

NON-COMPLIANT CAMPING

Toolkit for Caravan Park Operators





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How to Use this Guide

This toolkit is designed for caravan parks owners, managers and operators who are in areas where councils may be considering, or actively initiating free or low-cost facilities for caravan and camping visitors to their region. These facilities most commonly include but are not limited to; free/low cost dump points and free/low cost stopovers for RVs (either by the side of the road or on council managed land).

This guide outlines the steps that should be taken by caravan parks working with council to help highlight the impacts that changes to the status quo may have on caravan parks. It also provides case studies that illustrate different strategies that caravan parks have used to illustrate their points to council and the community to highlight their economic and social value.

The attached appendices contain state specific research which forms the basis of the argument against initiating free/low-cost camping initiatives. Caravan parks are incredibly diverse, in terms of size, location, marketing environment, ownership status and product mix. With an estimated 1600 parks around Australia; each has differing issues, opportunities and challenges, it remains difficult to provide a one size fits all approach to challenges. However, there are several key points and strategies which are relevant to all caravan parks and councils, especially regarding non-compliant camping and how this affects the tourism eco-system in a region.

Our Objective

The goal of this document is to help caravan parks demonstrate they are a vital part of the tourism system in regional destinations.

Current research demonstrates that whilst non-commercial camping is growing by market share – this is **not** due to increases in the demand for RV Stopovers or free/low cost campsites. The increases in non-commercial camping is due to two main factors;

a) Camping in National Parks; which is driven by increased consumer demand for experiential travel, especially regarding nature, and

b) Camping on private property; this is driven by the increased propensity of people to camp; especially at music festivals and on private properties such as farm stays.

Both trends are being driven by the younger demographic which is the primary group being lost by caravan parks. Ultimately, there is no evidence which indicates that pursuing a low cost/'free' camping area in a town with a caravan park will increase visitation to an area and, instead, will cannibalise the market share of caravan parks which will have a detrimental effect to the local community from an economic and social perspective.

Strategic Response Blueprint: the 4C's

Community

- Keep informed of community and council conversations surrounding public/ free/low cost camping and facilities.
- Work with your council to understand motives for implementing strategies.
- Be part of the community groups, boards and clubs to boost you and your park's profile in the region.

Communication

- Work with your State Association/National Association/marketing body as soon as possible.
- Use data from Tourism Research Australia, BDO and other third party sources to show the importance of caravan parks.
- Highlight the social benefits your caravan park has to the local community.

Collaboration

- Work with other caravan parks in your area to build your case.
- With the local business community to build advocates outside of the Caravan Park Industry.
- Be present for as many meetings as possible and remain in touch with the arguments presented.

Counter

- Debunk data put forward by interest groups.
- Maintain a consistent message with consistent, trustworthy and accurate data.
- Present a diverse range of evidence from a variety of reputable sources.
- Draw on Case Studies to support your contention.

Community

Why this matters

Councils will have the final say regarding the implementation of free/low-cost camping facilities; hence it is vital to engage with the council throughout the process. This communication should be done in a planned and organised way.

Ultimately, it is important to have the right information at the right time to give to the right people in your community.

“It is vital to work with your council and not against your council”

Keep informed of council agendas, minutes and meetings:

Council agendas and minutes are often long and wordy documents. Keyword searches of documents can help identify relevant passages: “RV stopover”; “Free camping”; “RV Friendly” etc. If this leads to any hits, read thoroughly to examine what the proposal is.

Council agendas are made available to the public before a meeting – usually online and subsequent minutes are made available usually within two weeks of the meeting. Obviously, the best course of action is for caravan parks to be represented at any meeting where this issue is discussed.

Try to understand why your council is pursuing this course of action:

Sometimes, councils are simply unaware that implementing public camping areas is a threat to the local business community. Free or low-cost RV stopovers are seen as a way to boost visitation which, although misguided as a strategy, is understandable. Councils may be struggling to meet visitation goals and have been misinformed by interest groups who have their own members to please.

It is vital to work with your council and not against your council. Throughout the process, be patient but persistent in your points and ensure you send the appropriate follow-ups thanking your council and reiterating your key points. Building and maintaining a working relationship with your council is key to supporting positive outcomes.

Case Study: Alpine Shire, Victoria

Situation:

In Alpine Shire (Victoria) the Council received a petition of 2056 signatures wanting to establish a public dump-point for caravans and motorhomes; citing that there were no dump points suitable for large RVs.

Industry Strategy:

Twelve caravan parks provided their details and whether they had a dump point and whether it was available to be used by the public or guests – it was determined that there were seven dump points available for public access already within caravan parks that could be accessed with a small fee. A further analysis of the petition identified that only 156 signatures were from the Alpine Shire.

The local water board (North East Water) also notified council during the consultation phase of the requirements for an installation. One of these requirements was that council staff would require the ability to monitor, control, lock and charge for the use of the facility.

Outcome:

The council rejected the implementation of a new dump point in town, instead agreeing to upgrade the existing dump point at the council-run Myrtleford Holiday Park to better cater for longer and larger RVs.

The collaboration with the water board also proved valuable in achieving a positive result for the local caravan parks as it highlighted the regulations that needed to be met by caravan parks to be compliant.

Collaboration

Why this matters

The sooner you contact the relevant state associations, marketing bodies and caravan parks in your area, the sooner relevant research will be passed through, and action can be taken. State based research is immediately available, and, sometimes, region specific data can be obtained to help you demonstrate the importance of caravan parks to the region.

State Associations may have templates available which can be used to support submissions to councils.

Working together:

A collective of caravan parks and stakeholders is more powerful than an individual business. If there are other caravan parks or businesses in the area that may be impacted by changes/addition of free/public camping areas, get in touch and work with them to build an action plan, and work together to convey the message to councils and the community. Each caravan park should make an individual submission using examples of their own businesses, along with collective examples of the benefits that caravan parks provide to the community.

Create Advocates within your community:

Seeking out businesses who pay licenses/registrations/insurance fees, to explain the ramifications of a public or 'free' campsite for your business is an important strategy. This highlights the challenges that non-compliant camping presents to caravan parks and the potential repercussions that could be felt on their own businesses.

Case Study: Tuncurry, New South Wales

Situation:

Without any community or industry consultation, a trial of a non-compliant campsite was undertaken in Tuncurry by the Mid Coast council during the Christmas period. This site was located within 2km of five caravan parks who were CCIA NSW members. In addition, the site took up parking spaces for day trippers and locals going to the popular beach area.

Industry Strategy:

After the situation was brought to the attention of CCIA NSW, vacancy information from local parks was collected and communicated to local businesses. Local media captured images of bins overflowing, rubbish strewn by campers and more than forty vehicles staying at the site which had only two toilets and two showers. These pieces were collated by the CCIA NSW and the local caravan parks. The Economic Value Report (BDO) was distributed to community stakeholders which highlighted the potential long-term impacts on local businesses.

Outcome:

A meeting was organised with the local Mayor, where the collected information was shown along with the impact on local amenities, the environment, social impacts (relating to alcohol consumption in an alcohol-free zone) and the effect on rate payers. Following this and acknowledging support from the industry, the trial was cancelled in mid-January, a month after it commenced. This highlights the benefits of collaborating with your State Association and utilising local media as well as third-party reports.

Case Study: Horsham, Victoria

Situation:

Horsham City Council was approached to create a number of low-cost stopovers for RVs in town.

Industry Strategy:

A caravan park owner during a tourism meeting, explained the idea that a rival 'business' without licenses/insurance/regulations/fees that could operate in the vicinity would severely undercut his business. One of the attendees was a local real-estate agent who empathised and recognised the unfairness of the situation.

Outcome:

The real estate agent was active in the local business community and spoke up to council on behalf of the caravan park multiple times. This was ultimately instrumental in the stopping of free camping in Horsham within a month. This was especially effective as the agent was **external to the caravan park industry**.

Communication

Why this matters

Having a consistent message is important so stakeholders you engage with receive the same information. Having consistent figures will validate your argument and build the profile of your caravan park as an important aspect of the local tourism and business community. Additionally, communicating data from credible parties such as Tourism Research Australia (TRA), BDO and the Australian Bureau of Statistics (ABS) and experiences from other councils or Destination Management Organisations (DMOs) will demonstrate that independent evidence is on your side.

For every \$100 of revenue created in a caravan park, \$138 of economic activity is generated in the local community.”

Provide State-based Research

This information is enclosed in the Appendices of this document. It shows that National and State level data supports the contention that RV-Stopovers and free camping solutions are not a growing trend or increasingly sought after by large numbers of consumers.

It is important to identify that this data comes **from an independent and official source:** Tourism Research Australia (TRA). This same dataset is used by Tourism Australia to justify multi-million dollar marketing campaigns and is used to quantify the value of tourism nation-wide by thousands of businesses, DMOs and the government.

Calculate the economic value of your Caravan Park to the local community.

You have two options for this – both will produce different figures for different purposes. This will demonstrate the potential economic loss to the community were your business to suffer.

Basic Figure:

Take your caravan park's total revenue per year and multiply by 1.38, which is the calculated multiplier effect for caravan parks (BDO, Economic Benefit Report, 2012). Hence for every \$100 of revenue created in a caravan park, \$138 of economic activity is generated in the local community.

Additionally, visit <http://www.parkbenefit.com.au/> which can estimate the economic benefit of your park to the community. You simply need to enter Tourist site nights, Local Government Area, State/Territory and total park income. Whilst, these individual statistics are useful for conversations; for more detailed explanations it is important to use a second method that expands on how important your caravan parks is to the region. This template is provided on the opposite page.

Therefore, it is the authority on tourism in Australia and supersedes any supposed research conducted by interest groups. If interest groups provide research to council, **ask for a copy of the research along with the methodology used.** Forward this to your state association who, along with the national association will analyse the data and assist with a response.

Additionally, continue to collect or begin to collect data on your occupancy statistics and revenue. This will be especially important if the town elects to undertake a trial period of RV Stopovers so the impacts on your business can be ascertained.

Case Study: Geelong, Victoria

Situation:

Lobbying from the CMCA to Geelong City Council led to the Council discussing the merit in creating free RV stopovers in town and several publicly accessible free dump-points.

Outcome:

Council acknowledged that current capacity was enough to cater for the needs of RV users without implementing a free/low- cost stopover or dump points.

Industry Strategy:

Twenty-six caravan parks in the area collaborated and contacted the council to lodge a combined report. They outlined their capacity (1700 sites) and ability to handle recreational vehicles from six to twenty meters. They also highlighted there were three easily accessible dump points in the caravan parks, which were all able to be access by non-guests for a fee.

How to Provide a Detailed Analysis for Submissions

Answer the following questions:

- How many direct employees do you have (full-time/ part time / casual)?
- What is your total wage bill each year?
- How many local contractors/businesses do you use (plumbers, tradesmen, laundromats, etc.)?
- What is the caravan park's total expenditure on this?
- What is your utilities bill annually? Internet, water, electricity and gas.

Enter the statistics into the following paragraph which can be used for media or submissions to council

“ We **[name of park(s)]** on average pay **[\$[utilities bill]** annually on utilities which supply customers and provide revenue to electrical, gas and water companies. In terms of wages, in the last 12 months **[\$[Wage Bill]** was paid by our park to **[number of employees]** employees which was recycled through multiple sectors of the local economy outside of the immediate visitor economy. These employees rely on our caravan park being able to operate in a stable, competitive and fair business environment.

Furthermore, we utilise a network of **[number of local businesses used]** local businesses and contractors external to our own direct employees. In the last 12 months **[\$[amount paid to contractors]** was paid to these local businesses. These businesses have their own supply chains, tax requirements and wage bills which rely on the success of businesses such as our caravan park to flourish and provide a stable environment for themselves to operate and flourish within.

IMPORTANT: If you collaborate with other caravan parks, add the totals of all parks and identify how many different contractors/businesses are used. If possible, obtain letters of support from these businesses you work with.

Case Study: Ballarat, Victoria

Situation:

A 12 month trial of a 'freedom camping area' took place in Ballarat, Victoria.

Industry Strategy:

It was agreed before the trial began that if at any time it could be demonstrated that the trial led to a damaging impact upon the financial viability of caravan parks (or any one of them) or if there was a miss-use of the 'free' site, the trial may be canceled.

Two caravan parks made 'substantial' submissions to council providing evidence that the trial resulted in a decrease of site nights which assisted the council in deciding to cancel the trial.

Outcome:

The Council drew the conclusion that the trial has 'impacted beyond the conditions established and recommends to cancel the trial'. This highlights the importance of collecting your own occupancy, revenue and other data indicators as soon as possible. Also, coming to an agreement with your Council regarding the cessation of any trial if there are negative impacts during the trial period can be a strategy or 'compromise' to use as a last resort if it appears a trial is going to be undertaken.

What are the Social Benefits of your Caravan Park(s)?

Why this matters

Often overlooked are the positive experiences gained by the local community by having a caravan park. Does your caravan park have events? Sponsor sports/arts/teams? Work with schools/community centres? Are the owners/managers involved in any programs or sit on any community boards?

Highlight that all of this is dependent on the caravan park being able to operate in a sustainable business environment which will be threatened by negative changes to the status quo.

Multiple Studies have highlighted the importance of commercial caravan parks in providing low cost accommodation for groups at risk of homelessness along with supporting increased housing capacity as they provide options for demographic groups seeking to downsize, retire or undertake a lifestyle change.

Research from BDO (2012) has also highlighted that commercial caravan parks can offer a range of non-financial intangible services to support a cohesive community, such as:

- Disaster Relief Centres;
- Tourist Information Centres;
- Child Care Centres;
- Secure Storage;
- First Aid Services;
- Wildlife Rescue;
- Emergency Services; or,
- Environmental protection/care services.

Case Study – Lake Sambell Caravan Park, Victoria

Owner/operators are involved with the community bank, assist with Beechworth Celtic Festival, and have organised 'Graze by the Lake' – a suicide awareness dinner. In addition the park hosts a section of a Victorian Cyclo Series bike event, and, annually, hosts the Beechworth Village Bonfire which brings together a diverse range of people from the community. These events are not run for-profit but demonstrate the caravan park is an integral part of the community.



Counter

Why this matters

Make your argument heard!

Letters to the editor in the local newspaper, local radio/tv or other media sources; make your case heard across multiple media streams. When drafting a letter or a statement; keep these things in note:

Keep to the facts: use provided research and quote your data source – usually Tourism Research Australia/ Caravan Industry of Australia/BDO Economic Benefit Report.

Avoid emotive language and personal attacks whilst advocating on behalf of your business. **It is important to remain patient but be persistent.**

Highlight the **benefits** of your caravan park to the community and **keep the message consistent.**

Use **statistics from reputable sources**, ensure that they are correct and verifiable if media/council or other stakeholders request to see your methodology.

Opposition to the CMCA RV Friendly Town Accreditation Endorsement

Often Councils will make movements towards RV stopovers or free/low-cost facilities after pressure or lobbying from the CMCA regarding their RV Friendly Town Accreditation. They have several claims which are quickly debunked by the following actualities:

Claim: "The CMCA is Australia's largest RV club and represents over 61,000 members".

Reality: A quick review of their Annual Report (under member's guarantee) shows a number significantly below this. Further a Presidents Report from CMCA President Garry Lee in the December 2017 Wanderer (CMCA member magazine) quotes:
"At June 2017, we now have only 25,000 full memberships. We are losing an average of 700 qualifying vehicles each year."

This represents less than 0.2% of caravan and camping visitors (TRA, 2018).

Claim: Providing 'free' or low-cost facilities in towns will boost visitation and economic benefit to the town.

Reality: Visitors to commercial caravan parks spent on average \$610.00 per trip compared to visitors to non-commercial sites who spent \$352.00. This is a 73% difference. Additionally, visitors who spend money on accommodation, indirectly fund businesses that support caravan parks such as tradesmen, laundry companies and utility providers. These industries rely on businesses like caravan parks to operate in a secure and fair business environment which is undermined by free and low-cost camping (TRA, 2018).

Claim: There is a growing trend amongst RV users, especially 'Grey Nomads' to be fully "self-contained" and not need the facilities provided by caravan parks.

Reality: There is no such thing as a fully self-contained RV. All vehicles need to dispose of waste and fill up with water at some point, this is not a free service. Additionally, as the research in the Appendices outline, Grey Nomads overwhelmingly prefer to use caravan park facilities, with 62% of trips taken by the 55+ market involving a stay at a caravan park (Tourism Research Australia, 2018). Furthermore, only 14% of trips involved staying in an RV by the side of the road/private property, with no growth in market share since 2012.

Case Study: Salisbury, South Australia

Situation:

The CMCA provided a proposal for the establishment of a low-cost RV Park in a recreation park and offered to provide a dump point valued at \$1,800 to the council for installation. The park was estimated (by the CMCA) to cost the Council \$80,000 to establish plus per annum costs of \$25-\$30,000 to operate.

Industry Strategy:

Industry was not consulted initially; however the Council calculated the costs at being in the region of \$600,000 to develop – a significant difference to CMCA estimations. The Council also acknowledged SA Parks Policy Paper (2014) that stated 'free or low-cost camping should only be established more than 20km from existing facilities', with there being four parks within the area. Two parks made deputations to council highlighting the potential of the low-cost facility to divert campers away from their caravan parks. Data from the BDO 'Economic Benefit' report was given to Council which again, conflicted with the CMCA's estimations of daily expenditure for caravanners.

Outcome:

The Council did not proceed with the RV park with the main reasons cited being 'cost uncertainty and commercial impacts'. The key message to take from this case study is highlighting the differences in costs from the CMCA compared to Council costings and the different in expenditure figures between the CMCA's figures and the BDO report. This demonstrates the value in providing accurate and timely data to Council to counter opposition data.

Case Study: Winchelsea RV Stopover Trial, Victoria

Situation:

After lobbying from the CMCA, the Surf Coast Shire implemented a 12 month trial of a free RV Stopover in the centre of town beginning in April 2016. In an email received in late August 2018, the Acting Manager of Economic Development & Tourism of the Surf Coast Shire (Victoria) in relation to the Winchelsea RV trial stated;

“I found the CMCA data to be wildly inaccurate in terms of the economic benefits promised. I believe that the findings in this Council report will be similar for many RV sites. It didn't do a great deal for the economy or to impact businesses, but residents and visitors just liked to see something positive / welcoming going on for their town.” - Acting Manager of Economic Development & Tourism, Surf Coast Shire.

Case Study – Murray Region, New South Wales & Victoria

Situation:

Murray Regional Tourism represents thirteen local government councils in the Murray Region. Their Destination Management Plan (June, 2012) issued the following recommendation to towns considering an RV Strategy:

“Many towns in the Murray Region are considering or have become RV Friendly Towns under the guidelines set out by the CMCA. This include free camp sites for up to 72 hours within close proximity to town centre, free dump points among other requirements. This created conflict when there is an expectation of free facilities in towns that have commercially operated caravan parks. Councils may also be contravening competitive neutrality legislation by providing free facilities in areas with commercial camping grounds. Only towns without caravan parks and existing visitor demand should consider becoming RV friendly: other locations should consider providing RV facilities on a commercial basis, typically within existing caravan parks”

“Destination Management Plan”, Murray Regional Tourism Board, June 2012, p. 37.

Outcome:

The following Plan (2018) further reiterates this position:

“The region's camping and caravan parks are an important draw for [the] market, and it is important that reinvestment and improvements to the regions' parks is encouraged and facilitated” p.28.

Additionally, with this support, local caravan parks have benefited and expanded offerings for visitors thus boosting the overall visitor experience:

“Our business has a strong commitment to the Murray River and the local tourism industry. We are continually investing in growing our business and employing locally, with our houseboat fleet expanding to 16 by the end of this year. We have also invested over \$1 million in our caravan park business over the past three years. We have great confidence in the future of the Murray tourism industry.” - Owner, All Seasons Mildura, Houseboats and Holiday Park.



What happens if Non-Compliant Camping is introduced to your area?

If, despite all your best efforts, a free or low-cost facility is introduced to your region;

- Continue to collect data on occupancy and revenue to quantify the impact that the implementation has had on your business;
- Understand on which demographics this will impact at your park. Identify which markets will potentially be lost and which markets will likely remain visiting your park.
- Resources permitting, gauge the visitor satisfaction levels at your park. Ask your customers why they chose your park instead of the free/low cost alternative.
- Record all your findings and continue to advocate to Council and the Chamber of Commerce.
- Advocate for ongoing data collection to be undertaken at the non-compliant site.

Useful Resources

Caravan Industry Association of Australia:
<https://www.caravanindustry.com.au>

Caravanstats:
<http://www.caravanstats.com.au>

Park Benefit:
www.parkbenefit.com

Competitive Neutrality Information:
<http://ncp.ncc.gov.au>

State Association Resources

The following resources are available from your State Association:

- Position Papers
- Additional Reports from Government Authorities (State Department of Planning, Land & Property Management Authority etc.)
- Letters of Support
- Submission Templates
- Small Business Commissioner details

State Association Contacts

Caravan and Camping Industry Association of New South Wales:
admin@cciansw.com.au

Caravanning Queensland:
parks@caravanqld.com.au

Caravanning Tasmania:
hello@caravanningtas.com.au

CIA WA:
reception@caravanwa.com.au

NT Caravan Parks Association:
ntcaravanparks@gmail.com

SA Parks:
admin@sa-parks.com.au

Vic Parks:
admin@vicparks.com.au

Case Studies:

All case studies used in this document as well as the specific section they were taken from are accessible for download at:

<https://www.caravanindustry.com.au/wp-content/uploads/2018/10/Non-Compliant-Camping-Case-Studies.pdf>

APPENDICES

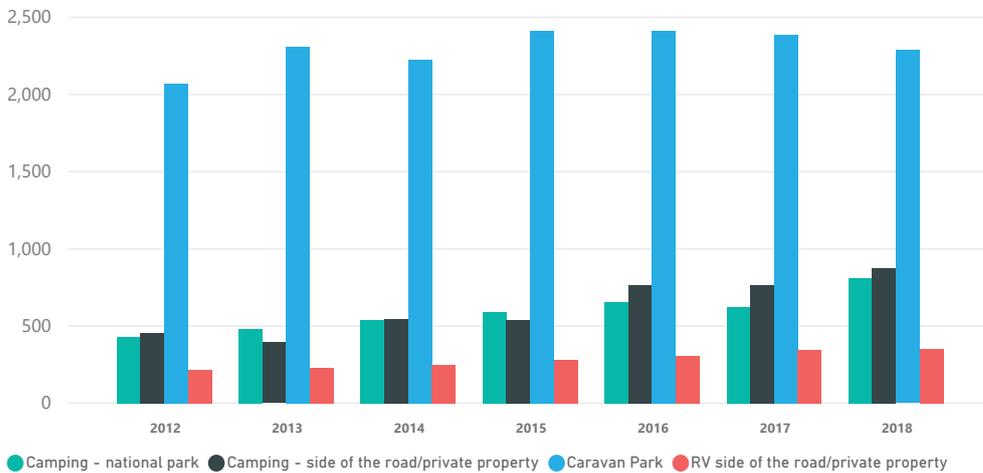
State specific research

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New South Wales Insights

Trips to NSW by Accommodation Type (000s)

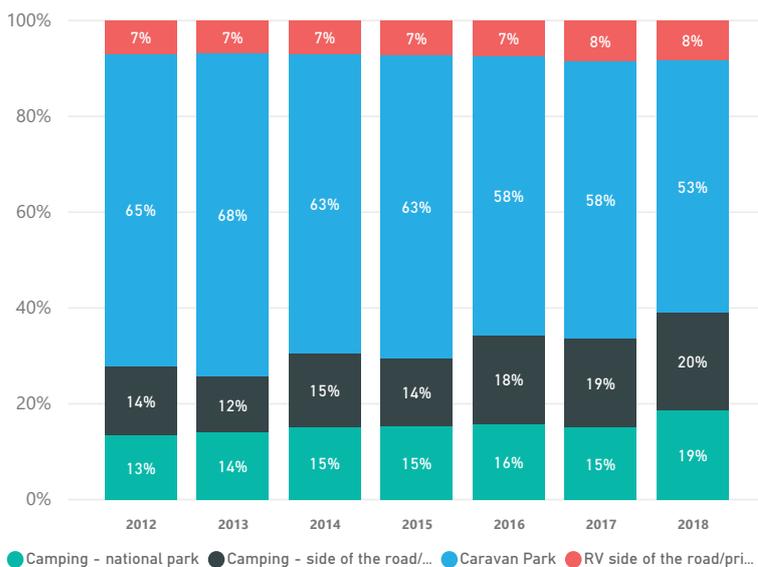


Summary

Caravan Parks remain the most popular accommodation choice for domestic caravanners and campers in New South Wales, however there has been an increase in non-commercial accommodation by marketshare since 2012, which has led to caravan parks losing market share.

The growth of non-commercial accommodations has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to NSW



Choice of Accommodation on Trips

By marketshare, caravan parks have lost 12% of trips spent by caravanners and campers in New South Wales. This has been due to the increases in marketshare of **Camping** in National Parks (+6%) and **Camping - side of the road/private property** (+6%). This growth is due to the increased demand for experiential travel allowing tourists to get off the beaten track to seek a more authentic experience.

Trips that involved being in an RV by the side of the road/private property has increased by only 1% since 2012, and remains the least popular option for caravanners and campers to New South Wales. This highlights there has been no move in consumer demand for RV stopovers.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

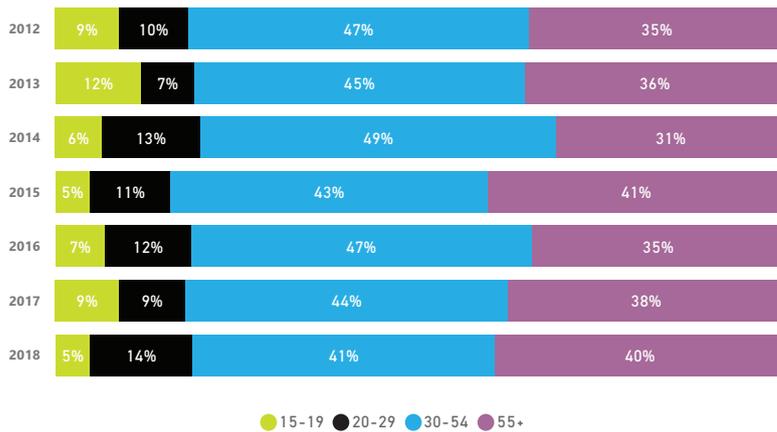
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

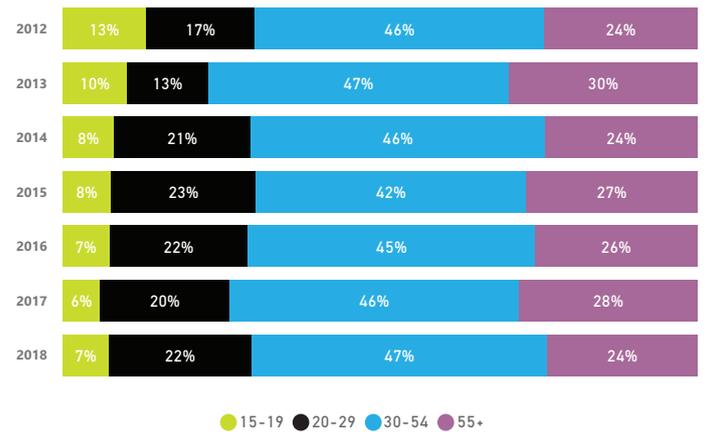
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Trips to NSW Caravan Parks by Age Group



Trips to NSW Non-Commercial Sites by Age



Caravan Parks Vs Non-Commercial Camping in New South Wales

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in New South Wales. The spread of trips to caravan parks has been relatively consistent since 2012, with the 30-54 market being the biggest users of caravan parks (41% of trips) followed by the 55+ market (40%). The 20-29 year olds comprised only 14% of trips to caravan parks for Y/E June 2018.

In non-commercial accommodations however, the 20-29 bracket made up 22% of trips, nearly equalling the 55+ market (24%). The 30-54 bracket makes up 47% of trips. What we see here is the growing preference of the 20-29 for non-commercial options, and the preference of 55+ for caravan parks.

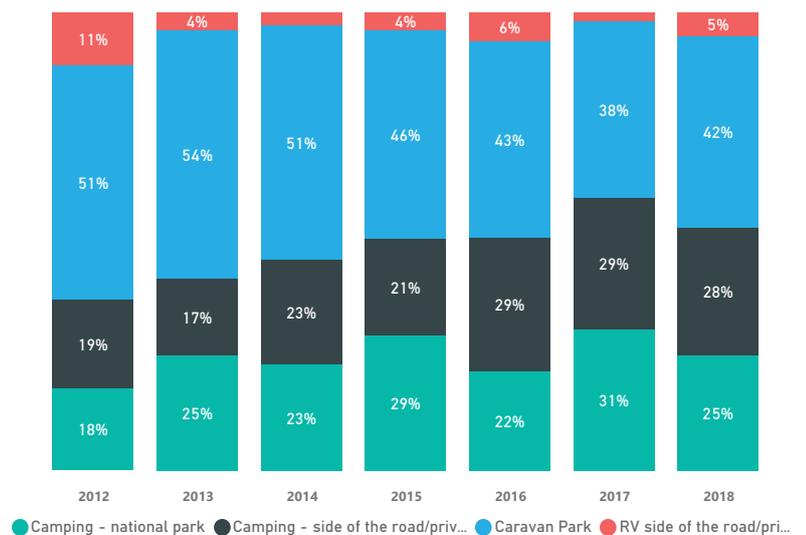
Where are 20-29s staying?

The 20-29 year bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 51% in 2012 to 42% by trips in 2018.

The rise in camping by the side of the road/private property is linked to an increase in music festivals being held on private properties that are specifically targeted at the 20-29 year market.

Staying in national parks for the 20-29 year market has increased from 18% of trips to 25%. This is linked to visitors seeking more experiential based travel options (which is a global tourism trend, especially for millennials). Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce from traditional government sources.

20-29 Accommodation Used in NSW



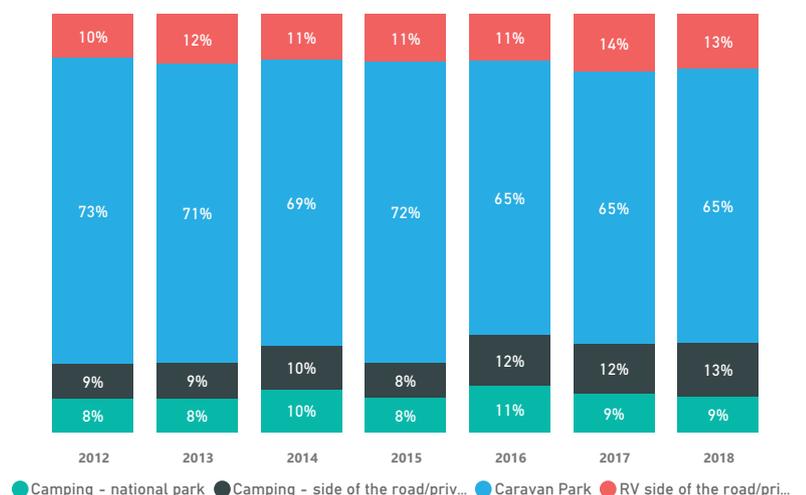
What about the 'Grey Nomads'?

Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who increasingly have little need for caravan park facilities. However this is simply not true according to government data.

For 2018, 65% of 55+ market went to caravan parks, and 13% stayed in RVs by the side of the road/private property in New South Wales. Additionally, there has been no significant growth in the past 7 years in terms of demand for RV side of the road stopovers.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

55+ Accommodation Used in NSW



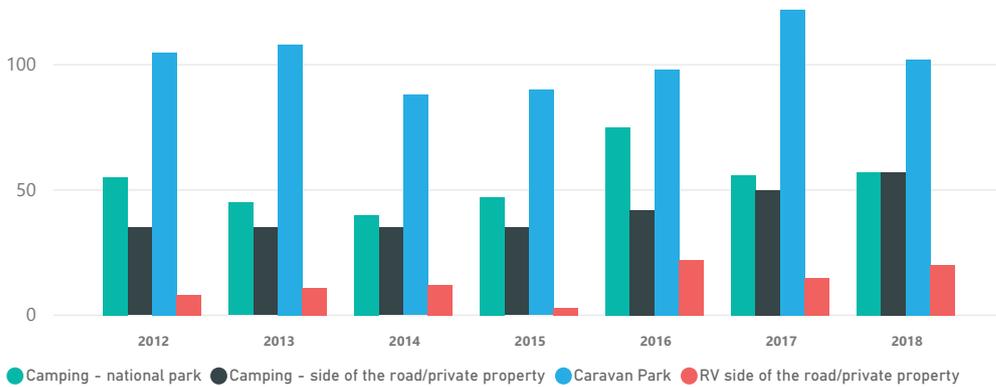
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



Northern Territory Insights

Trips to NT by Accommodation Type (000s)

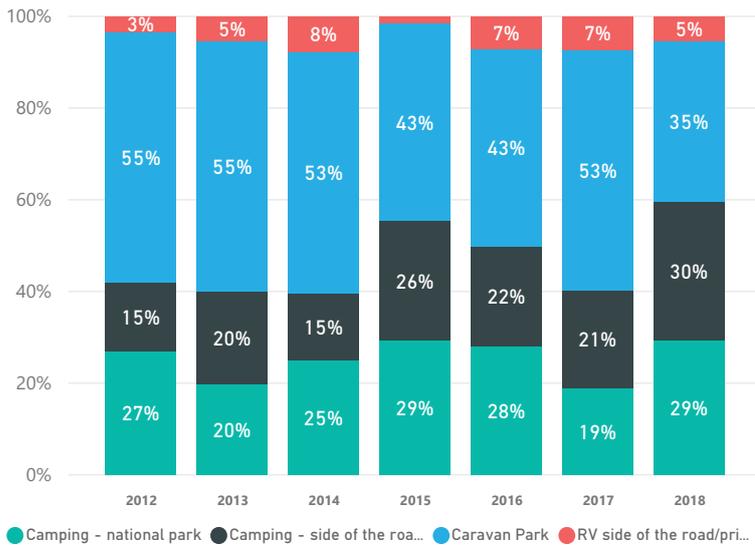


Summary

Caravan parks remain the most popular accommodation choice for domestic caravanners and campers in Northern Territory, however there has been an increase in non-commercial accommodation by marketshare since 2012.

However, the growth of non-commercial accommodations has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to NT by Accommodation Type



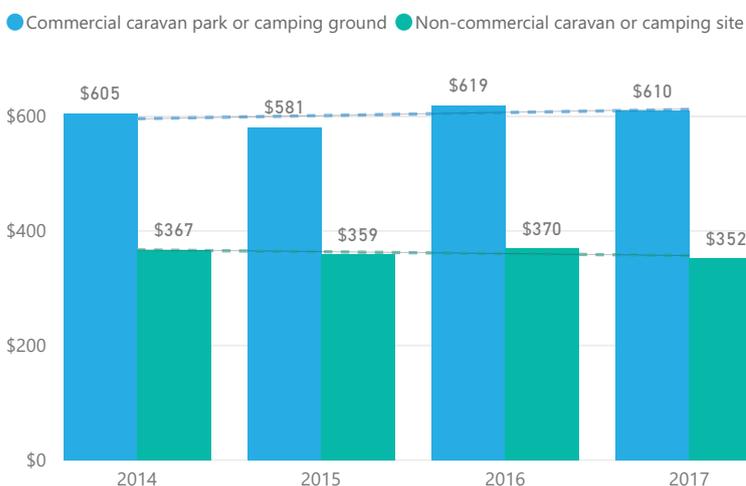
Choice of Accommodation on Trips

By marketshare, caravan parks have lost 20% of trips spent by caravanners and campers in Northern Territory. This has been due to the increases in marketshare of **Camping - side of the road/private property** (+15%). This growth is due to the increased demand for experiential travel allowing tourists to get off the beaten track to seek a more authentic experience.

Nights spent in an RV by the side of the road/private property has increased by only 1% since 2012, and remains the least popular option for caravanners and campers to Northern Territory. This highlights there has been no increase in consumer demand for RV stopovers.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

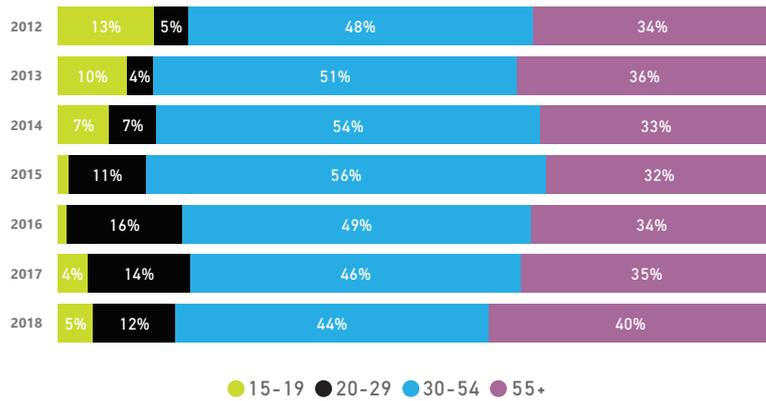
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

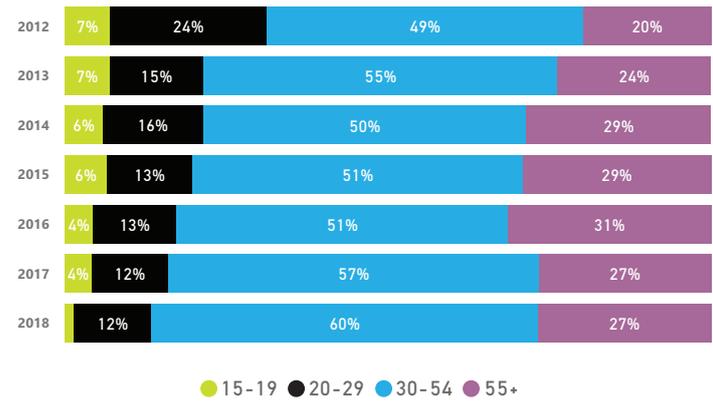
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Trips to Caravan Parks by Age Group (NT, 3-Year Average)



Trips to Non-Commercial Sites by Age (NT, 3-Year Average)



Caravan Parks Vs Non-Commercial Camping in Northern Territory

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in Northern Territory. The spread of trips to caravan parks has been relatively consistent since 2012, with the 30-54 segment being the biggest users of caravan parks. The 20-29 year olds comprised only 12% of trips to caravan parks for Y/E June 2018.

In non-commercial accommodations however, the 30-54 bracket made up 60% of trips, growing from 49% six years earlier. The 55+ market comprises only 27% - this being the key demographic difference. This highlights the increased preference of the 30-54 generation for non-commercial options, and the preference of older generation for caravan parks.

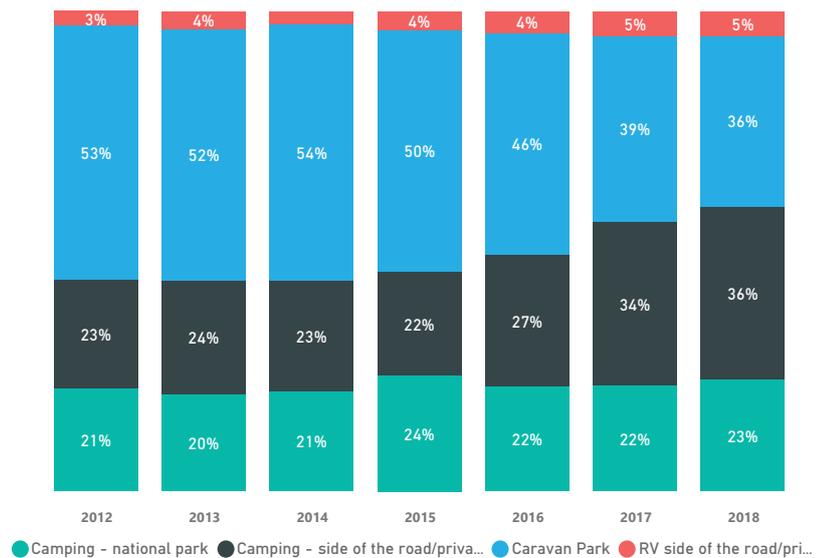
Where are 30-54s staying?

The 30-54 year bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 53% to 37% by trips.

Camping by the side of the road or in private property has increased from 23% to 36% since 2012, which has eaten into the accommodation marketshare of caravan parks in the Northern Territory.

What is important to note here, is that RV stopovers by the side of the road/private property have not increased in marketshare which indicates no extra consumer demand for RV stopovers for this market. For Y/E June 2018 only 5% of trips for the 30-54 year market involved a stopover by the side of the road in an RV.

30-54, Accommodation Used (NT, 3-Year Average)



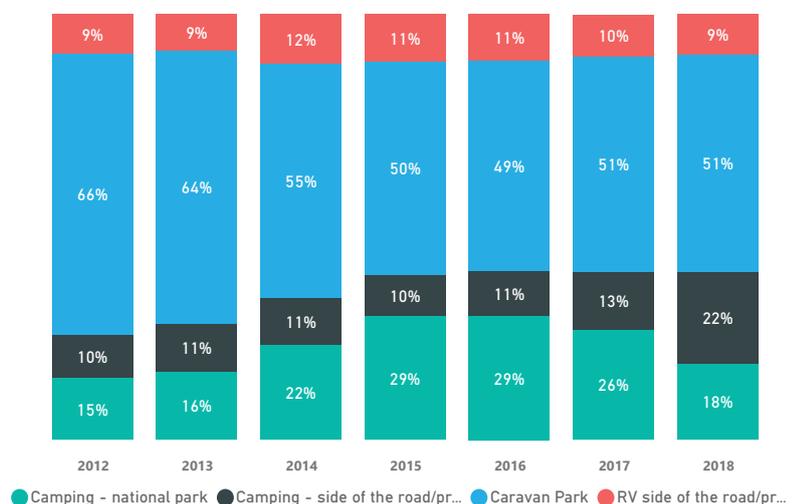
What about the 'Grey Nomads'?

Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who have little need of caravan park facilities. However this is simply not true according to government data.

For Y/E June 2018, 51% of 55+ market went to caravan parks, and 9% stayed in RVs by the side of the road. Since 2012 there has been no growth in marketshare of staying overnight in an RV by the side of the road/private property

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

55+ Accommodation Used (NT)



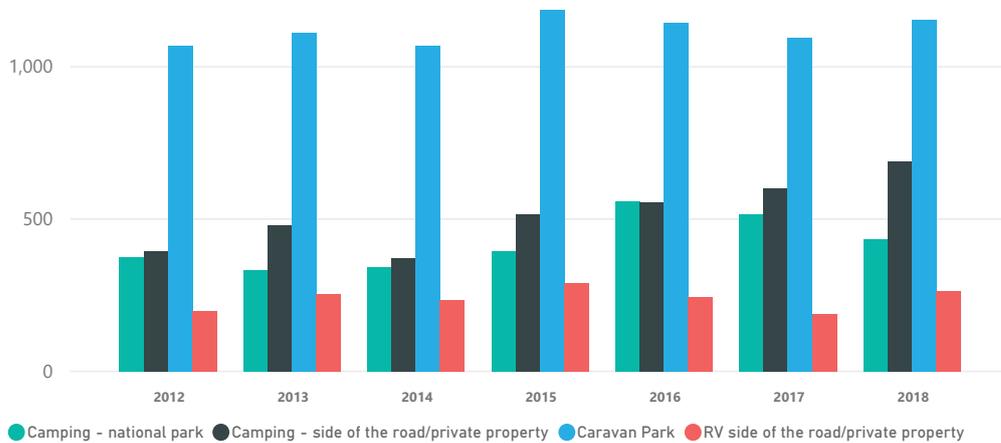
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



Queensland Insights

Trips to Queensland by Accommodation Type (000s)

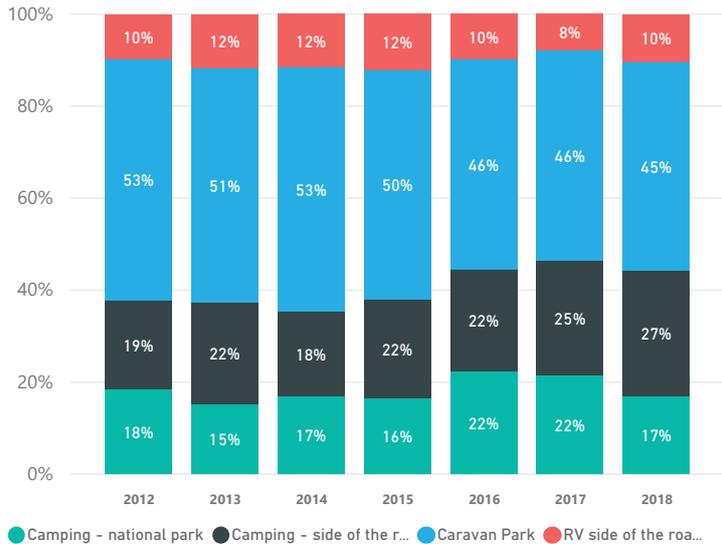


Summary

Caravan parks remain the most popular accommodation choice for domestic caravanners and campers in Queensland, however there has been an increase in non-commercial accommodation by since 2012.

The growth of non-commercial accommodations has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to Queensland by Accommodation Type



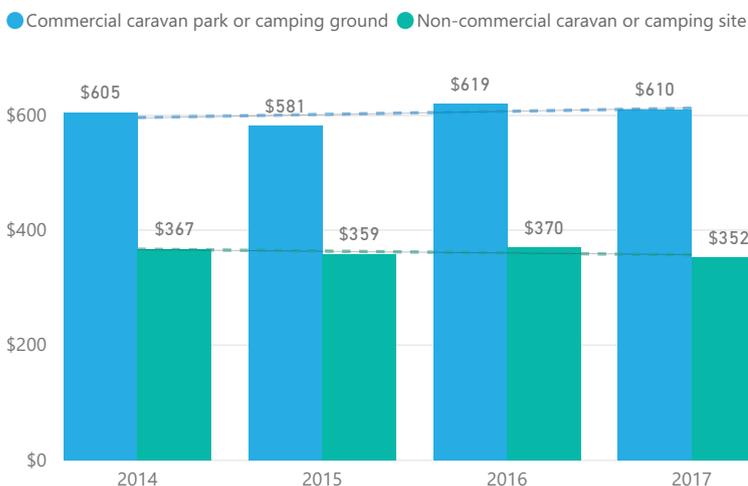
Choice of Accommodation on Trips

By marketshare, caravan parks have lost 8% of trips since 2012. This has been due to the increase in marketshare of **camping** by the side of the road/private property (+8%). This growth is due to the increased demand for experiential travel and tourists wanting to get off the beaten track to seek a more authentic experience.

Trips that involved being in an RV by the side of the road/private property have not increased since 2012, and remain the least popular option for caravanners and campers in Queensland. This highlights the lack of consumer demand for staying in an RV by the side of the road/private property.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

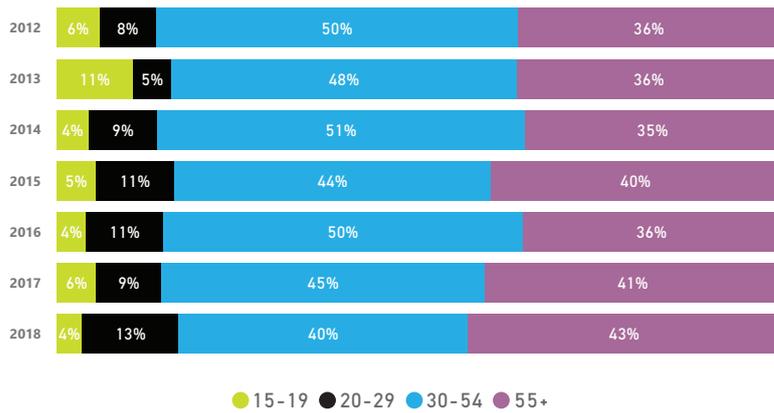
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

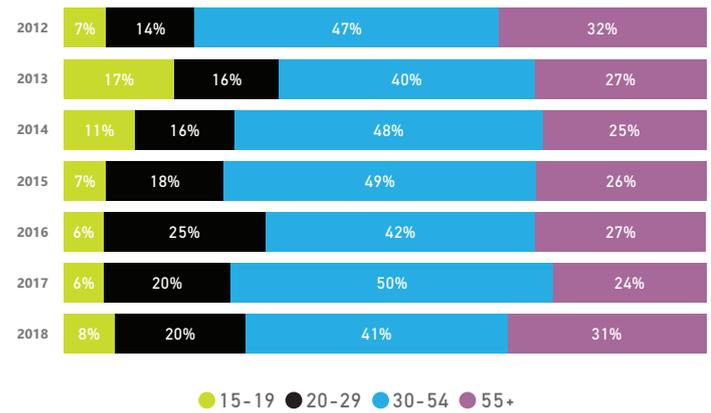
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Trips to Queensland Caravan Parks by Age Group



Trips to Queensland Non-Commercial Sites by Age Group



Caravan Parks Vs Non-Commercial Camping in Queensland

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in Queensland. The spread of trips to caravan parks has been relatively consistent since 2012, with the 55+ market being the biggest users of caravan parks for Y/E June 2018 making up 43% of trips to caravan parks, but only 31% of trips to non-commercial accommodations.

In non-commercial accommodations however, the 20-29 bracket have grown their marketshare since 2012, representing 20% of trips to non-commercial caravan and camping accommodations. There has been no marketshare growth from the 30-54 or 55+ markets. This shows the preference of caravan parks for 55+ and increasing preference for non-commercial options for the 20-29 group in Victoria.

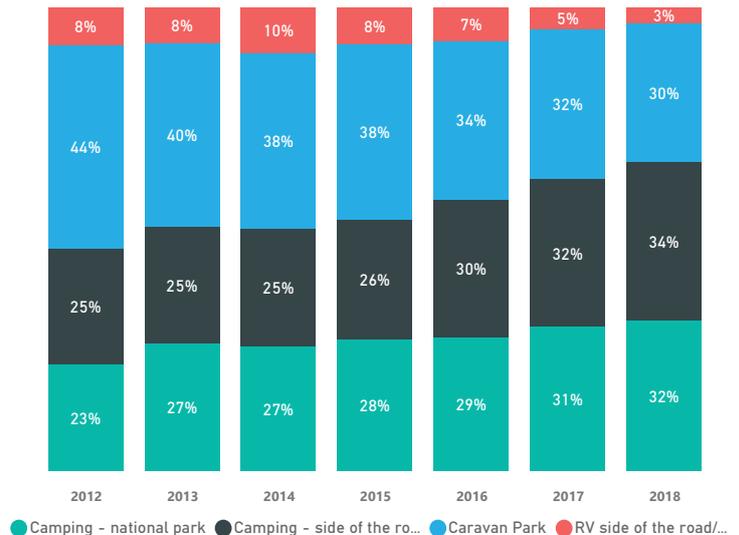
Where are 20-29s staying?

The 20-29 years bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 44% to 30% by trips.

Staying in national parks for the 20-29 year market has increased from 23% of trips to 32%, which is linked to visitors seeking more experiential based travel options. Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce.

The rise in camping by the side of the road/private property (25% to 34%) is linked to an increase in music festivals being held on private properties that are targeted at the 20-29 year market.

20-29 Accommodation Used in QLD (3- Year Avg.)



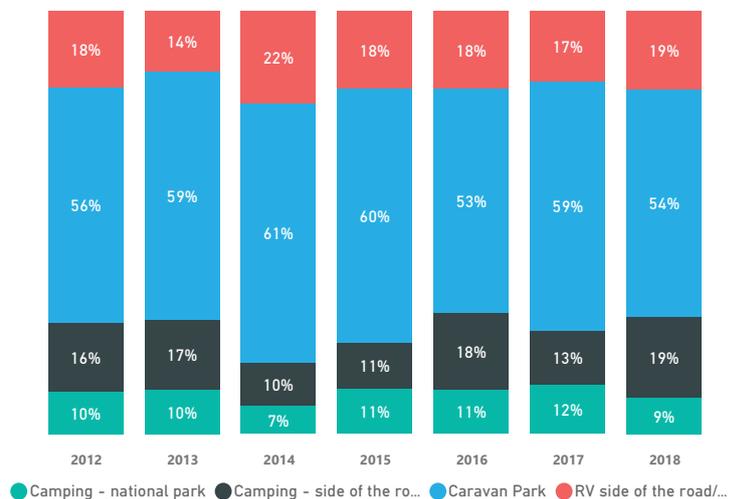
What about the 'Grey Nomads' in Queensland?

Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who increasingly have little need for caravan park facilities. However this is simply not true according to government data.

For Y/E June 2018, 54% of 55+ market went to caravan parks, and 19% stayed in RVs by the side of the road/private property. There has been very little change in the preference of 55+ age groups.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are pushing for benefits for their own membership base, which negatively impacts on destinations that have caravan parks.

55+ Accommodation Used in Queensland



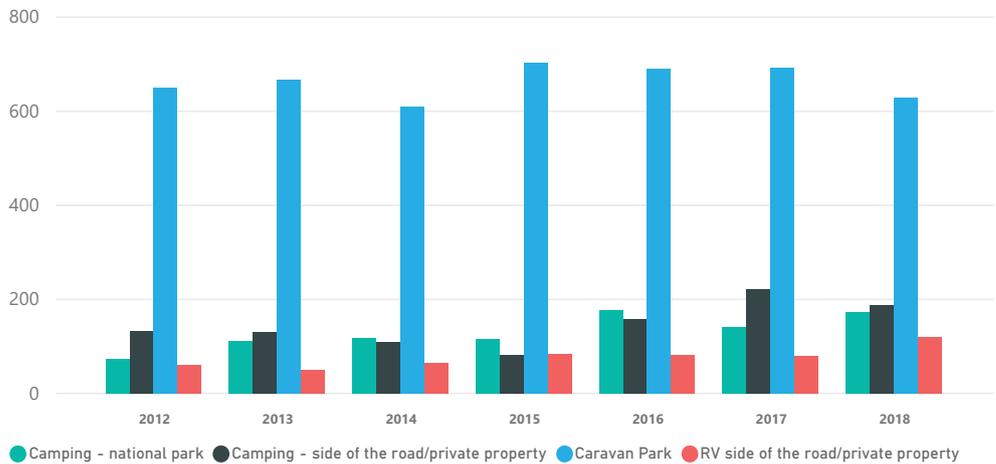
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



South Australia Insights

Trips by Accommodation Type (000s)

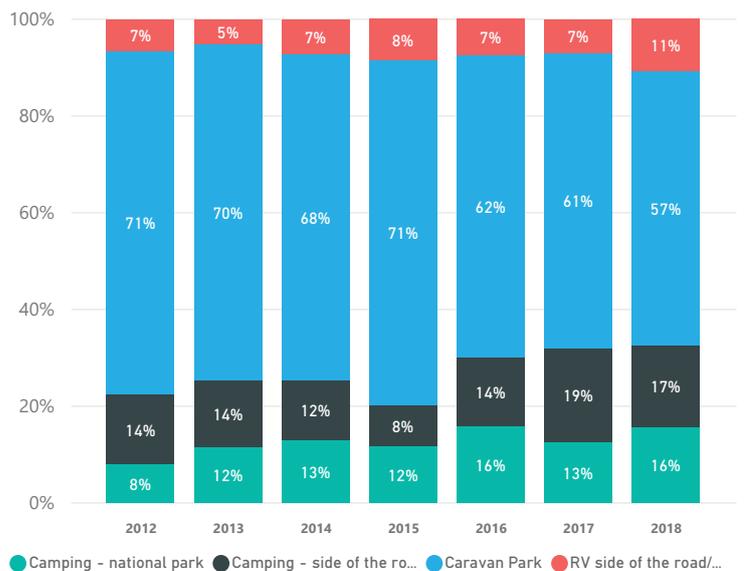


Summary

Caravan Parks remain the most popular accommodation choice for domestic caravanners and campers in South Australia, however there has been an increase in non-commercial accommodation by marketshare since 2012, which has reduced the number of visitors staying in South Australia parks.

This growth has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to SA (3 Year-Average)



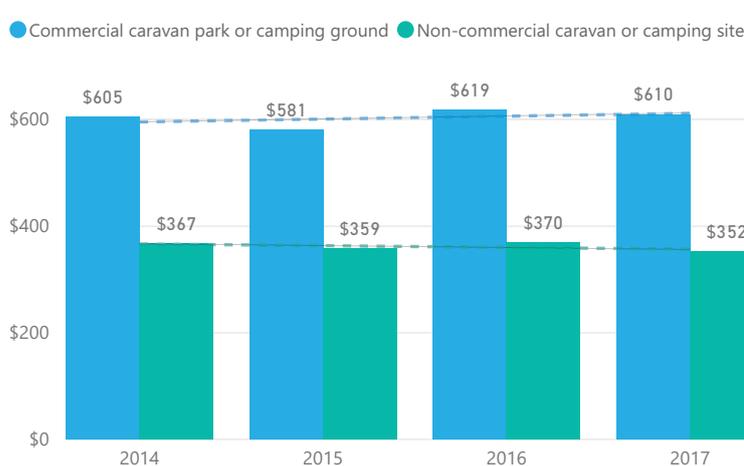
Choice of Accommodation on Trips

By marketshare, caravan parks have lost 14% of the trips to South Australia. This has been primarily due to the increases in marketshare of **National Parks** (+8%) and **Camping** - side of the road/private property (+4%). This growth is due to the increased demand for experiential travel allowing tourists to get off the beaten track to seek a more authentic experience.

Whilst trips involving an RV by the side of the road/private property has increased marginally, this is only by 3% since 2015. This mode of accommodation remains the least popular option for caravanners and campers to South Australia. This highlights there has been no strong move in consumer demand for RV stopovers.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per person per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

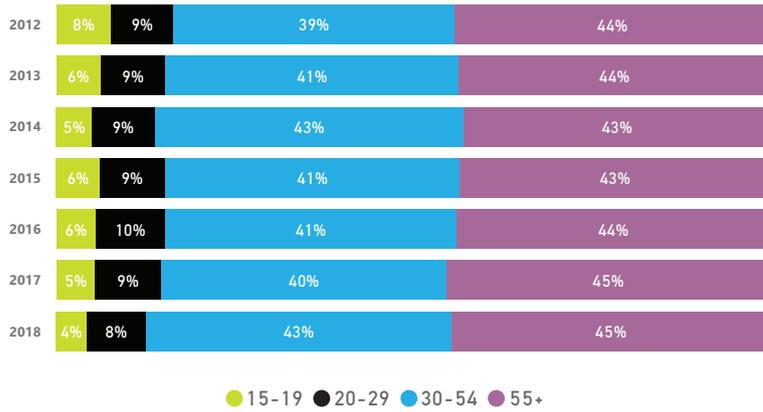
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

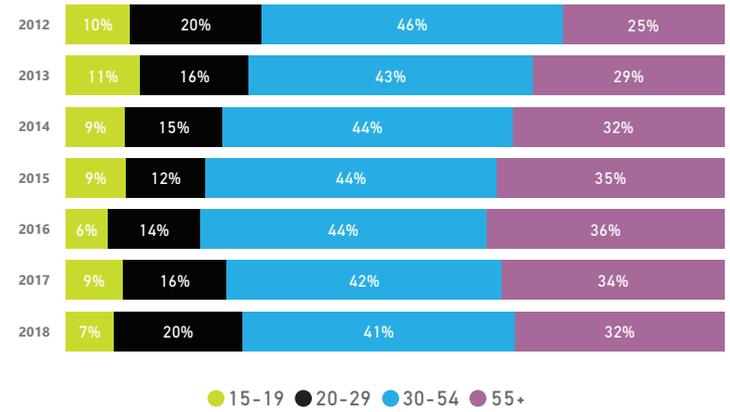
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Trips to Caravan Parks by Age Group (SA, 3yr Avg.)



Trips to Non-Commercial Sites by Age (SA, 3yr Avg.)



Caravan Parks Vs Non-Commercial Camping in South Australia

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in **South Australia**. The spread of trips to caravan parks has been relatively consistent since 2012, with the 55+ market being the biggest users of caravan parks (45% of trips, year-ending June 2018). 20-29 year olds comprised only 8% of trips to caravan parks.

In contrast, 20% of non-commercial accommodation visitors were 20-29 year olds, and the 55+ market was 31% of the market (13% less than caravan parks). This highlights the differing accommodation preferences for the 20-29 year bracket compared to the 55+ market.

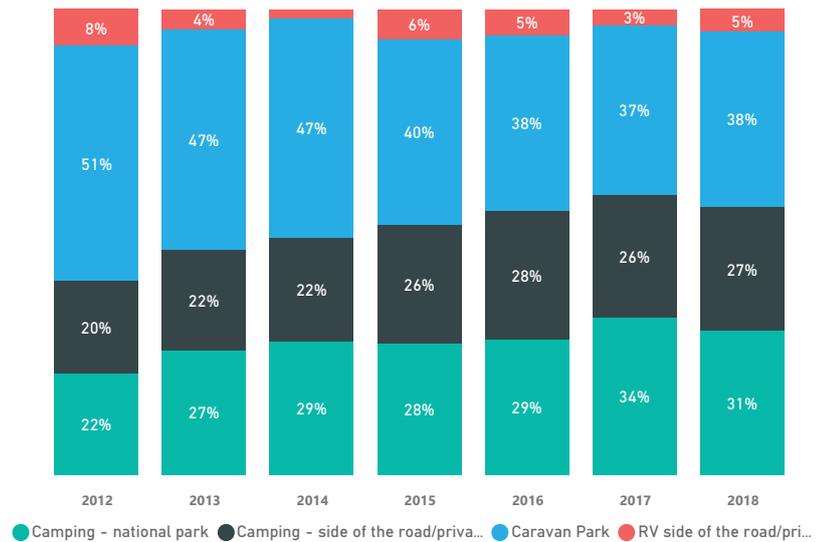
Where are 20-29s staying?

The 20-29 year bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 51% to 37% by trips taken by this group.

Staying in national parks for the 20-29 year market has increased from 24% of trips to 32%, which is linked to visitors seeking more experiential based travel options. Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce from other traditional sources.

The rise in camping by the side of the road/private property is linked to an increase in music festivals being held on private properties that are targeted at the 20-29 year market.

20-29, Accommodation Used (National)



What about the 'Grey Nomads'?

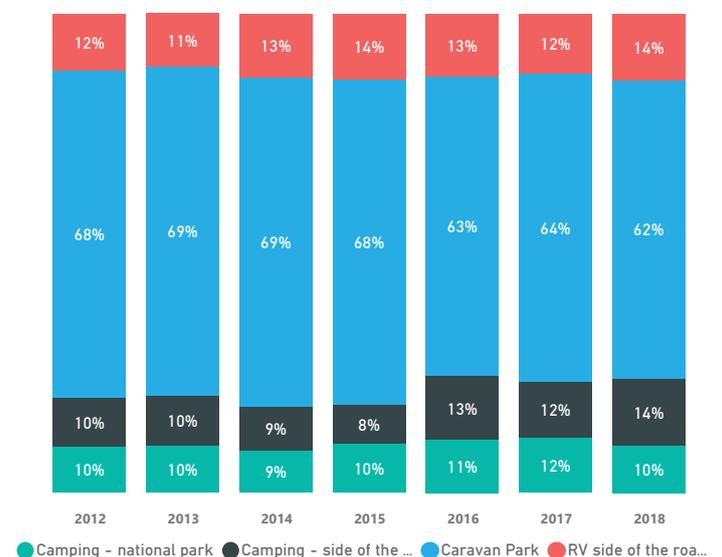
Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who have little need of caravan park facilities. However this is simply not true according to government data.

For Y/E March 2018, 62% of 55+ market went to caravan parks, and 14% stayed in RVs by the side of the road/private property.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

In summary, destinations should focus on how to increase expenditure in their towns instead of trying to attract 'empty' masses who use rate-payers resources, and leave less money in their wake.

55+ Accommodation Used (Nationally)



Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



Tasmania Insights

Trips to Tasmania by Accommodation Type (000s)

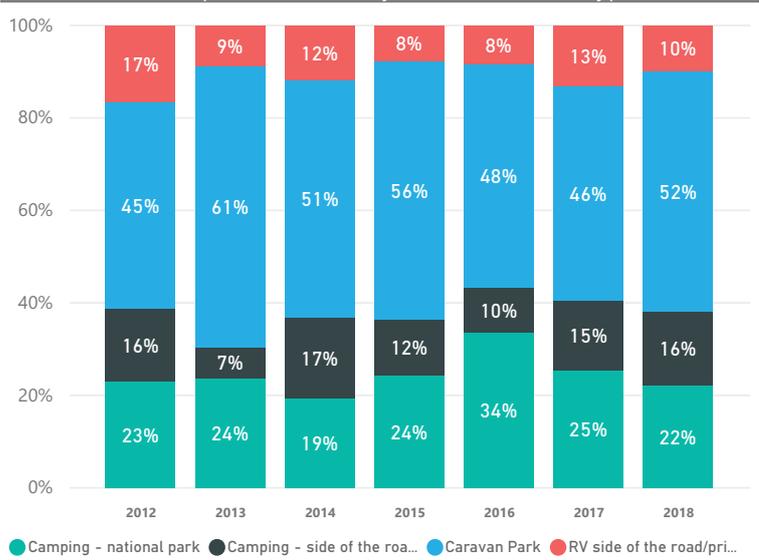


Summary

Caravan parks remain the most popular accommodation choice for domestic caravanners and campers in Tasmania, however there has been an increase in non-commercial accommodation by marketshare since 2012.

The growth of non-commercial accommodations has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to Tasmania by Accommodation Type



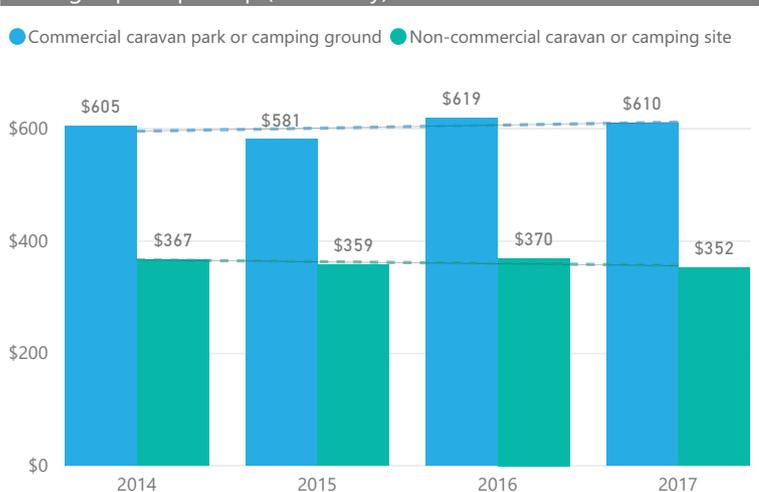
Choice of Accommodation on Trips

By marketshare, caravan parks usage is at its highest since 2015, accounting for 52% of trips for 2018 and since 2012 there has been a halving in the proportion of trips involving an RV by the side of the road.

This demonstrates that there is no increase in demand for 'free' camping stopovers for recreational vehicles in Tasmania, and increasingly consumers are using Tasmanian caravan parks.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

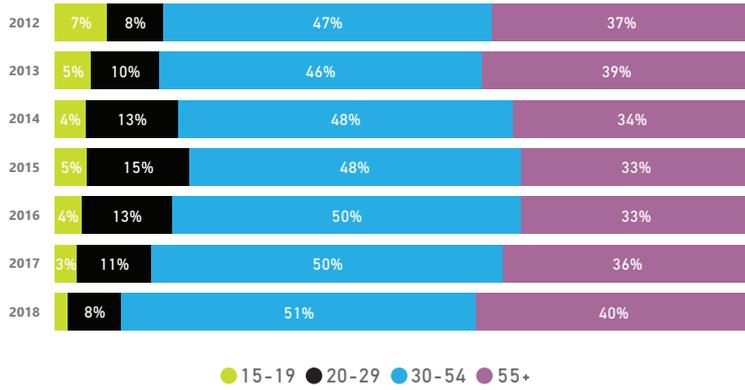
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

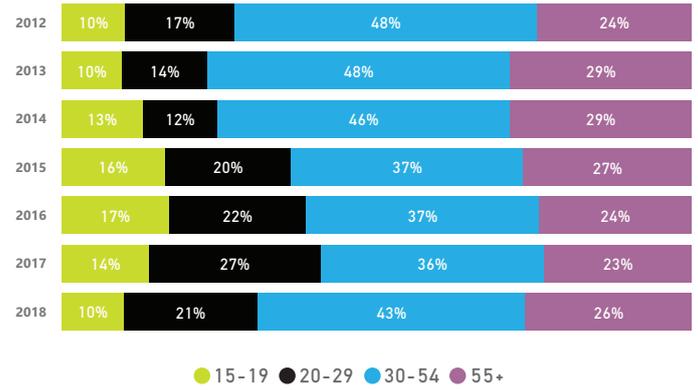
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Trips to Caravan Parks by Age Group (Tasmania, 3yr Avg.)



Trips to Non-Commercial Sites by Age (Tasmania, 3yr Avg.)



Caravan Parks Vs Non-Commercial Camping in Tasmania

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in **Tasmania**. The spread of trips to caravan parks has been relatively consistent since 2012, with the 30-54 segment being the biggest users of caravan parks (50% of trips, year-ending March 2018). 20-29 year olds comprised only 8% of trips to caravan parks.

In non-commercial accommodations however, the 20-29 bracket made up 21% of trips, and the 55+ market only 26% - this being the key demographic difference. This highlights the increased preference of the younger generation for non-commercial options, and the preference of older generations for caravan parks.

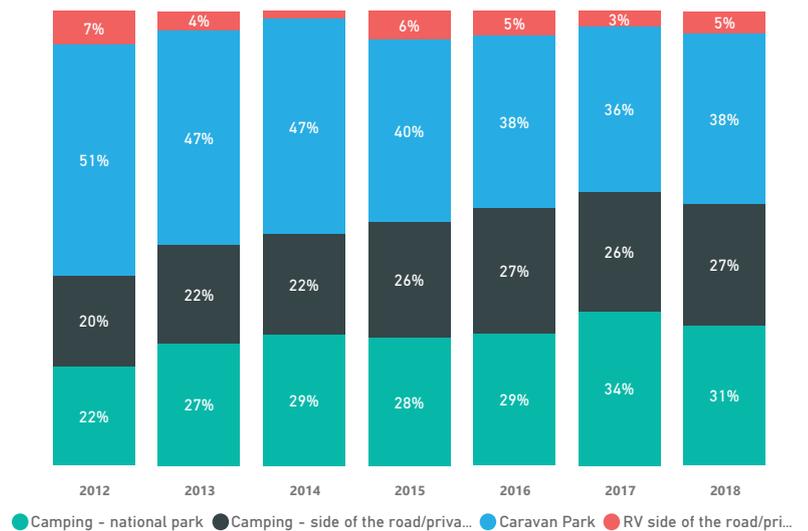
Where are 20-29s staying?

The 20-29 year bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 51% to 38% by trips.

Staying in national parks for the 20-29 year market has increased from 24% of trips to 32%, which is linked to visitors seeking more experiential based travel options. Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce.

The rise in camping by the side of the road/private property is linked to an increase in music festivals being held on private properties that are targeted at the 20-29 year market.

20-29 Accommodation Used (Nationally)



What about the 'Grey Nomads'?

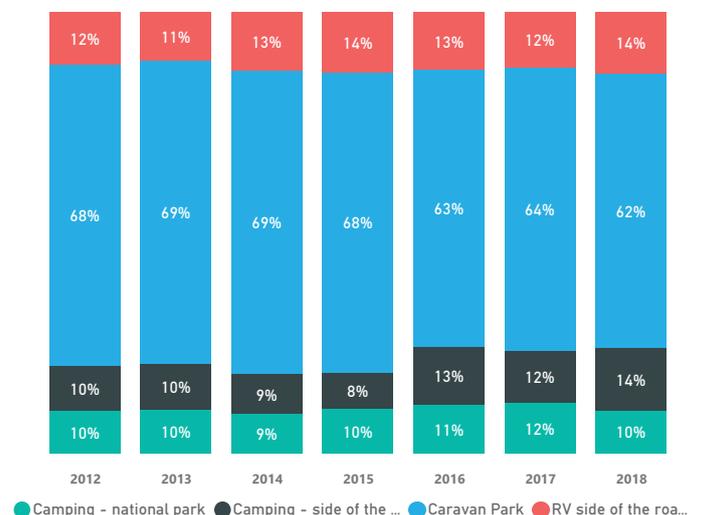
Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who have little need of caravan park facilities. However this is simply not true according to government data.

For Y/E June 2018, 62% of 55+ market went to caravan parks, and 14% stayed in RVs by the side of the road/private property.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

In summary, destinations should focus on how to increase expenditure in their towns instead of trying to attract 'empty' masses who use rate-payers resources, and leave less money in their wake.

55+ Accommodation Used (Nationally, Y/E March)



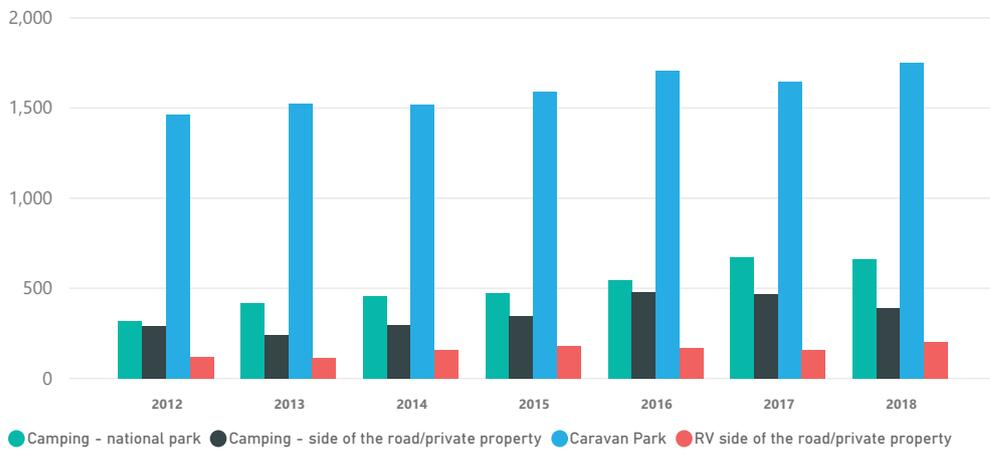
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



Victoria Insights

Trips to Victoria by Accommodation Type (000s)

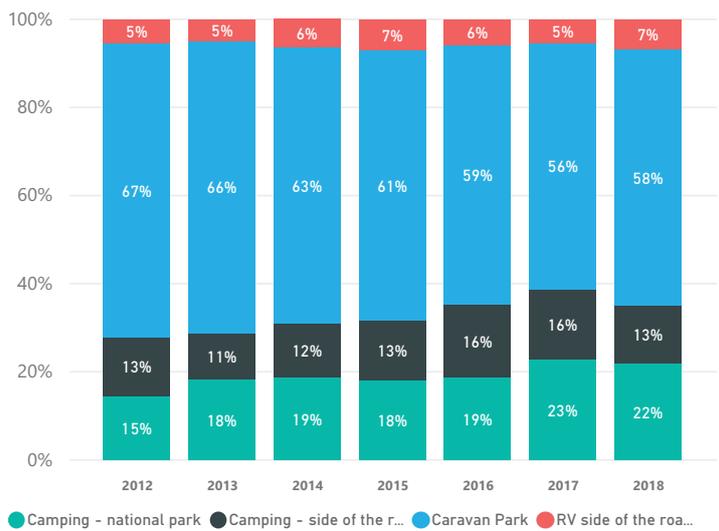


Summary

Caravan Parks remain the most popular accommodation choice for domestic caravanners and campers in Victoria, however there has been an increase in non-commercial accommodation by marketshare since 2012.

The growth of non-commercial accommodations has come from **national parks** and **camping** by the side of the road/private property, not from recreational vehicles (RVs) by the side of the road. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to Victoria by Accommodation Type



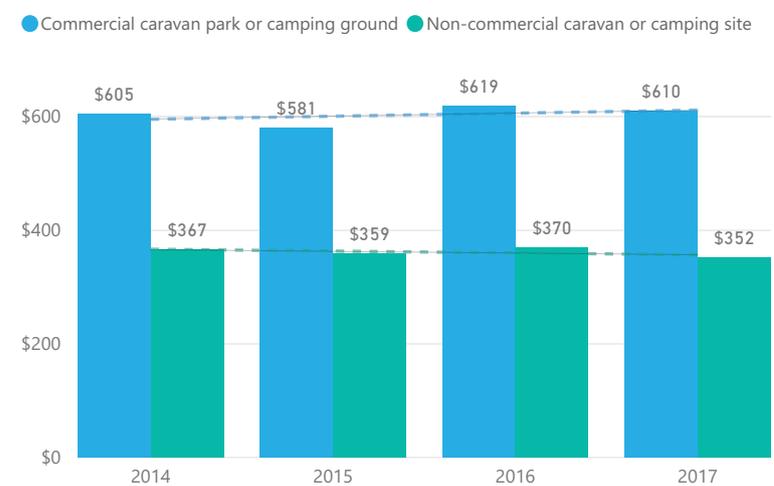
Choice of Accommodation on Trips

By marketshare, caravan parks have lost 9% of trips by caravanners and campers to Victoria. This has been due to the increase in marketshare of **National Parks** (+7%). This growth is due to the increased demand for experiential travel and tourists wanting to get off the beaten track to seek a more authentic experience.

Trips that involved being in an RV by the side of the road/private property have increased by 2% since 2012, and remain the least popular option for caravanners and campers to Victoria. This highlights the lack of consumer demand for staying in an RV by the side of the road/private property.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610 per trip. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

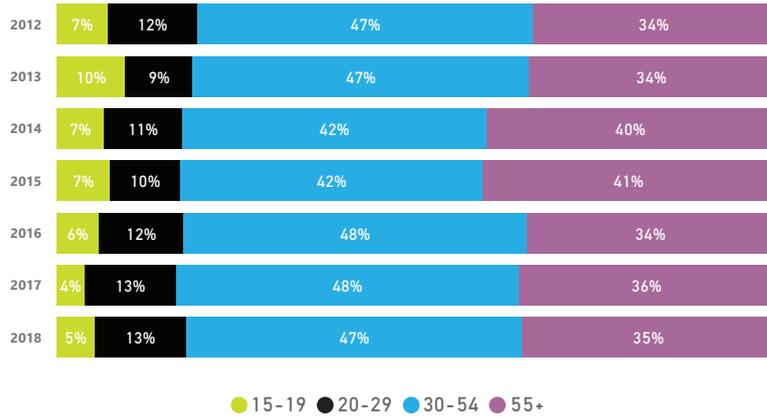
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

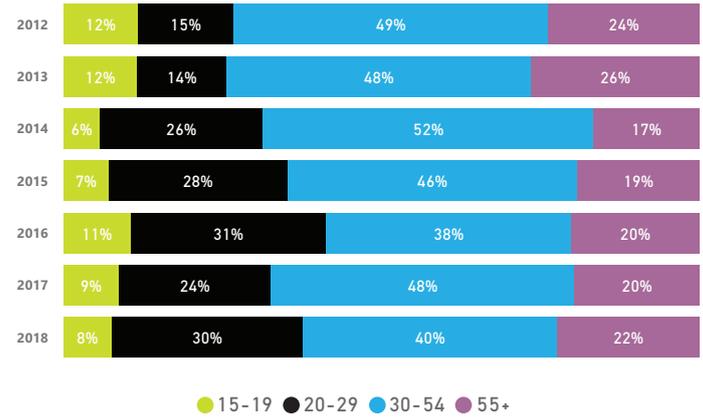
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Marketshare by Age to Victorian Caravan Parks



Marketshare by Age to Victorian Non-Commercial Sites



Caravan Parks Vs Non-Commercial Camping in Victoria

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in Victoria. The spread of trips to caravan parks has been relatively consistent since 2012, with the 30-54 market being the biggest users of caravan parks, followed by the 55+ market. Growth in trips to caravan parks has come from these groups with no movement from the 20-29 year market.

In non-commercial accommodations however, the 20-29 bracket have boosted growth dramatically, doubling their market share since 2012, to 30% in 2018. There has been no growth in terms of marketshare from the 30-54 or 55+ markets. The 55+ market especially has a higher preference for caravan parks, shown by the fact they account for 35% of trips to parks, compared to 22% for non-commercial options.

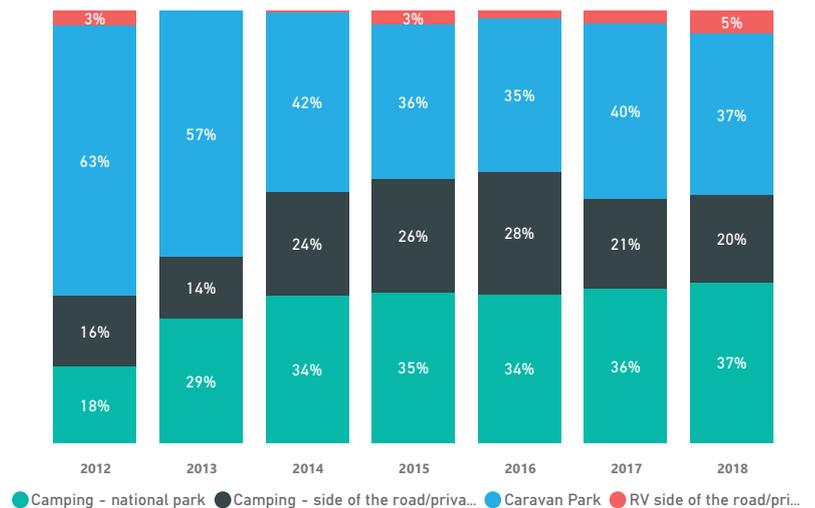
Where are 20-29s staying?

The 20-29 years bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 63% to 37% by trips.

Staying in national parks for the 20-29 year market has increased from 18% of trips to 37%, which is linked to visitors seeking more experiential based travel options. Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce.

The rise in camping by the side of the road/private property is linked to an increase in music festivals being held on private properties that are targeted at the 20-29 year market.

20-29 Accommodation Used in Victoria



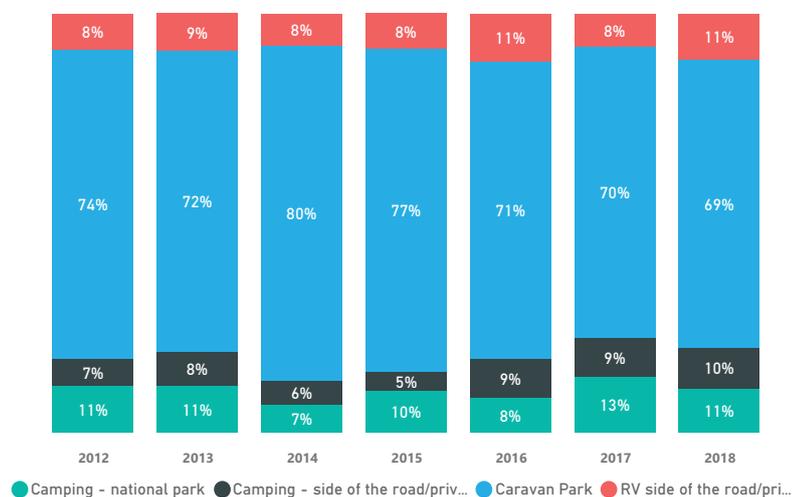
What about the 'Grey Nomads'?

Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who increasingly have little need for caravan park facilities. However this is simply not true according to government data.

For Y/E June 2018, 69% of 55+ market went to caravan parks, and 11% stayed in RVs by the side of the road/private property, there has been **no significant growth** in consumer demand for staying by the side of the road in an RV in the past seven years.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

55+ Accommodation Used in Victoria



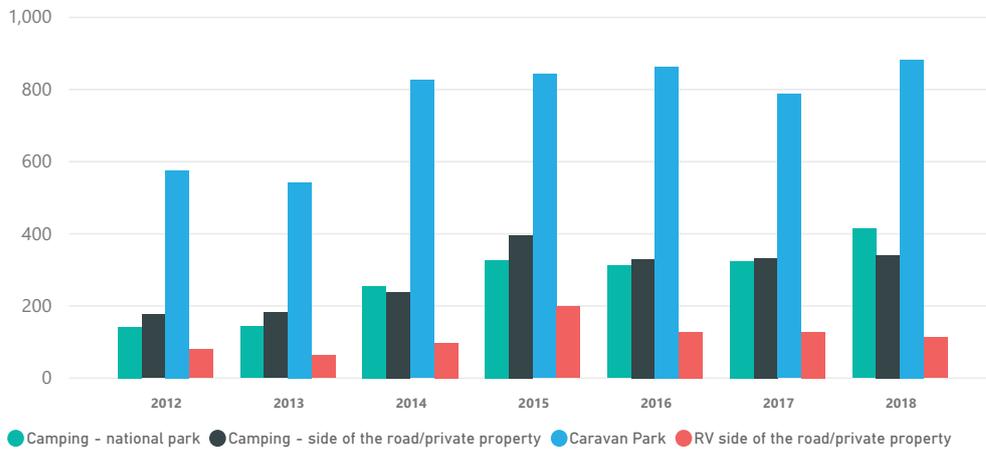
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.



Western Australia Insights

Trips to Western Australia by Accommodation Type (000s)

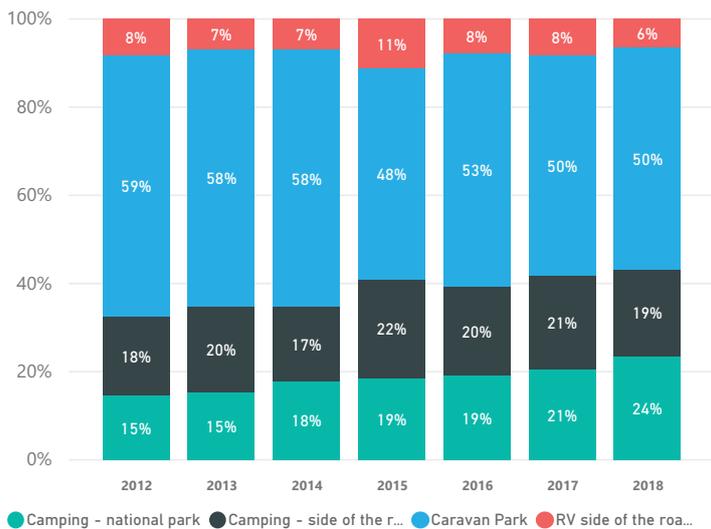


Summary

Caravan parks remain the most popular accommodation choice for domestic caravanners and campers in Western Australia, however there has been an increase in non-commercial accommodation since 2012.

The growth of non-commercial accommodations has come from **national parks**, and, whilst all caravan/camping tourism has grown, there is no extra demand to stay by the side of the road in an RV. This highlights that there is no relative increase in consumer demand for RV stopovers.

Marketshare of Trips to Western Australia



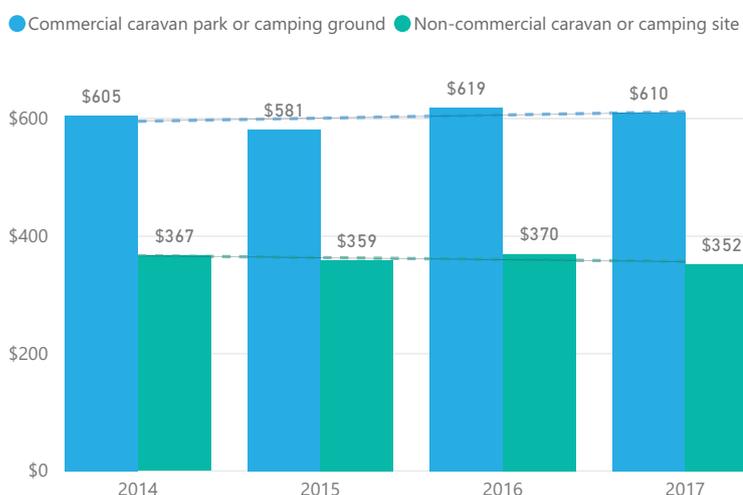
Choice of Accommodation on Trips

By marketshare, caravan parks have lost 9% of trips since 2012. This has been due to the increase in marketshare of **camping** in National Parks (+9%). This growth is due to the increased demand for experiential travel and tourists wanting to get off the beaten track to seek a more authentic experience.

Trips that involved being in an RV by the side of the road/private property have decreased by marketshare since 2012, and remain the least popular option for caravanners and campers in Western Australia. This highlights the lack of consumer demand for staying in an RV by the side of the road/private property.

Additionally, a survey of 1000 caravan and camping consumers indicates that the camping lifestyle and location of the caravan park or campground is the main motivation for undertaking a caravan and camping holiday. Therefore, it is important that caravan parks are supported to ensure a quality experience for visitors to a destination.

Average Spend per Trip (Nationally)



Expenditure

In 2017, visitors to commercial caravan parks spent on average \$610. This is 73% more than the spend of those who stayed in non-commercial accommodation options (\$352).

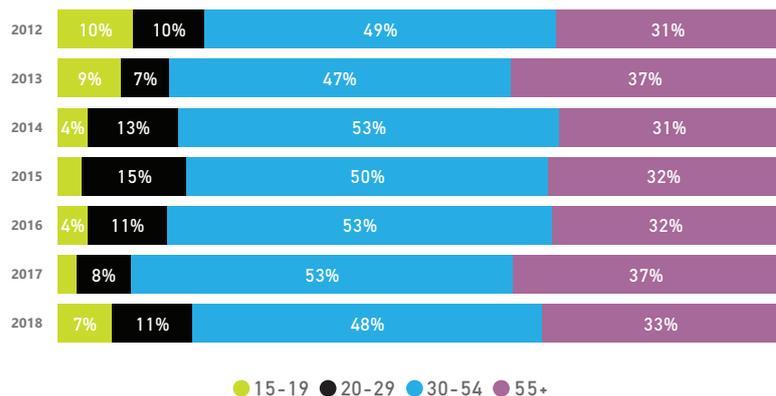
By type of spend, visitors staying in non-commercial camping facilities spend on average \$169.50 per person on food and beverage while visitors staying in **commercial** caravan facilities will spend \$209.10 per person.

Commercial Caravan Parks and Camping Grounds generate 67% of all caravan and camper visitor expenditure around the country with a total of \$4.1 billion generated in 2017. This is in comparison to \$1.9 billion by visitors staying in non-commercial camping facilities.

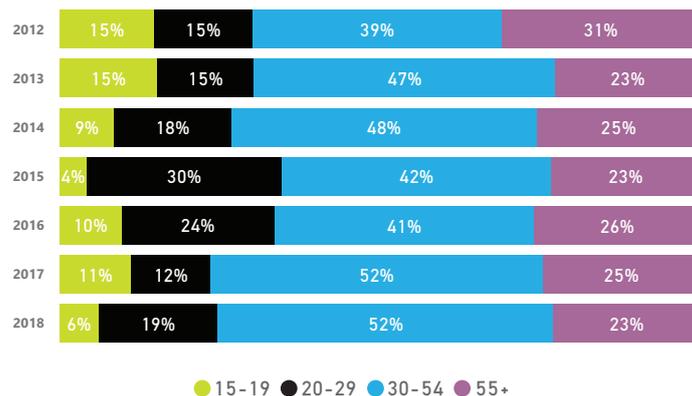
Note on the Data

Data Source: Tourism Research Australia, 2018. A three-year moving average has been used where the sample rate is under 40 as suggested by Tourism Research Australia. Where this sample remains too low, the national figures have been used to ensure the data remains as statistically significant as possible.

Caravan Parks Marketshare by Age Group (Western Australia)



Non-Commercial Marketshare by Age (Western Australia)



Caravan Parks Vs Non-Commercial Camping in Western Australia

The above graphs highlight the key demographic differences between caravan parks and non-commercial accommodations in Western Australia. The spread of trips to caravan parks has been relatively consistent since 2012, with the 30-54 market being the biggest users of caravan parks (48% of trips, Y/E June 2018), followed by the 55+ market, making up 33% of trips

However in non-commercial accommodations, the 55+ are 10% less of the market, with the 20-29 year olds comprising 19% of the non-commercial market; 8% higher than in caravan parks. This indicates that the 20-29 year market has a greater preference for non-commercial accommodations and the 55+ market prefers caravan parks.

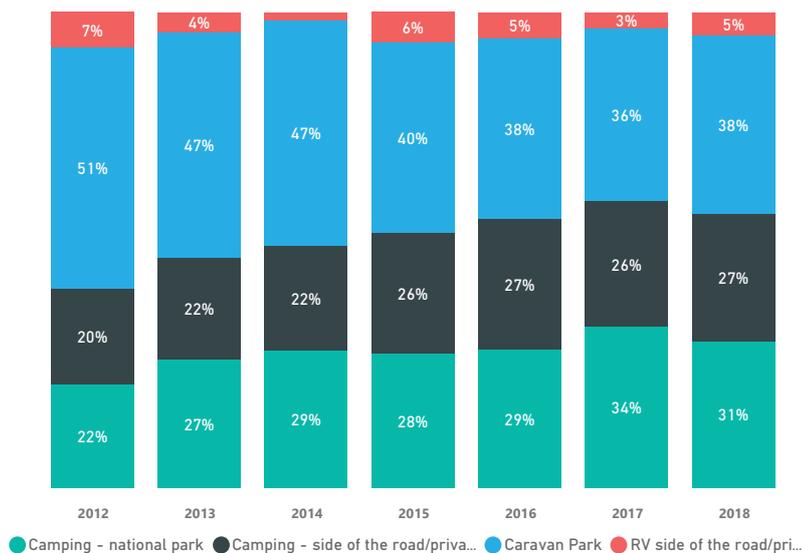
Where are 20-29s staying?

The 20-29 year bracket are increasingly choosing to **camp** in National Parks, and **camp** by the side of the road/private property. This has led to caravan park marketshare dropping from 51% to 38% by trips on a national basis amongst the 20-29 year group.

Staying in national parks for the 20-29 year market has increased from 22% of trips to 33%, which is linked to visitors seeking more experiential based travel options. Additionally, National Parks are actively seeking to increase their revenue from visitors as funding becomes more scarce.

The rise in camping by the side of the road/private property is linked to an increase in music festivals being held on private properties that are targeted at the 20-29 year market.

20-29 Accommodation Used (Nationally)



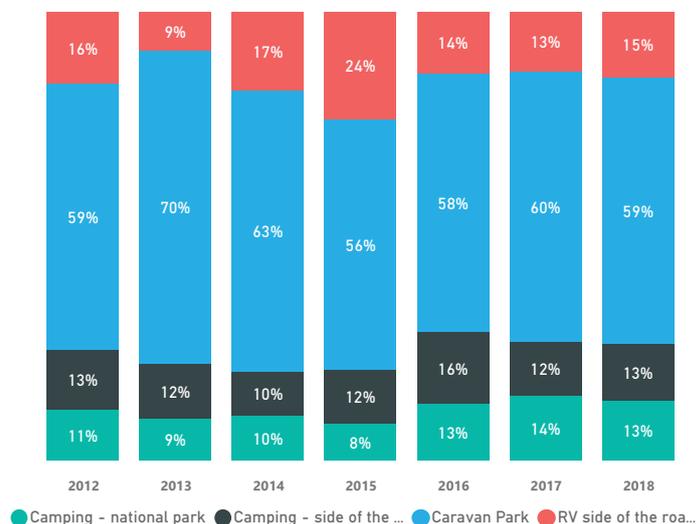
What about the 'Grey Nomads' in Western Australia?

Advocates of 'public' or 'free' camping say RV stopovers are desired by the 55+ market who have little need of caravan park facilities. However this is simply not true according to government data.

For Y/E June 2018, 59% of the 55+ market went to caravan parks, and 15% stayed in RVs by the side of the road/private property. There has been no growth in the marketshare of trips involving RVs by the side of the road since 2012.

Any advocacy groups that promote the idea that 55+ prefer to stay at 'free' RV stopovers are not looking at data, and are pushing for benefits for their own members, which negatively impacts on destinations that have caravan parks.

55+ Accommodation Used (Western Australia)



Note on the Data

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