



Brego
Driven by Data

Leisure Market Insight

May 2026

The contents of this document are private and confidential and are for the intended recipient only. If this is not you, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this document.

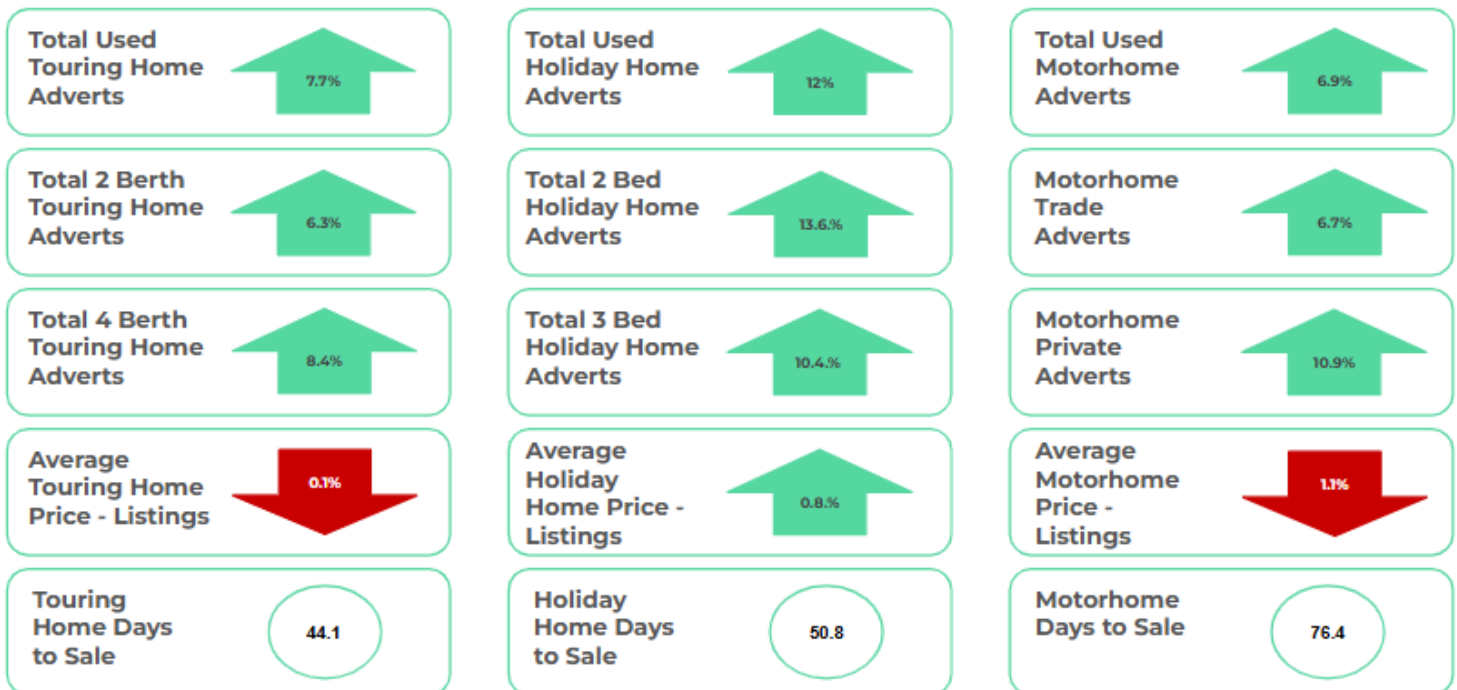
This page does not need to be printed. The information displayed here is displayed elsewhere in the document - please try not to print this page.

May Monthly Leisure Market Insight

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

Key Used Leisure Home Market Indicators

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



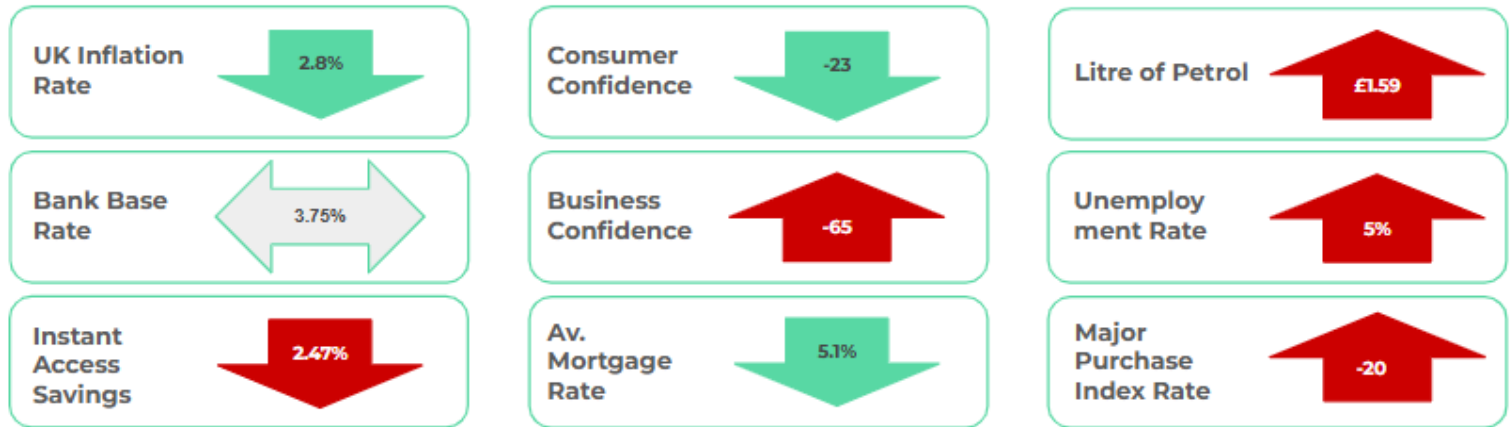
Data Powered by Brego Insight

It is great to see some positive news across all the Leisure market verticals as the season appears to have got itself properly under way, despite the challenging geopolitical situation. The first thing to highlight is that adverts across all verticals increased by between 6.9% and 12% and this shows that there is a strong stock holding at all dealers and parks. This is likely to be due to increased part exchange levels as well as more private sellers advertising their Touring Homes, Holiday Homes, and Motorhomes.

Higher stock levels can indicate a slowdown in sales, but the data showed that in May sales increased across the board with an uplift of 2.8% for Touring Homes, 7% for Motorhomes and Campers and a significant 13.2% for Holiday Homes which will help the vertical bounce back from the 11.5% decline that was experienced in April.

Of note was that the Average Sale Price for all Leisure verticals decreased with the biggest drop for Touring Homes at 4.8%. This matches the market sentiment that consumers were looking at lower priced units in part as a bid to reduce and manage rising monthly costs.

Key UK Economic Indicators



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

The May economic KPIs show a contradictory view of the economy. On the positive side the inflation rate remained at 2.8% where common sense suggested this should have risen given the marked increase in the cost of living. This increase was driven by transport costs which rose from 4.5% to 6.8% and consisted of motor fuel, aviation fuel and VED increases amongst other things. However, this was offset by lower inflation for food and non-alcoholic drinks with a figure of 2.2%. It is almost a certainty that this will change for the worse on June 17th when the next inflation rates are announced.

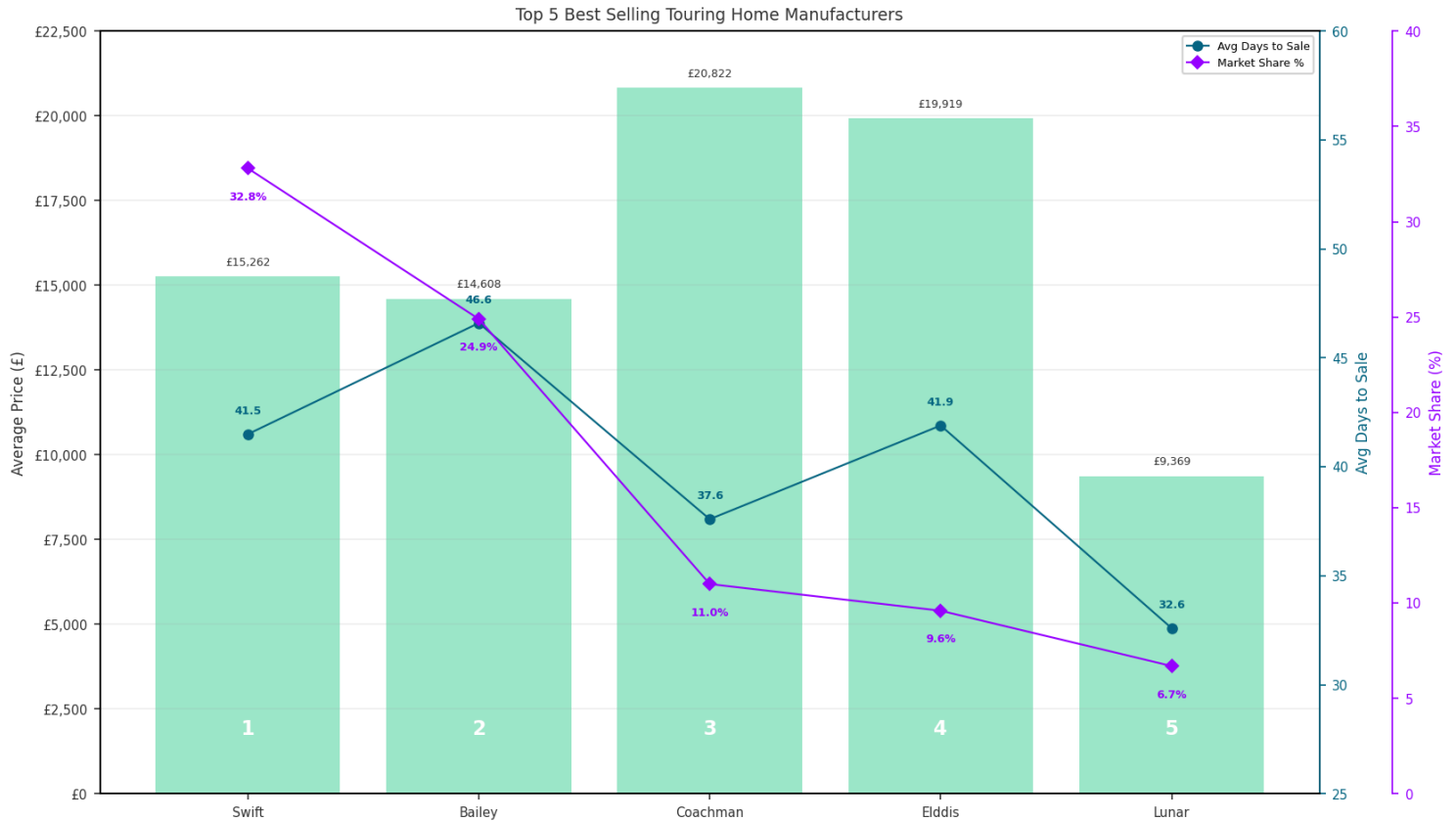
A further positive was that the Bank Base Rate remained at 3.75%. Many had feared that this would rise and predictions were for a jump up to 4%. With the generally stable conditions in the Middle East, the fear of a rate increase has subsided somewhat, and the next rate decision will be announced on June 18th.

However, Business Confidence remained low as UK companies battled with increased costs and reduced order books. Unemployment increased and is set to go further in the coming months. In addition, the savings rates continued to fall, and the housing market remained stagnant despite a minimal drop in the mortgage rates. The major purchase index also declined further, and the cost of fuel edged up a touch which came as a surprise to many as the cost of a barrel of oil dipped slightly.

Finally, despite all these things the Consumer Confidence rate improved to -23. This is interesting and there is evidence that consumers are still spending money across parts of the economy. Of note was the fact that whilst footfall and enquiries in the Leisure sector were changeable, demand was clearly still there but driven by promotional finance and discounting of both new and used units across all market verticals.

Top 5 Best Selling Touring Home Manufacturers

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



Data Powered by Brego Insight

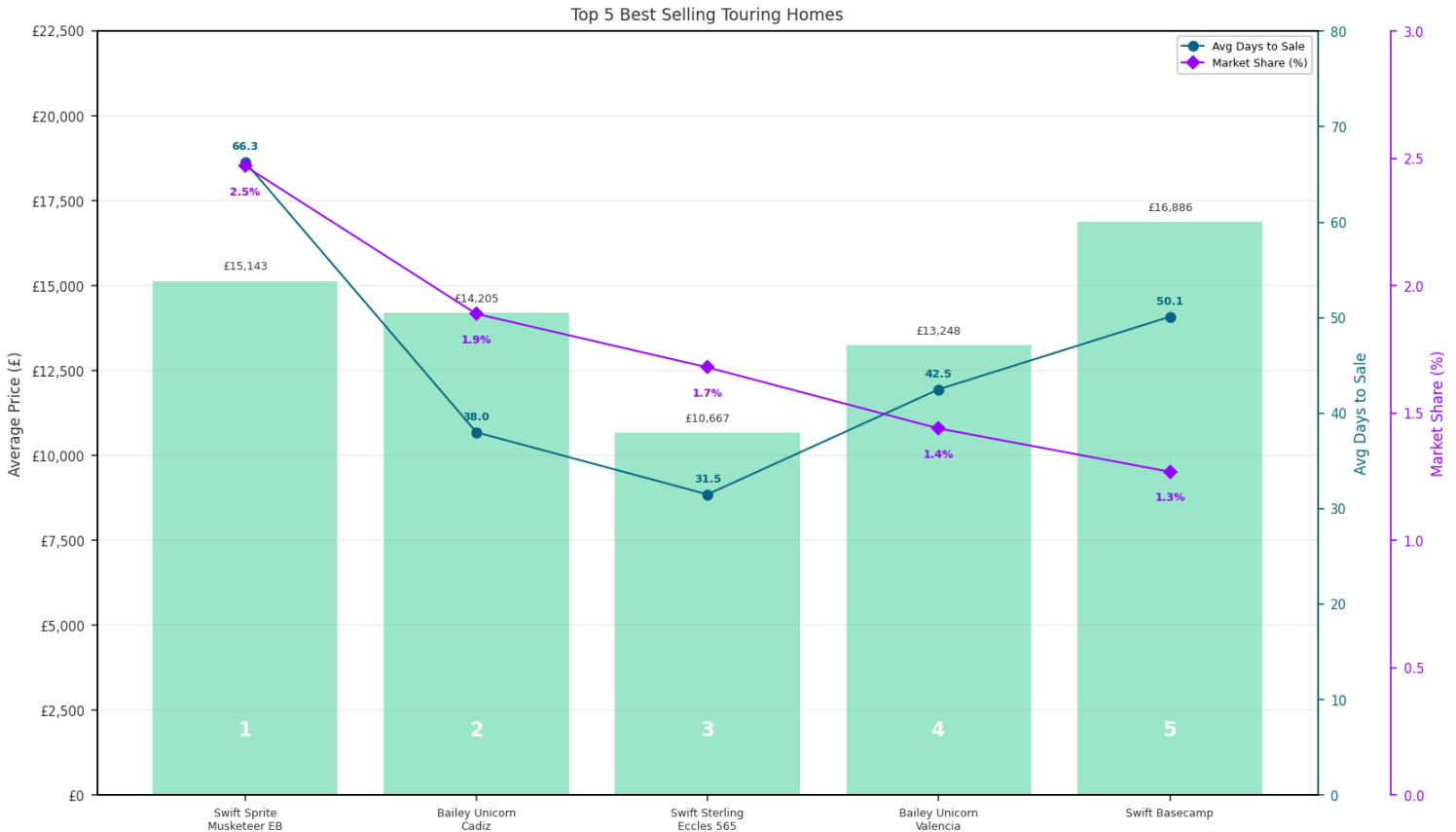
Once again, the Top 5 remain the same as the previous month although there were some fascinating changes in the detail. Firstly, it is important to note that the total volume of sales for the Top 5 increased by 19.3% month on month against a whole market increase of 2.8%. All but Eddis saw marked increases in sales ranging from 7% for Coachman to 38.8% for Swift.

When looking at the Average Sale Price, the only manufacturer to see an increase month on month was Lunar which saw a 5.5% uplift to £9,369, which was by far the lowest average sale price. Coachman had the highest price at £20,822 although this was 4.8% lower than in April. The overall drop for the Top 5 was 3.9% and this shows that consumers were a little more cautious with their expenditure and this aligns with the whole UK retail sector which experienced a drop off in sales of big-ticket items during the month.

The Average Days to Sale for the month improved by four days to an average of 40. Swift Touring Homes enjoyed the greatest improvement of 11.5 days to 41.5, although Lunar sold the quickest at 32.6 days.

Top 5 Best Selling Touring Homes

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



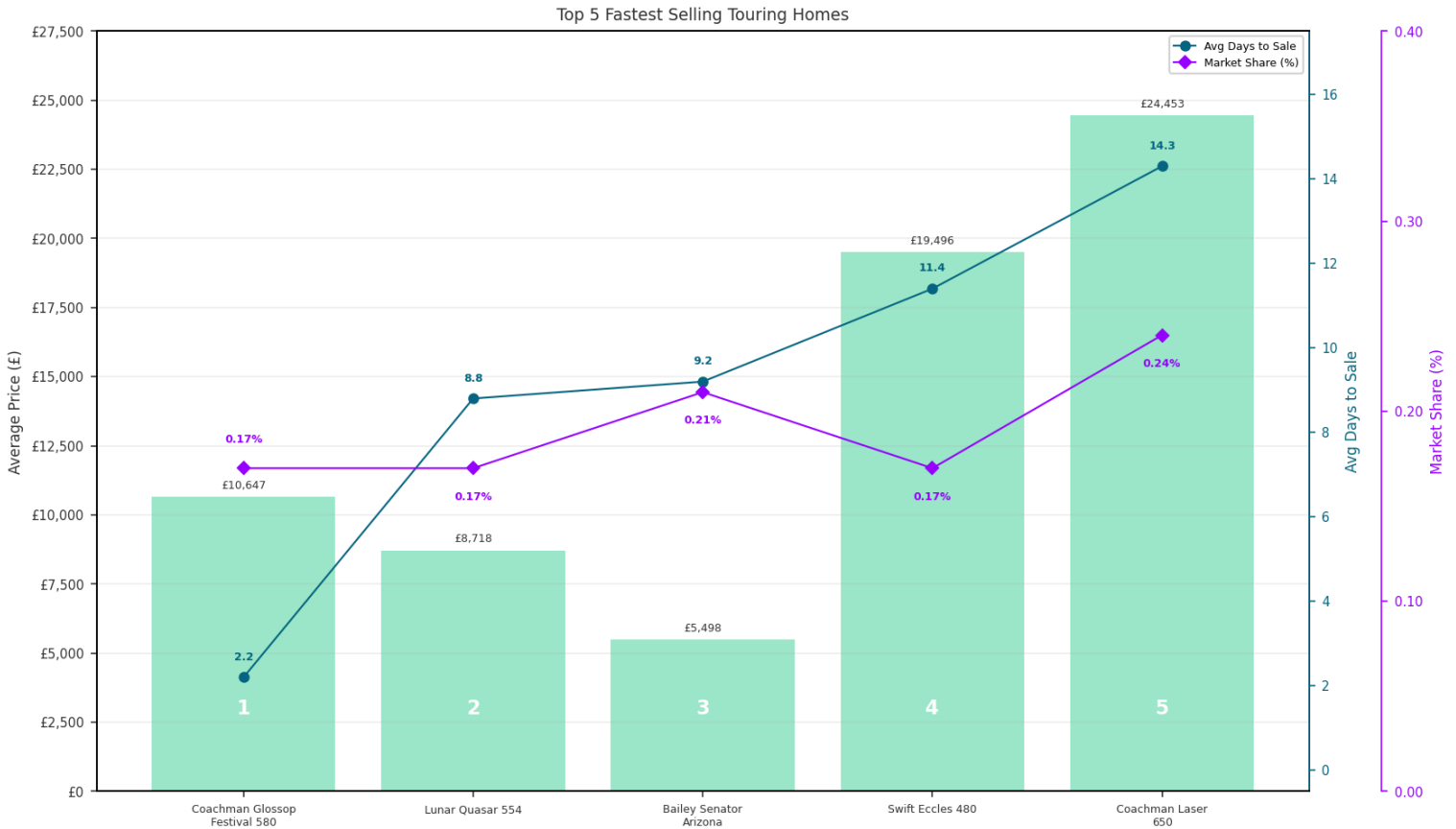
Data Powered by Brego Insight

Looking in more detail at individual models and the Top 5 Best Sellers were consistent with April and the only change was the Swift Sterling slipping from second spot to third in favour of the Bailey Unicorn Cadiz. The latter also recorded a 41% increase in sales too. The overall volume for these Top 5 Best Sellers increased by 14.3% month on month. In addition, the percentage of total Market Share also improved but only by 0.3 of a percentage point to 8.75%.

The Average Sale Price increased by 2.67% overall to £14,030 and it was the Swift Sprite that contributed the most to this with a 14.3% increase month on month to £15,143. The Average Days to Sale improved by 4.2 days overall to 45.7 against a whole market figure of 44.1.

Top 5 Fastest Selling Touring Homes

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



Data Powered by Brego Insight

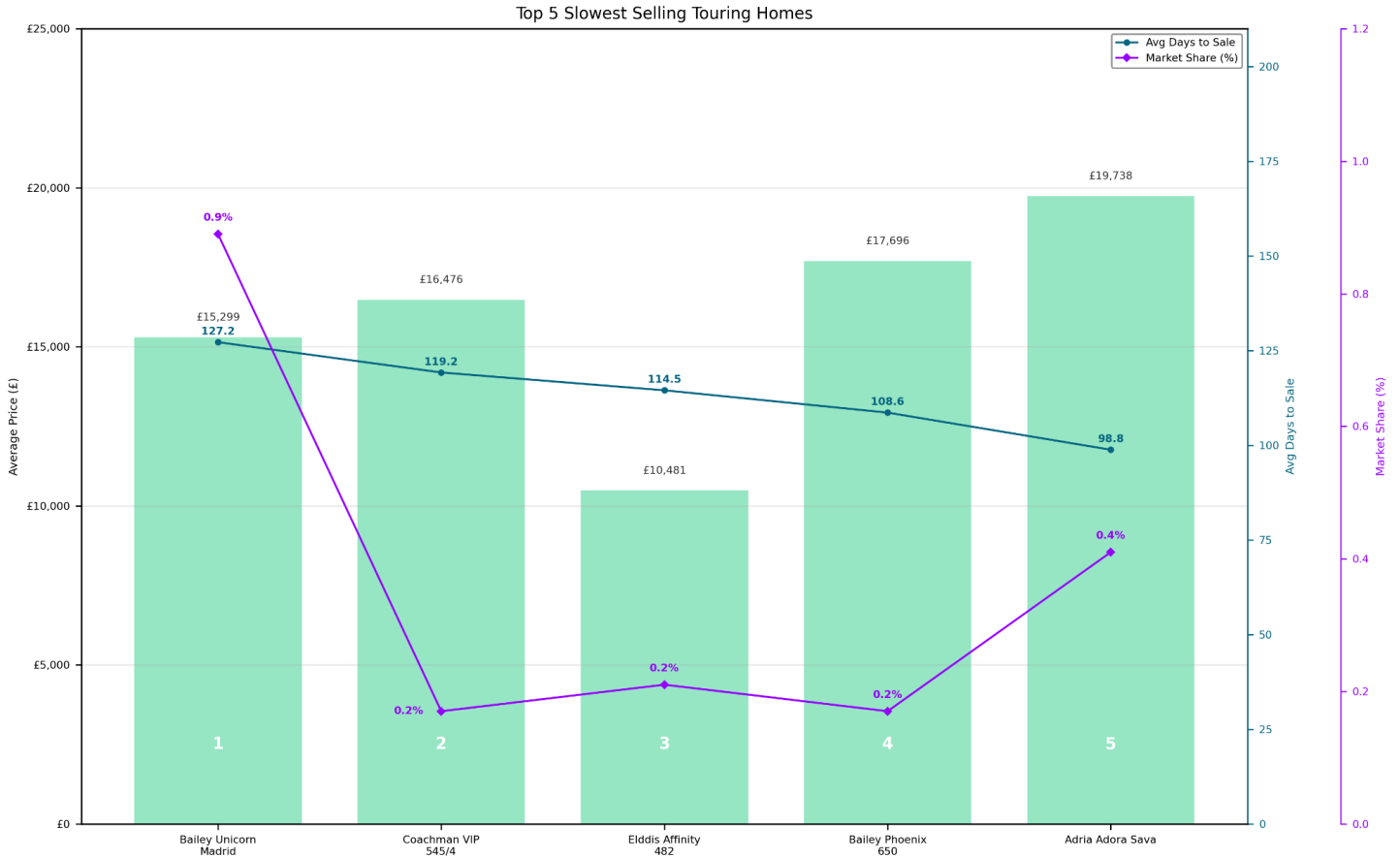
The data looks at all Tourers that sold at least five units during the month, and it is great to see a fresh list of entries when compared to April. There are four manufacturers represented in the list with two Tourers from Coachman and it is interesting to see that the top spot was taken by a dealer special in the form of the Glossop Festival 580.

At a high level, the Top 5 sold 20% less than the previous month's list with a market share down 0.4 of a percentage point to 0.9%. Of specific note is that the Average Sale Price for the month is much lower at £13,762 which is 36% lower than for the April Top 5 Fastest Sellers. This further highlights the consumer demand for cheaper Touring Homes.

The Average Days to Sale improved by 3.9 days to just 9.1 days overall for May. This was largely driven by a 2.2 day figure for the Coachman Glossop Festival 580 which had the third highest Average Sale price of £10,647.

Top 5 Slowest Selling Touring Homes

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



Data Powered by Brego Insight

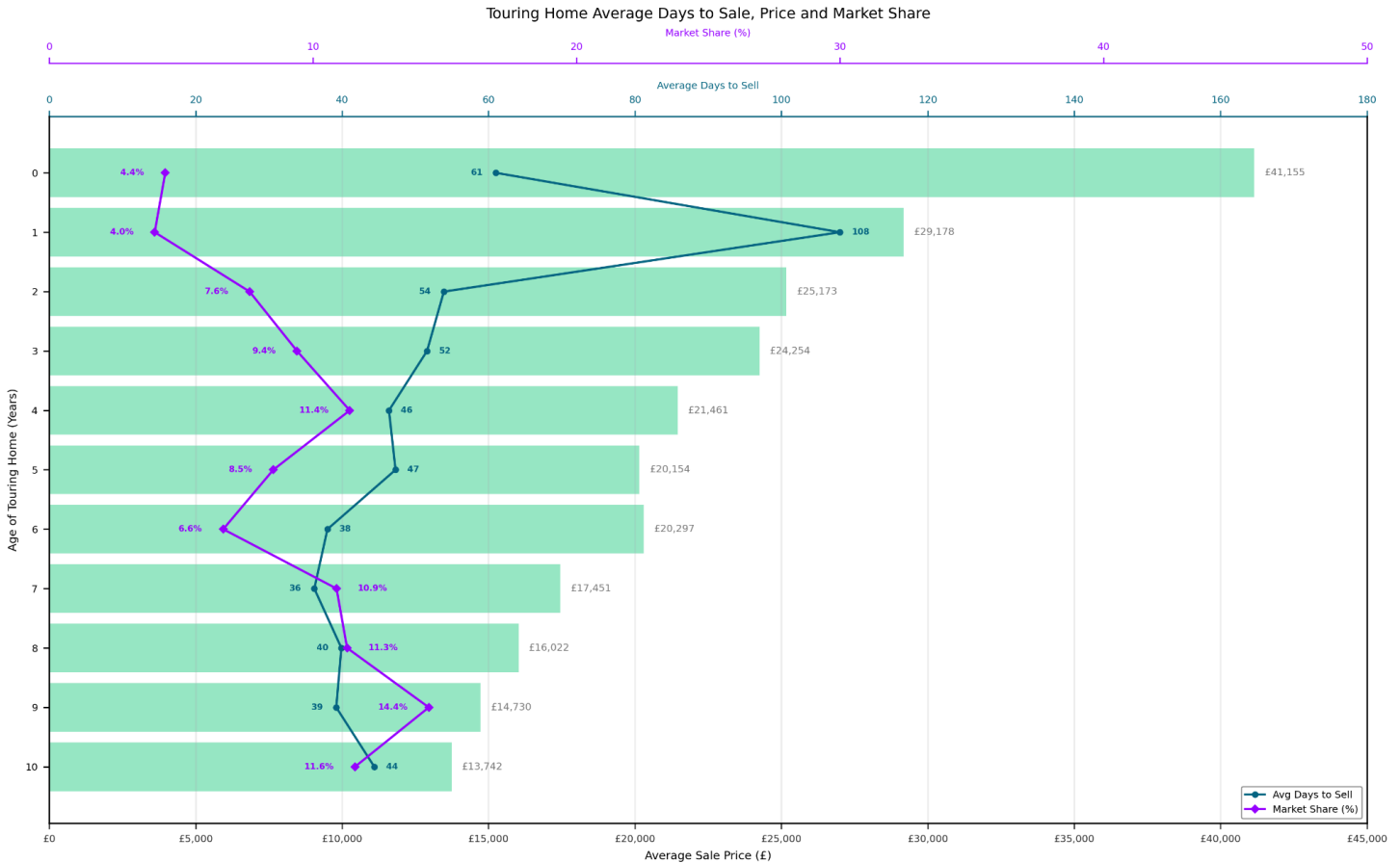
As with the Top 5 Fastest Sellers, this month's data has a fresh list of Tourers from four different manufacturers. Topping the list was the Bailey Unicorn Madrid at 127 days to sale. This model can be found in three and four berth configurations and it is probably the three berth layout that has caused the issue here as it is not a desirable layout being too small for most families.

Looking at the data overall, there was an 80% increase in the volume of sales over April for the Top 5 and the market share increased by 0.5% of a percentage point to 1.85%. The Average Sale Price dropped by 37% to £15,938 whilst the Average Days to Sale dropped by 40.8 to 113.7.

It is important to note that the parameters for this data exclude any Tourer that has recorded less than 5 sales in the month. This avoids spurious one-off derivatives and poor quality examples that have extended sale periods.

Touring Home Average Price by Age

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



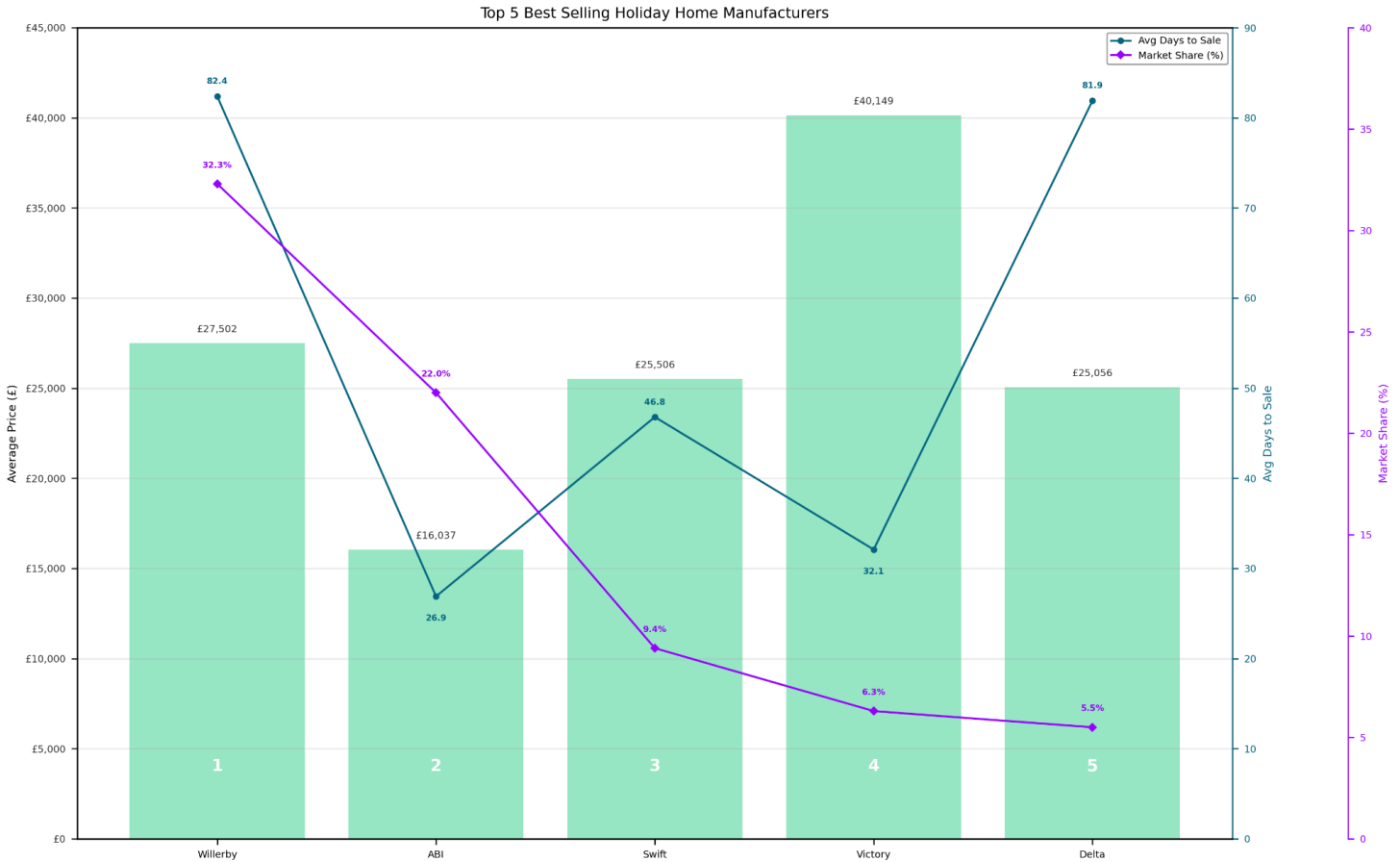
Data Powered by Brego Insight

The May data in this chart shows a stable month overall and the green bars show a sensible decline year on year except for six year old Tourers where the Average Sale price is higher than expected and just marginally higher than a five year old Tourer when it should really be below. This is not caused by low data volumes and is likely due to some cheaper five year old units on sale in the market. It also suggests that this age and price of Tourer is a bit of a sweet spot in demand.

Overall sales volumes in this data set increased by 9.6% whilst market share showed a decline for most years up to seven years old when compared to April further highlighting the demand for older, cheaper Tourers. The biggest increase month on month was for nine year old Tourers which increased by 2.5% and the largest drop was for sub one year old models with a 3% drop.

Top 5 Best Selling Holiday Home Manufacturers

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



Data Powered by Brego Insight

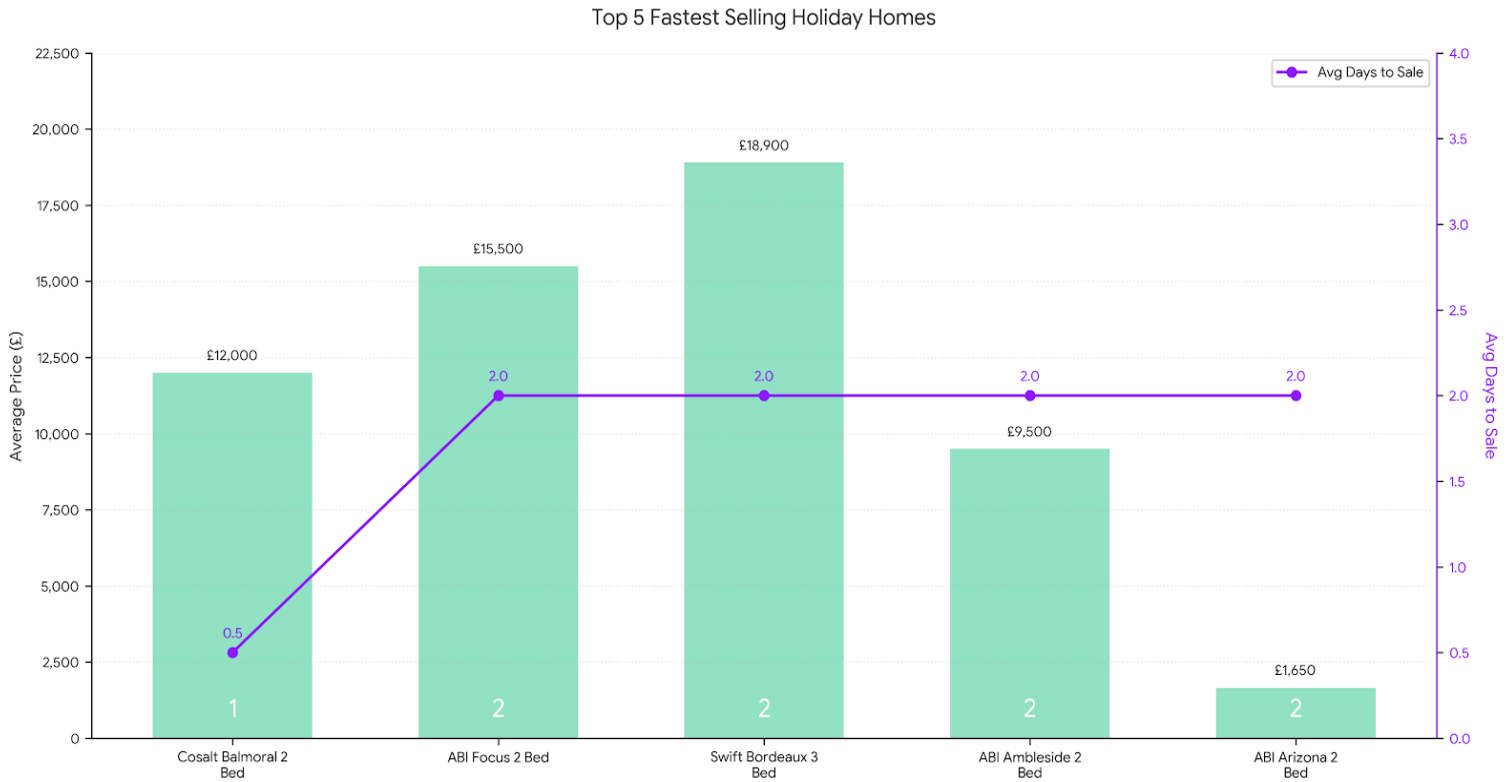
The May Top 5 Best Selling manufacturers have changed slightly with Victory displacing Atlas from the list and taking fourth spot and as such pushing Delta into fifth spot. The top three spots mirror the April data.

Overall, sales increased by 24.7% when compared to April against a full market increase of 13.2% which is impressive, although market share for the Top 5 decreased by 2.3 percentage points to 75.5%. The biggest change in market share was for Willerby which enjoyed a 5 percentage point increase to 32.3% whilst at the other end of the spectrum Delta lost 4.6 percentage points to take just 5.5% of the market.

The overall Average Sale Price increased by 16.9% to £26,850 and this is due to the entry of Victory with an average price of £40,149 which replaced the April figure of £14,102 for Atlas.

Top 5 Fastest Selling Holiday Homes

The chart below shows the Top 5 Fastest Selling Holiday Homes in May 2026. The average price is shown above the bar and the days to sale shown on the blue line with the percent of market share on the purple line.



Data Powered by Brego Insight

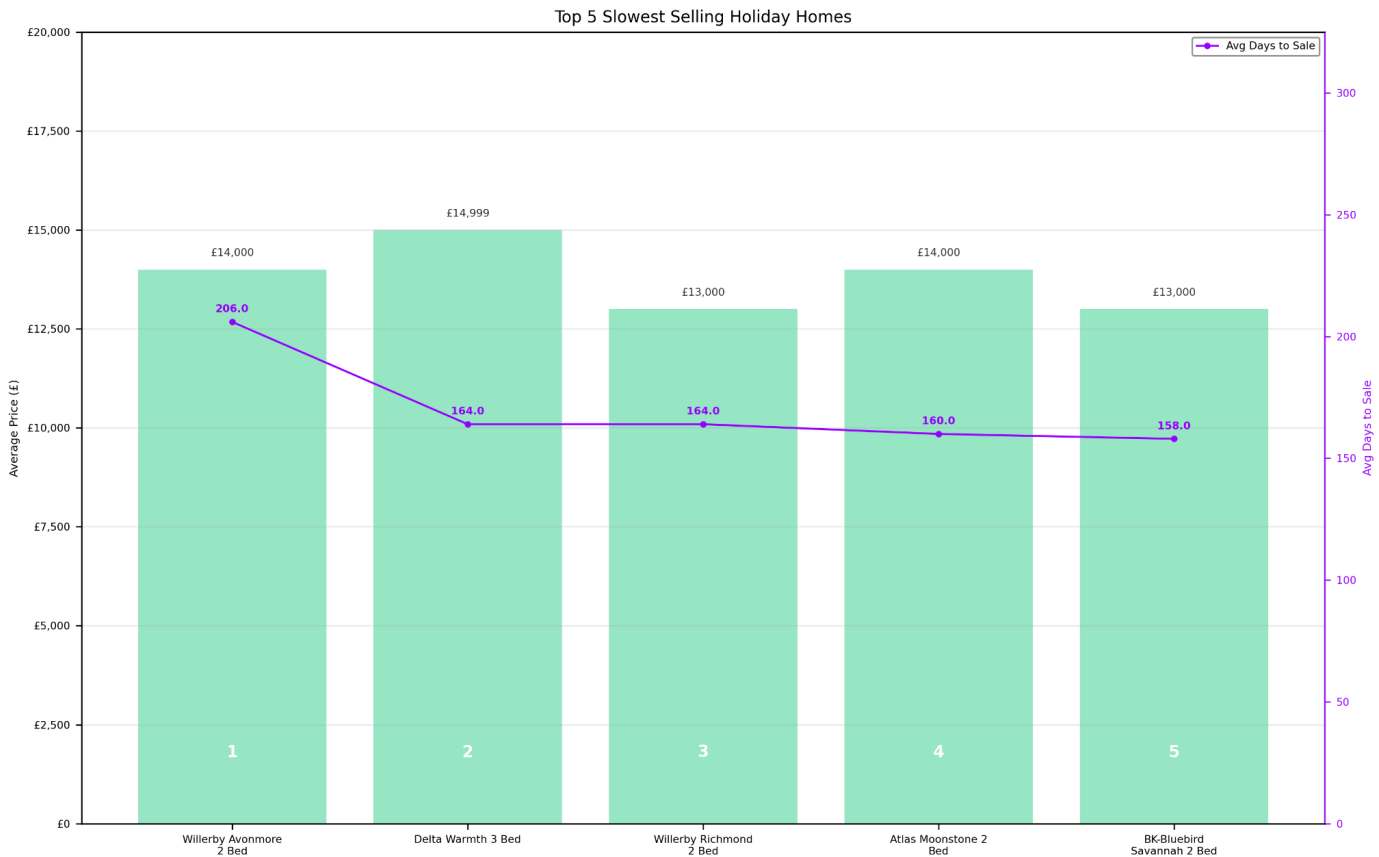
This month's data shows a completely fresh Top 5 Fastest Sellers list and is made up of three different manufacturers with the Cosalt Balmoral taking the top spot with an astonishing, and double checked, 0.5 days to sale. The fact that the remaining four units took just 2 days to sale each, either reinforces the strength of the market or suggests a very competitive price point as is evident by the Average Sale Price of the ABI Arizona.

Sales volumes for the Fastest Sellers increased by 20% month on month which is positive and ahead of the 13.2% increase for the whole market. That said the % of Market Share actually dipped by 0.2 of a percentage point. The Average Sale Price was £11,439 overall which is 44.5% lower than it was in April. This drop is in part due to the low Average Price of the ABI Arizona, but it is also worth noting that last month's data had two high value Holiday Homes in the Top 5 which also brought the figure up and thus exacerbated the impact on this month's data.

The overall Average Days to Sale improved by 2.5 days to 1.7. It will be very interesting to see what happens with this data next month.

Top 5 Slowest Selling Holiday Homes

The chart below shows the Top 5 Slowest Selling Holiday Homes in May 2026. The average price is shown above the bar and the days to sale shown on the purple line.



Data Powered by Brego Insight

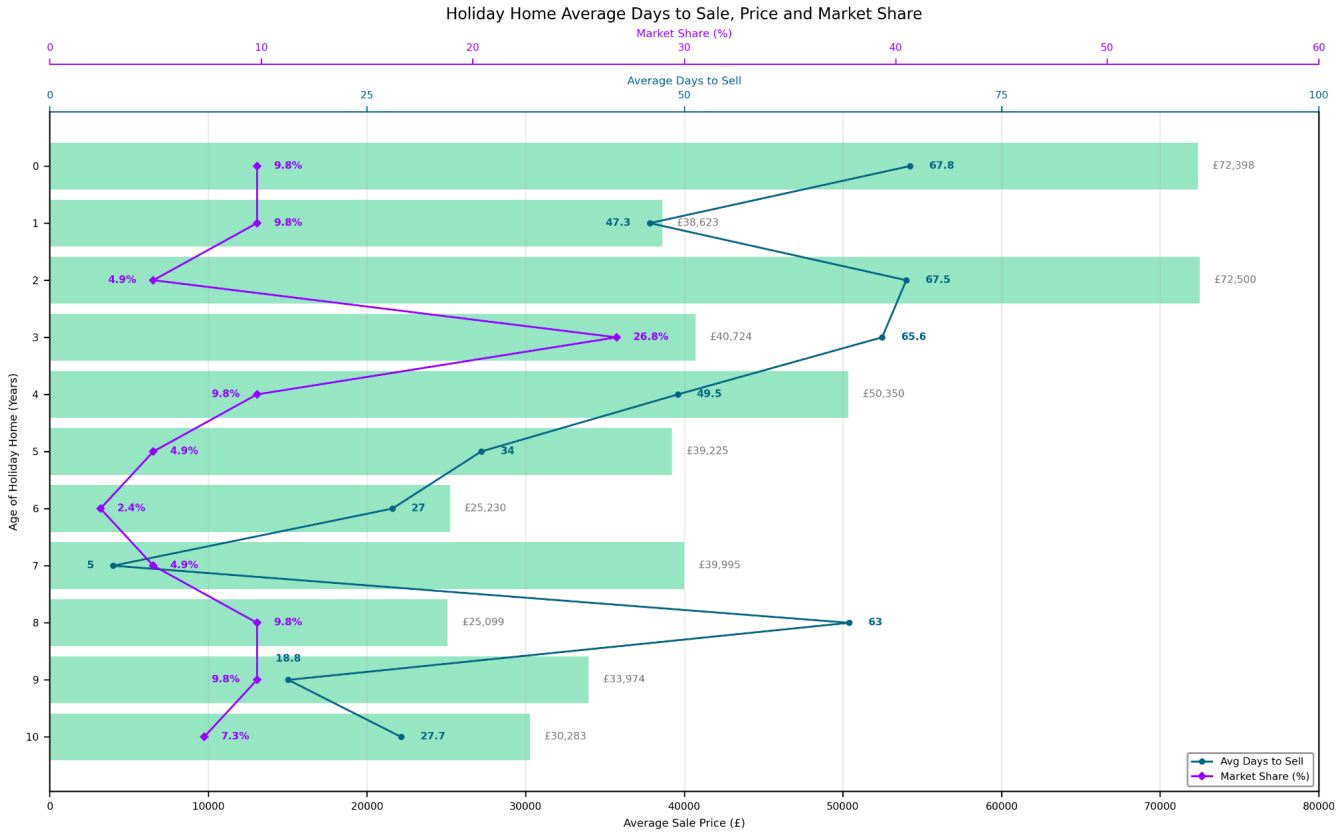
This month's data sees a complete change in the Top 5 which is to be expected really and there are Holiday Homes from four different manufacturers. The Willerby Avonmore tops the list with a lethargic 206 days to sale, although this is better than the 213 days it took to sell the Willerby Rio which topped the list in April. Willerby also took third spot with the Richmond 2 bed at 164 days.

At a high level, the volume of units in the Top 5 decreased by 16.7% which is a positive and the Average Sale Price increased by 17.3% to £13,800 which is quite low given the fairly high cost of a new Holiday Home. This suggests that this month the models in the Top 5 are older units. Of equal note, the Average Sale Price is very consistent ranging between £13,000 and £14,999 whereas in April the Average Price spanned between £5,990 and £17,250.

The Average Days to Sale for the month stood at 170 and this is actually 5.3 days worse than in April. It will be interesting to see if this drops as the selling season approaches its peak in the coming months.

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



Data Powered by Brego Insight

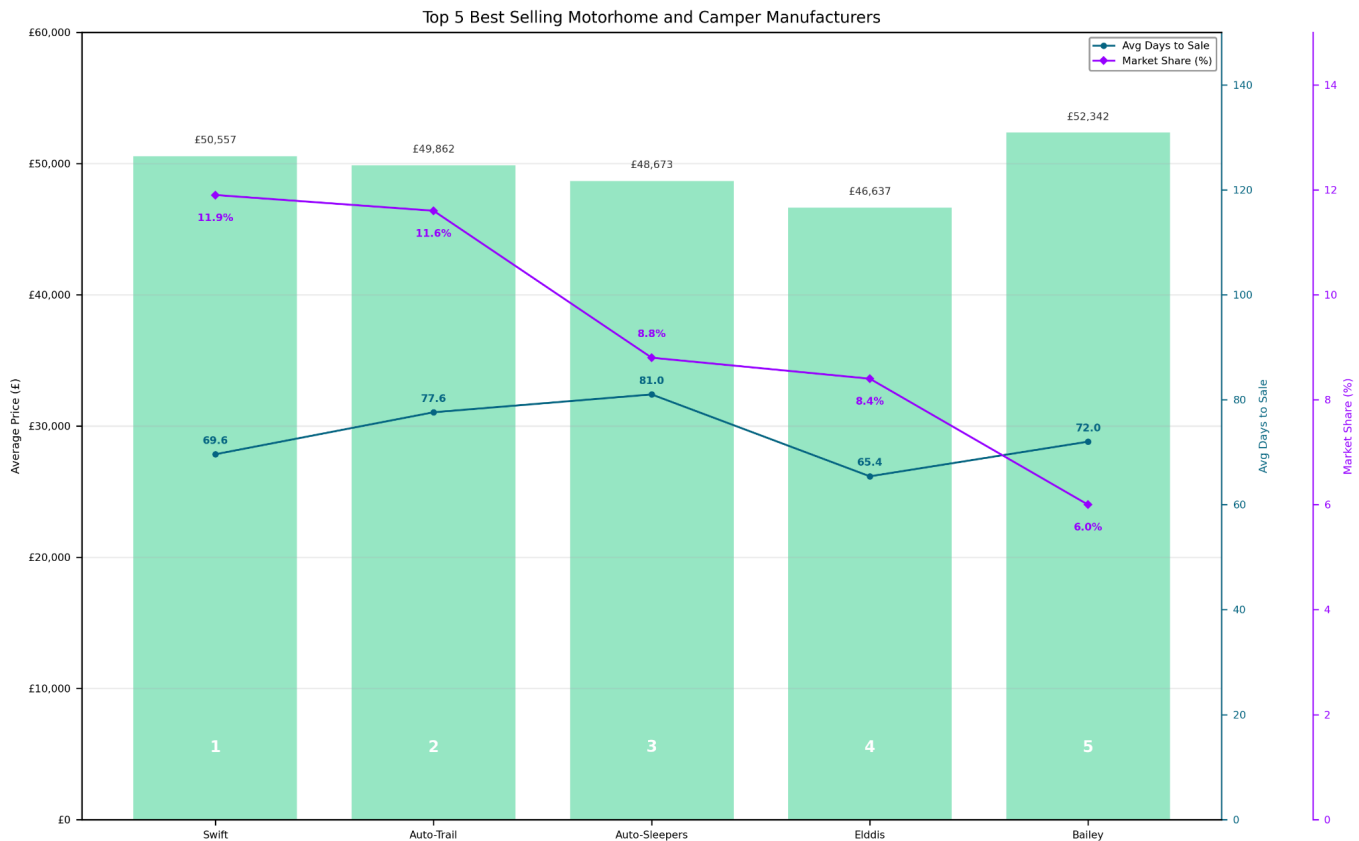
May's data revealed another fairly turbulent month when using this particular lens on the market. The pattern of the Average Sale Price by age is shown by the green bars and is very variable and not as balanced and consistent as it was with Touring Homes. This suggests that although sales and adverts have increased there are still some older and randomly priced Homes being sold which is probably due to overage stock clearance.

When compared with April, the total volume of sold units dropped by 4.6% against a full market increase of 13.2%. This indicates that Holiday Homes over ten years old took a bigger share of used sales in May. The Average Sale Price increased by 5% to £42,582 with the largest increase being for ten year old units where the price increased by 40%. There were decreases of between 15.7% and 11.5% for one, two and six year old Homes.

Looking at Market Share for Holiday Homes up to ten years old, the change is minimal with a 0.2 percentage point increase and the Average Days to Sale increased by 2.9 to 43 against a whole market figure of 50.8.

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 May 2026. The average price is above the bar. The average days to sale is shown by the blue line and the percent of market share is shown by the purple line.



Data Powered by Bregio Insight

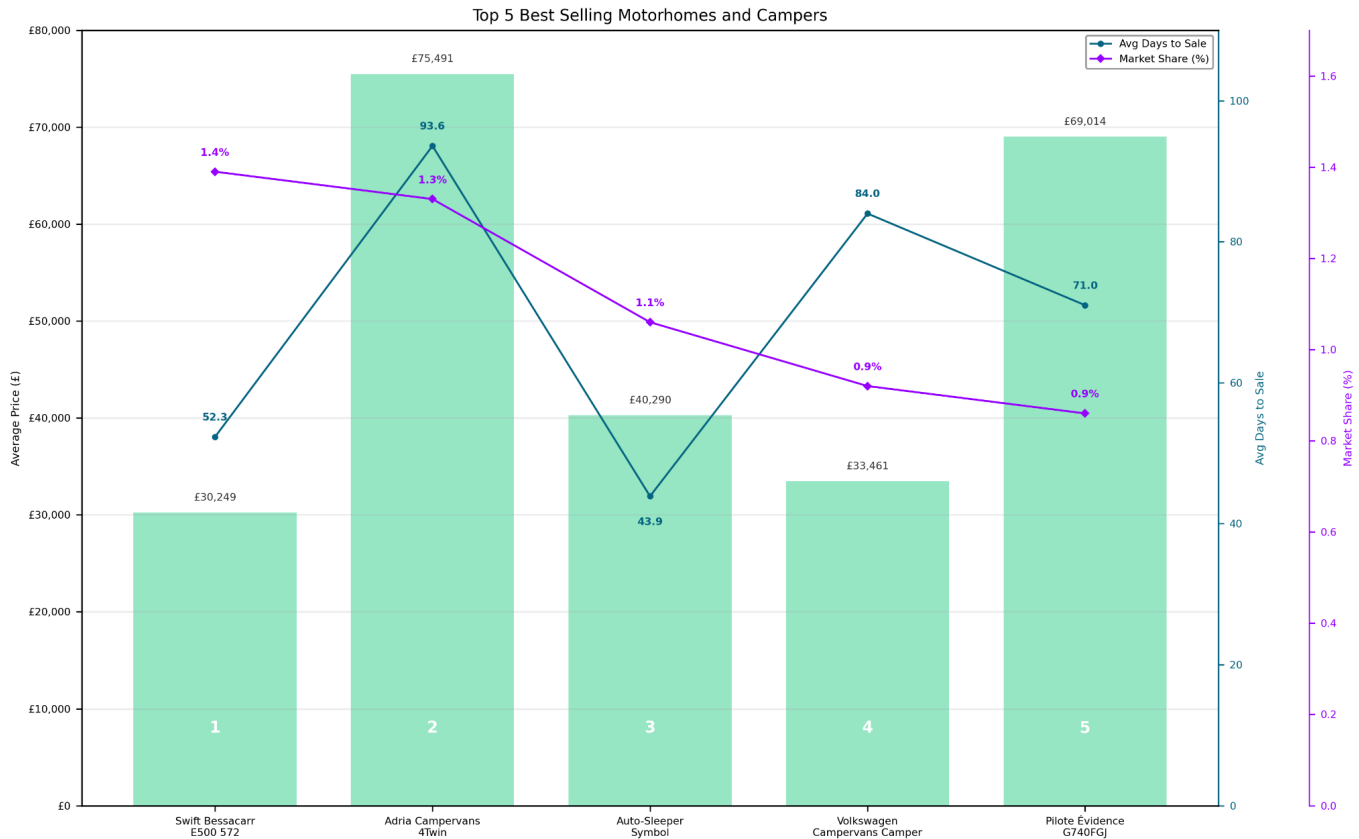
The May data shows that the Top 5 list has changed slightly with the departure of Roller Team that was in fourth place in April and the re-entry of Auto-Sleepers who pushed Elddis from third spot to fourth.

Sales volumes increased by 40% month on month against a whole market uplift of 7% overall which is fascinating as it implies there has been a real drop in sales for some of the less well-known brands. Market share for the Top 5 also grew by 9.9 percentage points to 46.7% and Elddis experienced the biggest growth in sales volume for the month with a boost of 78% over the April figure.

The Average Sale Price saw a 1.2% decline dropping to £49,614 which is lower than the full market average of £52,088. Auto-Trail experienced the largest increase in price with a jump of 5.8% to £49,862 whilst at the other end of the scale Elddis saw a drop of 15.6% to £46,637. The Average Days to Sale improved by a minimal 0.5 of a day to 73.1 although Swift enjoyed a 10.8 day improvement over April.

Top 5 Best Selling Motorhomes and Campers

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



Data Powered by Bregio Insight

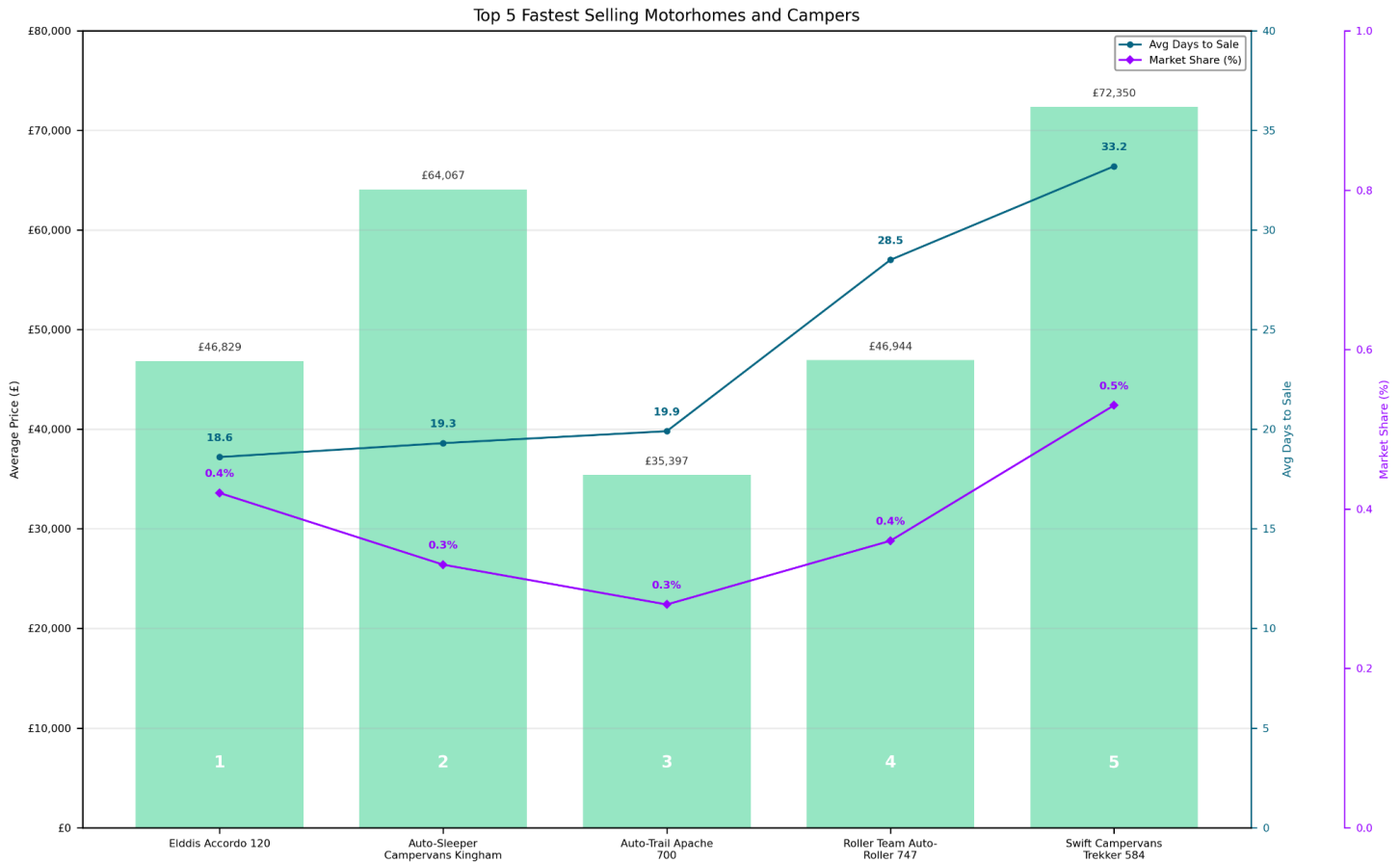
This month's data reveals each of the Top 5 Best sellers comes from a different manufacturer. There is just one change in the list compared to April and that is the VW, which is the Camper variant in fourth spot, based on the Caddy Maxi, and has replaced the California Ocean that was in third spot in April.

The total volume of sales for the Top 5 increased by 54% against a whole market increase of 7% which is remarkably interesting and worthy of deeper investigation. The Swift saw the biggest increase with an uplift of 92.3% month on month. The Average Sale Price remained almost exactly the same with just a £39 drop although the change by model month on month ranged between a 20% increase for the Adria and an 8% drop for the Pilote.

Looking at the Average Days to Sale, there was an increase of 12.7 days which is not so good, and this ranged between an improvement of 19.8 days for the Pilote and an increase of 38 for the Adria. The overall market share increased by 1.7 percentage points to 5.6%.

Top 5 Fastest Selling Motorhomes and Campers

The chart below shows the Top 5 Fastest Selling Motorhomes and Campers in May 2026. The average price is shown above the bar and the days to sale shown on the blue line with the percent of market share on the purple line.



Data Powered by Brego Insight

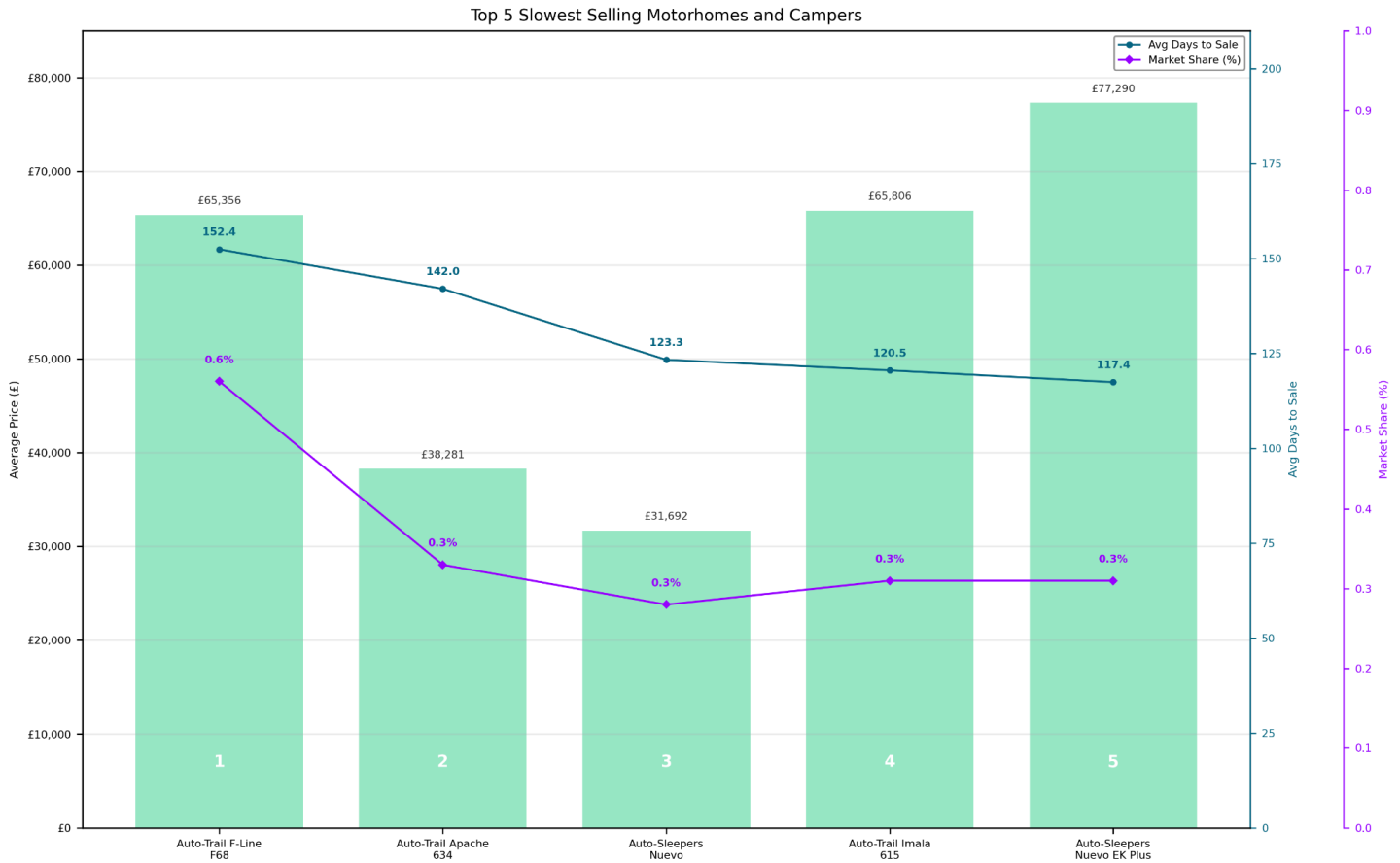
The third month looking at the Fastest Sellers reveals a completely fresh list of models from five different manufacturers. In total the volume sold of the Top 5 increased by 3% compared to April and the percentage share of the whole market sales declined by 0.2 of a percentage point.

Of note is the fact there are four motorhomes and one camper in the list. Every motorhome is a low-profile model, and the Auto-Trail and the Roller Team boast family focused twin lounge layouts. It is also interesting to see the Swift Trekker in the list as this is a fairly rare model and its off-road appearance and product marketing are fairly unique in the sector.

Overall, the Average Sale Price increased by a considerable 44.9% and was influenced by the high value of the Swift although the lowest price was hardly a budget model at £35,397 for the Auto-Trail.

Top 5 Slowest Selling Motorhomes and Campers

The chart below shows the Top 5 Slowest Selling Motorhomes and Campers in May 2026. The average price is shown above the bar and the days to sale shown on the blue line with the percent of market share on the purple line.



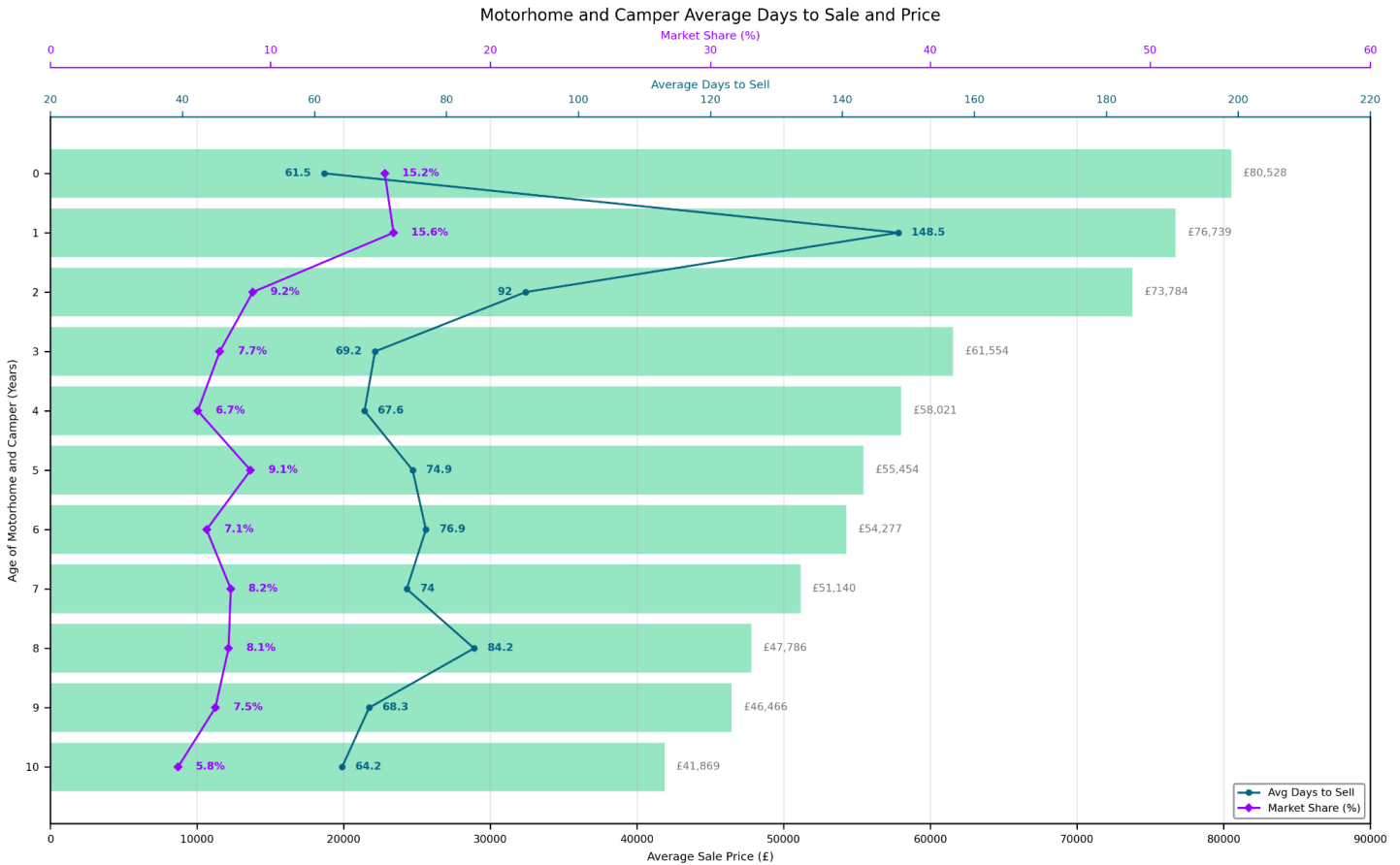
Data Powered by Brego Insight

This month's data shows a fresh list of the Top 5 Slowest Sellers from just two manufacturers with Auto-Trail taking first, second and fourth spot. It is interesting to see that they are all 2 berth models and four of the five are branded as premium models thus highlighting that larger family motorhomes are more popular at this time of the year. Of note is the fact there are two of the same models in the list in the form of the Auto-Sleepers Nuevo with one having the often less desirable end kitchen layout.

Overall, the data shows that the volume of sales for the Top 5 increased by 16.4% when compared to the April list and the total market share of sales increased by a nominal 0.1 of a percentage point. The Average Sale Price dropped by 9.9% to £55,685 primarily driven by the lower pricing of the Apache 634 and the Nuevo. The Average Days to Sale improved by 14 days to 131.1.

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



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. Of particular interest here is the increased average days to sale for 1 year old vehicles which also correlates with a high market share at 15.6% suggesting there may be some oversupply in the market that is still being cleared out after the quieter winter months.

Overall, the volume of sales in May increased by 6.9% which is slightly behind the whole market which was at 7% and the Average Sale Price stayed almost the same, moving up by just £193 to £58,874. The Average Days to Sale increased by 1.6 days to 80.1 which is a little surprising given the time of year.

Summary

The May Leisure market was surprisingly buoyant given the ongoing difficulties in the Middle East, the Iran war and the resulting geopolitical unrest that is hindering economic growth in many countries and pushing the cost of living up. Under these circumstances one would naturally expect consumers to tighten their belts and change their spending habits, and this has been the case in some retail sectors in the UK although the Leisure market seems to have escaped significant hardship to date.

May brought an increase in sales across all Leisure verticals with improvements of between 2.8% and 13.2% and the market saw an increase in adverts of up to 12%. In addition, footfall at the dealers and parks improved as did enquiry levels for most businesses. That is not to say it has been easy to close sales and customers feel the need to ensure they are getting value for their money. Indeed, the data shows a migration towards cheaper models and often a shift to older products. But most importantly, and in line with previous similar periods of unrest, the UK consumer has shown a desire to holiday in the UK and avoid the inflated costs of international travel to countries that may also be struggling to give elevated levels of service to foreign travellers.

Therefore, now is the time for Dealers and Operators to implement robust stocking strategies that will ensure they have the right stock in place, and it is priced appropriately to drive sales. However, whilst this is often easier said than done, using high quality data and insight will ensure you have an edge in the market and give the best opportunity to maximise sales and more importantly drive the best profit possible.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting-edge AI driven Insight platform to help bring detail and clarity to the complex UK Leisure market.