



# A profile of travellers who used caravan or camping accommodation in Australia in 2003/04

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## Executive Summary

This report is the sixth in the Niche Market Report series produced by Tourism Research Australia (TRA)<sup>1</sup>. The report examines travel activity by, and characteristics of, domestic and international visitors who stayed at least one night in caravan or camping accommodation, primarily focusing on the 2003/04 financial year. The report also provides information on the supply side of the caravan or camping industry including quantitative information about caravans, campervans and caravan parks in Australia.

Caravan and camping visitors were defined as domestic or international travellers who on their trip stayed at least one night in caravan or camping accommodation; the location of the accommodation being in caravan parks, commercial camping grounds, or caravan or camping by the side of the road, private property, crown land, or in a national park.

With over 334 000 caravans and campervans in use, caravanning and camping has become a popular form of accommodation for domestic and international travellers in Australia.

In recent years park operators have made considerable investments in the face of growing competition, increasing the supply of on-site vans, cabins/flats/units and villas significantly. The number of on-site vans increased by 21.7 per cent and cabins/flats/units and villas increased by 27.4 per cent between 2000 and 2003. However this has led to a decrease in the number of caravan sites under long term lease.

Based on the Bureau of Tourism Research (BTR)<sup>2</sup> International Visitor Survey (IVS) and National Visitor Survey (NVS), in 2003/04, 12 per cent of domestic travellers (9.2 million) and seven per cent of international visitors (333 000) used caravan or camping accommodation. These visitors accounted for 76.3 million visitor nights in Australia, although some of these nights were spent in other types of accommodation.

Caravan and camping travellers tended to travel for holiday or leisure purposes, the majority travelled to regional areas of Australia and had a longer trip length than other visitors.

In 2003/04 domestic visitors who stayed mainly in caravan and camping accommodation, tended to travel in groups either as an adult couple (seniors, 55 years and over) or in a family group (younger travellers). These two groups accounted for 24 per cent and 37 per cent respectively, of all nights spent in caravan or camping accommodation. Senior travellers who used caravan or camping accommodation travelled for long periods of time throughout the year, while family travellers who used this type of accommodation concentrated their travel in the holiday periods of Christmas and Easter.

International visitors who stayed in caravan or camping accommodation tended to travel as individuals and stayed in diversified accommodation, staying in a number of other types of accommodation including particularly backpacker establishments and hostels. They also relied heavily on travel books/guides and the internet as a source of information. The majority of international caravan and camping visitors were from European countries.



Domestic senior travellers (over 55 years) are important to the caravan and camping industry, accounting in 2003/04 for 24 per cent of total visitor nights in this type of accommodation. With ageing of the Australian population, the proportion of seniors is expected to increase significantly in coming years, potentially driving an increase in demand for caravan or camping accommodation.

Caravan and camping sites are mainly located in regional areas. In 2003/04, of the nights spent in caravan or camping accommodation, 86 per cent of domestic visitor nights (38.3 million nights) and 74 per cent of international visitor nights (3.5 million nights) were in regional Australia.

In terms of nights spent in caravan or camping accommodation in regions, the top three tourism regions were South Coast, New South Wales (NSW), North Coast (NSW) and Gold Coast, Queensland (QLD) tourism regions. However, travel by visitors who use caravan or camping accommodation was well dispersed across a large number of tourism regions.

2

The expenditure of \$6.2 billion by international and domestic visitors who used caravan or camping accommodation in the financial year 2001/02 generated a Gross Value Added (GVA) of \$2 323 million and contributed to the employment of an estimated 50 300 persons. This equates to nine per cent of national tourism's GVA and nine per cent of total tourism employment in the 2001/02 financial year.





## Introduction

Caravan and camping is one of the fastest growing and most important niches in the tourism market (Tourism – White Paper Plus, 2004). The number of recreational accommodation vehicles, such as caravans, motor homes, pop tops, tents or camper trailers has been growing steadily over recent years (CIA, 2004). Between 1999 and 2003, the number of registered caravans and campervans increased from 303 113 to 333 870 (ABS, 2004a). The number of domestic and international travellers using this form of accommodation on their trips in Australia has also increased from 8.8 million visitors in the financial year 1999/00 to 9.6 million visitors in the financial year 2003/04. Similarly the nights spent in caravan or camping accommodation increased from 70.7 million nights in 1999/00 to 76.3 million nights in 2003/04.

Government and industry initiatives, including the National Road Tourism Strategy which will focus on the camping and caravan sectors, will help to further improve the sector. Areas to be addressed in this strategy will include: safety and

infrastructure issues such as the availability of camping sites and caravan parks, provision of sewerage pump-out facilities and ways to develop integrated routes such as Northern Australia's 'Savannah Way'. This will open up the outback to be enjoyed by more Australians and will encourage the growing number of international visitors looking for a unique Australian adventure (Australian Government, 2004). In addition, the Australian Government has recently allocated funds for the Caravan Safari Trail project which will promote the unique caravan experience and encourage self-drive tours for those who wish to undertake their own Australian journey.

The main appeal of a caravan or camping holiday is the freedom it provides—combining the flexibility of self catering with ability to move location relatively easily. Another factor is the cheapness of the holiday when this type of accommodation is used. Once the initial outlay has been made in buying a caravan or camping equipment the ongoing cost of use and maintenance is relatively small. In 2003/04, 12 per cent of domestic travellers

(9.2 million) and seven per cent of international visitors (333 000) stayed at least one night in caravan parks, commercial camping grounds, in a caravan or camp near the road, on private property, crown land, or in a national park. These visitors accounted for 76.3 million visitor nights in Australia, although some of these nights were spent in other types of accommodation. Domestic travellers who stayed at least one night in caravan or camping accommodation spent \$5.0 billion on their trips, 13 per cent of the total expenditure by domestic tourists in 2003/04. International visitors who stayed at least one night in caravan or camping accommodation spent \$1.7 billion in Australia, accounting for 14 per cent of total expenditure by all international tourists.

There have been limited investigations into visitors who use caravan or camping accommodation in Australia (Prideaux and McClymont 2003; Ward and Foo 1999; Kelly 1994). In consultations leading to the formulation of the Tourism White Paper launched in November 2003, industry and government agencies identified gaps in data relating





to the caravan or camping sector. The present study aims to bridge some of these information gaps. The focus of the report is to provide a profile of international and domestic visitors who use caravan or camping accommodation. The report examines travel activity by, and characteristics of, domestic and international visitors who stayed at least one night in caravan or camping accommodation, primarily focusing on 2002/03 and 2003/04 financial year data from the Bureau of Tourism Research (BTR) International Visitor Survey (IVS) and National Visitor Survey (NVS). Analysis of visitor nights, expenditure, travel behaviour and demographic characteristics of travellers is presented in the report. Results for visitors who used caravan or camping accommodation are compared with data for those domestic and international visitors who stayed in other types of accommodation. The report also provides information on the supply side of the caravan or camping industry including quantitative information about caravans, campervans and caravan parks in Australia.



## Caravan parks, capacity and accommodation

### Caravans and campervans

The accommodation choice in caravan parks is varied, offering everything from basic camping facilities to luxurious ensuite cabins. Most standard parks have powered and un-powered sites along with some form of cabin accommodation. Other parks have various types of on-site accommodation for hire, including bunk houses, villas, holiday units, tents or caravans. A number of caravan parks also have permanent on site caravans (owned by the individual), some with annexes, for which people pay an annual fee and have the right to use throughout the year.

New caravan park establishment and capacity counts can be used to determine which categories are experiencing growth and to estimate the caravan parks' share of tourist accommodation in Australia. The Survey of Tourist Accommodation conducted by the ABS (ABS, 2004b) collects a wide range of data including the number of establishments and their capacity, occupancy rates, employment and takings for various types of accommodation.

According to the latest Motor Vehicle Census<sup>3</sup> (ABS, 2004a) the number of registered caravans increased from 269 491 in 1999 to 295 533 in 2003, an increase of ten per cent in four years, while in the same period the number of registered campervans increased by 14 per cent (Table 1).

### Caravan parks and occupation

Manufacturing statistics collected by the CIA (CIA, 2004) show that approximately 15 800 new caravans, 1 500 tent trailers, 1 500 park cabins and 1 200 motor homes were added in 2003, contributing a potential of 60 000 new beds to tourist accommodation.

Total site nights increased by 2.7 per cent between 2000 and 2003 reaching 295 000 nights (ABS, 2004b). Although there was relatively little change in capacity, the provision of the higher yielding forms of accommodation in caravan parks increased significantly; the number of on-site vans<sup>4</sup> increased by 21.7 per cent and the number of cabins/flats/units and villas increased by 27.4 per cent. This increase in fixed accommodation at caravan parks was counter balanced by a decrease in the number of other powered sites<sup>5</sup> and un-powered sites (Table 2). However, in 2003 vacant sites (other powered sites and un-powered sites) still remained by far the most popular form of accommodation available within caravan parks, accounting for 79.4 percent of sites.

**Table 1 Caravan and campervan registration, 1999–2004**

	1999	2001	2002	2003	2004
	<b>Number of registrations</b>				
<b>Caravan</b>	269 491	273 106	285 423	295 533	na
<b>Campervan</b>	33 622	na	35 164	38 337	39 947
<b>Total</b>	303 113	na	320 587	333 870	na

na not available.

Source: Motor Vehicle Census, 2003, ABS Cat 9309.0.

Coupled with this shift toward on-site vans and cabins/flats/units and villas, there has been a shift toward short term<sup>6</sup> leasing of sites, with sites occupied by long term guests<sup>7</sup> and other sites permanently reserved<sup>8</sup> decreasing by 0.6 per cent and 6.3 per cent respectively between 2000 and 2003 (Table 2). This trend is most obvious in New South Wales and Victoria which have seen both a decrease in the number of permanently reserved sites (9.1 per cent and 8.0 per cent respectively). This substitution points to caravan park operators shifting their product towards the higher yielding short stay caravan park sites, away from the longer term and lower yielding permanently reserved sites. However, as short term leasing is traditionally done during the summer months, long term leasing provides an income to the caravan park during the quieter months.

The number of people employed in caravan parks increased by 7.9 per cent from 9 338 persons in 2000 to 10 077 persons in 2003. Total takings from accommodation in caravan parks rose by 23.8 per cent, from \$160 million in 2000 to \$199 million in 2003.

6

**Table 2 Caravan parks <sup>a</sup>, capacity and occupation 2000 and 2003<sup>b</sup>**

	2000	2003	Percentage change per cent
Number of Establishments	1 800	1 825	1.4
Capacity			
On-site vans	15 564	18 943	21.7
Other powered sites	160 299	150 549	-6.1
Un-powered sites	44 806	41 813	-6.7
Cabins, flats, units and villas	24 236	30 873	27.4
Total capacity	244 905	242 178	-1.1
Persons employed	9 338	10 077	7.9
Sites occupied by long-term guests	39 176	38 941	-0.6
Other sites permanently reserved	45 391	42 549	-6.3
Site nights occupied (000)	10 896	11 191	2.7
Site occupancy rate (per cent)	48.4	50.4	4.1
Takings from accommodation (\$000)	160 341	198 556	23.8

*a* Comprising establishments with 40 or more powered sites and cabins, flats, units and villas.

*b* Year ended 31 December.

Source: ABS, Tourist Accommodation, expanded scope collection, 2004, ABS Cat—8635.0.55.001.

## Comparison with other types of accommodation

Although accommodation takings from caravan or camping (\$199 million) were 11 per cent of total accommodation takings in 2003, the caravan, camping and motor home industry provided nearly half of the accommodation spaces available in Australia in 2003 (Table 3).

Table 3 Guest capacity and annual takings by accommodation type, 2003

Accommodation type	Guest rooms		Takings from accommodation	
	Number	Per cent	\$ million	Per cent
Hotels	78 720	15	760	40
Motels and guest houses	85 390	16	407	21
Serviced apartments	40 351	8	332	17
Holiday flats, units and houses	28 010	5	147	8
Visitor hostels	48 588	9	48	3
Caravan parks (cabins/flats/units and villas)	242 178	46	199	11
Total	523 237	100	1 893	100

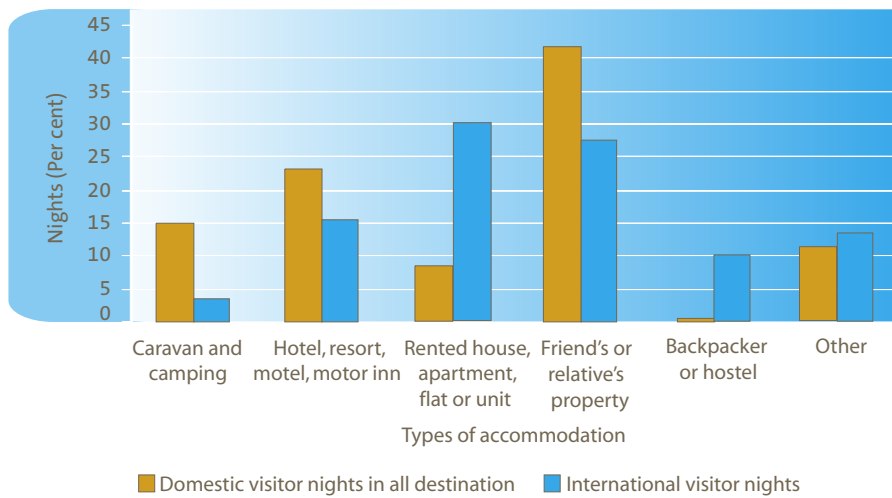
Source: ABS, *Tourist Accommodation, expanded scope collection, 2004*, ABS Cat -8635.0.55.001.

According to TRA survey results caravan or camping accommodation comes third in terms of popularity of the type of accommodation used by all domestic travellers—following a friend’s or relative’s property and hotel, motel, resort or motor inn accommodation. Caravan or camping accommodation accounted for 15 per cent of domestic visitor nights while friends’ or relatives’ properties accounted for 42 per cent and hotels, motels, resorts and motor inns accounted for 23 per cent (Figure 1).

Four per cent of international visitor nights in 2003/04 were spent in caravan and camping accommodation. The most popular type of accommodation for international visitors was rented

house, apartment, or flat where 30 per cent of international visitor nights were spent in 2003/04, followed by friend’s or relative’s property (28 per cent of nights) and hotel, resort, motel, and motor inn (15 per cent of nights).

**Figure 1 Share of domestic and international visitor nights in selected types of accommodation, 2003/04**



Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

camping accommodation spend most of their nights in this type of accommodation. Of the total trip nights spent by domestic travellers who stayed at least one night on the trip in caravan or camping accommodation in 2003/04, 83 per cent of the nights were spent in caravan or camping accommodation. In contrast, international visitors who stayed at least one night in caravan or camping accommodation spent only 27 per cent of their nights in this type of accommodation. This is primarily because domestic trips are typically of much shorter duration than international trips so there is less potential for a variety of accommodation to be used.

## Data definitions

Camping means overnight sleeping in temporary accommodation including; tents, caravans, motor homes, camper trailers, campervans, Kombi-type or other types of vehicles. A question on the type of accommodation used by domestic overnight travellers and international visitors in Australia is included in the IVS and NVS. The data cover international visitors and Australian residents, aged 15 years and over. In the IVS and NVS

respondents are asked the type of accommodation they used. The accommodation options include: caravan or camping in caravan park or commercial camping ground; and caravan or camping by side of road, on private property, on crown land or in a national park. The two options do not separate out those who use caravans and those who use camping accommodation. The distinction is in the type of site used for the caravan or camping. It is worth noting that domestic travellers who use caravan or

## Recent travel trends by caravan and camping visitors

In the financial year 1999/00, 8.5 million domestic travellers used caravan or camping accommodation for their overnight trips in Australia, accounting for 12 per cent of all domestic travellers. The number of travellers using this type of accommodation increased to 9.2 million in 2003/04, an increase of nine per cent over the five year

period (Table 4), or an average annual increase of 2.2 per cent; the number of nights spent in this type of accommodation increased at an average annual rate of 1.9 per cent to 54.1 million nights.

During this five year period from 1999/00 to 2003/04, the number of international visitors who stayed in caravan or camping accommodation increased by nine per cent from 305 000 to 333 000, and the number of nights spent in this type of accommodation increased by eight per cent to 22.2 million nights.

**Table 4 Domestic and international visitors using caravan or camping accommodation, nights and expenditure, 1999/00–2003/04**

Year	Visitors		Nights		Expenditure <sup>a</sup>	
	Number 000	Proportion Per cent	Number 000	Proportion Per cent	\$ million	Proportion Per cent
<b>Domestic overnight</b>						
1999/00	8 453	12	50 121	17	3 886	11
2000/01	9 134	12	49 940	17	4 581	12
2001/02	9 191	12	49 211	17	4 829	13
2002/03	9 043	12	51 693	17	4 915	12
2003/04	9 220	12	54 085	18	5 038	13
<b>International</b>						
1999/00	305	7	20 592	19	1 299	15
2000/01	312	7	26 400	21	1 634	15
2001/02	326	7	23 132	19	1 754	16
2002/03	312	7	20 363	18	1 598	14
2003/04	333	7	22 243	17	1 699	14

*a* Excluding other major equipment.

Source: BTR International Visitor Survey and National Visitor Survey, 1999–2004 (unpublished data).

As previously stated, 12 per cent of domestic travellers in 2003/04 stayed at least one night in caravan or camping accommodation. Of these, 63 per cent camped or used caravans on commercial sites. Domestic travellers who stayed on commercial sites spent 40 million nights on their trips, accounting for 14 per cent of all domestic nights, and those who stayed on non-commercial sites spent 19 million nights on their trips, accounting for six per cent of all domestic nights (Table 5).

By comparison, seven per cent of all international visitors stayed at least one night in caravan or camping accommodation; of these 83 per cent used caravans or camped on commercial sites and 29 per cent used caravans or camped on non-commercial sites<sup>9</sup>.

### Expenditure by caravan and camping visitors

In 2003/04, domestic visitors who stayed in caravan or camping accommodation spent a total of \$5 billion on their travels. Of this

amount, \$3.6 billion was spent by those who stayed on commercial sites and \$1.9 billion was spent by those who stayed on non-commercial sites<sup>10</sup>.

International visitors who stayed at least one night in camping or caravan accommodation spent a total of \$1.7 billion on their travel in Australia. Of this amount, \$1.5 billion was spent by those who camped or used caravan accommodation on commercial sites.

**Table 5 Domestic and international visitors using caravans or camping accommodation by visitors, nights and expenditure, 2003/04**

Type of accommodation	Visitors		Nights <sup>c</sup>		Expenditure	
	000	Per cent	000	Per cent	\$ billion	Per cent
<b>Domestic overnight</b>						
On commercial sites	5 778	8	40 126	14	3.6	9
On non-commercial sites	3 719	5	19 064	6	1.9	5
<b>Total sites<sup>a</sup></b>	<b>9 220</b>	<b>12</b>	<b>54 085</b>	<b>18</b>	<b>5.0</b>	<b>13</b>
<b>All accommodation types</b>	<b>74 356</b>	<b>100</b>	<b>295 873</b>	<b>100</b>	<b>39.1</b>	<b>100</b>
<b>International<sup>b</sup></b>						
On commercial sites	276	6	19 578	15	1.5	13
On non-commercial sites	97	2	5 988	5	0.4	3
<b>Total sites<sup>b</sup></b>	<b>333</b>	<b>7</b>	<b>22 243</b>	<b>17</b>	<b>1.7</b>	<b>14</b>
<b>All accommodation types</b>	<b>4 675</b>	<b>100</b>	<b>132 070</b>	<b>100</b>	<b>12.0</b>	<b>100</b>

*a* Components may not add to the total as some visitors stayed on both commercial and non-commercial sites.

*b* Includes visitors in transit.

*c* Includes nights spent in all accommodation types by visitors who have spent at least one night in caravan or camping accommodation.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

On average, expenditure by domestic travellers who used caravan or camping accommodation (\$546 per visitor), was slightly higher than that of domestic travellers who used other types of accommodation (\$523 per visitor). Visitors who stayed on commercial sites, on average, spent more on their trip (\$622 per visitor) than visitors who stayed on non-commercial sites (\$508 per visitor). The apparent cheapness of caravanning and camping holidays needs qualification; while it is true that other forms of accommodation

are more expensive in terms of dollars per night (\$141, as opposed to \$93<sup>11</sup>), caravanning and camping trips tend to be longer than trips using other forms of accommodation (six nights compared with four nights), which counterbalances the lower nightly cost (Table 6).

On average, international visitors who used caravan or camping accommodation spent \$5 098 per visitor (see Table 12 for expenditure by country of residence). Visitors who stayed on commercial sites,

on average, spent more on their trip than visitors who stayed on non-commercial sites (\$5 504 per trip for visitors on commercial sites compared with \$4 455 for visitors on non-commercial sites). Expenditure per night for international visitors who used other types of accommodation was higher (\$94) than for visitors who used caravan or camping accommodation (\$77).

The average length of stay was considerably longer for international visitors who used caravan or camping accommodation (66 nights) than for international visitors who used other types of accommodation (25 nights).

**Table 6 Expenditure per visit and per night by domestic and international visitors who stayed in caravan or camping accommodation, 2003/04**

Type of accommodation	Expenditure per visit \$	Expenditure per night \$	Average length of stay nights
<b>Domestic overnight</b>			
On commercial sites	622	90	7
On non-commercial sites	508	99	5
Total commercial and non-commercial sites	546	93	6
<b>Other accommodation</b>	523	141	4
<b>International</b>			
On commercial sites	5 504	78	71
On non-commercial sites	4 455	72	62
Total commercial and non-commercial sites	5 098	77	66
Other accommodation	2 367	94	25

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

### Itemised expenditure

Domestic travellers who stayed at least one night in caravan or camping accommodation spent most money on accommodation, food and drink (52 per cent), followed by spending on transport (26 per cent). They spent practically no money on education as very few travelled for education purposes (less than two per cent of domestic travellers who used caravan or camping accommodation were students)(Table 7).

International visitors who stayed in caravan or camping accommodation also spent most of their money on accommodation, food and drink (45 per cent), followed by expenditure on transport (15 per cent). Shopping was less important to both international and domestic visitors who used caravan or camping accommodation than to visitors who used other types of accommodation. Presumably this is because much of their travel is to more remote locations, distant from shops.

**Table 7 Itemised expenditure by domestic overnight and international visitors who stayed in caravan or camping accommodation, 2003/04**

Expenditure item	Accommodation type			Other accommodation
	On commercial sites	On non-commercial sites	All caravan or camping sites	
	Per cent			
<b>Domestic overnight</b>				
Accommodation, food and drink	57.3	39.6	51.7	47.7
Transport <sup>a</sup>	20.9	37.1	26.2	13.0
Airfares	2.1	3.1	2.4	12.5
Shopping	9.3	7.9	8.8	13.1
Other <sup>b</sup>	10.4	12.2	10.9	13.7
<b>Total expenditure (\$ million)</b>	<b>3 595</b>	<b>1 890</b>	<b>5 038</b>	<b>34 068</b>
<b>International</b>				
Accommodation, food and drink	45.1	42.5	45.2	40.7
Transport <sup>a</sup>	15.0	15.0	14.6	6.6
Airfares	3.3	3.8	3.4	3.5
Shopping	9.8	11.9	10.6	18.8
Other <sup>b</sup>	26.7	26.8	26.2	30.4
<b>Total expenditure (\$ million)</b>	<b>1 520</b>	<b>431</b>	<b>1 699</b>	<b>10 278</b>

*a* Includes rental vehicles, taxi, long distance transport, other local transport, car hire, fuel cost and vehicle maintenance and repairs.

*b* Includes entertainment, gambling, phone, fax, postage and other expenditure, education, organised tours and purchase of vehicles.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Purpose of visit

Cost savings, as well as flexibility in travel schedules, stopover duration and greater convenience when travelling with children were identified as the most common reasons for taking a caravan or camping holiday. In 2003/04, the

most popular purpose for taking a caravan or camping trip was to have a holiday, with 77 per cent of domestic visitors who used caravan or camping accommodation travelling for this purpose. Seventy one per cent of international visitors who used caravan or camping accommodation also travelled for

holiday or leisure purposes (Table 8). A higher proportion of international visitors than domestic travellers who stayed in caravan or camping accommodation travelled to visit friends and relatives (16 per cent for international visitors as opposed to nine per cent for domestic travellers). Ten per cent of domestic visitors who used caravan or camping accommodation cited business as their main reason for travelling. In comparison, only a small proportion of international visitors who stayed in caravan or camping accommodation indicated business as their main reason for travelling to Australia.

**Table 8 Domestic overnight and international visitors who used caravan or camping accommodation by main purpose of visit, 2003/04**

Main purpose of visit	Accommodation type			
	On commercial sites	On non-commercial sites	All caravan or camping sites Per cent	Other accommodation
<b>Domestic overnight</b>				
Holiday or leisure	81	72	77	36
Visiting friends and relatives	12	6	9	40
Business	5	18	10	20
Other	3	4	3	4
<b>Total visitors (000)</b>	5 778	3 719	9 220	65 136
<b>International</b>				
Holiday or leisure	72	69	71	52
Visiting friends and relatives	14	17	16	21
Business	n/a	n/a	n/a	16
Education	8	7	7	6
Other	n/a	n/a	n/a	6
<b>Total visitors (000)</b>	276	97	333	4 342

n/a Not available due to reliability issues.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

### Travel party

Domestic travellers who used caravan or camping accommodation largely travelled in groups, either with family (25 per cent) or with friends or relatives (31 per cent). Twenty seven per cent of domestic travellers using caravan or camping accommodation were adult couples (32 per cent for international visitors). Only a small proportion of international visitors using caravan or camping accommodation

travelled in family groups (five per cent).

In 2003/04, fifty one per cent of international visitors who used caravan or camping accommodation travelled alone, compared with only 12 per cent of their domestic counterparts (Table 9).

It is interesting to note that when considering visitor nights spent in caravan or camping accommodation, two distinct groups emerge;

domestic travellers aged between 15 and 54 years travelling with friends or family (accounting for 37 per cent of total visitor nights spent in caravan or camping accommodation) and domestic senior travellers travelling as a couple (accounting for 24 per cent<sup>12</sup> of total visitor nights spent in caravan or camping accommodation).

These two groups have distinctly different travel patterns in relation to seasonality, as those aged between 15 to 54 years travelling with friends or family tend to travel during the school holidays, while the seniors travelling as a couple travelled more consistently throughout the year (see the section on seasonality for more information).

It is interesting to note when considering the relative contribution these two groups make to the caravan and camping industry that there is a distinction to be made between visitor nights (as per the TRA surveys) and caravan or camping accommodation slots used (as seen by the caravan or camping park owners).

For the same number of people in

each of the two categories (seniors in a couple and visitors travelling with friends or family), seniors in a couple occupy more slots than visitors travelling with friends or family. This is under the assumption that visitors travelling with friends or family are more likely to share the same accommodation slot than to occupy separate accommodation slots. For example, if there is a group aged between 15 and 54 years travelling with friends or family travelling in a party of three adults, the party would for each night spent in caravan or camping accommodation contribute three nights to TRA's NVS, yet they would be using only one accommodation slot. On the other hand seniors travelling in a couple would contribute only two nights to TRA's NVS, yet they would also be using one accommodation slot. The two groups would both consume one caravan or camping slot, yet their number of nights according to the NVS would be different.

According to the NVS of those domestic travellers aged between 15 and 54 years travelling with friends or family the majority of their nights (88 per cent<sup>13</sup>) are spent travelling in groups of three or more.

**Table 9 Domestic overnight and**

14

### international visitors who stayed in caravan or camping accommodation by travel party, 2003/04

Travel party	On commercial sites	Accommodation type		
		On non-commercial sites	All caravan or camping sites	Other accommodation
		Per cent		
<b>Domestic overnight</b>				
Unaccompanied traveller	5	21	12	28
Adult couple	31	22	27	28
Family group-parents and children	30	16	25	18
Friends and/or relatives travelling together	29	33	31	20
Other <sup>a</sup>	5	7	5	6
<b>Total visitors (000)</b>	<b>5 778</b>	<b>3 719</b>	<b>9 220</b>	<b>65 136</b>
<b>International</b>				
Unaccompanied traveller	50	56	51	50
Adult couple	33	31	32	26
Family group-parents and children	5	n/a	5	10
Friends and/or relatives travelling together	12	10	11	10
Business associates travelling together	n/a	n/a	n/a	4
<b>Total visitors (000)</b>	<b>276</b>	<b>97</b>	<b>333</b>	<b>4 342</b>

*a* Includes school, university groups, non-school sporting groups/community groups, business associates travelling together and other travel parties.

*n/a* Not available due to reliability issues.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Demographics

### Age group

Most visitors who used caravan or camping accommodation, whether domestic or international, were in the 15–44 age group. In 2003/04, 60 per cent of domestic travellers and 70 per cent of international

visitors who used caravan or camping accommodation were aged between 15 and 44. Around one fifth of domestic travellers and a similar fraction of international visitors using caravan or camping accommodation in 2003/04 were 55 years or over (Table 11)<sup>14</sup>.

However, when considering actual

nights spent in caravan or camping accommodation by domestic visitors who used caravan or camping accommodation, visitors over the age of 55 years, accounted for 35 per cent of nights and had an average length of stay of 8.0 nights, which is double that of domestic visitors under 55 years of age.

**Table 10 Visitors, visitor nights and expenditure of international and domestic travellers who used caravan or camping accommodation by age group, 2003/04**

	Trips by caravan and campers 000	Visitor nights spent in caravan and camping accommodation <sup>a</sup> 000	Expenditure <sup>b</sup> \$ million	Average nights spent in caravan and camping accommodation per trip <sup>c</sup> Nights	Average expenditure per trip \$
<b>Domestic</b>					
Age group					
15–24 years	1 891	6 086	436	3.2	231
25–34 years	1 593	5 700	898	3.6	564
35–44 years	2 080	8 771	1 318	4.2	634
45–54 years	1 695	8 241	1 108	4.9	654
55 years and over	1 961	15 671	1 279	8.0	652
<b>Total</b>	<b>9 220</b>	<b>44 469</b>	<b>5 038</b>	<b>4.8</b>	<b>546</b>
<b>International<sup>d</sup></b>					
Age group					
15–24 years	90	1 364	667	15	7 421
25–34 years	102	1 557	572	16	5 635
35–44 years	40	637	160	15	3 995
45–54 years	38	444	141	13	3 761
55 years and over	64	782	158	13	2 470
<b>Total</b>	<b>333</b>	<b>4 785</b>	<b>1 699</b>	<b>15</b>	<b>5 100</b>

*a* Nights spent in caravan and camping accommodation rather than nights spent by caravan and camping travellers.

*b* Expenditure spent by caravan and camping travellers on whole trip.

*c* Average number of nights spent in caravan and camping accommodation while on a trip (rather than total number of nights spent on trip.)

*d* International visitor nights are based on average annual figures for 2002/03 and 2003/04 to improve reliability.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).



### **Marital status**

The majority (69 per cent) of domestic travellers who used caravan or camping accommodation were part of a couple, while the proportion of international visitors who used caravan or camping accommodation who were part of a couple was 46 per cent (Table 11).

### **Lifecycle group of domestic traveller**

In 2003/04, caravan or camping accommodation was mainly used by families. Thirty seven per cent of domestic travellers who used caravan or camping accommodation during 2003/04 were parents with children, followed by young or middle aged singles (24 per cent) and older married couples (22 per cent).

### **Employment and income**

Fifty one per cent of domestic visitors who used caravan or camping accommodation in 2003/04 had full-time jobs and a further 16 per cent were working on a part-time basis. Just over half of all domestic visitors who used caravan or camping accommodation (54 per cent) had an annual household

16

income of less than \$78 000 per annum (Table 11).

### **Gender**

Of the 9.2 million domestic travellers who used caravan or camping accommodation for at least one night in 2003/04, 61 per cent were males (compared with 52 for other travellers). The gender differences for international visitors were small with 52 per cent of international visitors who used caravan or camping accommodation being male (Table 11).



**Table 11 Demographic characteristics of international and domestic travellers who used caravan or camping accommodation, 2003/04**

	Domestic overnight				International			
	On commercial sites	On non-commercial sites	All caravan and camping sites	Other accommodation	On commercial sites	On non-commercial sites	All caravan and camping sites	Other accommodation
	Per cent of visitors							
<b>Gender</b>								
Male	56	68	61	52	53	56	52	52
Female	44	32	39	48	47	44	48	48
<b>Age group</b>								
15–24 years	19	21	21	17	27	28	27	16
25–34 years	16	18	17	19	32	27	30	24
35–44 years	22	23	23	20	12	n/a	12	20
45–54 years	18	19	18	21	12	n/a	11	19
55 years or older	24	18	21	24	17	21	19	21
<b>Marital status</b>								
Single	29	34	31	32	53	59	54	39
Part of a couple	71	66	69	67	46	41	46	61
<b>Lifecycle group</b>								
Parent with child	39	34	37	34	n a	n a	n a	n a
Older married	24	20	22	23	n a	n a	n a	n a
Young or middle single	21	26	24	21	n a	n a	n a	n a
Young/midlife couple, no kids	11	15	13	14	n a	n a	n a	n a
Older single	4	4	4	8	n a	n a	n a	n a
<b>Employment status</b>								
Working full-time	46	59	51	53	n a	n a	n a	n a
Working part-time	18	12	16	15	n a	n a	n a	n a
Retired or on a pension	18	12	15	16	n a	n a	n a	n a
Other <sup>a</sup>	18	17	18	15	n a	n a	n a	n a
<b>Annual household income</b>								
Less than \$26 000	13	9	11	11	n a	n a	n a	n a
\$26 000 – \$51 999	21	24	22	19	n a	n a	n a	n a
\$52 000 – \$77 999	22	20	21	19	n a	n a	n a	n a
\$78 000 – \$103 999	14	14	14	15	n a	n a	n a	n a
Over \$104 000	13	15	14	20	n a	n a	n a	n a
Refused/don't know	17	18	18	17	n a	n a	n a	n a
<b>Total visitors ('000)</b>	5 778	3 719	9 220	65 136	276	97	333	4 342

a Includes unemployed, students, doing home duties and others.

na Not available.

n/a Not available due to reliability issues.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Domestic senior travellers

In recent years the seniors market (55 years and over) has been hailed as one of the saving graces of the domestic tourism market. With larger amounts of free time, seniors have a higher propensity to travel than the rest of the Australian population.

According to the Australian Bureau of Statistics (ABS 2003), in 2003, 4.6 million Australians were over the age of 55 years, accounting for 23 per cent of Australians. By 2011 this proportion is expected to increase to 27 per cent of Australians (5.8 million). In recent years, on average, a traveller over the age of 55 years spent 20.9 nights per annum travelling in Australia. This is an estimated 3.4 nights per annum more than the nights spent by their younger counterparts. Domestic senior travellers spent 16 per cent of their nights travelling in caravan or camping accommodation. In 2003/04 this equated to 15.7 million visitor nights in caravan and camping accommodation, and if the trend in population growth and propensity to use caravan or camping accommodation continues, this suggests senior travellers will

18

spend 19.9 million nights in caravan and camping accommodation in 2011.

Based on 2003/04 NVS data, other important points to note about senior travellers who stayed in caravan and camping accommodation include:

- They travelled primarily as part of a couple; 70 per cent of senior travellers who used caravan and camping accommodation travelled in a party of two, while only 27 per cent of caravan or camping travellers under 55 years of age travelled in a party of two.
- On their trips they spent an average of \$652, while their younger counterparts spent \$517 per trip.
- In contrast to all senior travellers, those aged between 55 and 65 years of age and retired have an even greater propensity to stay in caravan and camping accommodation and travel for longer, spending 24 per cent of their nights away in caravan or camping

accommodation (16 per cent for all senior travellers) – and 28 nights away in all accommodation types (21 nights for all senior travellers).

- Senior travellers accounted for 35 per cent of visitor nights in caravan or camping accommodation, but only 21 per cent of the visitors.
- Senior travellers travelled consistently throughout the year, peaking during August, while their younger counterparts travelled primarily during the holiday periods of Christmas and Easter.

In 2003/04 senior travellers accounted for 21 per cent of visitors who stayed in caravan and camping accommodation, an increase of 5.1 percentage points over the last three years (Table 12). This trend, to a small extent, has been driven by increases in population in that cohort; but this also reflects a shift in consumer preferences. Senior caravan or camping travellers spent approximately \$1.3 billion on their caravan and camping trips in Australia in the financial year 2003/04.

**Table 12 Domestic overnight travellers over the age of 55 years who used caravan or camping accommodation, 2000/01–2003/04**

Year	Caravan and camping accommodation					
	Visitors Aged 55 years and over 000	Proportion of total Per cent	Nights <sup>a</sup> Million	Proportion of total Per cent	Expenditure <sup>b</sup> \$ million	Proportion of total Per cent
2000/01	1 483	16.2	13.8	32.9	1 107	24.2
2001/02	1 670	18.2	12.8	31.6	1 263	26.2
2002/03	1 776	19.6	13.9	33.9	1 181	24.0
2003/04	1 961	21.3	15.7	35.2	1 279	25.4

*a* These are nights spent only in caravan and camping accommodation by senior travellers. In 2003/04, 82 per cent of nights spent by caravan and camping visitors aged 55 years and over were in caravan or camping accommodation.

*b* Excludes other major equipment and motor vehicles.

Source: BTR National Visitor Survey, 2000/01–2003/04 (unpublished data).

Caravan buyer research conducted by Caravan Industry Australia (CIA) (CIA 2004) indicates that the majority of purchasers of new caravans and motor homes in 2004 were born between 1942 and 1950, i.e. purchasers were between 54 and 62 years of age. As Australia's 'baby boomers' approach retirement, there will be more of them with large retirement packages to spend on tourism and recreation related activities, including caravanning and camping.

### Country of residence—international visitors

Of the 333 000 international visitors who used caravan or camping accommodation in 2003/04, 70 per cent were from European countries, (29 per cent from Other Europe<sup>15</sup>, 27 per cent from the United Kingdom (UK) and 14 per cent from Germany) (Table 14).

Further analysis shows that of all the visitors from Germany a high proportion (35 per cent) stayed in caravan or camping accommodation, followed by Other Europe (24 per cent), the UK (14 per cent) and Canada (12 per cent). In contrast,

Asian visitors were much less likely to stay in caravan or camping accommodation, with only one per cent of visitors from Asian countries staying in this type of accommodation.

International caravan or camping visitors from different countries of origin had different levels of expenditure. Visitors from the UK who stayed in caravan or camping accommodation in 2003/04 had the highest expenditure per visit at \$5 975, followed by visitors from Other Europe (\$5 657 per visit), the United States of America (USA) (\$5 019 per visit) and Germany (\$4 769 per visit). New Zealand visitors who stayed in caravan or camping accommodation in 2003/04 had the lowest per trip expenditure at \$1 741 per visit, reflecting their short stay (Table 14).

**Table 14 International visitors who stayed in caravan or camping accommodation by country of residence, average stay and expenditure, 2003/04**

Country of residence	Visitors		Average duration of stay			Expenditure per visit			
	On commercial sites	Non commercial sites	All commercial sites	On commercial sites	On non commercial sites	All commercial sites	On commercial sites	On non commercial sites	
	000		travellers	Nights		travellers	\$		
United Kingdom	72	25	89	90	69	84	6 559	4 608	5 975
Other Europe <sup>a</sup>	86	26	97	71	70	70	5 839	5 265	5 657
United States of America	17	8	22	62	64	54	5 835	5 944	5 019
Canada	8	3	10	73	48	67	5 297	3 291	4 657
Germany	41	14	48	64	61	64	4 892	4 287	4 769
New Zealand	24	6	28	25	32	24	1 866	2 250	1 741
Asia	20	9	28	82	55	67	5 620	3 485	4 609
Other countries	9	6	12	56	n/a	52	5 539	2 720	4 773
All countries	276	97	333	71	62	67	5 504	4 455	5 098

<sup>a</sup> Excludes the United Kingdom and Germany.

n/a Not available due to reliability issues.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

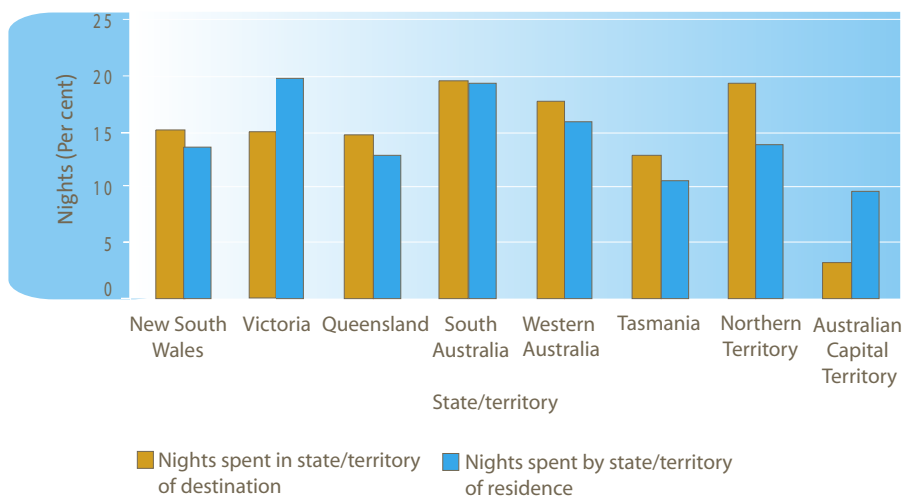
### State of residence and nights spent in caravan or camping accommodation by domestic travellers

In the 2003/04 financial year, domestic travellers who were residents of Victoria, South Australia and Western Australia were more inclined than travellers from other states to spend nights in caravan or camping accommodation. Twenty per cent of nights by travellers from Victoria, 19 per cent of nights by travellers from South Australia and 16 per cent of nights by travellers from Western Australia

were spent in caravan or camping accommodation (Figure 2).

Domestic travellers to destinations in the Northern Territory, South Australia and Western Australia spent a higher proportion of total nights in caravan or camping accommodation than travellers to other states and territories; twenty per cent of domestic travellers' nights in the Northern Territory, 19 per cent of nights in South Australia and 18 per cent nights in Western Australia were spent in caravan or camping accommodation.

**Figure 2 Proportion of nights in caravan or camping accommodation by state/territory of destination and residence, 2003/04**



Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Other travel characteristics

### Information sources — international visitors

Like other inbound visitors, the majority of international visitors who used caravan or camping accommodation in Australia made some level of pre-trip planning on areas they were to visit. They relied on travel book or guide (34 per cent), internet (33 per cent), friend or relative living in Australia (21 per cent), friend or relative who had visited Australia (18 per cent) and their previous visit (12 per cent). Of those who did not use caravan or

camping accommodation, 21 per cent used the internet as a source of information.

### Accommodation used

Domestic visitors who stayed in caravan or camping accommodation spent the majority of their visitor nights in caravan or camping accommodation, accounting for 83 per cent of their nights in this type of accommodation. The second most common form of accommodation was a friend's or relative's property, accounting for ten per cent of their nights (Table 13).

International visitors who stayed in caravan or camping accommodation tended to diversify their accommodation more than their domestic counterparts, spending only 21 per cent of their visitor nights in caravan or camping accommodation. Other forms of 'cheaper' style accommodation featured strongly with backpacker/hostel accommodation accounting for 29 per cent of visitor nights and rented houses/apartment/unit/flat receiving 20 per cent of nights. This diversification is most likely strongly related to the long length of stay in Australia by international visitors who stay in caravan or camping accommodation.

**Table 13 Domestic and international visitors who used caravans or camping accommodation, visitor nights in other types of accommodation, 2003/04**

	Domestic	International <sup>a</sup>
	Per cent	
Caravan and camping	83	21
Backpacker/hostel	n/a	29
Rented house/apartment/unit/flat	n/a	20
Friend's or relative's property	10	13
Hotel, resort, motel or motor inn	5	6
Other	2	11
<b>Total nights (000)</b>	<b>54 085</b>	<b>22 030</b>

*a* Includes nights spent at stopover destinations; excluding nights spent in transit.

*n/a* Not available due to reliability issues.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Activities undertaken

The majority of travellers who use caravan or camping accommodation are generally interested in and attracted to outdoor activities. In 2003/04, the same five activities were the most popular among international visitors who used caravan or camping accommodation and among visitors who used other types of accommodation, but the ranks were slightly different. These most popular activities were: visiting national parks/state parks; going to the beach; shopping for pleasure; going to pubs/clubs, discos etc and going to markets (Table 15).

The most popular activities among domestic travellers who stayed on commercial sites in 2003/04 were going to the beach, sightseeing, and eating out. The most popular activities among those who stayed on non-commercial sites were bushwalking/rainforest walking and sightseeing.

Outdoor activities such as going to the beach, bushwalking, visiting national parks, and general sight seeing featured strongly for both domestic and international caravan or camping visitors.

**Table 15 Top ten activities participated in by visitors who used caravan or camping and other<sup>a</sup> accommodation, 2003/04**

			International			
Rank	On commercial sites	Per cent	On non-commercial sites	Per cent	Other accommodation	Per cent
1	Visit National Parks/State Parks	76	Shopping for pleasure	75	Shopping for pleasure	78
2	Going to the beach	76	Visit National Parks/State Parks	74	Going to the beach	56
3	Shopping for pleasure	76	Swimming, surfing, diving	74	Go to markets	49
4	Pubs/clubs/discos etc	66	Pubs/clubs/discos etc	68	Pubs/clubs/discos etc	40
5	Go to markets	65	Go to markets	60	Visit National Parks/State Parks	37
6	Bushwalking/rainforest walks	63	Visit botanical or other public gardens	58	Visit wildlife parks/zoos/aquariums	36
7	Visit wildlife parks/zoos/aquariums	61	Charter boat/cruise/ferry	54	Visit botanical or other public gardens	36
8	Visit botanical or other public gardens	60	Visit wildlife parks/zoos/aquariums	53	Charter boat/cruise/ferry	29
9	Charter boat/cruise/ferry	57	Bushwalking/rainforest walks	51	Visit historical/heritage sites	25
10	Visit museums or art galleries	50	Visit museums or art galleries	48	Visit museums or art galleries	23
			Domestic overnight			
Rank	On commercial sites		On non-commercial sites		Other accommodation	
1	Go to the beach	46	Bushwalking/rainforest walks	33	Eat out at restaurants	50
2	General sight seeing	46	General sight seeing	31	Visit friends and relatives	48
3	Eat out at restaurants	42	Eat out at restaurants	26	Shopping for pleasure	28
4	Pubs/clubs/discos etc	29	Visit National Parks/State Parks	23	General sight seeing	27
5	Shopping for pleasure	25	Go fishing	22	Pubs/clubs/discos etc	24
6	Bushwalking or rainforest walks	24	Going to the beach	21	Going to the beach	22
7	Go fishing	24	Other outdoor activity	20	Go on day trip to another place	9
8	Visit friends and relatives	23	Picnic or BBQ	19	Bushwalking/rainforest walks	7
9	Visit National Parks/State Parks	19	Pubs/clubs/discos etc	18	Picnic or BBQ	6
10	Picnic or BBQ	18	Visiting friends and relatives	14	Go to markets	6

<sup>a</sup> Other types of accommodation excluding caravan or camping accommodation.

Source: BTR International Visitor Survey and National Visitor Survey, 2003/04 (unpublished data).

## Nights in tourism regions

In terms of nights spent in caravan or camping accommodation in regions, the top three tourism regions for domestic travellers were South Coast, New South Wales (NSW), North Coast (NSW) and Gold Coast, Queensland (QLD) tourism regions. More than five per cent of all domestic traveller nights were spent in these tourism regions.

The South Coast (NSW) tourism region was the most popular region visited by domestic travellers using commercial sites (when ranked by nights visitors spent in the region), with 2.2 million nights spent in this region in 2003/04. The second most popular tourism region for domestic travellers using commercial sites was the North Coast (NSW) (2.2 million nights), followed by the Gold Coast (QLD) (1.9 million nights), Northern Rivers—Tropical NSW, (1.4 million nights) and Sunshine Coast (QLD) (1.3 million nights) (Table 16).

Outback (QLD) was the most popular tourism region visited by domestic overnight travellers using non-commercial sites, accounting for 578 000 traveller nights. Australia's Golden Outback (WA) was the

next most popular tourism region, accounting for 563 000 traveller nights, followed by, Gippsland (Vic)(507 000 nights), Explorer Country (NSW) (468 000 Nights) and North Coast (NSW)(435 000 nights).

It is interesting to note that in 2003/04 38.3 million (or 86 per cent) of domestic visitor nights which were spent in caravan and camping accommodation were in regional Australia.

Additionally, 83 per cent of all nights<sup>16</sup> spent by domestic visitors who stayed in caravan or camping accommodation were spent in regional Australia, indicating this type of visitor has a much greater propensity to travel to regional Australia (for non caravan and camping visitors only 60 per cent of their visitor nights were spent in regional Australia). Details concerning each state/territory are at Appendix A.

**Table 16 Nights spent in selected tourism regions in caravan or camping accommodation by domestic travellers who used caravan or camping accommodation, 2003/04<sup>a</sup>**

	On commercial sites 000		On non-commercial sites 000
Region visited		Region visited	
South Coast (NSW)	2 248	Outback (QLD)	578
North Coast (NSW)	2 195	Australia's Golden Outback (WA)	563
Gold Coast (QLD)	1 891	Gippsland (VIC)	507
Northern Rivers — Tropical NSW (NSW)	1 364	Explorer Country (NSW)	468
Sunshine Coast (QLD)	1 259	North Coast (NSW)	448
Australia's South West (WA)	966	South Coast (NSW)	435
Western (VIC)	949	Brisbane (QLD)	393
Tropical North Queensland (QLD)	823	Northern Rivers — Tropical NSW (NSW)	378
Australia's Coral Coast (WA)	707	Hervey Bay/Maryborough (QLD)	375
Hervey Bay/Maryborough (QLD)	700	Central Murray (VIC)	362
Lakes (VIC)	649	Australia's South West (WA)	355
Australia's North West (WA)	638	Tropical North Queensland (QLD)	353
Explorer Country (NSW)	608	Australia's Coral Coast (WA)	308
Central Murray (VIC)	603	The Murray (NSW)	296
The Murray (NSW)	596	Australia's North West (WA)	284
Brisbane (QLD)	566	Sydney (NSW)	273
Outback (QLD)	534	Eyre Peninsula (SA)	273
Riverland (SA)	508	New England North West (NSW)	257
Eyre Peninsula (SA)	502	Darling Downs (QLD)	239
Fitzroy (QLD)	500	Darwin (NT)	238

<sup>a</sup> Because of high sampling variability the data in the table should be interpreted cautiously.  
Source: BTR National Visitor Survey, 2003/04 (unpublished data).

More caravan or camping accommodation nights (1.1 million) were spent by international visitors in Queensland than any other state followed by 1.0 million nights in Western Australia and 960 000 nights in New South Wales (Table 17). For more detail see Appendix A.

International visitors who used caravan or camping accommodation had a much higher propensity than other international visitors to spend nights in regional Australia. In 2003/04, 40 per cent of their nights in Australia were spent in regional locations (18 per cent for international visitors who did not use caravan and camping accommodation).

Of all the international visitor nights which were spent in caravan and camping accommodation 3.5 million (or 74 per cent) were in regional Australia, which reflects the location of caravan and camping parks. This accounted for 12 per cent of all international visitor nights spent in regional Australia.

**Table 17 Nights in caravan or camping accommodation by international visitors by State/Territory, major urban and regional areas, 2003/04<sup>a</sup>**

	Nights 000	Proportion of total nights <sup>b</sup> Per cent
Queensland	1 113	4.0
Western Australia	1 032	7.1
New South Wales	960	2.1
Northern Territory	585	22.3
Victoria	475	1.5
South Australia	382	6.5
Tasmania	81	4.1
Australia Capital Territory	22	1.0
Major urban <sup>c</sup>	1 192	1.2
Regional	3 459	12.0
<b>Total</b>	<b>4 651</b>	<b>3.5</b>

*a* Because of high sampling variability the data in the table should be interpreted cautiously.

*b* Proportion of total international visitor nights spent in each state/ territory, which were spent in caravan or camping accommodation.

*c* Major urban is defined as all the capital cities and the Gold Coast.

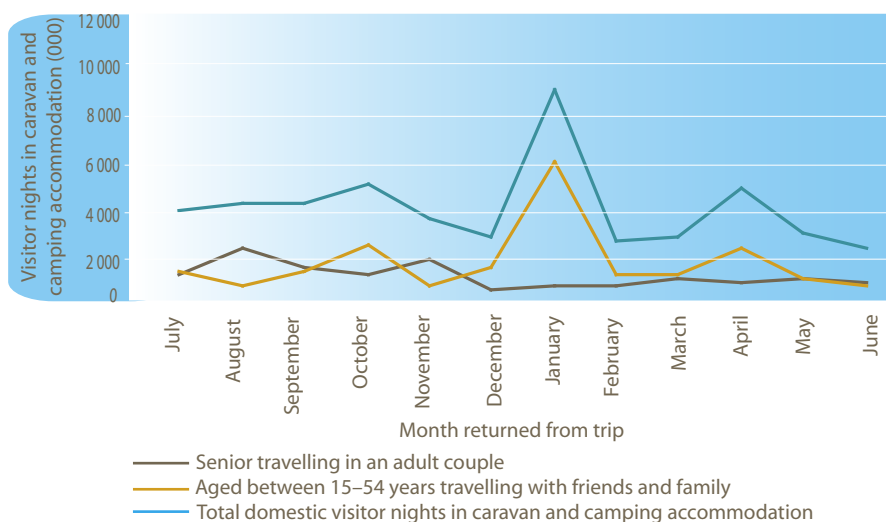
Source: BTR International Visitor Survey, 2003/04 (unpublished data).

## Seasonality

Caravan parks or camping grounds were used by domestic travellers mainly in the months of January, April and October, coinciding with school holidays. These peaks were driven by travellers aged between 15 to 54 years and travelling with friends and family. The lowest use occurred in the months of February, June and December. From Figure 3 it can be seen that domestic senior travellers travelling in an adult couple travelled more consistently throughout the year, with the notable troughs being during the peak periods for their younger counterparts.

26

**Figure 3 Nights in caravans or camping accommodation by domestic travellers, monthly average by travel party for 2002/03 and 2003/04**



Source: BTR National Visitor Survey, 2002/03–2003/04 (unpublished data).

## Economic contribution made by visitors who used caravan or camping accommodation

The economic contribution to the Australian economy of domestic and international travellers who used caravan or camping accommodation in their travel in terms of Gross Value Added (GVA) and employment can be estimated using IVS and NVS itemised expenditure data and Tourism Satellite Account (TSA) data provided by the ABS. The economic contribution model currently applied by TRA uses TSA data for the 2001/02 financial year and to be consistent with the TSA reference year data, caravan and camping's economic contribution estimates in this report are also provided for the same period.

The expenditure of \$6.2 billion by international and domestic visitors who used caravan or camping accommodation in the financial year 2001/02 generated a GVA of \$2 323 million and contributed to the employment of an estimated 50 300 persons. This equates to nine per cent of national tourism's GVA and nine per cent of total

tourism employment in the 2001/02 financial year.

As their expenditure flowed through the economy, the direct and indirect effects added further contributions across other industries. Significant contributions to the GVA came from the Accommodation, café and restaurant (\$728 million), Transport and storage (\$316 million), Retail trade (\$227 million), and Cultural and recreational services (\$124 million) industries.

In terms of employment, 18 871 jobs were in the Accommodation, café and restaurant industry, 13 453 jobs were in the Retail trade industry and 4 278 jobs were in the Transport and storage industry.

## Campervans and motor homes—transport and accommodation combined

Private or company vehicle was the form of transport most often identified by domestic caravan or camping travellers as their main form of transport in 2003 and 2004; on average 90 per cent of caravan or camping travellers used this form

of transport. The next most popular means of transport was bus or coach travel (three per cent of caravan or camping visitors) (Table 18).

The growth in registrations of camper vans and motor homes has been increasing in recent years. NVS shows that an annual average of 143 000 campervans and motor homes were used as the main form of transport by domestic travellers who stayed in caravan and camping accommodation in the 2003 and 2004 calendar years.

**Table 18 Main transport used on trips by domestic visitors who used caravan or camping accommodation, 2003–2004**

Type of transport	Trips <sup>a,b</sup> using caravan or camping accommodation 000
Private or company vehicle	8 003
Bus or coach	284
Air transport	187
Camper van or motor home	143
Other type of transport	326
Total	8 868

*a* Average for calendar years 2003 and 2004. Two years of data were used to improve data reliability. However, as the classification of camper van or motor home was introduced to the NVS 1 January, 2003, it was not possible to include in this report the results for the financial year 2002/03.

*b* Each type of transport may be used more than once for a trip by an individual/ individuals during the period.

Source: BTR National Visitor Survey, 2003–2004 (unpublished data).

In 2003/04, international caravan or camping visitors spent \$1.7 billion in Australia, 14 per cent of total international tourism expenditure, while domestic caravan or camping travellers spent \$5.0 billion, 13 per cent of total domestic tourism expenditure.

Domestic travellers from Victoria, South Australia and Western Australia were more inclined to spend nights in caravan or camping accommodation than travellers who were from other states. Domestic travellers spent a higher proportion of total nights in caravan and camping accommodation in the Northern Territory, South Australia and Western Australia than in other states/territories.




In 2003/04 domestic visitors who stayed in caravan or camping accommodation, tended to travel in groups either as an adult couple (seniors, aged 55 years or more) or in a family group (younger travellers, aged between 15 to 54 years). These two groups accounted for 24 per cent and 37 per cent respectively, of all nights spent in caravan or camping accommodation. The senior caravan and campers travelled for

## Conclusion

With over 334 000 caravans and campervans in use, caravanning and camping has become a popular form of accommodation for domestic and international travellers in Australia. In recent years caravan and camping site operators have made considerable investments in the face of growing competition, increasing the supply of cabins/flats/units, villas and on-site caravans. However, coupled with this shift towards establishment provided accommodation, there has been a

decrease in long term leasing of sites in caravan parks between 2000 and 2003.

In 2003/04, caravan and camping travellers accounted for 12 per cent of total domestic travellers and 18 per cent of total domestic visitor nights. With some nine per cent of ‘couple families’<sup>17</sup> in Australia owning caravans, campervans or motor homes, caravan or camping travellers collectively constitute a significant market segment in domestic tourism.



long periods of time throughout the year, while the family travellers concentrated their travel in caravan or camping accommodation during the holiday periods of Christmas and Easter.

International caravan or camping visitors accounted for seven per cent of total international visitors and 17 per cent of visitor nights. Visitors from Other Europe, the UK and Germany were the main users of caravan or camping accommodation, accounting for 29 per cent, 27 per cent and 14 per cent of international caravan or camping nights respectively. Outdoor activities such as going to the beach, bushwalking, visiting National/State Parks and general sight-seeing were popular with both domestic and international caravan and camping visitors.

According to the ABS, in 2003, 4.6 million Australians were over the age of 55 years, accounting for 23 per cent of Australians. By 2011 this proportion is expected to increase to 27 per cent of Australians (5.8 million). In recent years, on average, travellers over the age of 55 years spent 20.9 nights per

annum travelling in Australia. This is an estimated 3.4 nights per annum more than the nights spent by their younger counterparts. Additionally they spend a higher proportion of their nights in caravan or camping accommodation than their younger counterparts. If the trend in population growth and higher propensity, by senior travellers, to use caravan or camping accommodation continues, senior travellers will spend 19.9 million nights in caravan and camping accommodation in 2011.

The implementation of new government initiatives to develop integrated tourist routes will give impetus to more tourism throughout regional Australia. This will certainly increase tourist activity in the caravan and camping sector.

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## Appendix A

### Visitors and nights in caravan or camping accommodation, domestic and international, by state/territory, 2003/04

	Domestic		International	
	Visitors	Nights '000	Visitors	Nights
New South Wales	3 373	13 636	100	960
Victoria	2 453	8 326	75	475 <sup>a</sup>
Queensland	1 622	10 406	123	1 113
South Australia	974	4 274	53	382 <sup>a</sup>
Western Australia	969	4 885	71	1 032
Tasmania	273	1 367	11 <sup>b</sup>	81 <sup>a</sup>
Northern Territory	228	1 356	98	585 <sup>a</sup>
Australian Capital Territory	51	208	11 <sup>b</sup>	22 <sup>a</sup>
Total <sup>a</sup>	9 220	44 469	333	4 651

*a* Includes visitors who could not be allocated to a particular state or territory.

*b* Because of high sampling variability the data should be interpreted cautiously.

Source: BTR National and International Visitor Survey, 2003/04 (unpublished data).

## Endnotes

- <sup>1</sup> Tourism Research Australia (TRA) is a business unit of Tourism Australia (TA). TA is a statutory body established 1 July 2004, incorporating four former organisations: Bureau of Tourism Research (BTR), Tourism Forecasting Council (TFC), Australian Tourist Commission (ATC) and See Australia.
- <sup>2</sup> The Bureau of Tourism Research (BTR) is now Tourism Research Australia (TRA).
- <sup>3</sup> Changes to the Australian Bureau of Statistics (ABS) data collection cycle make it difficult to estimate the exact number of caravans and campervans in Australia.
- <sup>4</sup> On-site vans are defined as vans owned or leased by the establishment for the purpose of providing accommodation to the general public.
- <sup>5</sup> Other powered sites are defined as powered sites which do not have a van or cabin/flat/unit or villa which are owned or leased by the establishment. However, they may contain on-site vans which are permanently left by an individual for use throughout the year.
- <sup>6</sup> Short term is defined as a period of less than two months.
- <sup>7</sup> Sites occupied by long term guests are defined as a site which is occupied by guests who have stayed continuously for two months or more.
- <sup>8</sup> Other sites permanently reserved are defined as powered and un-powered vans, cabins etc. continuously rented for two months or more of the survey period to tenants who occupy the sites only on a casual or sporadic basis.
- <sup>9</sup> Percentages may not add to 100 as some travellers stayed on both commercial and non-commercial sites.
- <sup>10</sup> The sum total adds to \$5.0 billion as some travellers stayed on both commercial and non-commercial sites.
- <sup>11</sup> Note that this is expenditure on whole trip.
- <sup>12</sup> This figure is the number of domestic visitor nights spent in caravan and camping accommodation by senior travellers travelling as a couple, as a proportion of total visitor nights spent in caravan and camping accommodation. It differs from the figure given in the 'Age group' section, as it includes only senior travellers who are travelling as a couple and not all senior travellers.
- <sup>13</sup> Twenty five per cent of these nights are spent without any children. The remaining seventy five per cent of these nights are spent with children included in the travel group however, it is not known if more than two adults were in the travel group.
- <sup>14</sup> A study undertaken by Prideaux and McClymont (2003) shows the largest groups of caravans users were retired or near retirement and empty nesters.
- <sup>15</sup> Other Europe excludes UK and Germany
- <sup>16</sup> Includes nights in caravan or camping accommodation as well as in other types of accommodation.
- <sup>17</sup> The number of 'couple families' was estimated at 4 532 000 in 2003, Australian Social Trends, ABS Cat 4102.0, 2004