

This snapshot presents information on visitors to NSW who stayed in caravan and camping accommodation¹ in the year ended (YE) December 2017.²

NSW VISITOR MARKET SIZE AND EXPENDITURE

In YE December 2017, the total number of international and domestic caravan and camping overnight visitors to NSW were 4.2 million (up 1.8% on 2016). They stayed 17.1 million nights (down 3.6%) and spent \$2.1 billion (up 3.4%) in the State.

International and domestic caravan and camping visitors represented 11.7% of overnight visitors and 8.8% of nights in NSW. The State received 33.8% of caravan and camping visitors to Australia and 29.9% of nights in YE December 2017.

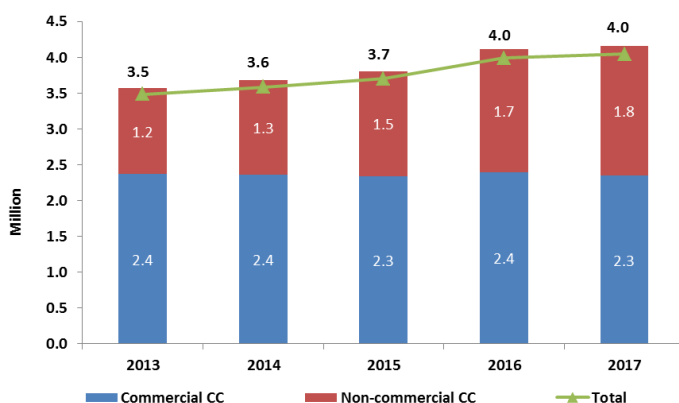
The main source market for the caravan and camping segment is Domestic with over 96.7% of caravan and camping visitors to NSW in YE December 2017 being Australian residents.

Table 1. Caravan & Camping Visitors, Nights and Expenditure

Visitors	Visitors (million)	Nights (million)	Average Length of Stay	Median Length of Stay	Total spend (\$ billion)	Spend per visitor	Spend per night
International	0.1	1.0	8 nights	11 nights	0.1	\$501	\$66
Domestic Overnight	4.0	16.1	4 nights	3 nights	2.0	\$497	\$125
Total	4.2	17.1	-	-	2.1	-	-

The snapshot from this point onward will focus on Domestic caravan and camping visitors to NSW.

Chart 1. Domestic caravan and camping visitors to NSW



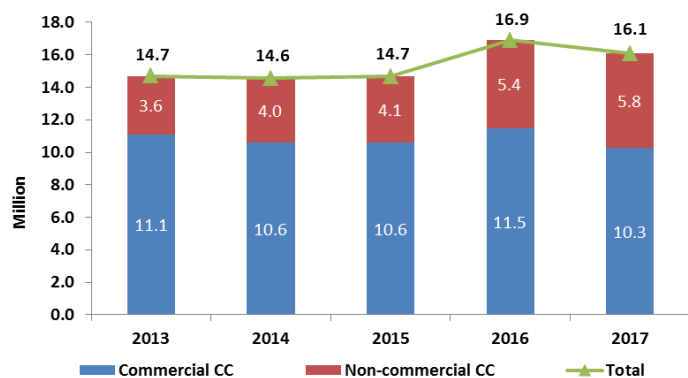
In the YE December 2017, NSW received a total of 4.0 million domestic caravan and camping visitors (up 1.3% on YE December 2016).

Of these, 2.3 million stayed in **commercial** caravan and camping sites (or 58.0% of total NSW domestic overnight caravan and camping visitors) and 1.8 million stayed in **non-commercial** caravan and camping sites.

Compared to YE December 2013, the number of domestic caravan and camping visitors to NSW grew by 16.1%. In the same period, the volume of **commercial** caravan and camping visitors declined by 0.9% while the number of **non-commercial** caravan and camping visitors recorded a substantial growth of 51.1%.

¹ **Definition:** Caravan and camping NSW visitors used overnight caravan and camping accommodation facilities at either commercial sites (caravan parks, camping grounds or cabins) or non-commercial sites (self-drive van; motor home or campervan; or camping by the side of the road, private property, crown land or a national park) within NSW. Visitors do not necessarily spend all of their trips nights in caravan and camping accommodation on their trip.

² **Source:** International Visitor Survey and National Visitor Survey, YE December 2017, Tourism Research Australia.

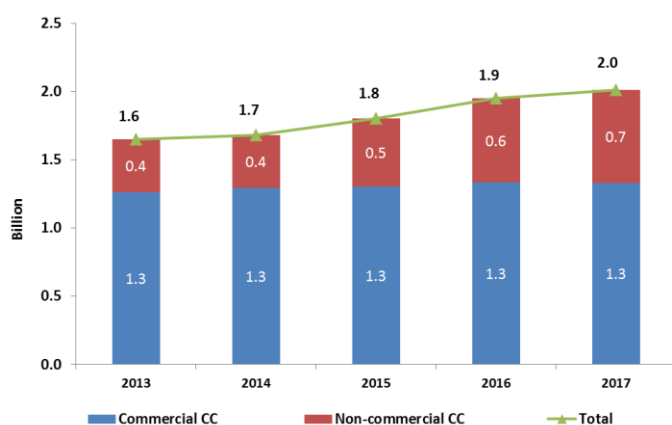
Chart 2. Domestic caravan and camping nights to NSW

In the YE December 2017, domestic caravan and camping visitors stayed 16.1 million nights in NSW (down 4.9% compared to YE December 2016).

Of these nights, **commercial** visitors accounted to 63.9% (10.3 million nights) and **non-commercial** accounted to 36.1% (5.8 million nights).

Compared to YE December 2013, domestic caravan and camping visitor nights in NSW increased by 9.4%. The number of nights spent by **commercial** caravan and camping visitors to the State dropped by 7.5% while nights spent by **non-commercial** caravan and camping visitors grew by 61.4%.

Domestic caravan and camping visitors stayed, on average, 4.0 nights in the State in YE December 2017. Compared to YE December 2013, the average length of stay by caravan and camping visitors was down by 0.2 nights.

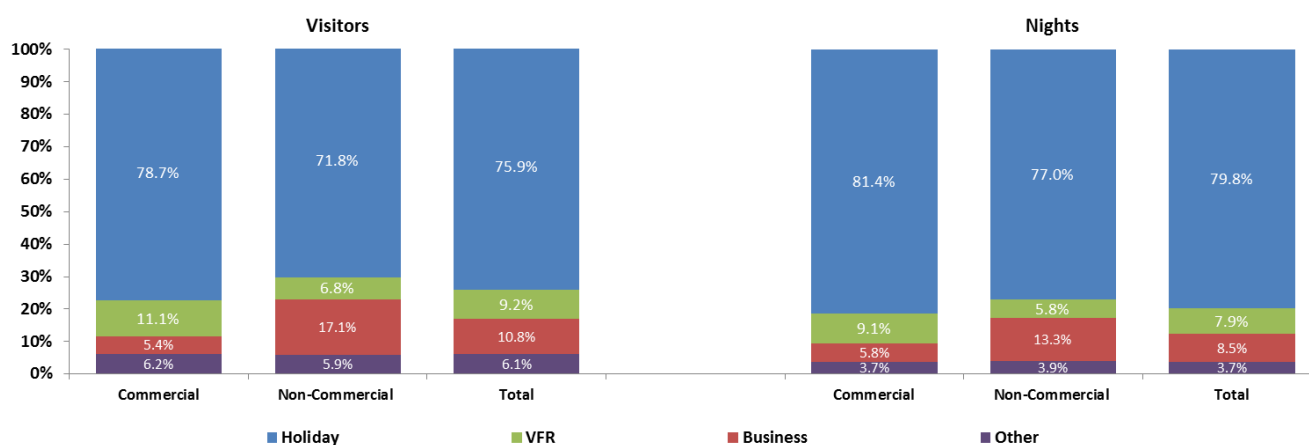
Chart 3. Domestic caravan and camping expenditure to NSW

In the YE December 2017 domestic caravan and camping visitors spent \$2.0 billion in NSW (up 3.1% on YE December 2016). Of these, \$1.3 billion was spent by **commercial** caravan and camping visitors (66.1% of total NSW domestic overnight caravan and camping expenditure) and \$0.7 billion was spent by **non-commercial** caravan and camping visitors.

In the period 2013 to 2017, domestic caravan and camping visitor expenditure grew by 21.9%. In the same time period, domestic **commercial** and **non-commercial** caravan and camping visitors expenditure increased by 5.2% and 76.6%, respectively.

PURPOSE OF VISIT

Chart 4. Domestic caravan and camping visitors and nights by purpose of visit



In the YE December 2017, 'Holiday' (75.9%) was the largest purpose of visit for domestic caravan and camping visitors to NSW, followed by 'Business' (10.8%) and 'Visiting friends and relatives (VFR)' (9.2%). Compared to YE December 2016, the number of domestic caravan and camping visitors who travelled for 'Holiday' declined slightly by 1.4% while 'Business' and 'VFR' visitors grew by 25.7% and 5.1%, respectively.

'Holiday' (79.8%) was also the largest purpose in terms of nights in the State, followed by 'Business' (8.5%) and 'VFR' (7.9%). Compared to YE December 2016, the volume of nights spent by 'Holiday' and 'VFR' visitors dropped by 6.8% and 3.9% while 'Business' nights grew by 34.4%.

Compared to YE December 2013, the number of domestic caravan and camping 'Holiday' visitors and 'Holiday' visitor nights increased by 12.6% and 6.4%, respectively.

DESTINATIONS VISITED IN NSW

Table 2. Total domestic caravan and camping destinations in NSW

Region	Visitors		Nights		Average Stay (nights)	Share to total	
	('000)	% share	('000)	% share		Visitors to region (%)	Nights to region (%)
Sydney	304	7.5%	869	5.4%	2.9	3.1%	3.2%
North Coast NSW	1195	29.6%	5588	34.8%	4.7	23.4%	27.5%
South Coast	773	19.1%	2610	16.2%	3.4	20.5%	22.2%
Central NSW	397	9.8%	1241	7.7%	3.1	15.6%	17.2%
New England North West	381	9.4%	1318	8.2%	3.5	23.3%	28.0%
Hunter	362	8.9%	928	5.8%	2.6	10.0%	10.3%
The Murray	260	6.4%	813	5.1%	3.1	21.9%	25.9%
Snowy Mountains	186	4.6%	671	4.2%	3.6	20.0%	19.6%
Capital Country	172	4.3%	388	2.4%	2.3	13.2%	13.0%
Outback NSW	156	3.9%	580	3.6%	3.7	30.7%	34.6%
Central Coast	155	3.8%	506	3.1%	3.3	10.8%	12.9%
Riverina	146	3.6%	306	1.9%	2.1	15.0%	13.6%
Blue Mountains	115	2.9%	247	1.5%	2.1	11.1%	10.4%
Regional NSW	3770	93.3%	15208	94.6%	4.0	16.9%	20.7%
Total NSW	4042	100%	16078	100%	4.0	12.8%	16.1%

Regional NSW is the main destination for domestic caravan and camping visitors to the State, having accounted for 93.3% of visitors and 94.6% of nights. In the YE December 2017, Regional NSW received nearly 3.8 million domestic caravan and camping visitors (up 0.7% on 2016) who stayed 15.2 million nights (down 5.4%) and spent \$1.8 billion (down 3.8%) in the State. The domestic caravan and camping segment accounted for 16.9% of all domestic overnight visitors and 20.7% of all domestic visitor nights in Regional NSW.

In the period 2013 to 2017, domestic caravan and camping visitors, visitor nights and expenditure to Regional NSW grew by 14.3%, 7.4% and 11.1%, respectively. In the same period, the domestic caravan and camping 'Holiday' visitors, visitor nights and expenditure increased by 10.7%, 4.6% and 12.5%, respectively.

The **North Coast region** was the most popular destination in NSW for domestic caravan and camping visitors with 29.6% of share of all domestic caravan and camping visitors in the State, followed by the South Coast region (19.1% share) and Central NSW (9.8% share). Domestic caravan and camping visitors spent more **nights** in the North Coast (34.8% share) than any other region in NSW. The South Coast region had the 2nd most number of nights (16.2% share), followed by New England North West (8.2% share). Since YE December 2013, the North Coast has been the number one destination for domestic caravan and camping visitors to NSW.

ORIGIN

Table 3. Origin of domestic caravan and camping visitors

Origin	Visitors		Nights		Average Stay (nights)
	'000	% share	'000	% share	
Sydney	1034	25.6%	3404	21.2%	3.3
Regional NSW	1648	40.8%	6782	42.2%	4.1
Total Intrastate	2681	66.3%	10186	63.4%	3.8
Queensland	611	15.1%	2764	17.2%	4.5
Victoria	493	12.2%	2068	12.9%	4.2
Other Interstate	257	6.3%	1060	6.6%	4.1
Total Interstate	1360	33.7%	5892	36.6%	4.3
TOTAL	4042		16078		4.0

Note: There are no major differences between commercial and non-commercial markets, in terms of visitors' origin.

In the YE December 2017, Regional NSW was the largest source market for both domestic caravan and camping visitors and nights to the State, followed by Sydney and Queensland.

Compared to YE December 2016, the number of domestic caravan and camping visitors from Victoria, Sydney and Regional NSW grew by 11.0%, 3.9% and 3.3%, respectively while visitation from Queensland declined by 8.5%.

Compared to YE December 2016, **nights** spent by domestic caravan and camping visitors from Regional NSW and Sydney increased by 4.6% and 2.2%, respectively. Nights from Victoria and Queensland residents declined by 13.6% and 18.2%, respectively.

Over the past five years, Regional NSW has been the main source market for domestic caravan and camping visitors (up 9.5% on YE December 2013) and nights (up 20.1% on YE December 2013) to NSW.

Table 4. Top source markets of domestic caravan and camping visitors from Regional NSW

Origin	Visitors		Nights	
	'000	% share to Regional NSW	'000	% share to Regional NSW
Hunter	401	24.3%	1413	20.8%
North Coast NSW	310	18.8%	1164	17.2%
Central NSW	203	12.3%	1029	15.2%
South Coast	180	10.9%	795	11.7%
Central Coast	177	10.8%	757	11.2%

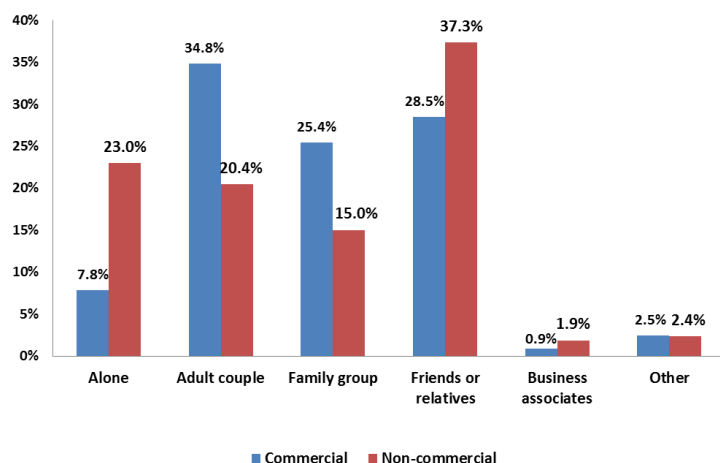
In the YE December 2017, Hunter was the largest source market in Regional NSW for domestic caravan and camping visitors and nights to the State, followed by North Coast and Central NSW.

In the last five years, Hunter has been the top source market for domestic caravan and camping visitors and nights. The North Coast was second top market from 2015 to 2017 while the South Coast was the second top origin market in 2014 and third in 2015 to 2016.



TRAVEL PARTY

Chart 5. Travel party of domestic caravan and camping visitors



In the YE December 2017, 'adult couple' was the most common travel party of **commercial** domestic caravan and camping visitors to NSW (34.8%), followed by 'friends and relatives' (28.5%) and 'family group' (25.4%).

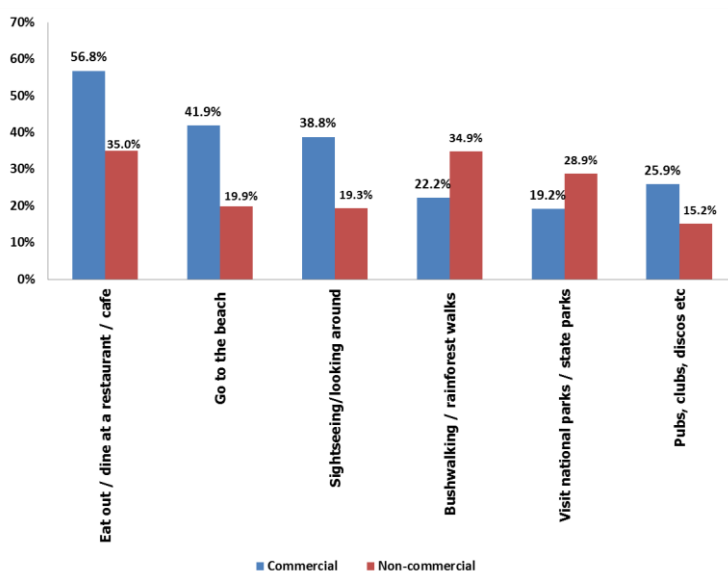
For **non-commercial** domestic caravan and camping visitors to NSW, the biggest travel party is 'friends and relatives' (37.3%), followed by 'alone' (23.0%) and 'adult couple' (20.4%).

Since YE December 2013, 'adult couple' has been the most common travel party for **commercial** domestic caravan and camping visitors to NSW except in 2013 when 'family group' was the most common travel party (34.4%), followed by 'adult couple' (31.7%).

For **non-commercial** visitors to NSW, the most common travel party since YE December 2013 has been 'friends and relatives'.

ACTIVITIES IN NSW

Chart 6. Top activities of NSW domestic caravan and camping visitors



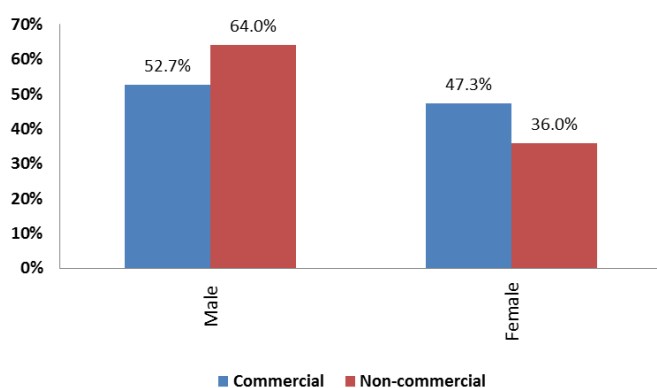
In the YE December 2017, the top activities undertaken by commercial and non-commercial caravan and camping visitors to the State were slightly different. For **commercial** domestic caravan and camping visitors, the most popular activity was 'eat out/dine at a restaurant and/or cafe' (56.8%), followed by 'go to the beach' (41.9%) and 'sightseeing/looking around' (38.8%).

For **non-commercial** caravan and camping visitors to NSW, the most popular activity was 'eat out / dine at a restaurant and/or cafe' (35.0%) followed by 'bushwalking/rainforest walks' (34.9%) and 'visit national parks / state parks' (28.9%).

In the period 2013 to 2017, 'eat out/dine at a restaurant and/or café', 'go to the beach' and 'sightseeing/looking around' have been the top activities for domestic caravan and camping visitors to NSW.

GENDER

Chart 7. Domestic caravan and camping visitors by gender

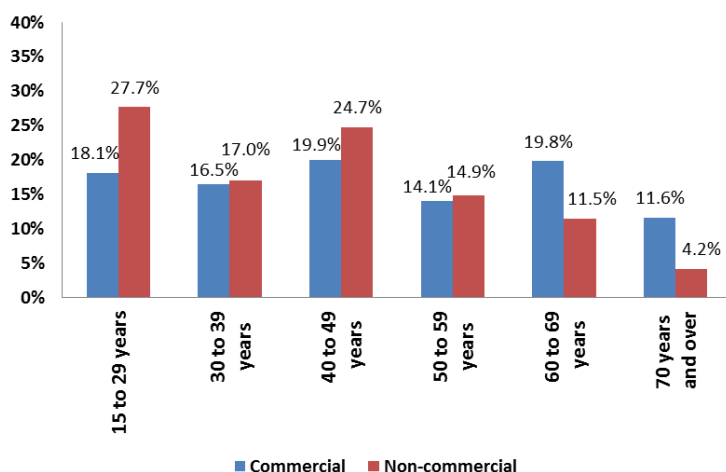


In the YE December 2017, there were an almost even split between males and females (52.7% and 47.3% respectively) for **commercial** caravan and camping visitors. For **non-commercial** caravan and camping visitors, there were more males (64.0%) than females (36.0%).

Compared to YE December 2013, the number of male and female caravan and camping visitors to **commercial** sites in NSW declined by 1.1% and 0.7%, respectively. The number of male and female visitors to **non-commercial** caravan and camping sites has recorded growth of 45.3% and 62.9%, respectively.

AGE GROUPS

Chart 8. Domestic caravan and camping visitors by age groups



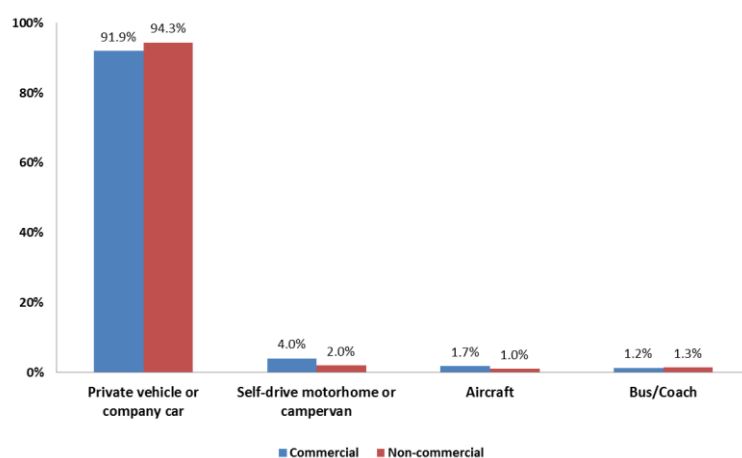
In the YE December 2017, most domestic caravan and camping visitors were aged '40 to 49 years' and '60 to 69 years' (19.9% and 19.8%, respectively), followed by 15 to 29 years (18.1%).

Among **non-commercial** caravan and camping visitors to NSW, the youth market (15-29 years) dominated, followed by those aged 40 to 49 years (24.7%) and the '30 to 39 years' (17.0%).

In the last 5 years, the '40 to 49' has been the largest age group for domestic **commercial** campers to NSW while the youth market leads **non-commercial** domestic caravan and camping visitors to NSW.

TRANSPORT IN NSW

Chart 9. Most popular form of transport used by domestic caravan and camping visitors

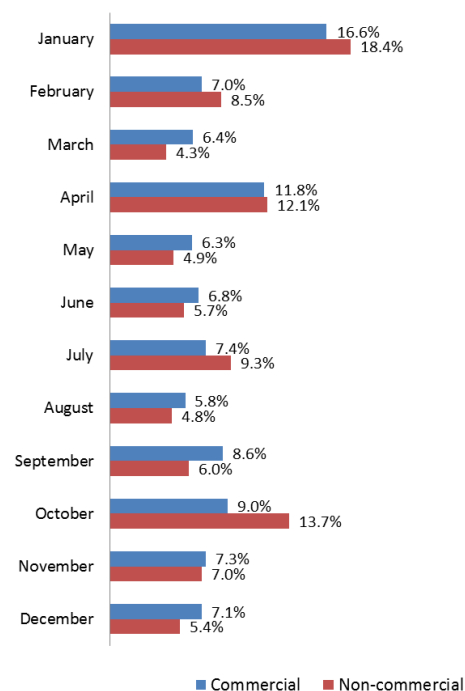


In the YE December 2017, 'private vehicle or company car' was the most popular form of transport used to destinations in NSW by both **commercial** and **non-commercial** domestic caravan and camping visitors (91.9% and 94.3%, respectively).

Compared to YE December 2013, the number of domestic caravan and camping visitors to NSW using 'private vehicle or company car' and 'aircraft' grew by 16.8% and 45.1%, respectively while visitors using 'bus/coach' declined by 24.2%.

SEASONALITY

Chart 10. Seasonality of domestic caravan and camping visitors



In the YE December 2017, top three months for visitation by both commercial and non-commercial caravan and camping visitors are the same. Most **commercial** caravan and camping visitors return from their trip in January (16.8%), followed by those returning in April (11.8%) and October (9.0%).

Nearly a fifth of non-**commercial** caravan and camping visitors also returned from their trip in January (18.4%), followed by those returning in October (13.7%) and April (12.1%).

Compared to YE December 2016, the total number of domestic caravan and camping visitors to NSW returning on September and April grew the most (51.6% and 29.0%, respectively).

MORE INFORMATION

For more information and statistics about tourism in NSW, see the *Tourism – Facts & Figures* page on the Destination NSW Corporate website at <http://www.destinationnsw.com.au/>.

