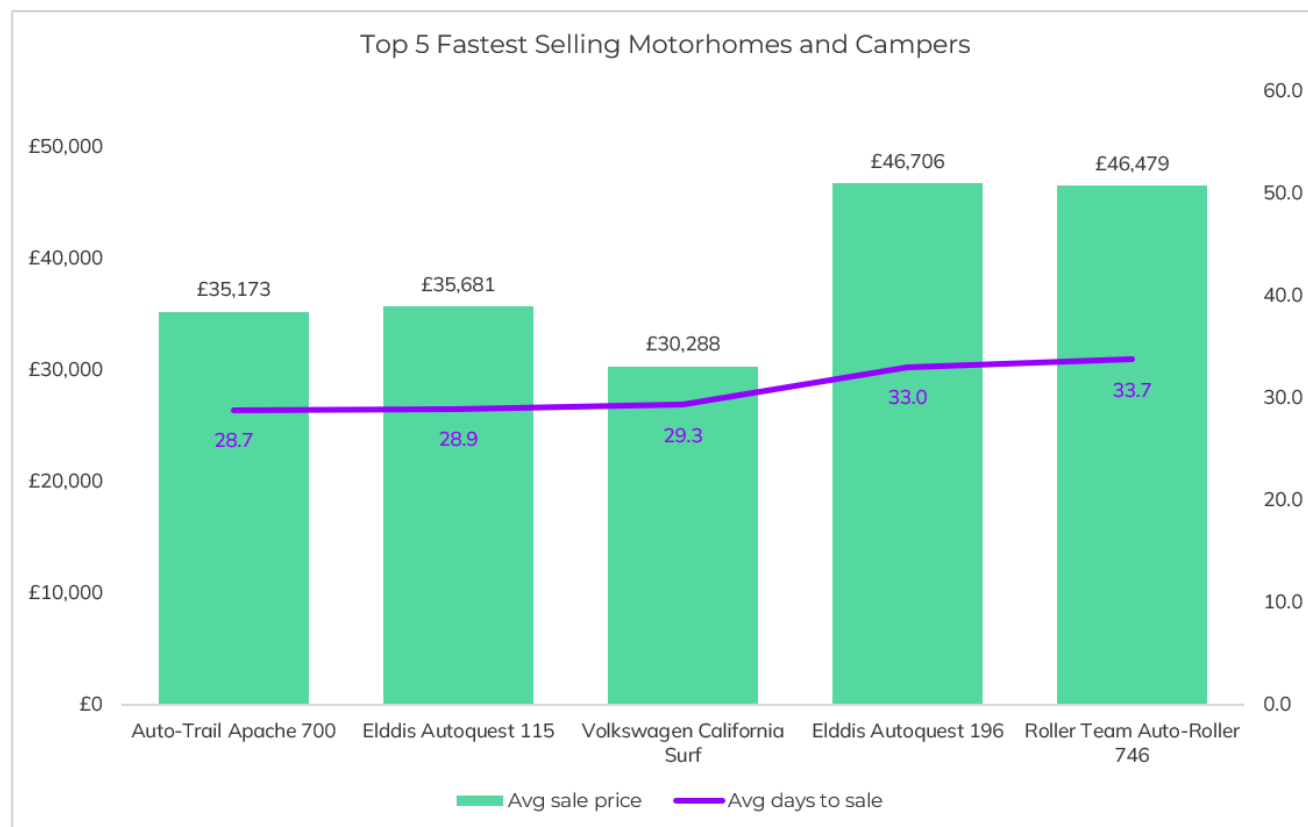
Data Powered by Brego Insight

As with July, the June Top 5 Best sellers came from four different manufacturers. The Adria Campervans 4Twin remained in first place with 55 sales. The Volkswagen California Surf was a new entry in second spot at the expense of the Nissan NV350, while the Swift Bessacarr E500 572 and Pilote Evidence G740FGJ retained places in the list. The Volkswagen California Ocean completed the Top 5.

Combined sales fell by 10.6% to 186 units and market share eased by 0.2 percentage points to 5.4%. The average price increased by 3.5% to £49,468, while average days to sale improved by 11.2 days to 45.3 which was a surprising positive given the slowdown in sales. The Volkswagen California Surf was the quickest seller at 29.3 days.

Top 5 Fastest Selling Motorhomes and Campers

The chart below shows the Top 5 Fastest Selling Motorhomes and Campers in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. This data is based on models that had a minimum of 10 sales and the ranking runs from number 1 on the left to number 5 on the right.



Data Powered by Brego Insight

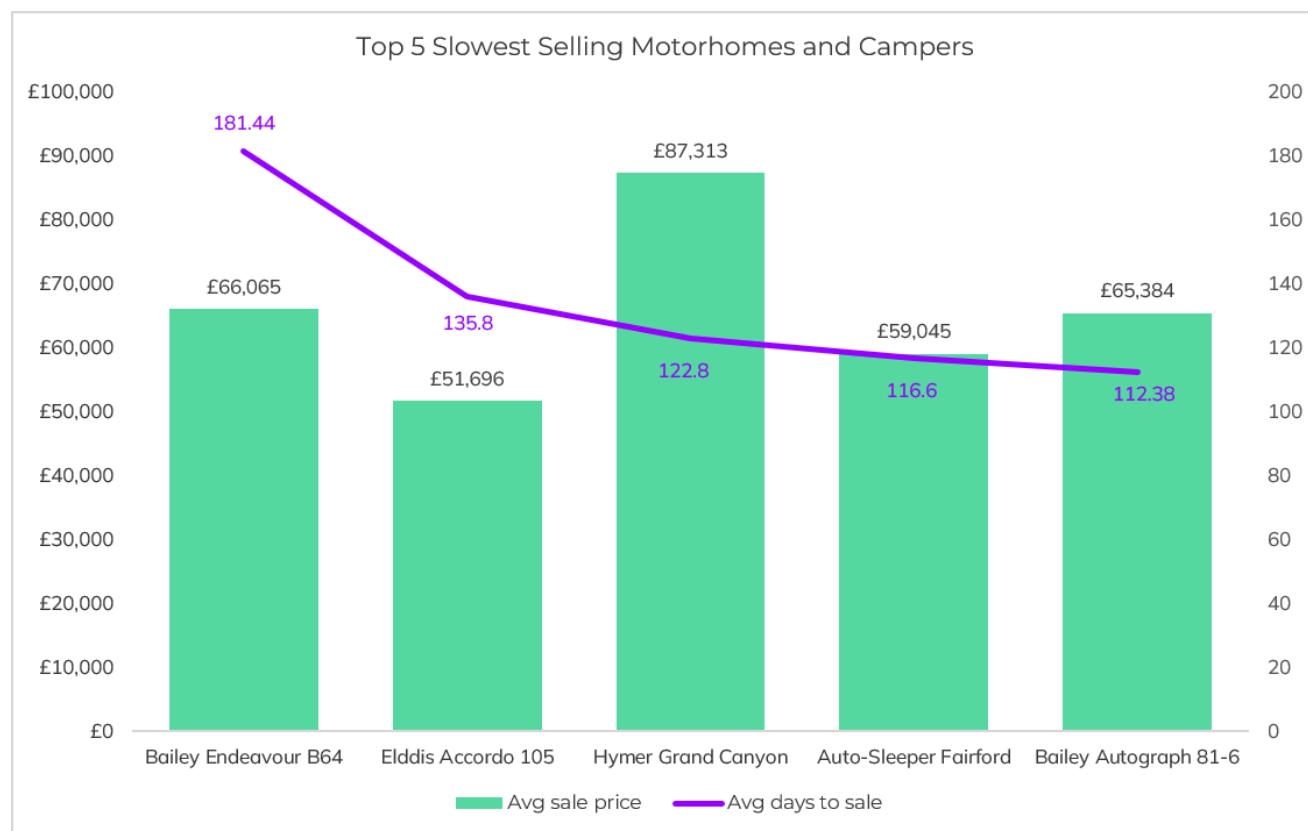
The August Top 5 Fastest Seller list reveals a completely fresh list of models from four different manufacturers. In total, the volume sold of the Top 5 increased by 60.7% compared to July and the % of the Market Share also increased by 1.1 percentage points to 2.6% of the whole market.

Of note is the fact that once again there are four motorhomes and one camper in the list. Of the Motorhomes the two Elddis models are low profile and on a Peugeot chassis and the Auto-Trail and Roller Team both have overcab beds. The Elddis Autoquest is the only two berth model in the list.

The Average Days to Sale decreased by 1.3 days to 30.7 which is 39 days quicker than the whole market average of 69.7.

Top 5 Slowest Selling Motorhomes and Campers

The chart below shows the Top 5 Slowest Selling Motorhomes and Campers in August 2026. The average price is shown above the bar and the days to sale shown on the purple line. This data is based on models that had a minimum of 10 sales and the ranking runs from number 1 on the left to number 5 on the right.



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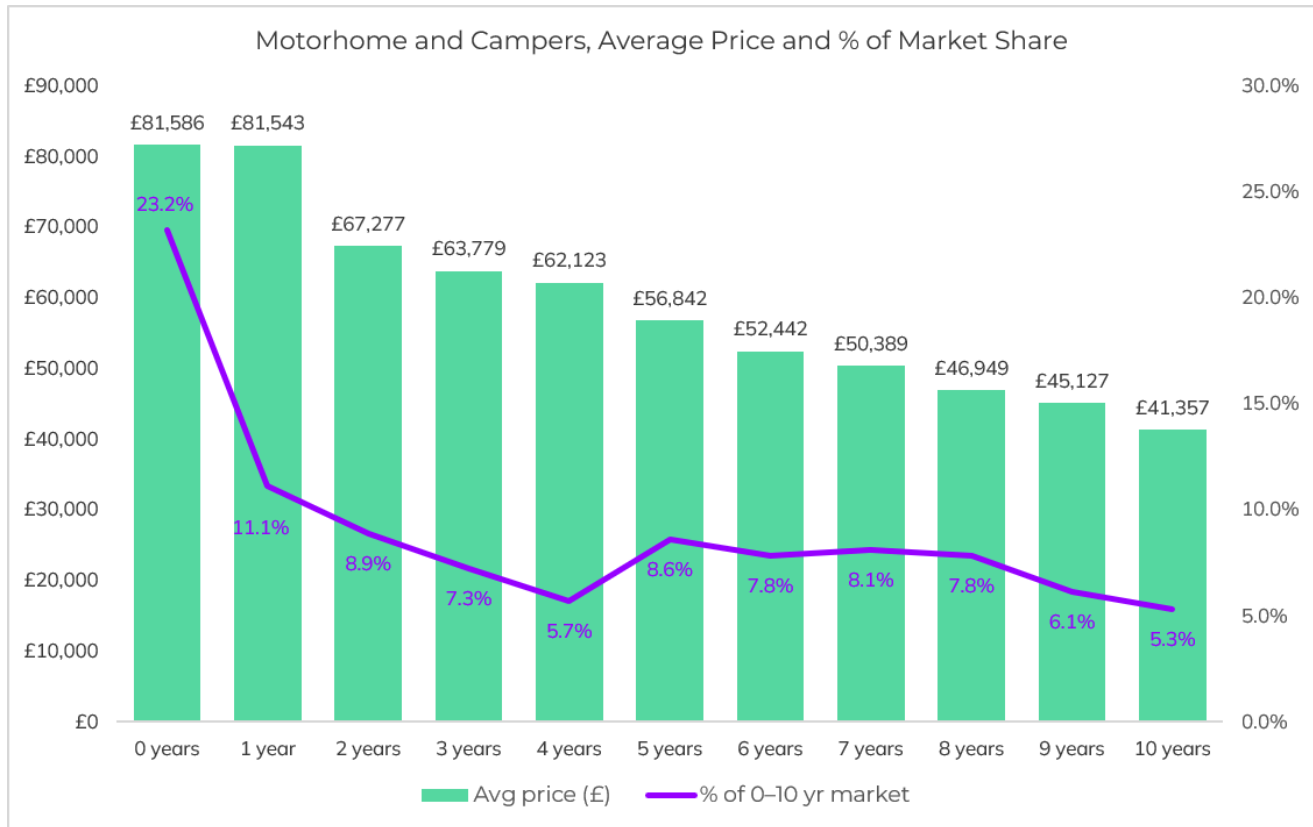
Once again the August data shows a completely fresh list of the Top 5 Slowest Sellers from four different manufacturers. The Bailey Endeavour B64 took the top spot at 181.4 days. The Elddis Accordo 105 followed at 135.8 days, with the remaining three models between 112.4 and 122.8 days.

The Top 5 sold 9.2% fewer units than July, and held 1.7% of the market. The average price for the Top 5 increased by 5.2% to £65,901, while average days to sale rose by 11.9 days to 133.8. The high average price and slower movement suggest that premium specification alone did not guarantee a quick sale in August.

It is interesting that three of the Top 5 are Campervans leaving the Elddis and the Bailey Autograph as the only motorhomes. The former has a large end washroom with a separate shower but this can be a negative as much as a positive as it takes up so much space. There is also one 4x4 in the form of the Hymer but it comes at a high cost.

Motorhome and Camper Average Price and Market Share by Age

The data in this chart shows the average retail price at the end of the bar and the percent of market share on the purple line for Motorhomes and Campers by age up to 10 years old.



Data Powered by Brego Insight

Another month of stable data for the Motorhome and Camper vertical. The green bars have a good pattern of price depreciation as the models age, unlike the Holiday Home data from earlier in the report.

Sales in the zero-to-ten-year group fell by 8.5% to 2,414 units. Current-year vehicles remained the largest segment at 23.2%, while one-year-old units fell by 20.6% in volume and accounted for 11.1%. Several mid-age bands gained share despite the overall contraction.

In addition, the average price fell by 6.8% to £59,038. One-year-old vehicles were the exception, rising by 9% to £81,543 and sitting close to current-year stock at £81,586. Average days to sale improved by 6.1 days to 71.5, although current and one-year-old vehicles took 86.2 and 151.2 days respectively.

Summary

August was a softer month for much of the Leisure market, although the detail varied considerably by vertical. Touring Home advertising decreased and the leading manufacturers gained market share, but sales volumes across the principal manufacturer and age groups declined.

Motorhomes and Campers delivered the clearest improvement in stock turn. Whole-market days to sale fell by 6.7 days, the Top 5 manufacturers improved by seven days and the fastest-selling models averaged 30.7 days. However, volumes declined across the leading manufacturers and the zero-to-ten-year age group, while average prices also softened.

The August data therefore points to a market in which careful stock selection matters more than broad assumptions about seasonal demand. Familiar manufacturers continued to dominate, but performance differed materially by model, age and price. Dealers and operators should use current model-level evidence when buying and pricing stock, particularly where high-value vehicles or low-volume Holiday Homes could distort an overall average.

All the data in this report is available to subscribers using the Brego Platform, which includes the Brego Insight AI driven facility to bring detail and clarity to the complex UK Leisure market and give the best opportunity to maximise sales and more importantly drive the best profit possible.

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