

Domestic Caravan and Camping Travel to NSW - COVID-19 Impact

Year ended March 2021

Source: National Visitor Survey, Tourism Research Australia.



Icons sourced from www.easil.ly

Caravan and camping visitors are Australian residents who have used overnight caravan and camping accommodation facilities at either commercial sites (caravan parks, camping grounds or cabins) or non-commercial sites (motor home or campervan; or camping by the side of the road, private property, crown land or a national park). Visitors do not necessarily spend all of their trip nights in caravan and camping accommodation on their trip.

The domestic caravan and camping travel to NSW factsheet provides a snapshot for the year ended (YE) March 2021, as well as visitation trend. It will also show the impact of COVID-19 pandemic on this segment based on comparison between pre-COVID (YE March 2020) and COVID (YE March 2021) period.

NSW is the most popular caravan and camping destination in Australia. The share of domestic caravan and camping visitors to all domestic overnight visitors to NSW increased in the YE March 2021 as compared to the year prior (15 per cent and 12 per cent, respectively). Due to the travel bans and border closures from late March 2020, caravan and camping visitors in NSW declined by 20 per cent in YE March 2021 as compared to YE March 2020. As cases declined and restrictions eased, the segment showed signs of recovery since the September Quarter 2020.

How big is the market?

TOTAL CARAVAN & CAMPING



Visitors
3.7m
-19.8% YoY*



Nights
13.5m
-24.2% YoY



Expenditure
\$2.0bn
-20.2% YoY

* YoY = change on previous year

Commercial camping

Visitors: 2.0m (-18.9% YoY)
Nights: 9.1m (-21.7% YoY)
Expenditure: \$1.4bn (-14.8% YoY)
Spend per night: \$152
ALOS*: 4.5 nights

Non-commercial camping

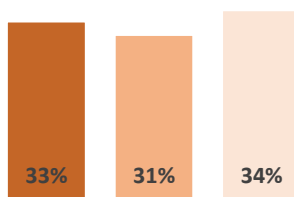
Visitors: 1.8m (-22.8% YoY)
Nights: 4.4m (-28.8% YoY)
Expenditure: \$0.7bn (-29.5% YoY)
Spend per night: \$150
ALOS: 2.5 nights

*ALOS = average length of stay

Market share

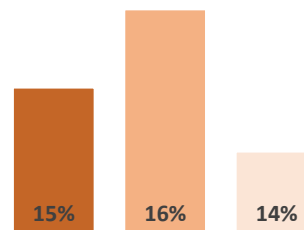
NSW share of AUS

■ Visitors ■ Nights ■ Expenditure



Share to total NSW

■ Visitors ■ Nights ■ Expenditure

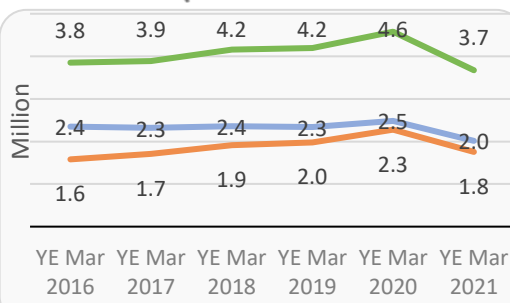


Year ended Time series

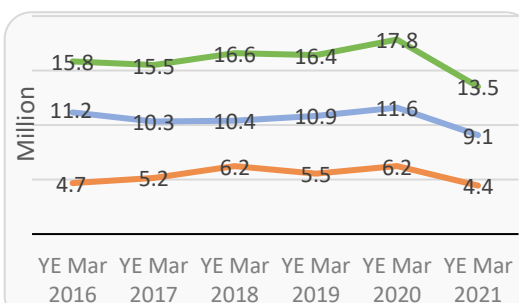
— Commercial — Non-commercial — Total



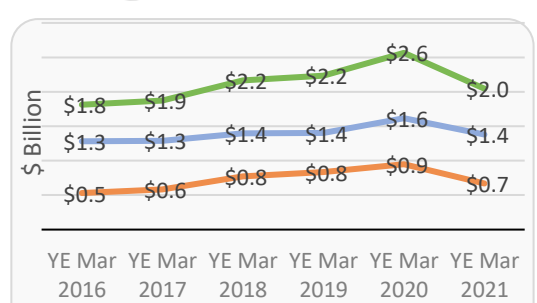
Visitors



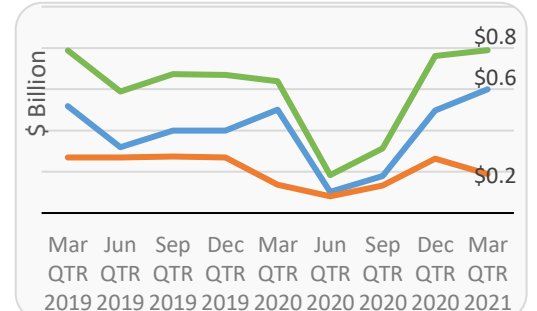
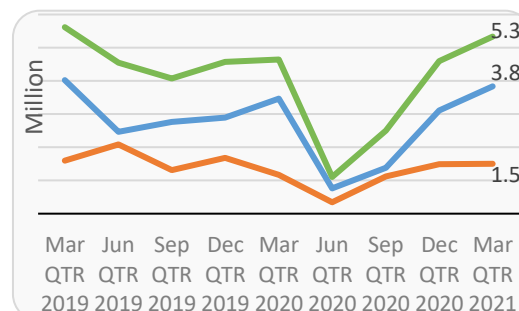
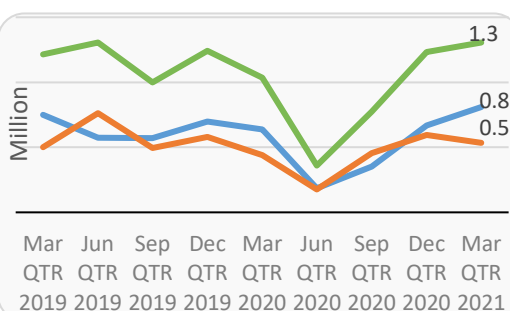
Nights



Expenditure



Quarterly Time series



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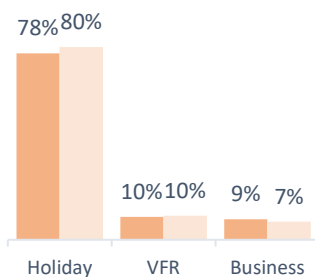
The infographic from this point onward will focus on pre-COVID (YE March 2020) Vs. COVID (YE March 2021) period comparison. For the aspects provided below, the profile of visitors who stayed in commercial caravan and camping sites were slightly different to those who stayed in non-commercial sites.

Among the commercial segment, the share of '40 to 49 years' was the highest during the COVID period. Among non-commercial caravan and camping visitors to NSW, the youth market (15-29 years) dominated in the pre-COVID and during the COVID period. While commercial caravan and camping showed no gender differences, there were more males than females for non-commercial caravan and camping visitors. The North Coast region continues to be the most popular destination in NSW for commercial and non-commercial caravan and camping visitors while there was an increase in share of commercial camping visitors to the South Coast region during the COVID period compared to pre-COVID period. Over a third of commercial domestic caravan and camping visitors to NSW travelled as part of an 'adult couple', nearly a third of non-commercial caravan and camping visitors travelled with their 'friends or relatives'. During the COVID period, share of visitors 'travelling alone' increased for both commercial and non-commercial caravan and camping.

Purpose of visit (visitors)

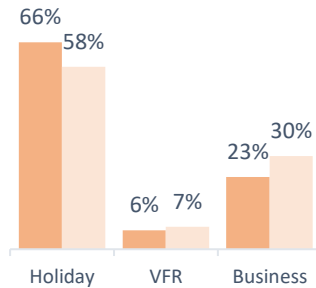
Commercial

Pre-covid Covid



Non-Commercial

Pre-covid Covid

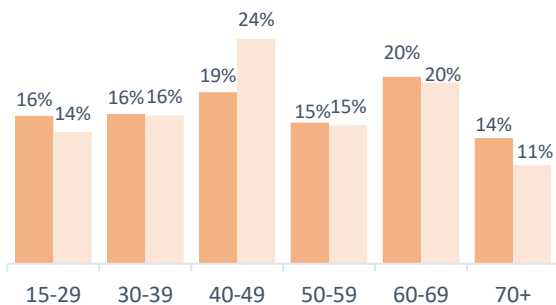


Note: Visitors may visit for more than one Purpose; VFR indicates Visiting Friends and/or Relatives

Age (visitors)

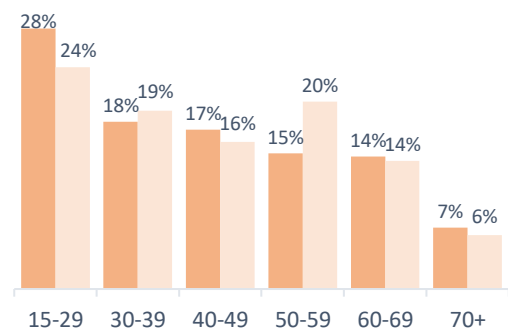
Commercial

Pre-covid Covid



Non-Commercial

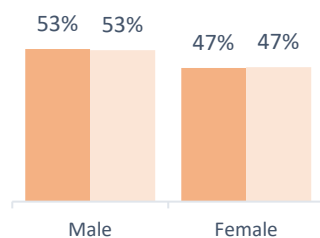
Pre-covid Covid



Gender (visitors)

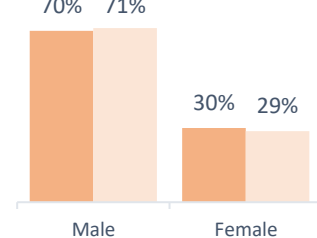
Commercial

Pre-covid Covid



Non-Commercial

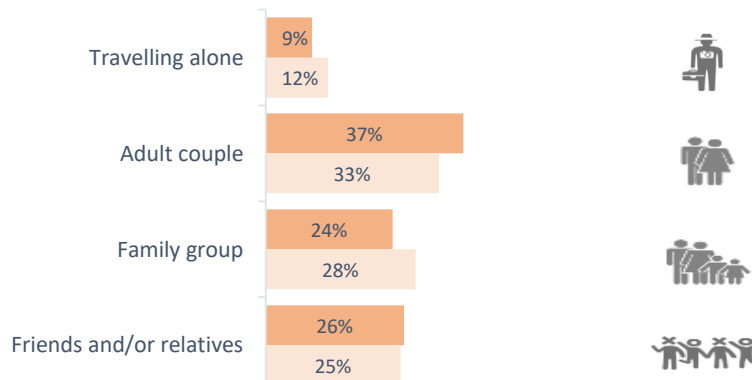
Pre-covid Covid



Travel party (visitors)

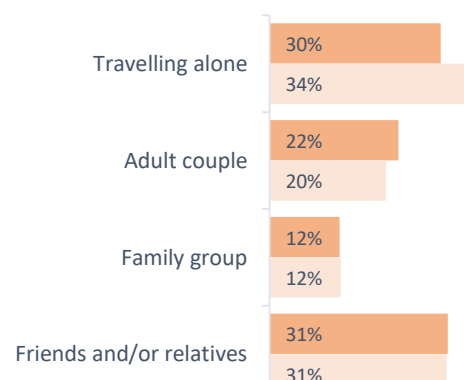
Commercial

Pre-covid Covid



Non-Commercial

Pre-covid Covid



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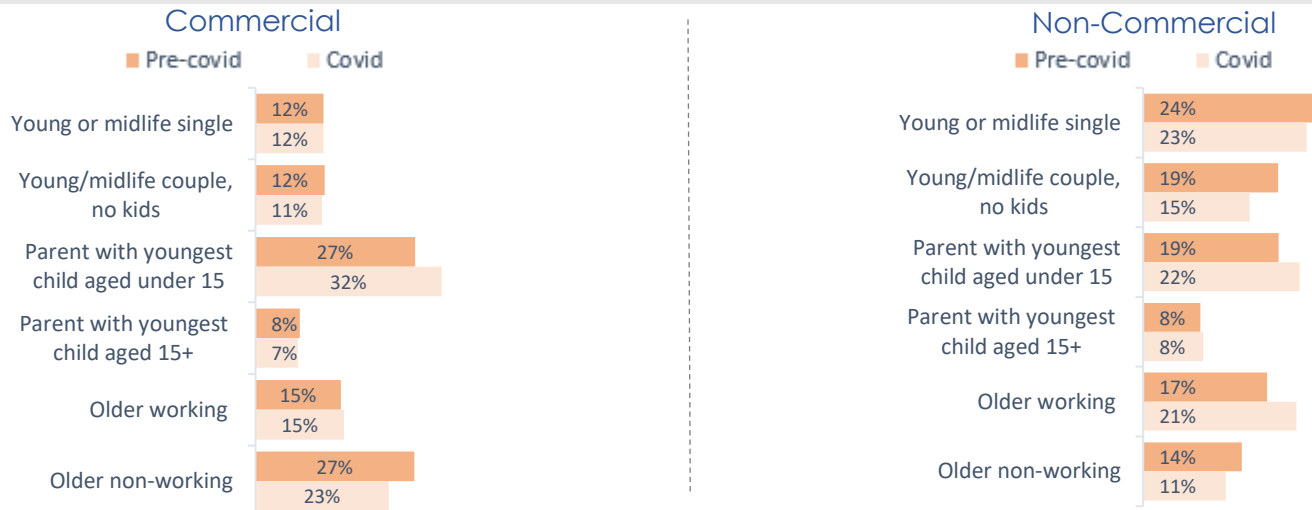
Year ended March 2021

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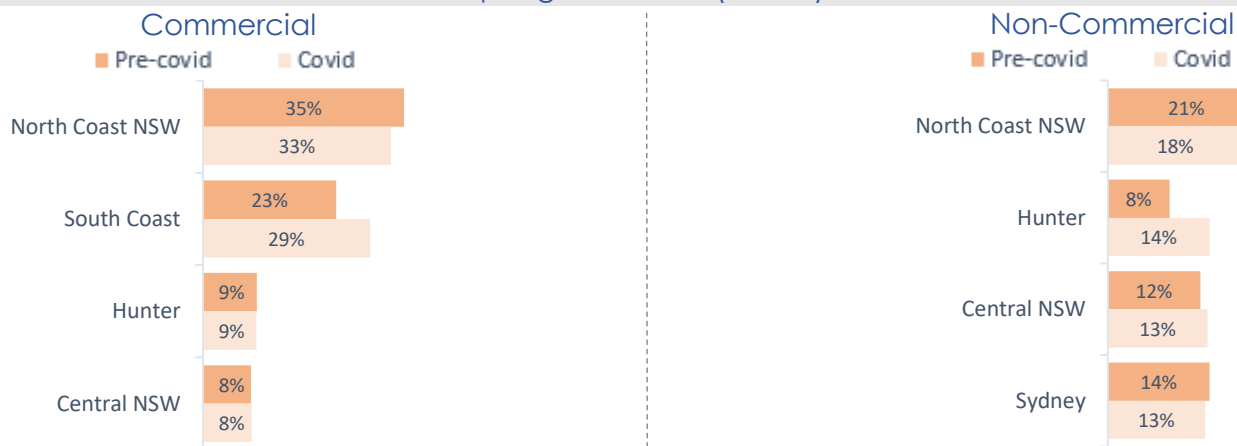


Icons sourced from www.easil.ly

Life cycle (visitors)



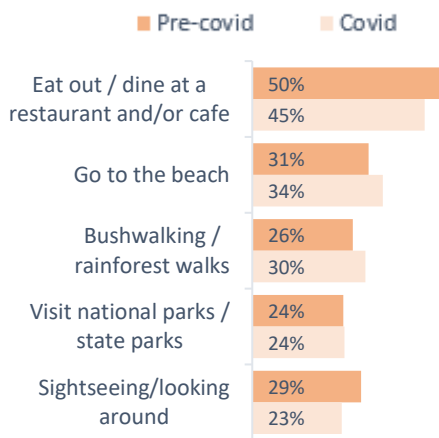
Top regions visited (visitors)



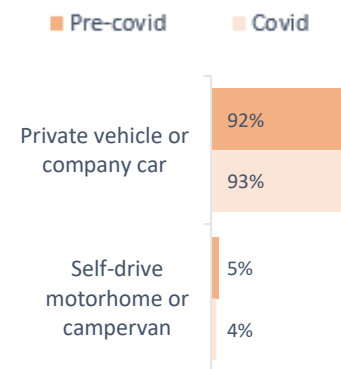
For the aspects provided below, the profile of visitors who stayed in commercial and non-commercial caravan and camping sites were similar.

The visitors were mainly from intrastate and their share increased during the COVID period owing to the border closures.

Top activities (visitors)



Top 3 transport types (visitors)



Origin (visitors)

Pre-Covid period



Covid period

