

This snapshot provides a profile of visitors to NSW who stayed in caravan and camping accommodation<sup>1</sup> in the year ended (YE) December 2018<sup>2</sup> as well as visitation trends.

Caravanning and camping is an activity which has been enjoyed by many Australians since they were children. Research from Caravan Industry Association of Australia revealed that 70% of Australians indicated they have visited a camping ground, caravan holiday park or national park at least once in their lifetime<sup>3</sup>. Another research into the Australian travel mindset found that campers were happier, more socially and environmentally conscious and closer to their loved ones than Australians who do not camp<sup>4</sup>. The same research found that 96% believe that camping makes them happier, 95% believes that camping reduces stress, and 94% believe that camping makes them appreciate nature more, generates happy memories and recharges their batteries.



### Overview

In YE the December 2018, the total number of international and domestic caravan and camping visitors to NSW was 4.3 million (up 3.9% on previous year). The State received one third of international and domestic overnight caravan and camping visitors to Australia in the latest year (33% each).

Caravan and camping visitors stayed 16.9 million nights and spent \$2.3 billion in NSW (down 1.1% and up 8.4%, respectively on YE December 2017). International visitors stayed longer than domestic visitors in terms of average length of stay (6 nights and 4 nights, respectively). In terms of average spend per night, however, domestic caravan and camping visitors nearly spent twice per night as compared to international visitors.

**Table 1. Visitors, Nights and Expenditure**

Visitors	Visitors (million)	Nights (million)	Average Length of Stay	Median Length of Stay	Total spend (\$ million)	Spend per visitor	Spend per night
International	0.1	0.8	6 nights	11 nights	57.5	\$442	\$71
Domestic Overnight	4.2	16.1	4 nights	3 nights	2,194.3	\$521	\$136
<b>TOTAL</b>	<b>4.3</b>	<b>16.9</b>	-	-	<b>2,251.9</b>	<b>\$519</b>	<b>\$133</b>

The main source market for the caravan and camping segment is domestic with 97% of caravan and camping visitors to NSW in YE December 2018 being Australian residents.

<sup>1</sup> 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.

<sup>2</sup> Source: International Visitor Survey and National Visitor Survey, YE December 2018, Tourism Research Australia.

<sup>3</sup> Source: Caravanning and Camping Consumer Demand Report 2017, Caravan Industry Association of Australia.

<sup>4</sup> Source: Real Richness Australia: Exploring the social benefits of camping, 2017, Caravan Industry Association of Australia.



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

### Domestic overnight visitor profile

The number of domestic caravan and camping visitors to NSW in the YE December 2018 was 4.2 million, up 4.1% when compared to YE December 2017. They stayed 16.1 million nights (up 0.05%) and spent \$2.2 billion (up 9.2%) in NSW.

- Domestic caravan and camping visitors accounted for 12% of all domestic overnight visitors to NSW, 15% of nights and 10% of expenditure.
- Of these, 2.3 million stayed in commercial caravan and camping sites (or 54% of total NSW domestic overnight caravan and camping visitors).
- The largest purpose of visit for domestic caravan and camping visitors to NSW was Holiday (76%), followed by 'Business' (11%) and 'Visiting friends and relatives' (10%).
- They were mainly from intrastate (66%). Sydney accounted for 42% of domestic intrastate caravan and camping visitors to NSW, followed by Hunter (12%) and North Coast (10%). Of the domestic interstate caravan and camping visitors to NSW, 40% came from Victoria and 38% from Queensland.
- The top 5 activities undertaken by domestic caravan and camping visitors to NSW were 'Eat out / dine at a restaurant and/or cafe' (50%), 'Gong to the beach' (35%), 'Sightseeing/looking around' (33%), 'Bushwalking / rainforest walks' (29%) and 'Visit national parks / state parks' (27%).
- 'Private vehicle or company car' (92%) was the most popular form of transport used to destinations in NSW by domestic caravan and camping visitors.
- Seasonality for caravan and camping domestic visitors to NSW is determined by two main factors, school holidays and the seasons. April and January, being the school holiday time, are the most popular months for domestic caravan and camping visitors visit to the State (13% each).
- Regional NSW is the main destination for domestic caravan and camping visitors to the State, having accounted for 95% of visitors and 97% of nights. In the YE December 2018, Regional NSW received nearly 4.0 million domestic caravan and camping visitors (up 6.1% on YE December 2017) who stayed 15.5 million nights (up 2.2%) and spent \$2.1 billion (up 16.9%).
  - The North Coast region was the most popular destination in NSW for domestic caravan and camping visitors with 27% of share of all domestic caravan and camping visitors in the State, followed by the South Coast region (19%) and Central NSW (13%).
  - The top 4 destinations in Regional NSW were the same for commercial and non-commercial caravan and camping visitors, though the South Coast was the 2<sup>nd</sup> most popular camping region for commercial visitors and Central NSW was the 2<sup>nd</sup> most popular for non-commercial campers.

**Table 2. Regions visited**

	Commercial visitors	Non- Commercial visitors	Total Domestic Caravan and Camping visitors
Sydney	np	np	6%
Regional NSW	98%	93%	95%
North Coast NSW	33%	21%	27%
South Coast	25%	12%	19%
Central NSW	11%	15%	13%
Hunter	9%	11%	10%
The Murray	7%	np	7%
New England North West	7%	9%	8%
Riverina	5%	np	4%
Snowy Mountains	np	np	5%
Central Coast	np	np	4%
Outback NSW	4%	np	3%
Capital Country	np	np	5%
Blue Mountains	np	np	4%

np means not publishable

- Regional NSW received over 3.1 million domestic caravan and camping 'Holiday' visitors (up 6.3%) who stayed 12.8 million nights (up 3.4% and spent \$1.6 billion (up 9.3%).

**For the following aspects, the profile of visitors who stayed in commercial caravan and camping sites were slightly different with those who stayed in non-commercial sites.**

- Most commercial caravan and camping visitors were aged '60 to 69 years' and '30 to 39 years' (20% and 18%, respectively), followed by 50 to 59 years (17%). Among non-commercial caravan and camping visitors to NSW, the youth market (15-29 years) dominated with 32% share, followed by those aged 30 to 39 years (19%) and the '50 to 59 years' (16%).
- Over a third of commercial domestic caravan and camping visitors to NSW travelled (37%) as part of an 'adult couple' (the largest age group was 60 years and over), 28% travelled with their 'friends or relatives' and 23% with their 'family'.
- Among non-commercial domestic caravan and camping visitors to NSW, 40% travelled with their 'friends or relatives', whereas 21% travelled 'alone' and 19% as part of an 'adult couple'. The largest age group for non-commercial caravan and camping visitors who were solo travellers or are part of adult couples was also 60 years and over.
- There was an almost even split between males and females (49% and 51%, respectively) for commercial caravan and camping visitors. For non-commercial caravan and camping visitors, there were more males (66%) than females (34%).

## Visitation trends

The volume of caravan and camping visitors, nights and expenditure in NSW have increased since YE December 2010 and were highest on record for visitor numbers and expenditure. The year-on year growth in expenditure (up 8.4%) was higher than the average annual growth since YE December 2010 (up 5.9%). For domestic visitation, all three metrics were highest on record since YE December 2010.

The share of international and domestic visitors to all caravan and camping visitors to NSW have been steady since YE December 2010 (3% and 97%, respectively).

**Table 3. International and domestic travel to NSW**

International and Domestic Caravan and Camping Visitors to NSW										NSW GOVERNMENT		Destination NSW	
YE December 2018										Source: International & National Visitor Survey, TRA			
OVERVIEW													
TOTAL Overnight - International & Domestic	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010		
Visitors ('000)	3,048	3,029	3,149	3,580	3,680	3,796	4,101	4,175	4,339	3.9%	42.3%		
Nights ('000)	13,652	14,647	14,743	15,552	15,465	15,504	17,730	17,075	16,895	-1.1%	23.8%		
Expenditure (\$ million)	\$1,419	\$1,421	\$1,475	\$1,703	\$1,735	\$1,857	\$2,007	\$2,077	\$2,252	8.4%	58.7%		
INTERNATIONAL OVERNIGHT TRAVEL													
Visitors, Nights and Expenditure													
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010		
Visitors ('000)	92	90	85	98	99	98	112	134	130	-2.6%	41.4%		
Nights ('000)	706	721	732	851	908	837	826	997	809	-18.9%	14.7%		
Average Length of Stay	7.7	8.0	8.6	8.7	9.2	8.5	7.4	7.5	6.2	-16.7%	-18.9%		
Expenditure (\$ million)	\$51	\$51	\$51	\$54	\$53	\$55	\$58	\$66	\$58	-13.2%	13.2%		
Spend per visitor per night (\$)	\$72	\$71	\$70	\$63	\$59	\$66	\$70	\$66	\$71	7.0%	-1.3%		
DOMESTIC OVERNIGHT TRAVEL													
Visitors, Nights and Expenditure													
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010		
Visitors ('000)	2,956	2,939	3,064	3,482	3,582	3,698	3,989	4,042	4,209	4.1%	42.4%		
Nights ('000)	12,946	13,926	14,011	14,701	14,557	14,667	16,903	16,078	16,085	0.0%	24.3%		
Average Length of Stay	4.4	4.7	4.6	4.2	4.1	4.0	4.2	4.0	3.8	-3.9%	-12.7%		
Expenditure (\$ million)	\$1,368	\$1,370	\$1,424	\$1,649	\$1,682	\$1,802	\$1,949	\$2,010	\$2,194	9.2%	60.4%		
Spend per visitor per night (\$)	\$106	\$98	\$102	\$112	\$116	\$123	\$115	\$125	\$136	9.1%	29.1%		