Caravanning and Camping Consumer Demand Report

2017

Caravan Industry Association of Australia

www.caravanindustry.com.au

This report should be read in conjunction with the attached disclaimer.

contents

Key Findings 03

Introduction 04

Last Time Respondents Went Caravanning or Camping 06

Accommodation Types Used in Last Two Years 07

Caravan Ownership and Purchase Intention 08

Future Holiday Intentions Within the Next Two Years 08

Previous Caravan and Camping Holiday 10

Purchase Process 16

Sample Profile 27

CaravanStats 28

This research is undertaken in partnership between the National Association and the Individual State Caravan and Camping Industry Associations.

This joint investment allows the industry to undertake research at a level not seen previously to support advocacy, benchmarking and marketing initiatives across the country.

Caravan Industry Association of Australia is proud to work collaboratively with each individual State Association to lead and champion a robust, compliant and sustainable caravan and camping industry.

Working collaboratively with State Associations on research that benefits the Caravan and Camping Industry

This report should be read in conjunction with the attached disclaimer.

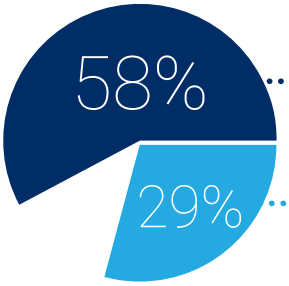
Key Findings

70% OF AUSTRALIANS INDICATED THEY HAD VISITED A **CAMPING GROUND**, **CARAVAN HOLIDAY PARK** OR **NATIONAL PARK** AT LEAST ONCE IN THEIR LIFETIME

In the last TWO YEARS

AUSTRALIANS stayed in a caravan holiday park, camping ground or national park

Of those who stayed in a caravan holiday park within the last two years...



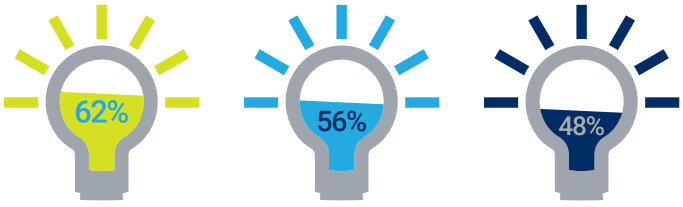
58% utilised a caravan

29% used a cabin

79% of the Australian population have a positive purchase intention towards caravan and camping holidays

TOP 3 REASONS FOR SELECTING A DESTINATION

INSPIRATION FOR DESTINATION SELECTION



FRIENDS + FAMILY

CARAVAN + CAMPING WEBSITES

HAD BEEN BEFORE

PLANNING

80% want an instant confirmation when booking online

79% read reviews on caravan parks before booking

BOOKINGS

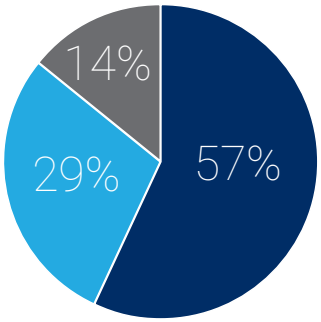
32% Booked One to Two Months Prior to Departure

28% Booked Two to Three Weeks Prior to Departure

DISTANCE TRAVELLED

57% of respondents indicated they travelled more than 300km on their last trip

TRIP LENGTH OF LAST HOLIDAY



- One Week or Less
- Two to Four Weeks
- More than Four Weeks

MOTIVATIONS TO CARAVAN AND CAMP

1. Caravan and Camping lifestyle
2. Spending time with family and friends
3. Escape the daily grind

FAVOURITE ACTIVITIES

75% cook outdoors

63% go fishing

78% go sight seeing

Introduction

The 2017 Caravanning and Camping Consumer Report is the first in an annual series of research that aims to measure domestic consumer preferences, behaviours and intentions with regards to caravan and camping holidays in Australia.

This research forms part of the Caravan and Camping Consumer Demand Project that Caravan Industry Association of Australia, in partnership with State Associations, is currently undertaking to profile and analyse the diverse domestic and international consumer segments that participate in the caravanning and camping lifestyle.

This research can support your business through the following insights:

- An overview of previous purchases and future intentions;
- An understanding of previous travel patterns including distances travelled, product preferences and trip characteristics;
- An understanding of the purchasing process of domestic caravanning and camping consumers - from initial motivation to travel, their transition into the planning stage and concluding with the purchasing phase;
- An overview of information sources that inspire consumers to go caravan and camping, along with the resources they use to plan their trips;
- The factors that influence the selection of a caravan holiday parks as well the destinations consumers choose when caravanning and camping; and
- An overview of the activities that consumers like to participate in when caravan and camping.

Methodology

A two-phased research program was undertaken in November 2016.

Phase 1: An online *population study* was used to measure the instances of caravanning and camping holiday park and accommodation usage versus non-usage among the Australian population. A sample size of 1,000 respondents was selected.

Phase 2: A questionnaire was provided to a dedicated consumer panel (1,000 respondents) who were positively disposed to caravanning and camping to analyse consumer behaviour. This consumer panel, taken from a 340,000-consumer database, is weighted against data provided from Tourism Research Australia to represent a nationwide representation of the population of caravanning and camping consumers.

Limitations: The size of the sample undertaken in this study allows for the findings to be extrapolated to represent the overall caravanning and camping Australian population. However, any age analysis provided in this document is provided as general guidance only due to smaller individual samples. Throughout the document, comparisons are made to a previous caravanning and camping consumer study undertaken in 2011 by Alliance. Due to different methodologies used in that research, comparative discussion is provided in general context only.

Furthermore, the findings presented should be read in conjunction to the disclaimer provided on the last page of this document.

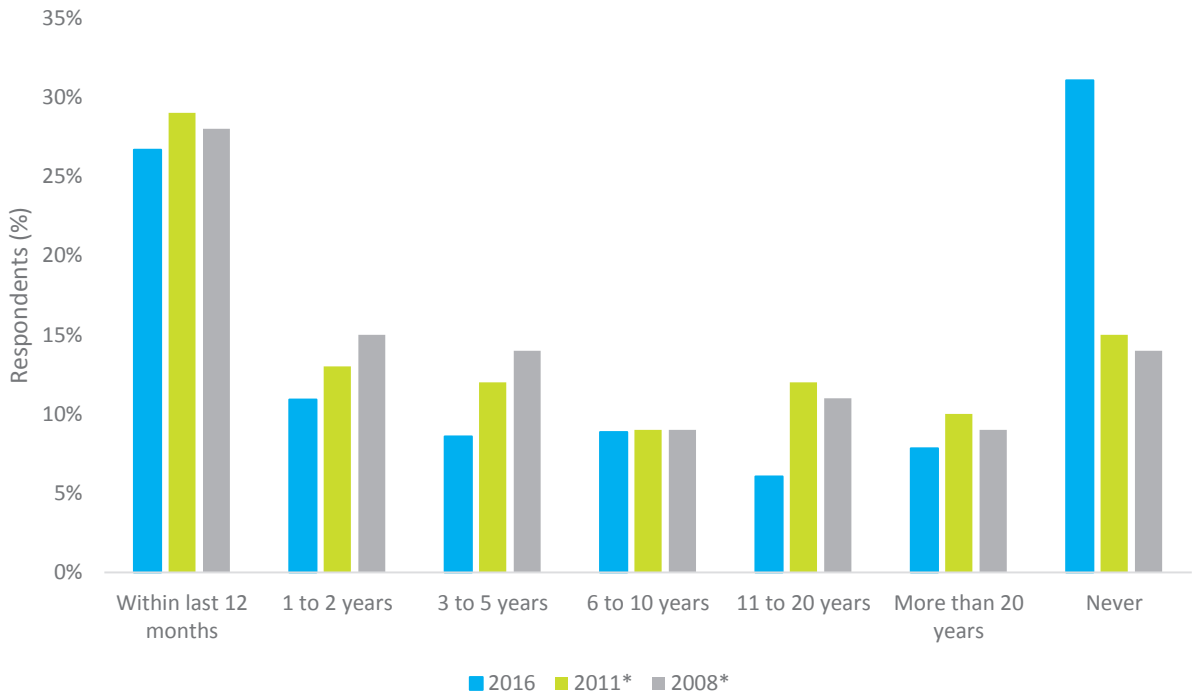
Refer to page 27 for an overview of the sample collected.

Jayco
READY TO RACE

Last Time Respondents Went Caravan or Camping

In the last two years, 7.1 million Australians (7.06 million in 2011) have stayed in a caravan holiday park, camping ground or national park. In addition, approximately 70% of all Australians indicated that they had visited a caravan holiday park, camping ground or national park at least once in their lifetime. In comparison to figures recorded in 2011 and 2008, caravan and camping accommodation usage was lower. However, this may be due to the oversampling of the over 65s in the 2011 and 2008 survey in comparison to the 2016 study which had a small population sample of this age segment.

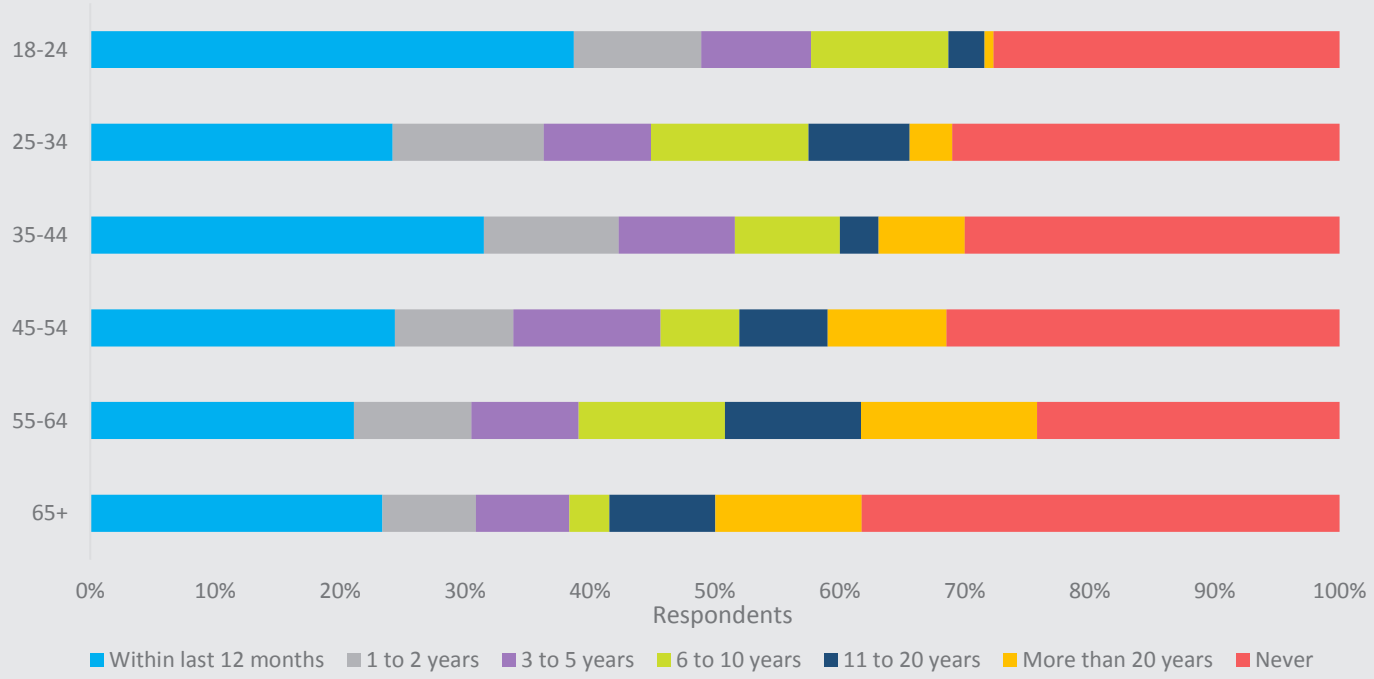
Visitation to Caravan Holiday Park, Camping Ground or National Park



Source: Population Survey n=1000

**Figures for 2011 and 2008 utilised a different methodology to 2016 and as such, any comparisons are provided in general terms.*

Last Time Respondents Visited a Caravan Holiday Park, Campground or National Park by Age Group



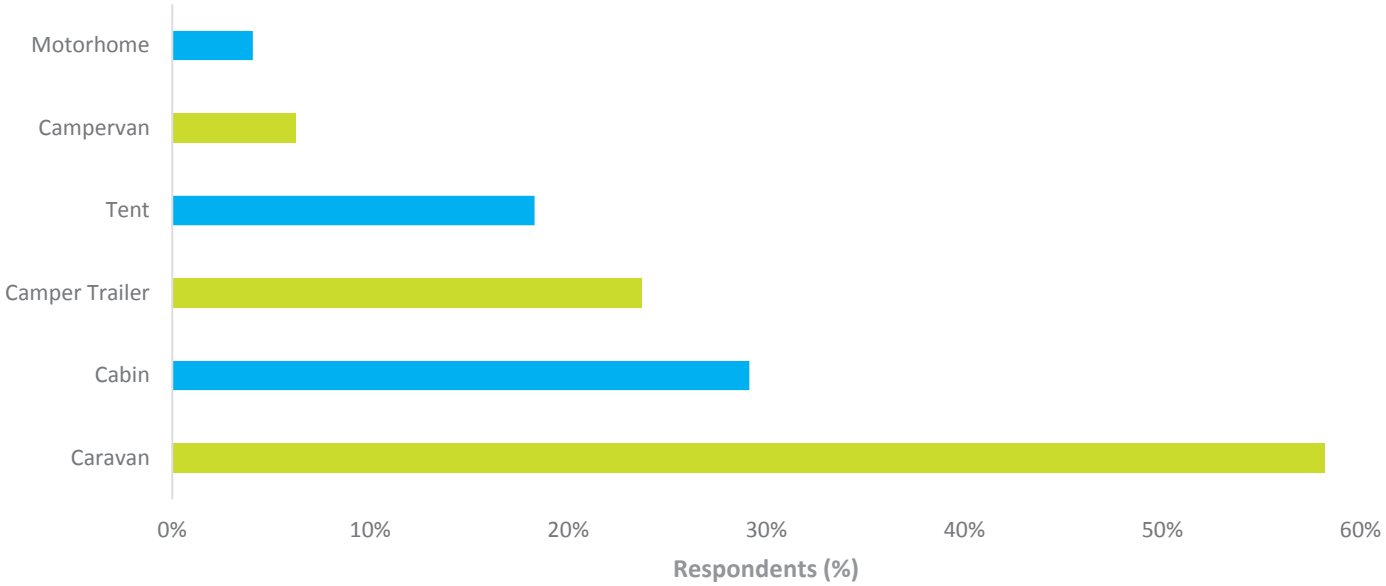
Source: Population Survey n=1000

Accommodation Types Used in Last Two Years

For those respondents who had stayed in a caravan holiday park within the last two years (n=885), 58% used a caravan during their stay while 29% stayed in a cabin. Examining accommodation usage by age group indicates that consumers aged 20 to 29 years were more likely to use a tent when overnighting in a caravan holiday park, while those aged 55 years and over had a higher usage of caravans. Cabin usage was highest among 30 to 34 years and 20 to 29 year age segments.

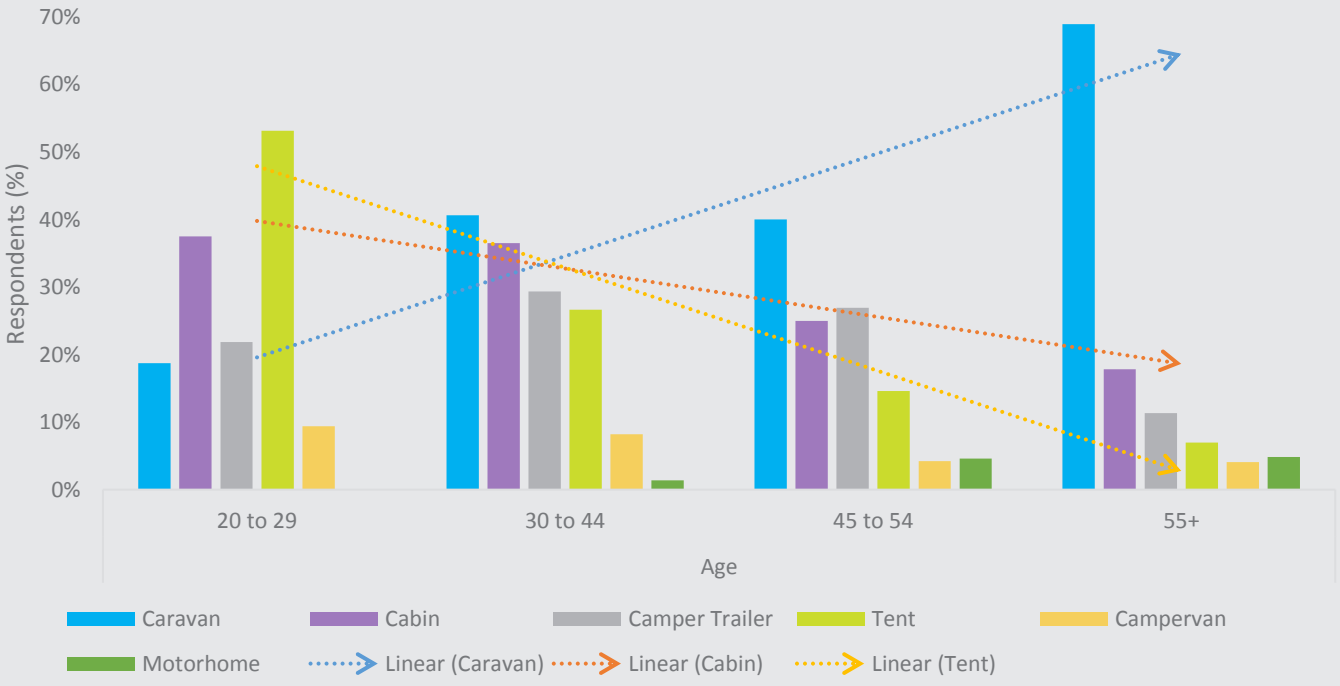
In addition, the data suggests that 30 to 44 years is the crossover period for consumers switching from camping with tents to camping with recreational vehicles. This would be expected as income for consumers increases as they progress through their 20s into their 30s, along with the higher likelihood of beginning a family which may influence the comfort and the conveniences that these consumers require.

Accommodation Types Used in a Caravan Holiday Park Within Last Two Years



Source: Online Panel n=1000

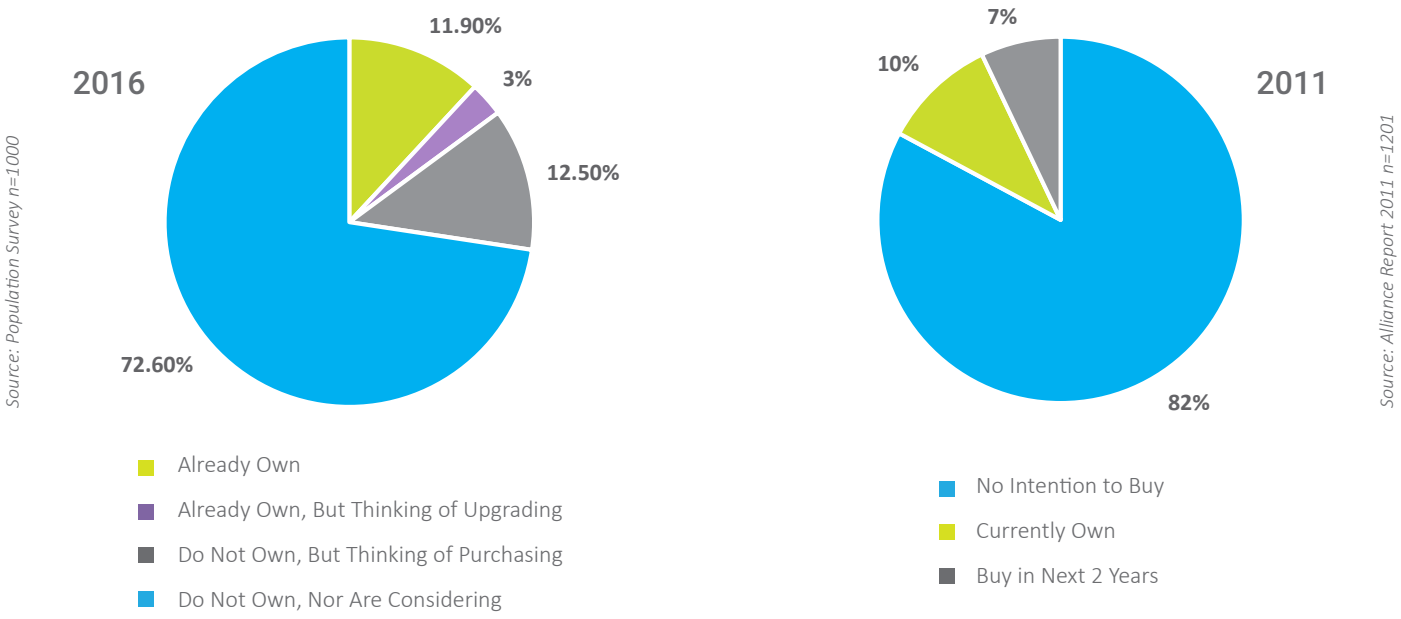
Accommodation Types Used in a Caravan Holiday Park Within Last Two Years by Age Group



Source: Online Panel n=1000

Caravan Ownership and Purchase Intention

A total of 11.9% of respondents indicated that they currently owned a caravan, motorhome or camper trailer which represents a 1.9% increase on the figure recorded in 2011. Purchase intention has increased by 8.5% from the previous survey in 2011, with 15.5% of respondents surveyed indicating they were considering buying a recreational vehicle for the first time or upgrading from an existing vehicle.



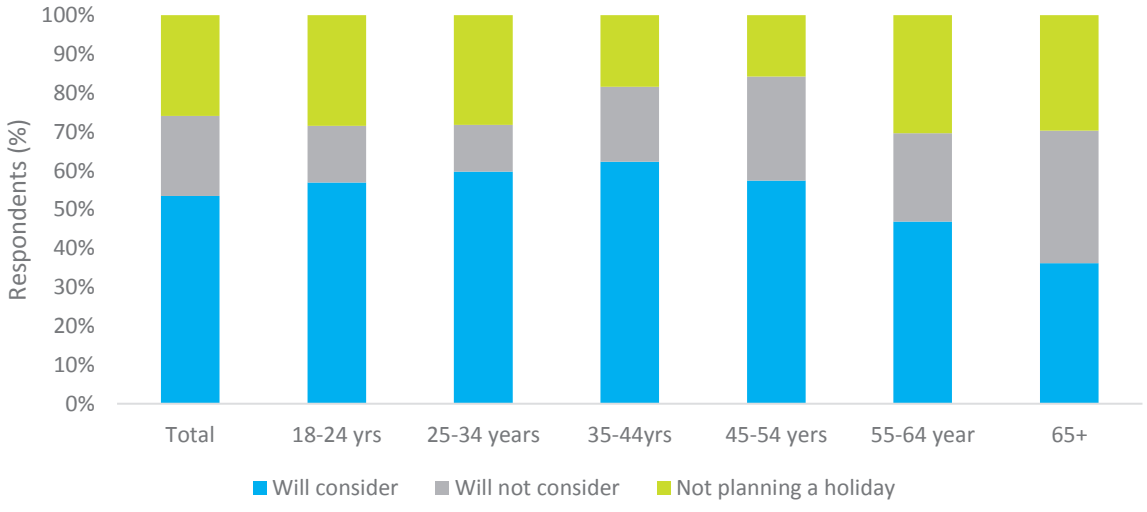
Source: Population Survey n=1000

Source: Alliance Report 2011 n=1201

Future Holiday Intentions Within the Next Two Years

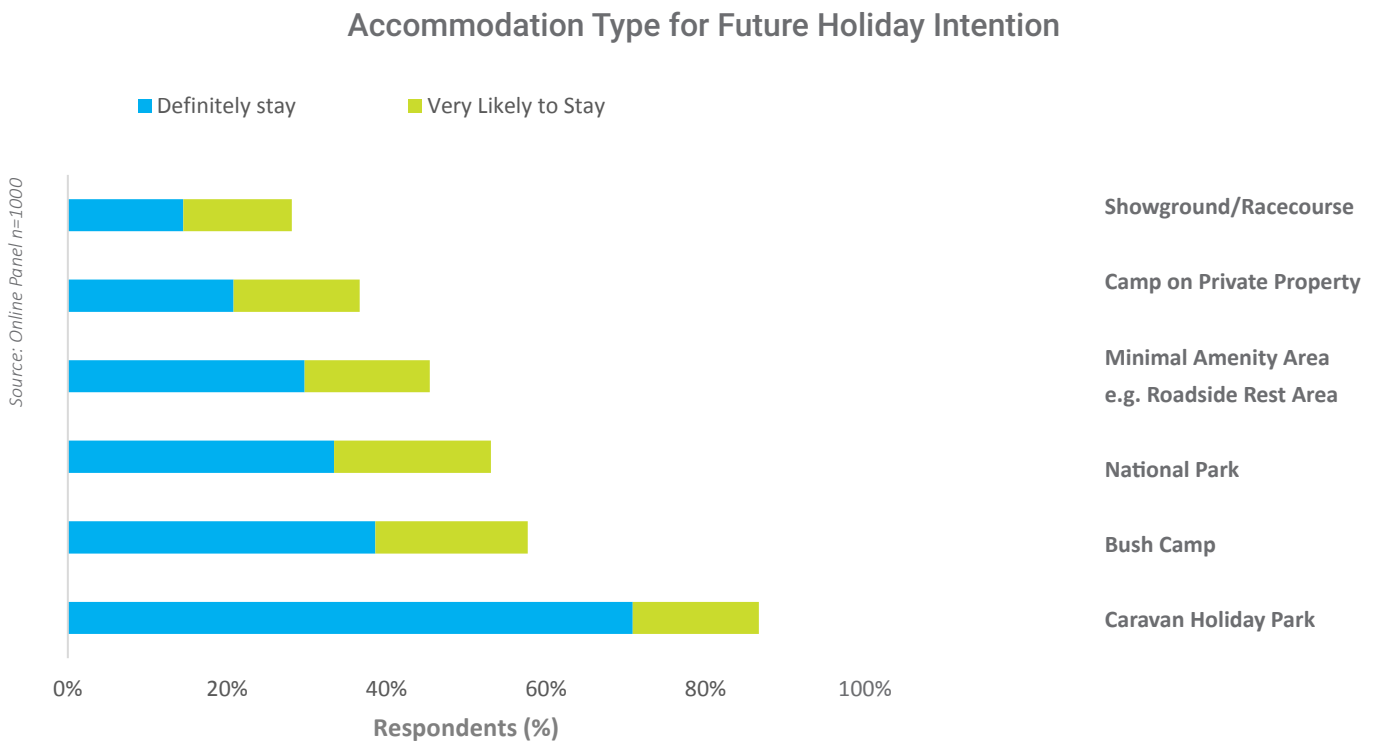
In the next two years, 53.4% of the Australian population would consider staying in a caravan holiday park, camping ground or national park while 25.9% indicated that had no plans for a holiday, however, were not against considering camping and caravanning as a future option. This would suggest that 79.3% of the Australian population has a positive purchase intention towards caravan and camping holidays. Similar to trends identified in 2011, the highest positive intentions towards caravan and camping holidays were among those Australians aged 18 to 44 years, while older segments were less likely to consider in the next two years.

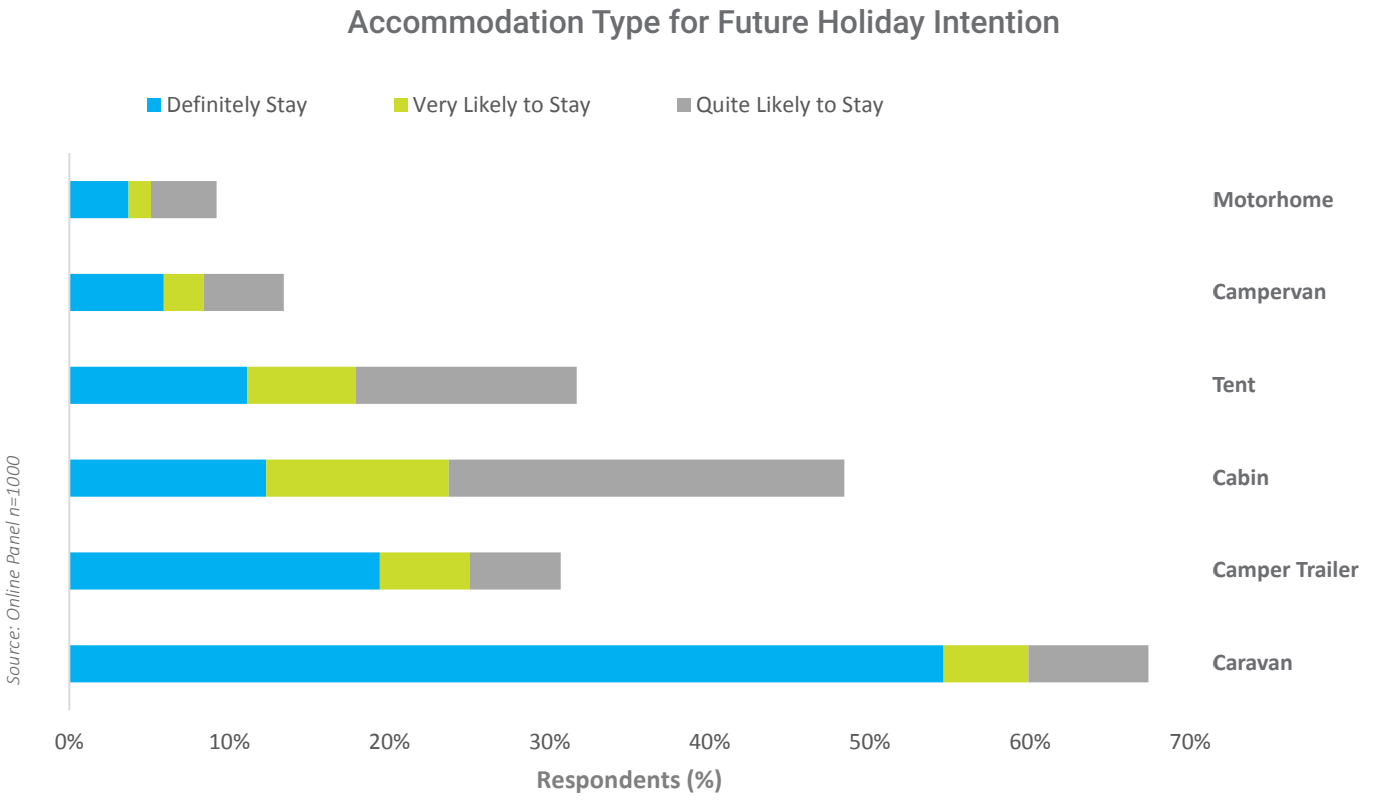
Usage of Caravan Holiday Park, Campground or National Park in Australia in the Next Two Years



Source: Population Survey n=1000

In the next two years, 95% of Australian caravanning and camping consumers indicated that they were likely to stay in a caravan holiday park with 71% stating that they would 'definitely' stay. Within a caravan holiday park, caravans and cabins were identified as the two most likely accommodation types to be used by consumers within the coming years.



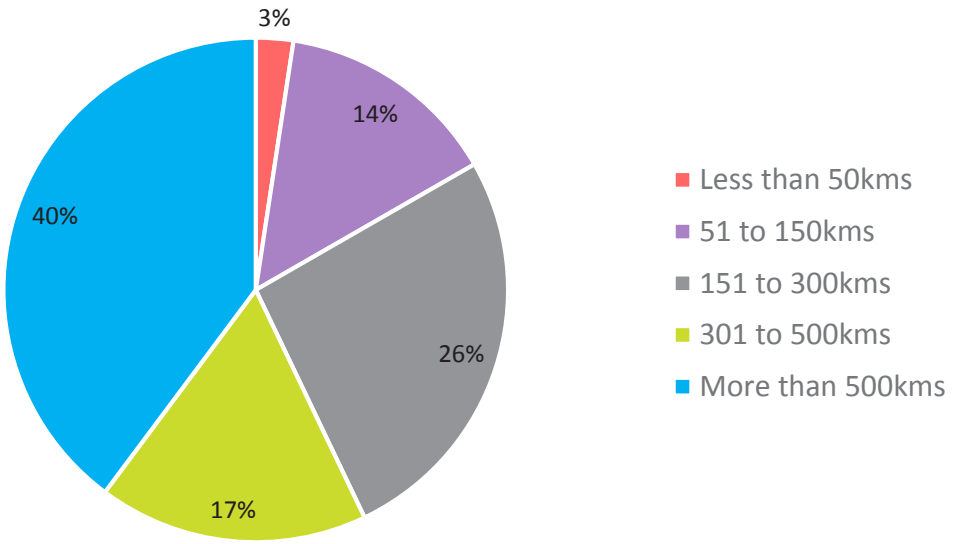


Previous Caravan and Camping Holiday

Distance from Home Travelled

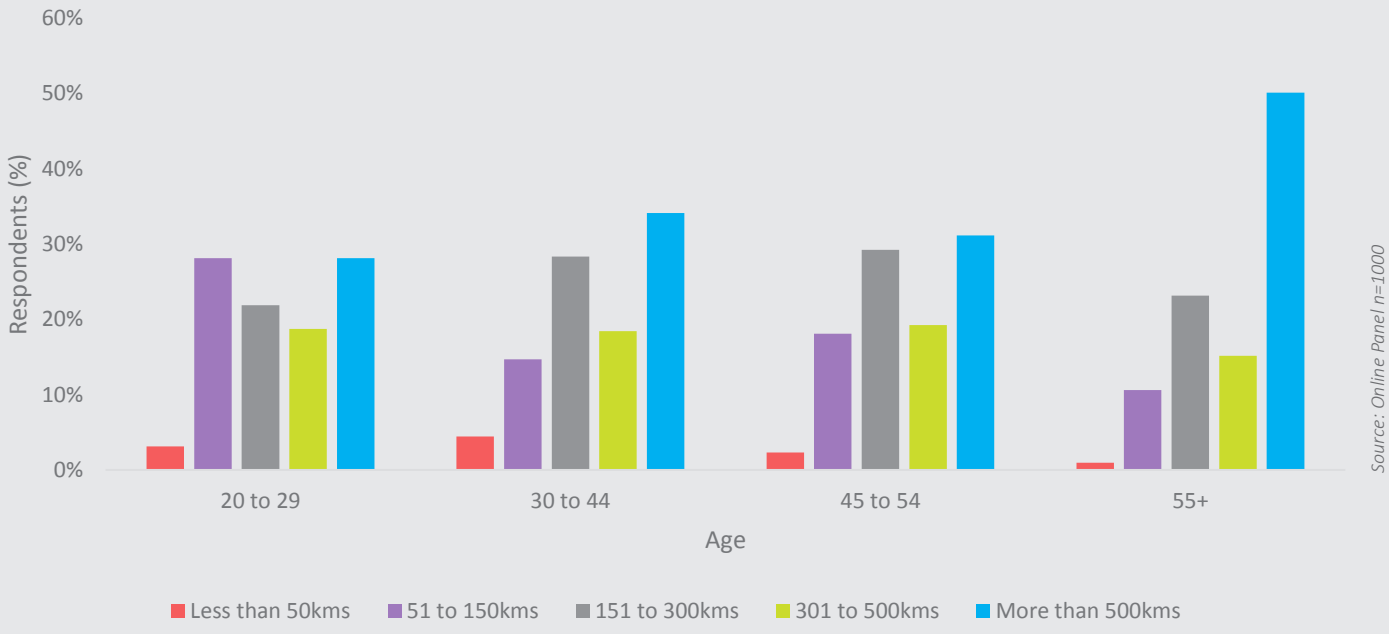
The majority of consumers surveyed (57%) indicated that they had travelled 300kms or more from their home on their last caravan and camping trip. Respondents aged 55 years of age and over (63% were retired) were more likely to travel a further distance than any other age group, which aligns with this segment having the time to travel longer due to their retirement. Younger segments, perceivably due to work, lifestyle and family commitments, were more likely to travel shorter distances from home.

Distance Travelled From Home on Previous Caravan and Camping Trips



Source: Online Panel n=1000

Distance Travelled From Home on Previous Caravan and Camping Trips by Age Group

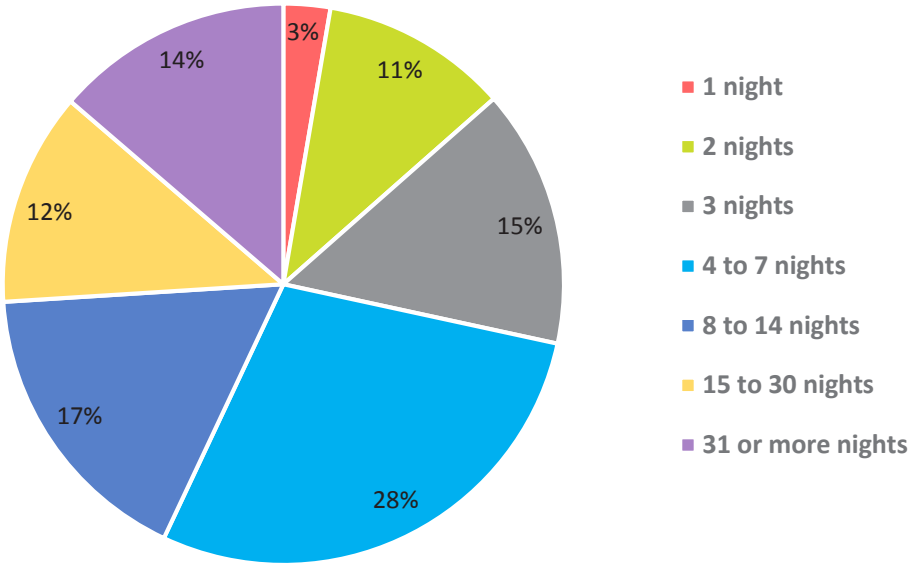


Source: Online Panel n=1000

Length of Last Trip

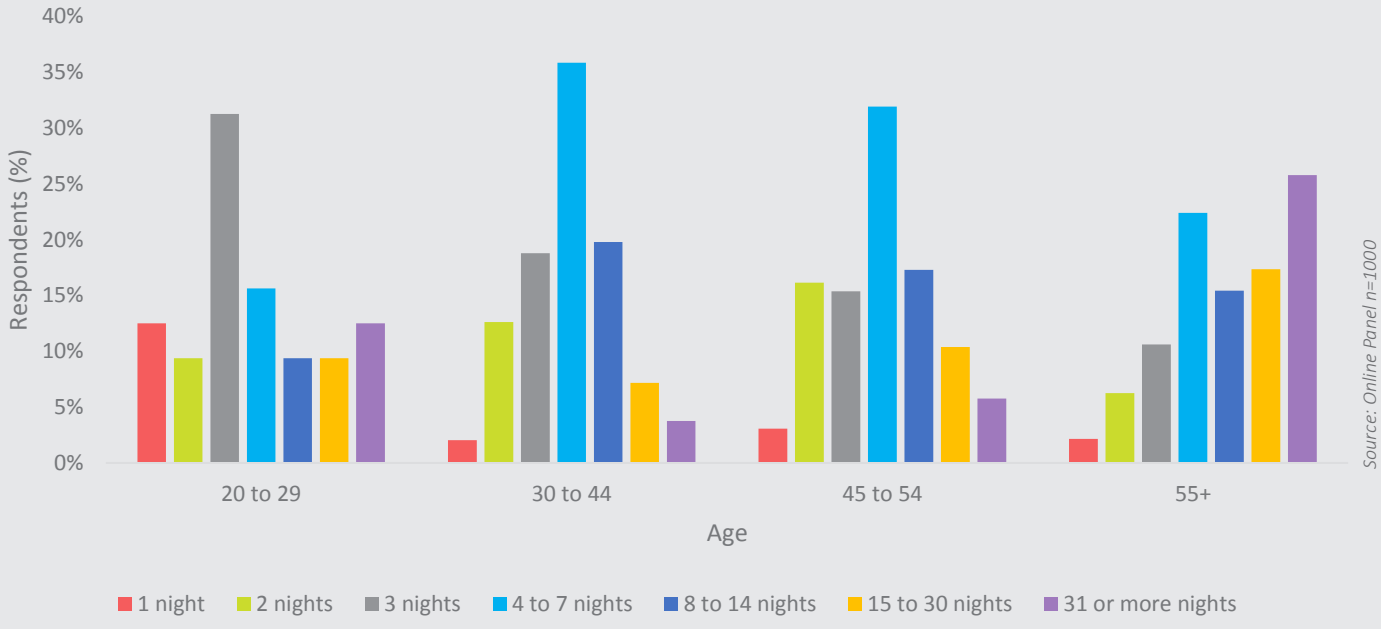
During their last trip, most adult campers (29%) undertook a caravan and camping holiday for 3 nights or less, followed by between 4 to 7 nights (28%). Consumers aged under 54 years were, on average, 28% more likely to have a holiday under 7 nights in comparison to the 55+ market who had a higher percentage (59%) of longer trips.

Length of Stay of Respondents' Previous Caravan and Camping Holiday



Source: Online Panel n=1000

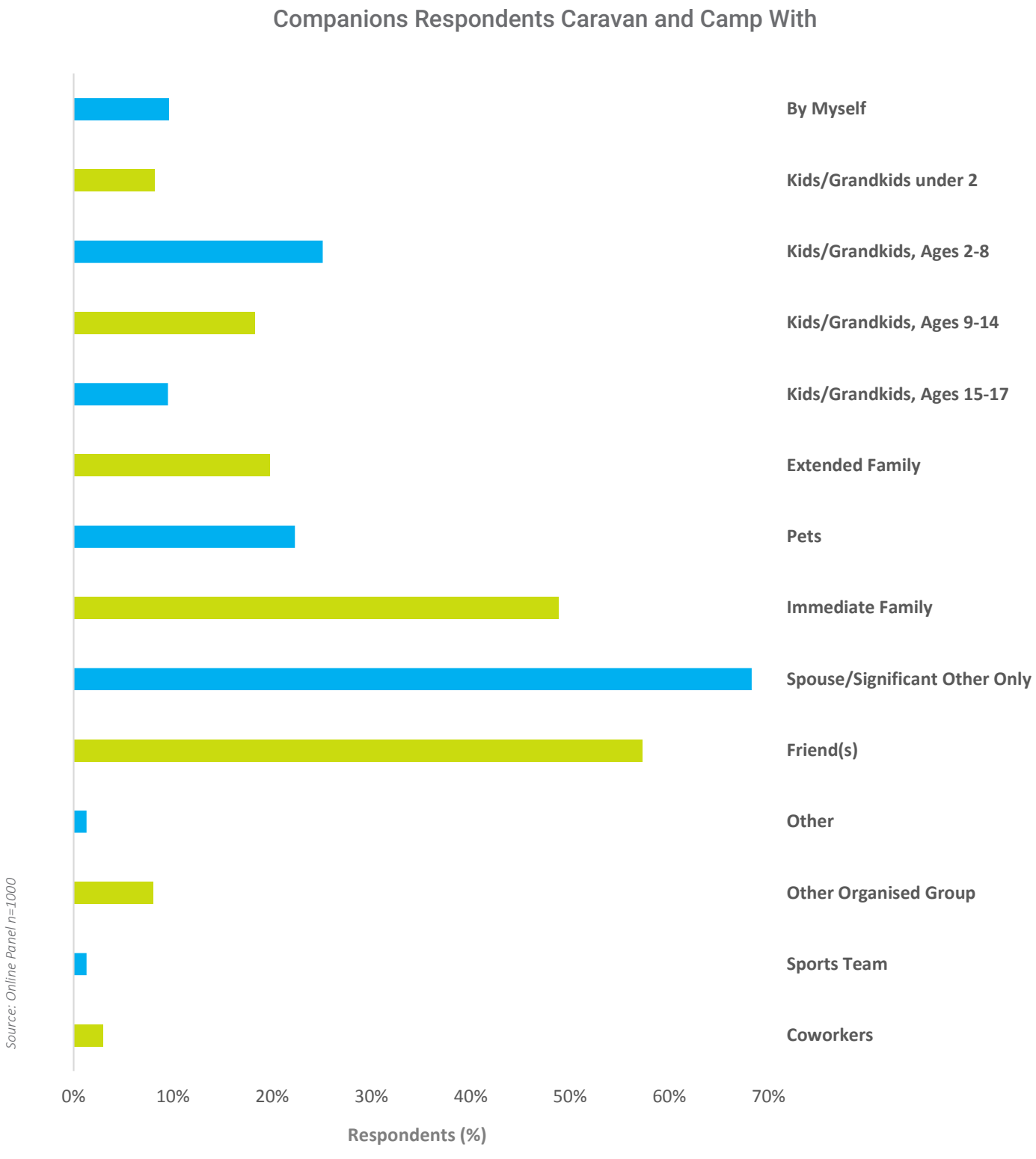
Length of Stay of Respondents' Previous Caravan and Camping Trips by Age Group



Source: Online Panel n=1000

Travel Companions

A total of 68% of adult campers indicated they had undertaken a caravan and camping trip within the last 12 months with their spouse or significant other only and 57% advised that they had travelled with friends. In addition, 61% of consumers indicated that they had travelled with children or grandchildren under the age 17 years, which continues to highlight the importance of the family market to the caravan and camping industry. Of growing interest is the 22% of caravan and camping consumers who travelled with their pets in last 12 months.

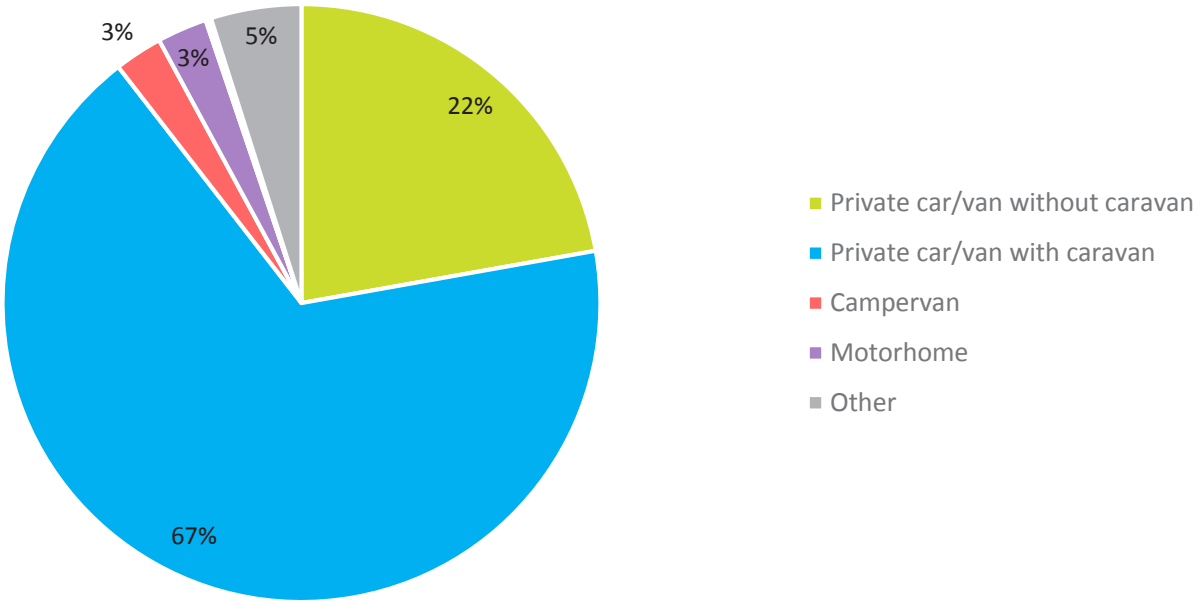


Preferred Form of Transport

The majority of consumer surveys (67%) indicated they preferred to travel by private car towing a caravan.

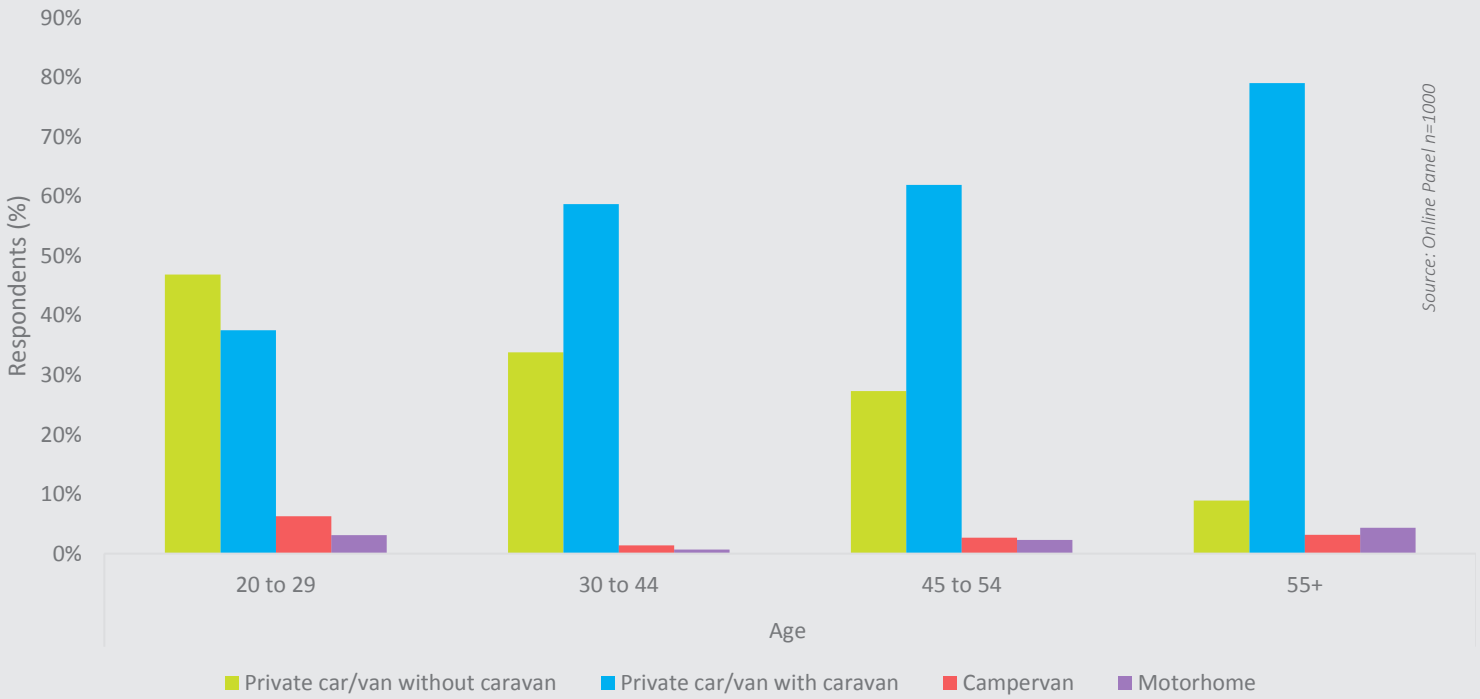
However, consumers aged 20 to 29 years of age, as similar to accommodation usage trends on page 9, were more likely to travel by private car without a caravan with 47% of respondents indicating this preference.

Main Form of Transport That Respondents Prefer to Use When Caravan and Camping



Source: Online Panel n=1000

Main Form of Transport That Respondents Prefer to Use When Caravan and Camping by Age Group

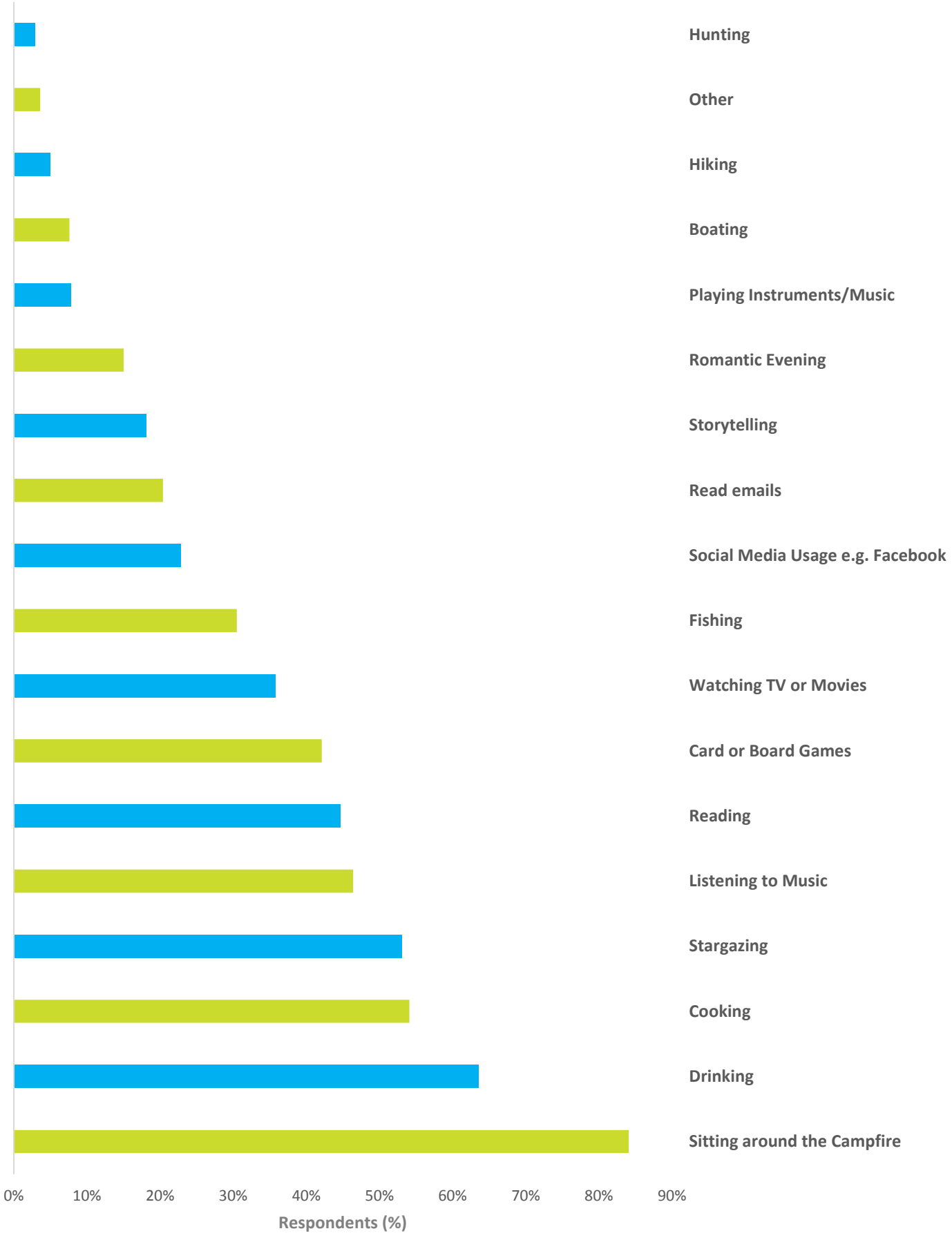


Source: Online Panel n=1000

Activities Respondents Enjoy When Caravan and Camping

Source: Online Panel n=1000

Night Time Activities Respondents Participate In When Caravan and Camping



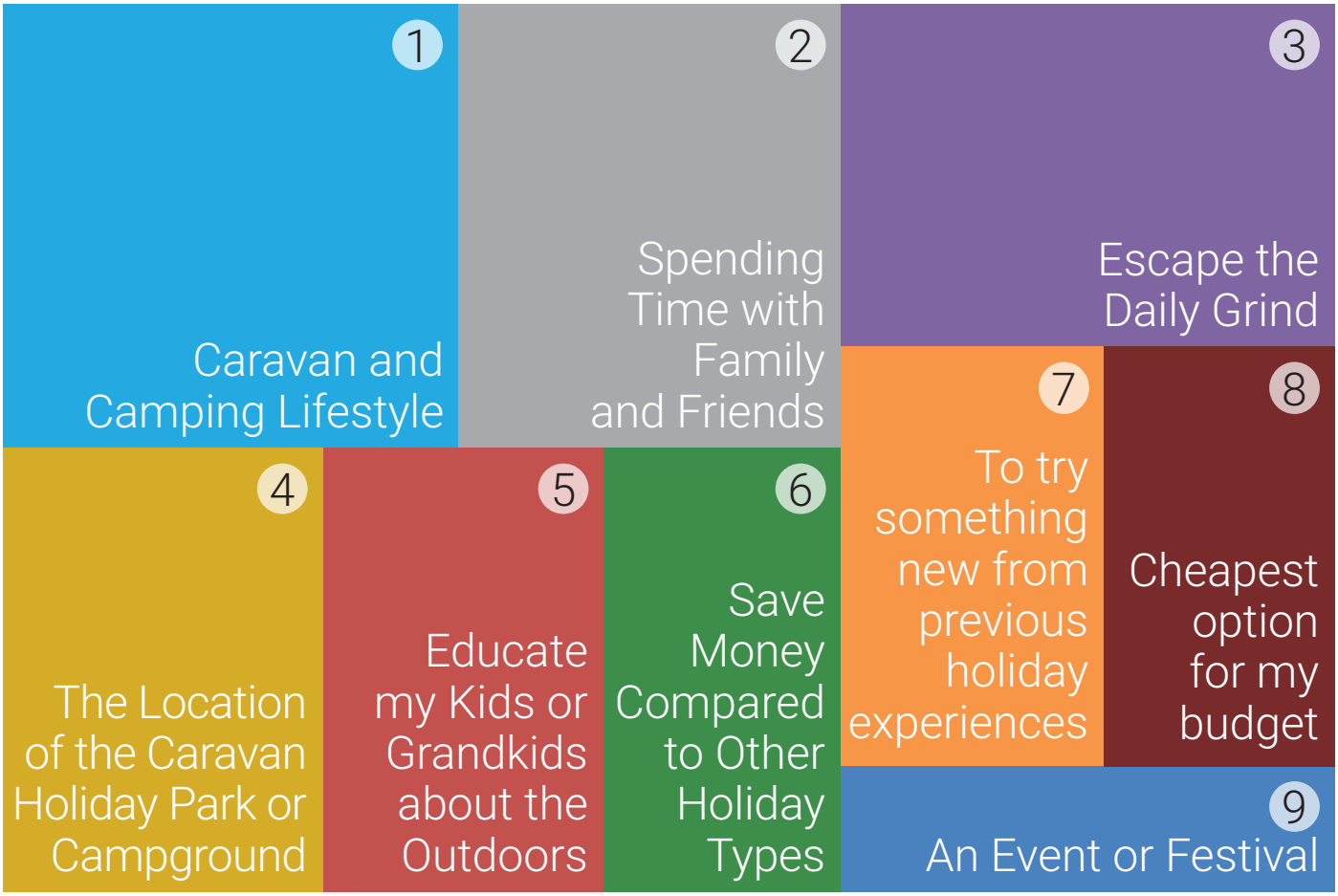
Source: Online Panel n=1000

Purchase Process

Motivation

The 'caravan and camping lifestyle' along with 'spending time with family and friends' were the two main motivations for respondents to undertake a caravan and camping trip within the last 12 months. This is followed by respondents who were travelling to 'escape the daily grind' and those who were travelling to specifically spend time in the destination where the caravan holiday park or campground was located.

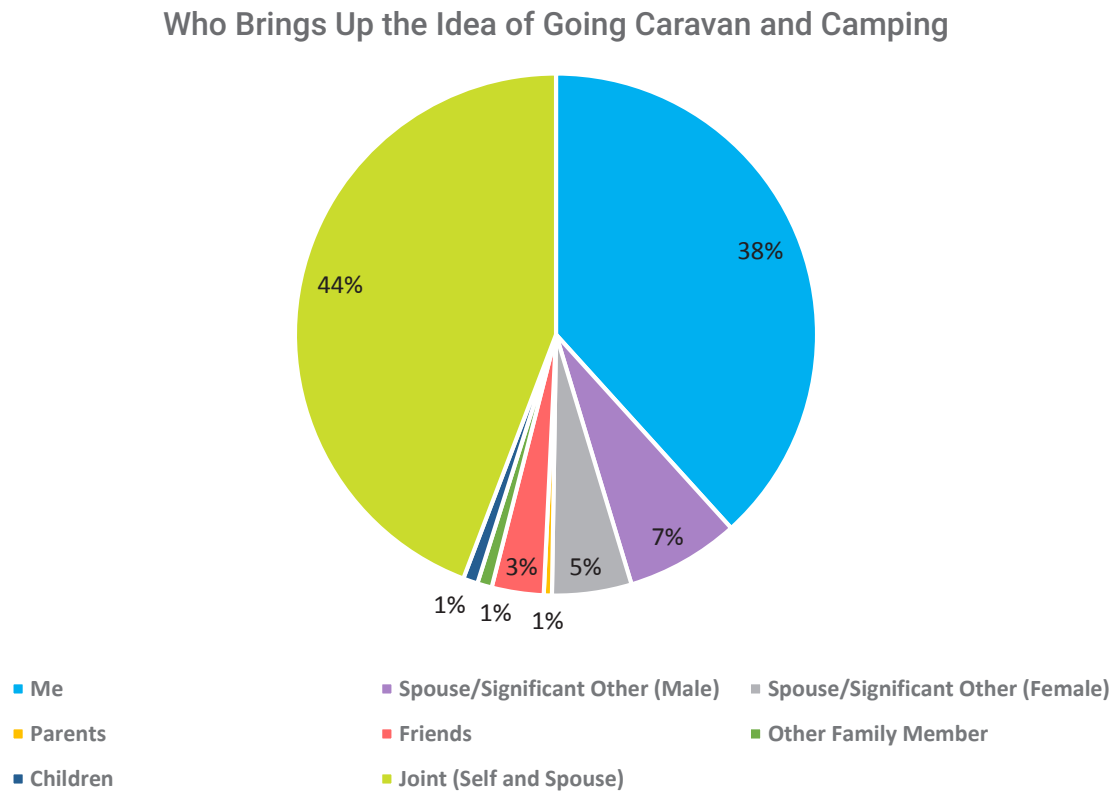
Main Motivations for Caravan and Camping in the Last Twelve Months



Source: Online Panel n=1000

Decision Making

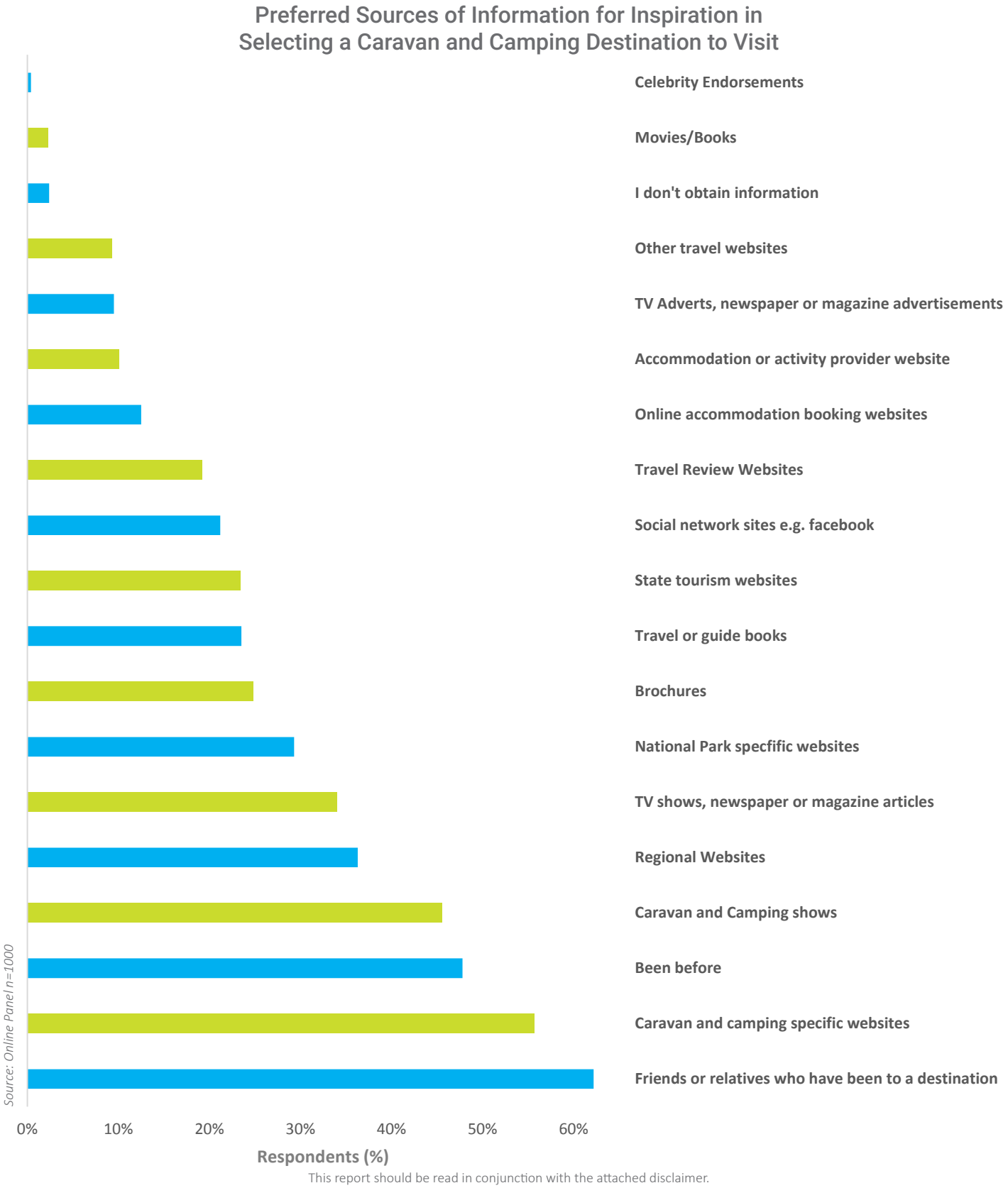
In general, the idea to undertake a caravan and camping holiday is primarily made as a joint decision between the respondent and their spouse, with 44% of consumers surveyed indicating this. This is closely followed by 38% of respondents (62% male and 32% female) who implied that they were solely responsible for suggesting the idea of experiencing a caravan and camping trip.



Source: Online Panel n=1000

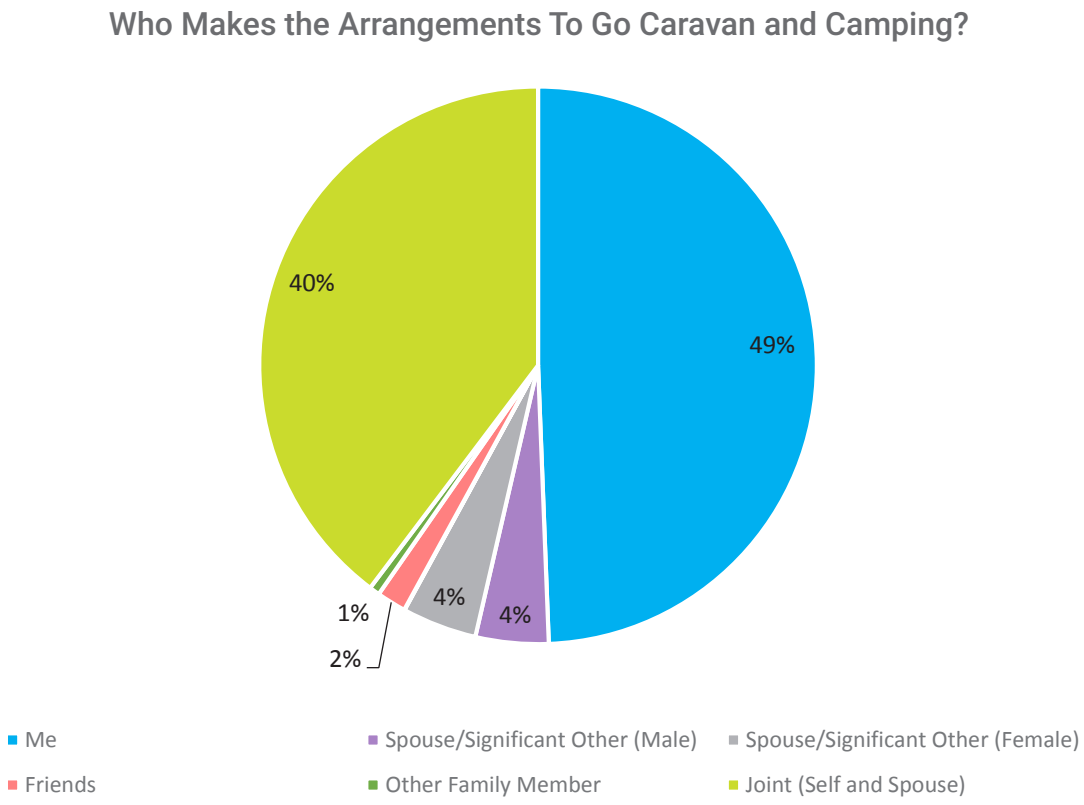
Sources of Information for Inspiration

Two thirds of consumers surveyed indicated that friends or relatives who had been to a destination previously were their preferred sources of information for inspiration when selecting a destination to go caravan and camping. This indicates the importance that brand ambassadors have in encouraging increased caravan and camping visitors among their family and peers. Caravan and camping specific websites were the second most important sources of information when looking for inspiration.



Travel Planning

A total of 49% of adult respondents indicated they generally made the arrangements to go caravan and camping by themselves (45% female and 55% male), while 40% indicated that they collaborated jointly with their spouses when arranging trips. This indicates that although male consumers are considerably more involved in the overall purchase process, female consumers play a more active role in planning than initiating travel.

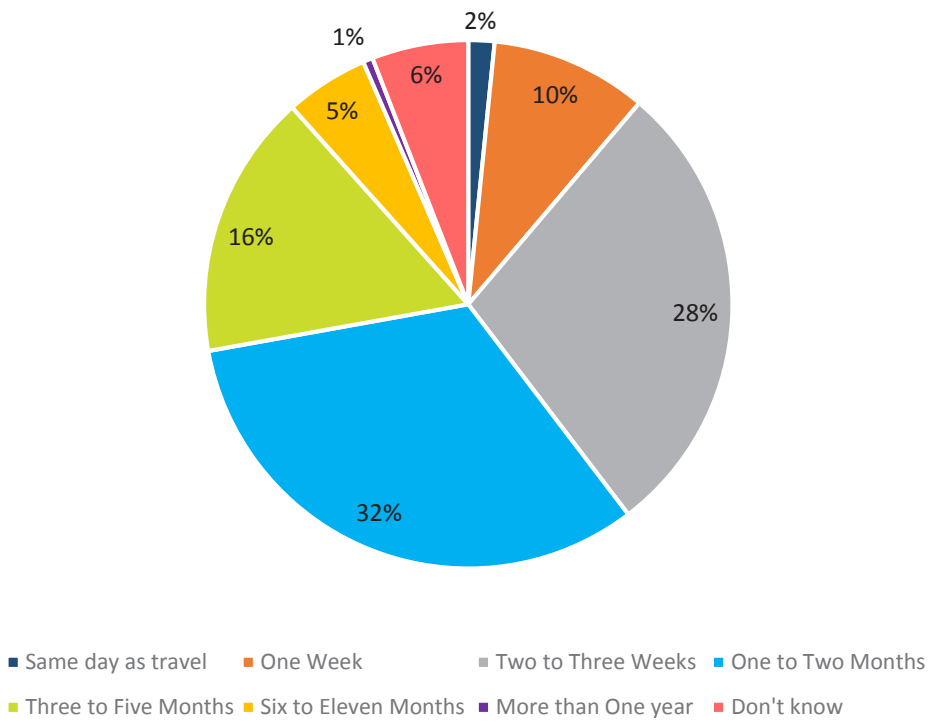


Source: Online Panel n=1000

Length of Research and Planning

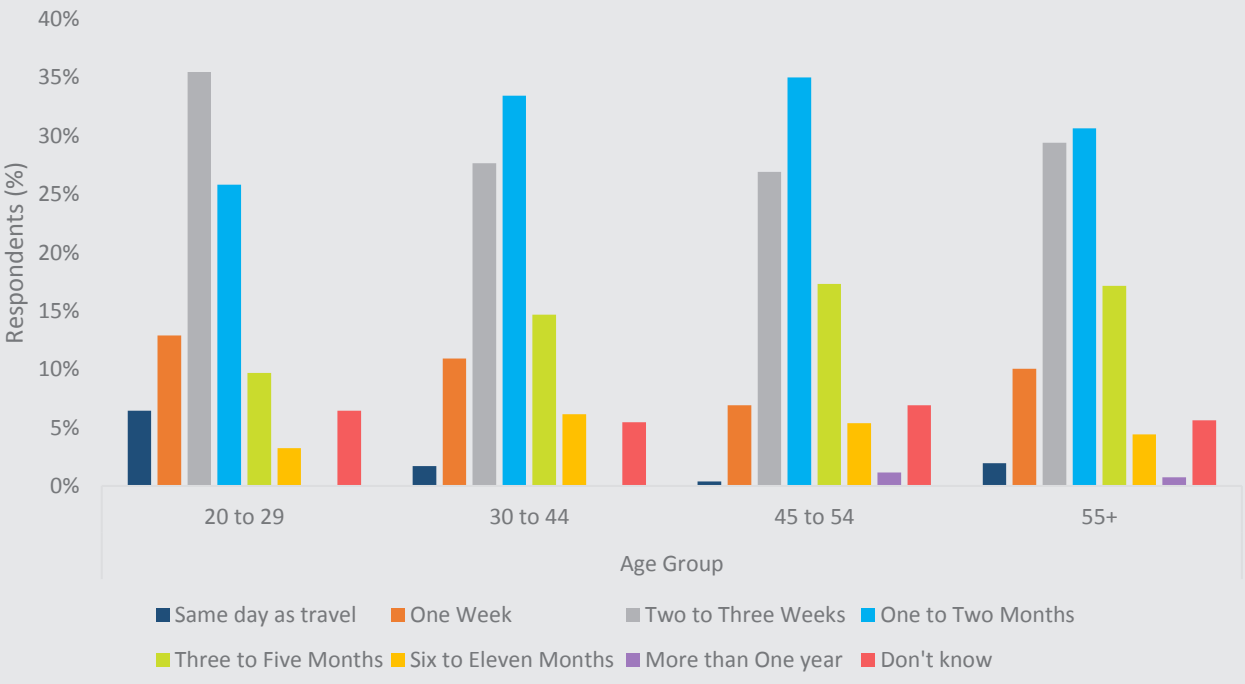
It was indicated by 32% of survey respondents that they generally prefer to research and plan a caravan and camping trip 'one to two months' ahead of departure, followed by 28% and 16% who indicated they prefer to plan their trips 'two to three weeks' and 'three to five months' before departure. Consumers aged 20 to 29 years were more likely to have shorter booking lead times before travelling as opposed to older markets.

Preferred Planning Length Prior to Departure



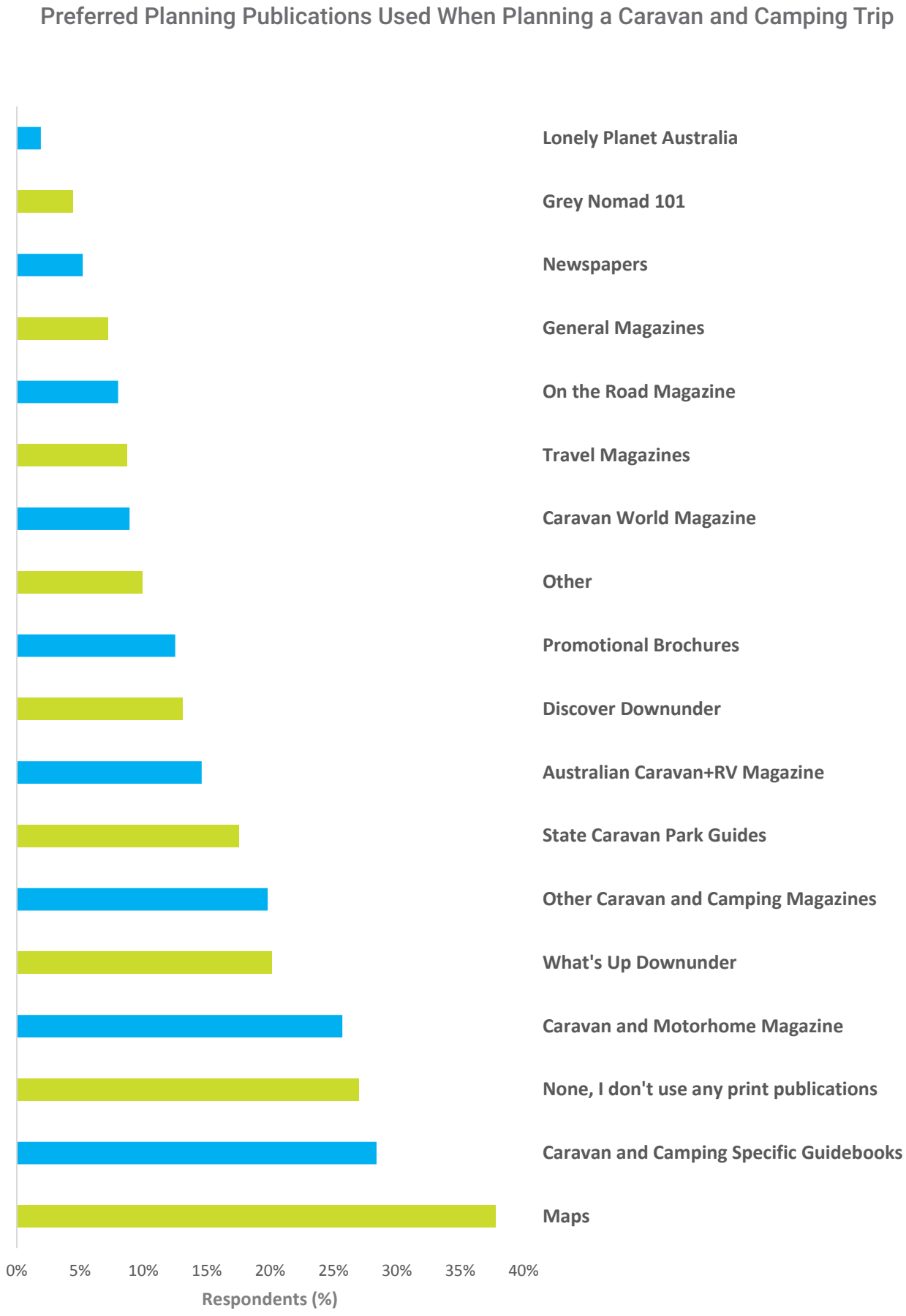
Source: Online Panel n=1000

How Long Consumers Prefer to Research and Plan Their Caravan and Camping Trip Prior to Departure (Age Analysis)



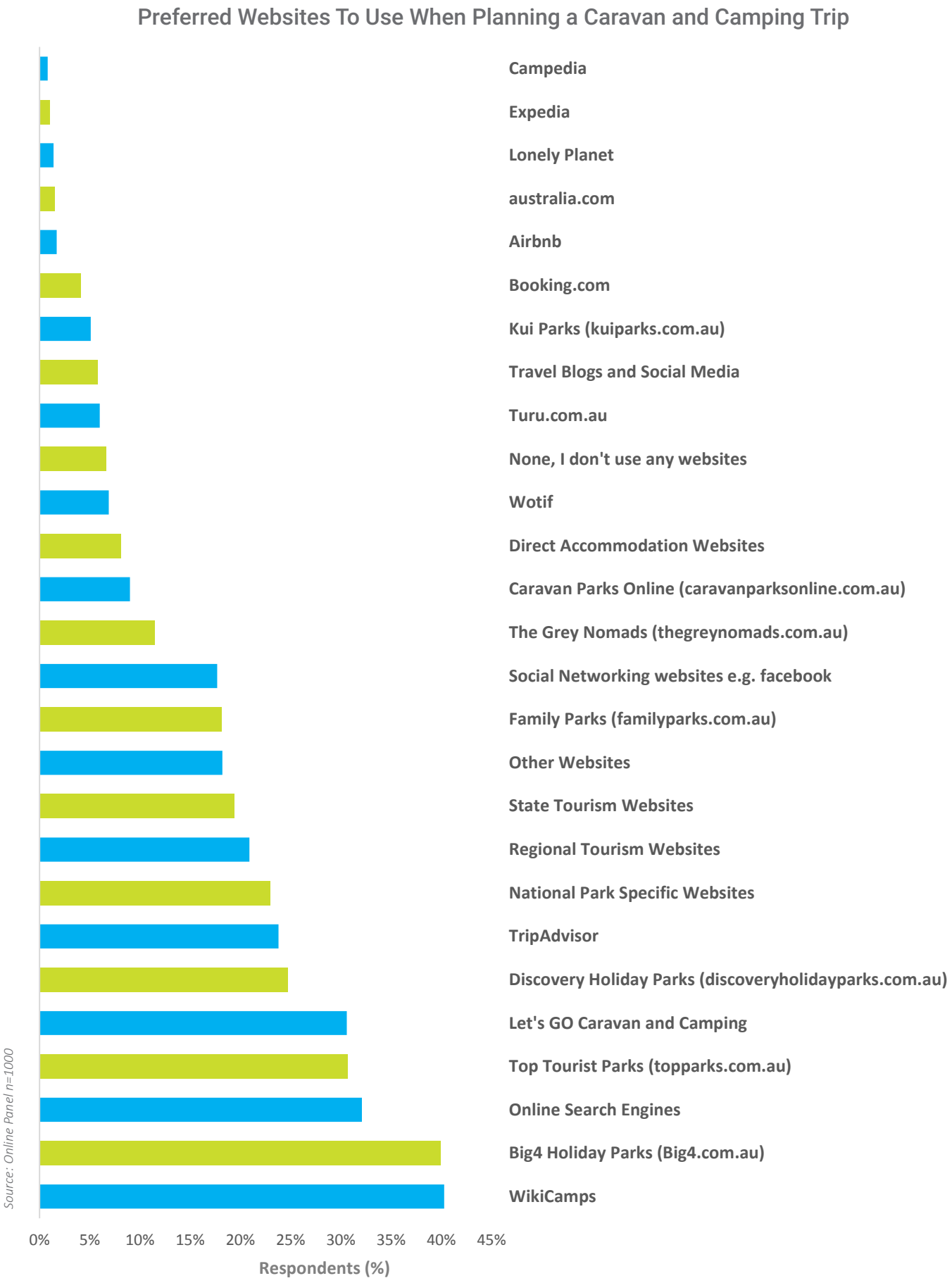
Source: Online Panel n=1000

Sources of Print Information Used for Research and Planning



Source: Online Panel n=1000

Sources of Digital Information Used for Research and Planning

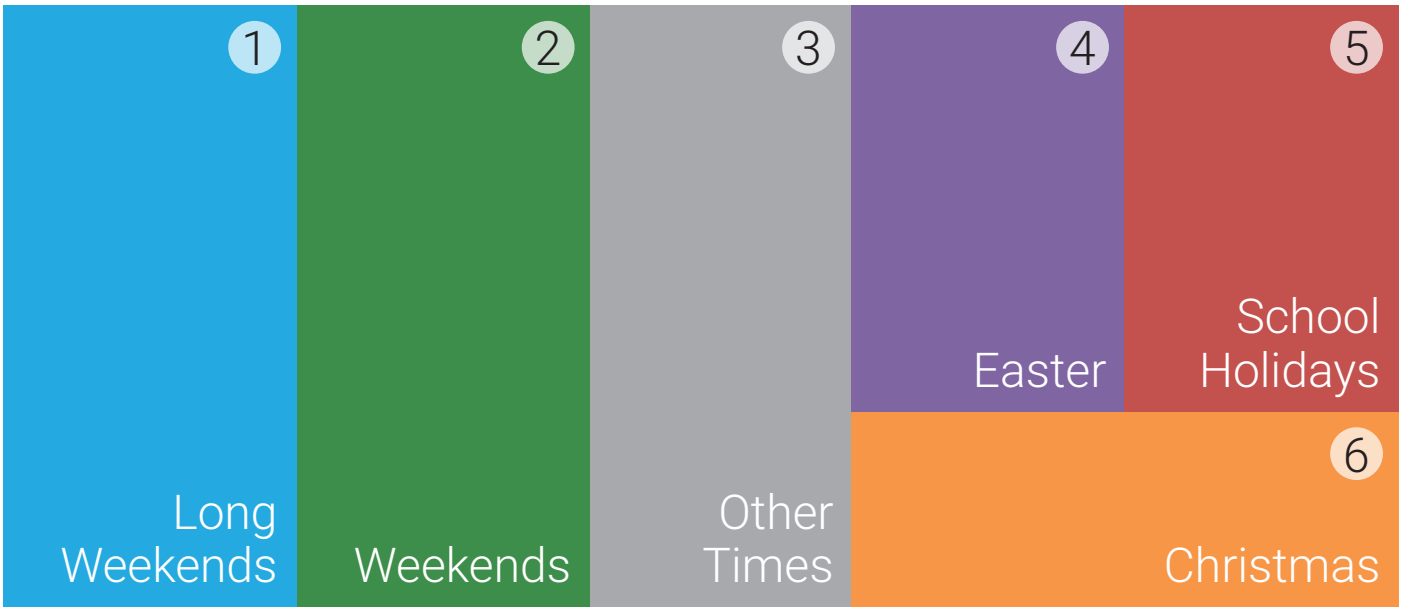


1995
SURFBREAK

Preferred Travel Time of Year

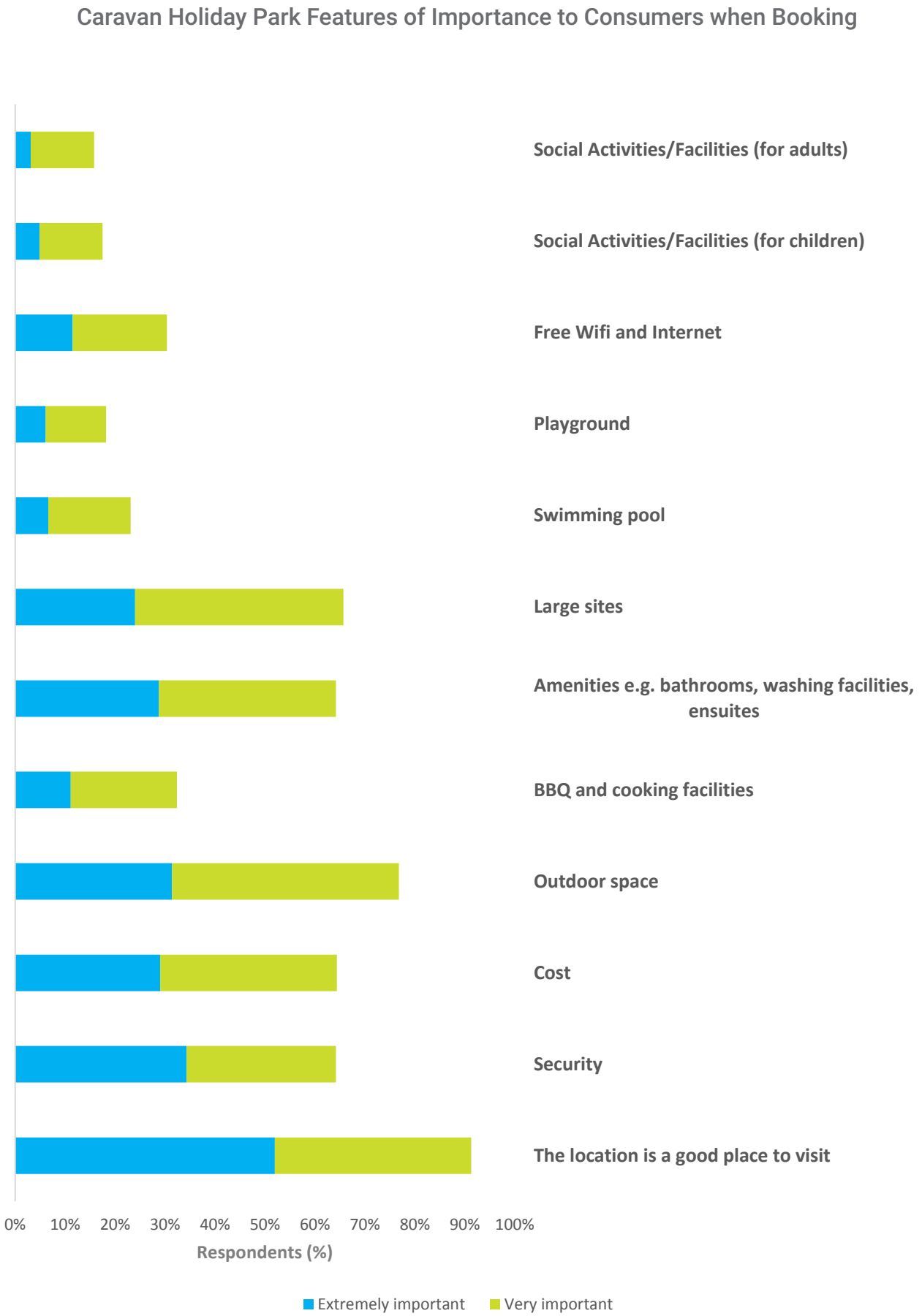
'Long Weekends' and 'Weekends' were the two most preferred times of the year that survey respondents indicated that they would like undertake a caravan and camping holiday. This trend aligns with length of stay analysis indicating a significant proportion of respondents who travelled for 3 nights or less.

Preferred Time of Year to Take a Caravan and Camping Holiday



Source: Online Panel n=1000

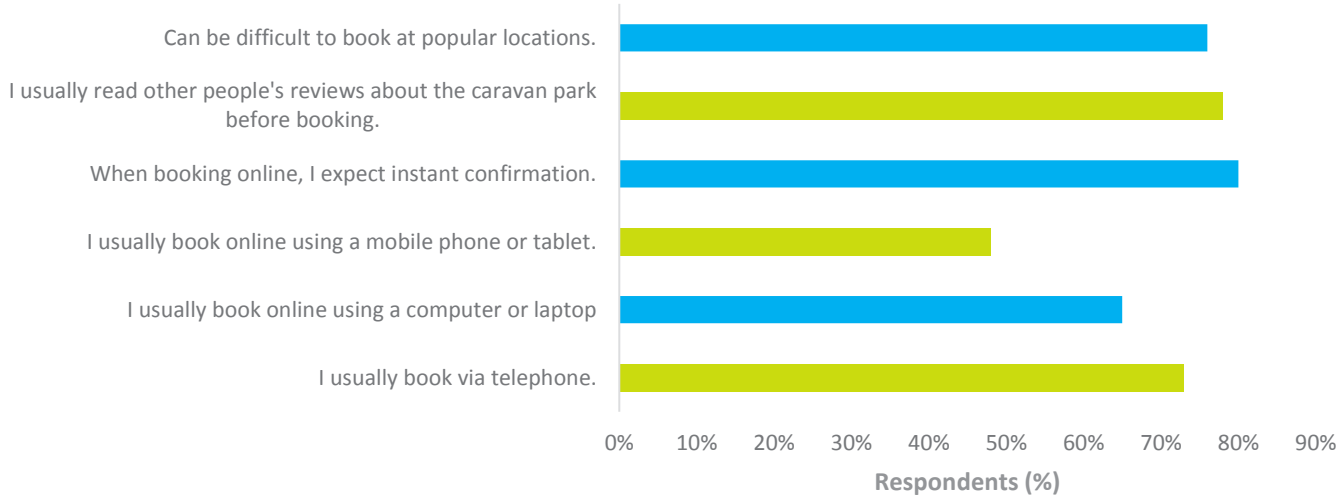
Caravan Holiday Park Features



Source: Online Panel n=1000

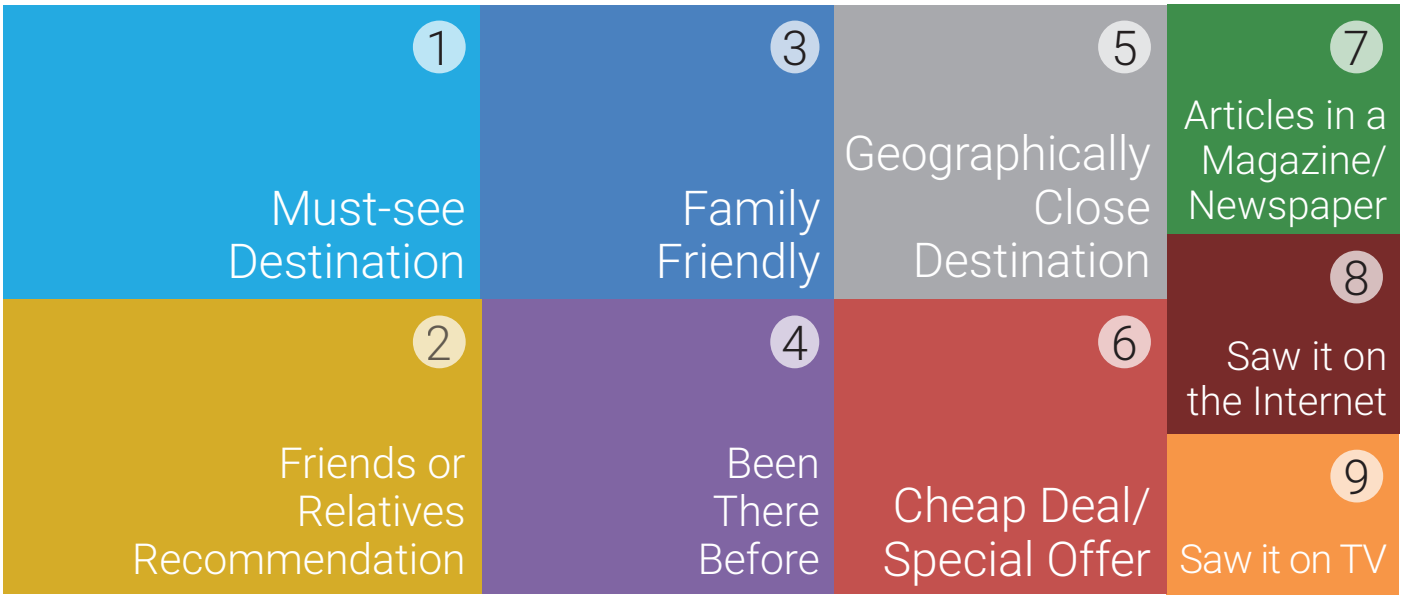
Attitudes to Booking a Caravan Holiday Park

Consumer Expectations When Making a Booking at a Caravan Holiday Park



Source: Online Panel n=1000

Factors That Influence Destination Selection to go Caravan and Camping



Source: Online Panel n=1000

Sample Profile

Sample Profile for Let's Go Caravan and Camping Online Consumer Panel

		Respondents (%)
Age	15 - 19 years	-
	20 - 29 years	3.2%
	30 - 44 years	29.3%
	45 - 54 years	26%
	55+ years	41.5%
Gender	Male	54.5%
	Female	45.5%
Have Children under 18 years	Yes	38.6%
	No	61.4%
Work Status	Full Time	41.5%
	Part Time/Casual	17.6%
	Retired	21.6%
	Stay at Home Parent	4.6%
	Other	14.7%
State of Residence	ACT	1.9%
	NSW	27.6%
	NT	0.6%
	QLD	21.4%
	SA	10.9%
	TAS	3.3%
	VIC	23.4%
	WA	10.9%
Household Income (net)	< $40,000	14.5%
	$40,000 - $80,000	26.1%
	> $80,000	27.5%
	Did not disclose	31.9%

Note: 20-29 years is under represented in this sample

Source: Online Panel n=1000

Sample Profile for Population Survey

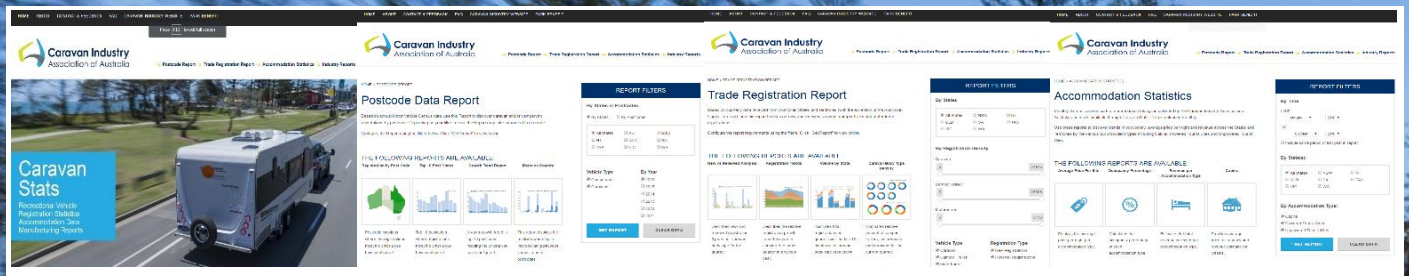
		Respondents (%)
Age	18 - 24 years	17.9%
	25 - 34 years	21.7%
	35 - 44 years	16.1%
	45 - 54 years	16.2%
	55 - 64 years	16%
	65+ years	12.2%
Gender	Male	49%
	Female	51%

Source: Population Survey n=1000

Have you been using CaravanStats to help your business?

CaravanStats is an online portal of all major research within the industry, specifically allowing users to navigate postcode data, trade registration data and accommodation data reports.

These reports, built off data from the ABS, State Government and Park Operators are useful for businesses especially if you are looking to identify business opportunities, RV purchase trends in specific areas or understand occupancy and revenue takings.



Since its launch in 2015, CaravanStats has been providing businesses with relevant data to assist in a variety of business needs:

Park Chain

"The Postcode Data and Trade Registration reports are very useful. The density of caravan and campervan registrations and the registrations growth, better enables us in targeting our marketing efforts."

Manufacturer

"I have logged in a couple of times now and find the Caravan Stats website an extremely useful resource. The first time I logged I was impressed with the level of content. Being able to compare market/industry sales information with our warranty registrations to see patterns is a large help. It's also beneficial to see where possibilities exist to potentially expand service agent requirements in areas densely populated with caravan owners. It's quite eye opening to see how many units are out there and the general state of play the industry is in."

If you are yet to visit the site, head to www.caravanstats.com.au today and begin using this great free-to-access resource to advance your business.

Caravan Industry Association of Australia

ACCREDITED Caravan Industry Association of Australia YOUR KEY TO SUCCESS ™

Let's GO CARAVAN & CAMPING ™

Melbourne Office
Suite 6, Level 1,
214 Graham Street
PORT MELBOURNE VIC 3207
03 9815 2015

Brisbane Office
Unit 9/10
Hudson Road
ALBION QLD 4010
07 3262 6566

Caravan Industry Association of Australia

research@caravanindustry.com.au

www.caravanindustry.com.au

This document has been carefully prepared, but it has been written in general terms and should be seen as broad guidance only. The document cannot be relied upon to cover specific situations and you should not act, or refrain from acting, upon the information contained therein without obtaining specific professional advice. Caravan Industry Association of Australia Ltd, their partners, members and/or directors, employees and agents do not accept or assume any liability or duty of care for any loss arising from any action taken or not taken by anyone in reliance on the information in this document or for any decision based on it.