

Caravan Park

ACCOMMODATION
INSIGHTS

2023
AUGUST



**Caravan
Industry**
Association of Australia





Working collaboratively with member state associations on research that benefits the caravan and camping industry.

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 safe, compliant and sustainable Caravan and Camping Industry.

Report Overview

OVERVIEW

Caravan park data is crucial to understanding trends in the demand for staying in a caravan park, and the evolving preferences of consumers.

Around Australia, there are an estimated 1600 caravan parks with more than 40 sites/cabins in total. In a 'normal' year, caravan park income totals over \$2 billion nationwide, making it a vital source of income, jobs and prosperity for regional Australia. Caravan parks provide more holidays nights than any other commercial accommodation type in Regional Australia (Tourism Research Australia) hence it is vital for government & industry to be aware of trends & opportunities in the market.

Until 2015, the Australian Bureau of Statistics collected accommodation data for caravan parks and other accommodations around Australia, however when this was ceased, there was a lack of data available to access. Caravan Industry Association of Australia, in 2016, began working with caravan parks, property management systems (Newbook, RezExpert and RMS) and an external consultancy (BDO) to ensure that the industry would have access to industry benchmarks.

METHOD

Deidentified data is provided from 442 caravan parks around Australia collected through Newbook, RezExpert and RMS reservations systems and statistically compiled by BDO. To become a participant in this project please contact Caravan Industry Association of Australia research@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.

GLOSSARY

Revenue per available room (RevPAR) is a performance metric and is calculated by multiplying an accommodation's ADR by its occupancy rate.

Average Daily Rate (ADR) is monthly income divided by number of occupied cabins. Also sometimes referred to as 'tariff'.

Occupancy is total sites/cabins sold divided by stock available.

DATA PARTNERS

newbook

RMS
The Hospitality Cloud

RezExpert
Powering Global eTourism

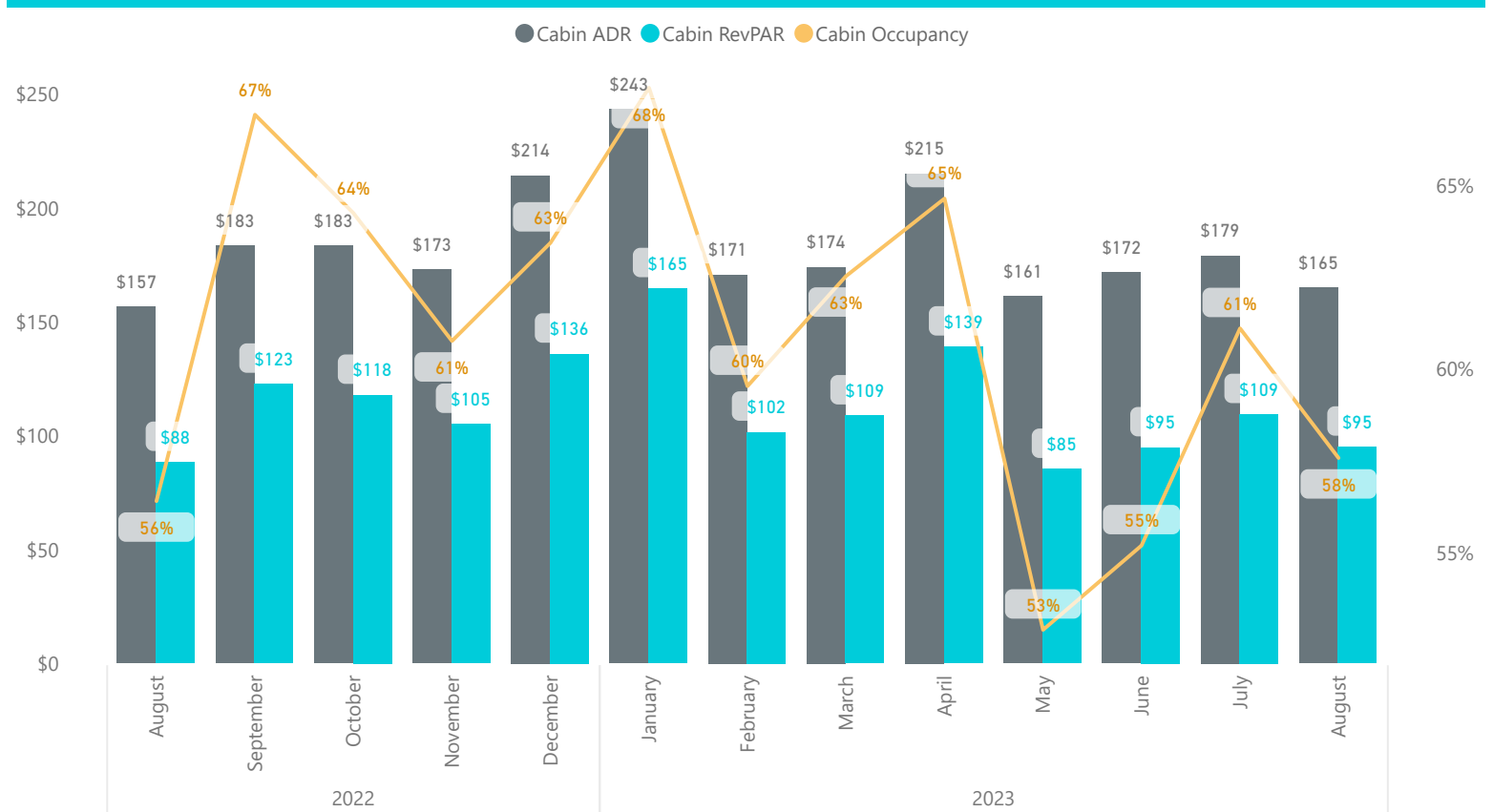
BDO

Cabins - Monthly Summary

\$165 Cabin ADR	58% Cabin Occupancy	\$95 Cabin RevPAR
5% Change from Previous Year	2% Change from Previous Year	8% Change from Previous Year

State	ADR	ADR % Change	Occup.	Occup. % Change	RevPAR	RevPAR % Change
NSW	\$163	4%	52%	10%	\$85	14%
NT	\$185	17%	80%	9%	\$148	27%
QLD	\$169	4%	73%	-6%	\$124	-2%
SA	\$137	11%	58%	-1%	\$79	10%
TAS	\$125	-2%	48%	-6%	\$60	-8%
VIC	\$147	2%	41%	-11%	\$61	-9%
WA	\$203	11%	63%	-5%	\$129	6%
Total	\$165	5%	58%	2%	\$95	8%

Cabin Performance Indicators

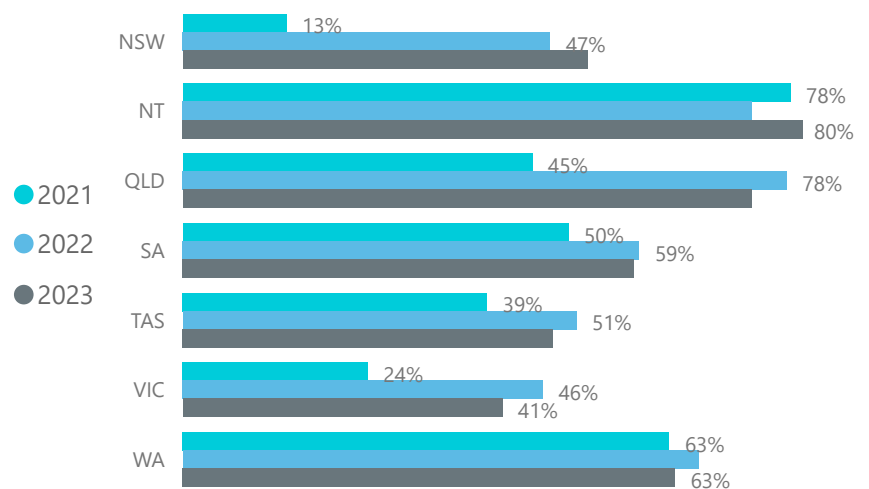


Cabins - Monthly Comparison

Cabin Occupancy (%)

Year	2023		
	June	July	August
NSW	50%	56%	52%
NT	63%	76%	80%
QLD	69%	78%	73%
SA	57%	60%	58%
TAS	39%	44%	48%
VIC	44%	47%	41%
WA	62%	69%	63%
Avg	55%	61%	58%

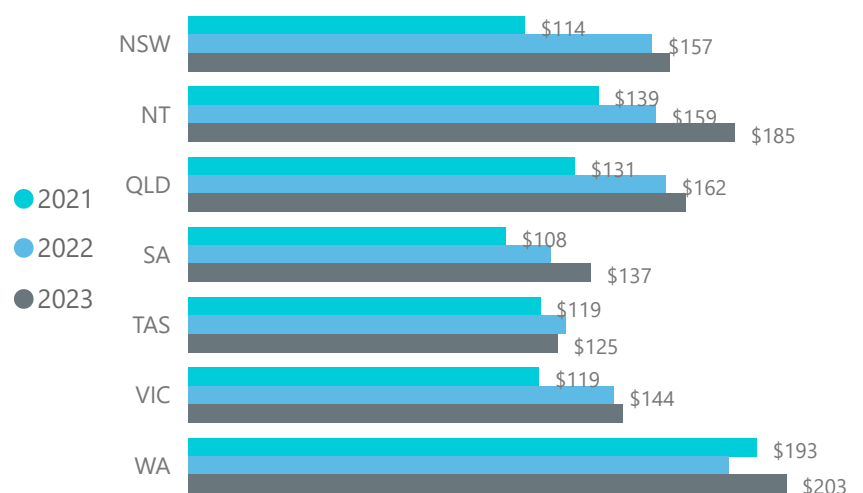
Cabin Occupancy by State Latest Month



Cabin ADR (\$)

Year	2023		
	June	July	August
NSW	\$161	\$169	\$163
NT	\$247	\$194	\$185
QLD	\$171	\$188	\$169
SA	\$147	\$151	\$137
TAS	\$141	\$146	\$125
VIC	\$168	\$165	\$147
WA	\$198	\$222	\$203
Avg	\$172	\$179	\$165

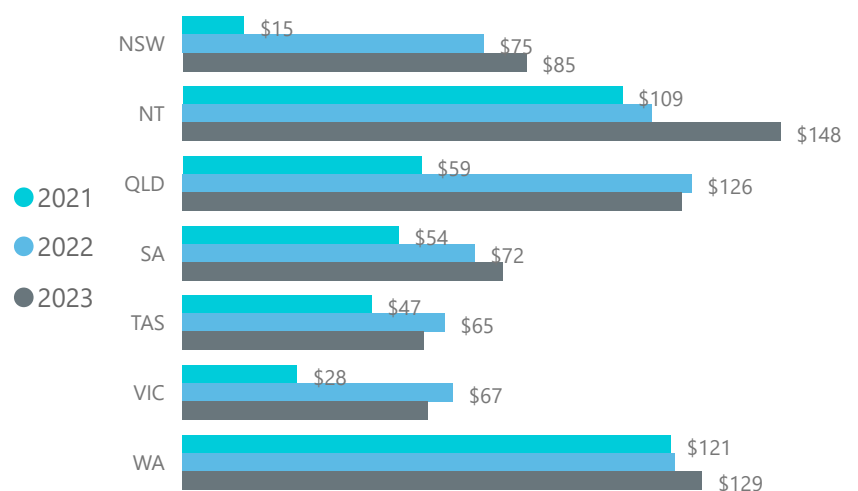
Cabin ADR by State Latest Month



Cabin RevPAR (\$)

Year	2023		
	June	July	August
NSW	\$80	\$94	\$85
NT	\$155	\$148	\$148
QLD	\$117	\$146	\$124
SA	\$84	\$90	\$79
TAS	\$55	\$64	\$60
VIC	\$74	\$77	\$61
WA	\$123	\$153	\$129
Avg	\$95	\$109	\$95

RevPAR by State Latest Month

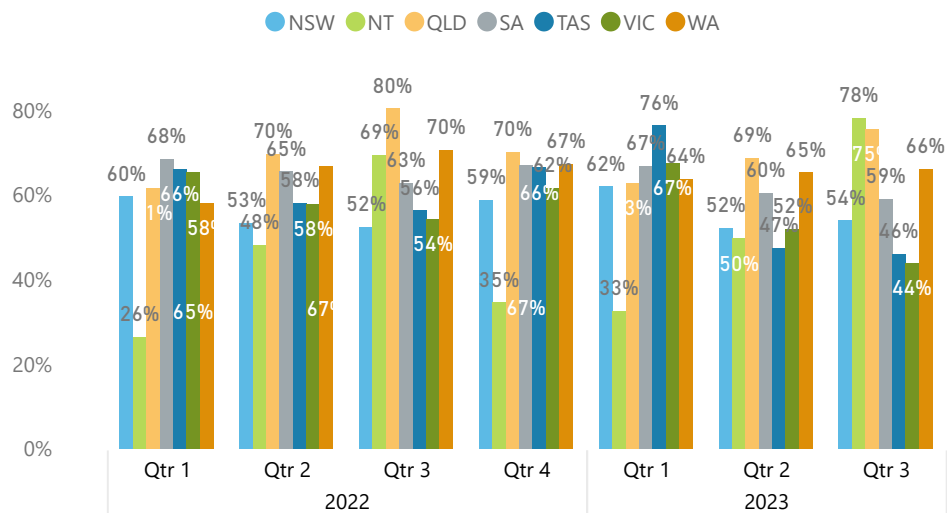


Cabins - Quarterly Comparison

Cabin Qtr Occupancy (%)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	18%	52%	54%
NT	74%	69%	78%
QLD	56%	80%	75%
SA	54%	63%	59%
TAS	48%	56%	46%
VIC	34%	54%	44%
WA	67%	70%	66%
Avg	39%	61%	59%

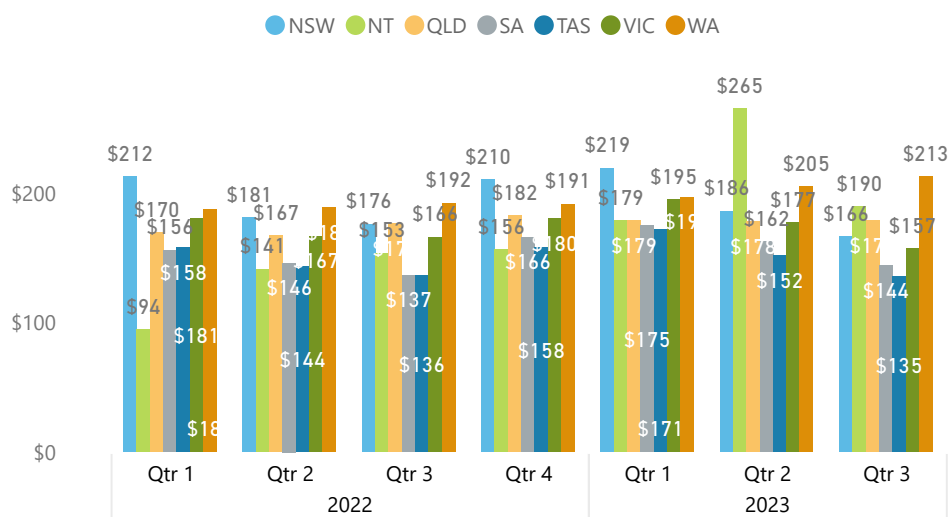
Quarterly Cabin Occupancy by State



Cabin Qtr ADR (\$)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$136	\$176	\$166
NT	\$136	\$153	\$190
QLD	\$149	\$176	\$179
SA	\$117	\$137	\$144
TAS	\$127	\$136	\$135
VIC	\$145	\$166	\$157
WA	\$194	\$192	\$213
Avg	\$149	\$172	\$172

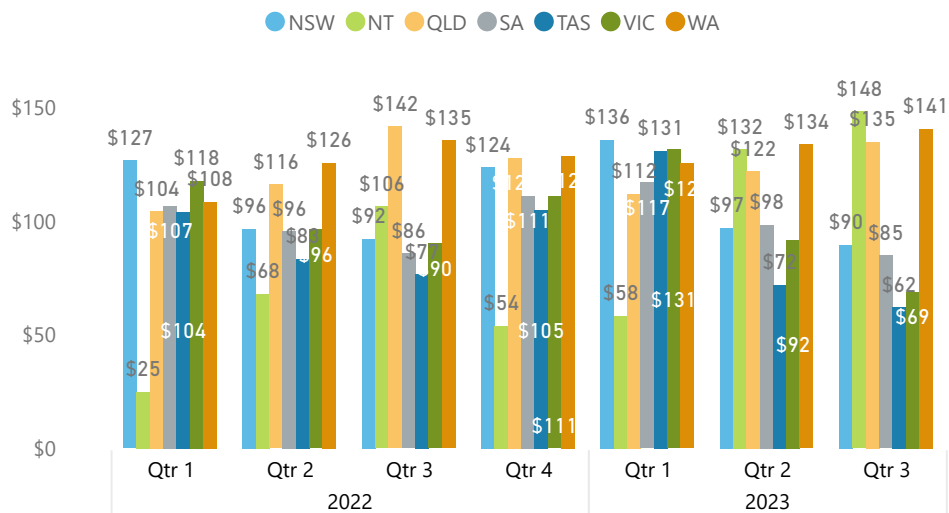
Quarterly Cabin ADR by State



Cabin Qtr Rev PAR (\$)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$24	\$92	\$90
NT	\$101	\$106	\$148
QLD	\$83	\$142	\$135
SA	\$64	\$86	\$85
TAS	\$61	\$77	\$62
VIC	\$49	\$90	\$69
WA	\$129	\$135	\$141
Avg	\$59	\$105	\$102

Quarterly Cabin RevPAR by State

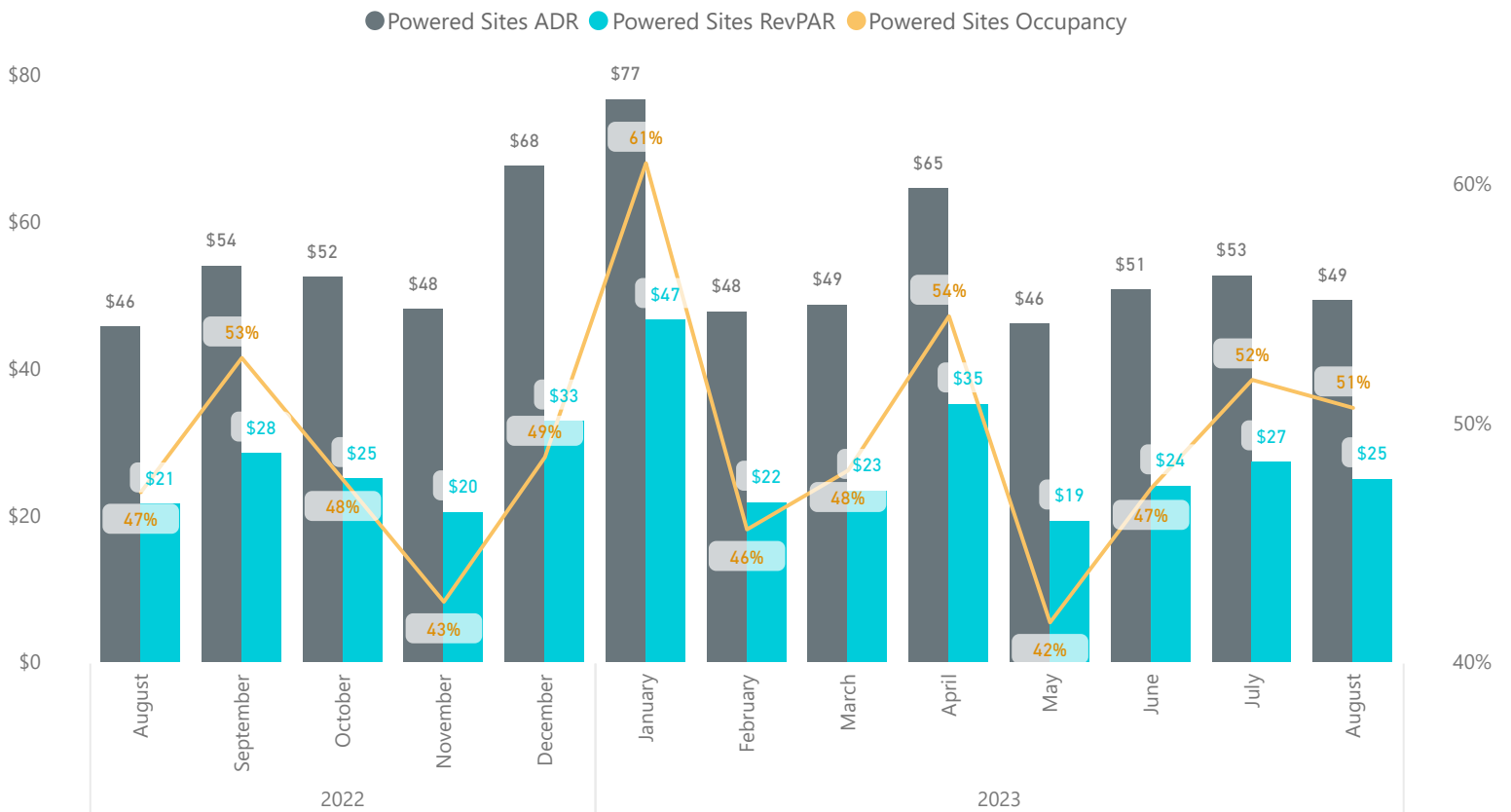


Powered Sites - Monthly Summary

\$49 Powered Sites ADR	51% Powered Sites Occupancy	\$25 Powered Sites RevPAR
8% Change from Previous Year	7% Change from Previous Year	16% Change from Previous Year

State	ADR	ADR % Change	Occup.	Occup. % Change	RevPAR	RevPAR % Change
NSW	\$43	3%	38%	8%	\$16	12%
NT	\$65	27%	57%	46%	\$38	85%
QLD	\$53	5%	84%	0%	\$44	5%
SA	\$36	6%	35%	0%	\$13	6%
TAS	\$37	3%	25%	-22%	\$9	-19%
VIC	\$39	15%	19%	-2%	\$7	12%
WA	\$56	11%	59%	6%	\$33	18%
Total	\$49	8%	51%	7%	\$25	16%

Powered Sites Performance Indicators

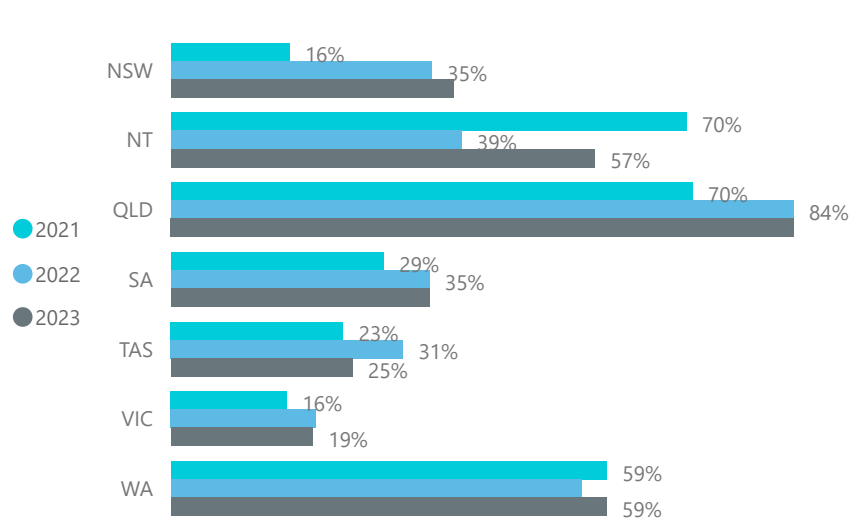


Powered Sites - Monthly Comparison

Powered Site Occupancy (%)

Year	2023		
State	June	July	August
NSW	35%	37%	38%
NT	65%	74%	57%
QLD	74%	89%	84%
SA	35%	32%	35%
TAS	26%	23%	25%
VIC	23%	19%	19%
WA	57%	60%	59%
Avg	47%	52%	51%

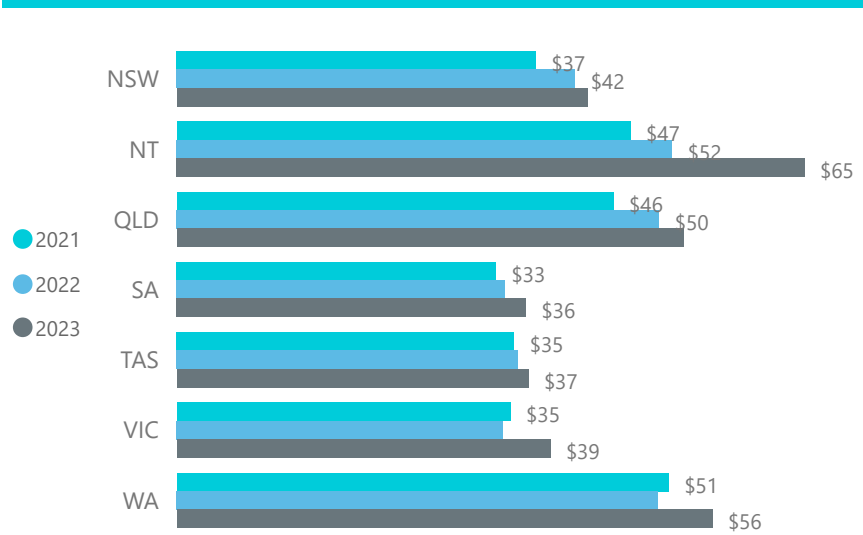
Powered Site Occupancy by State Latest Month



Powered Site ADR (\$)

Year	2023		
State	June	July	August
NSW	\$45	\$46	\$43
NT	\$67	\$69	\$65
QLD	\$52	\$54	\$53
SA	\$41	\$41	\$36
TAS	\$39	\$38	\$37
VIC	\$48	\$43	\$39
WA	\$59	\$61	\$56
Avg	\$51	\$53	\$49

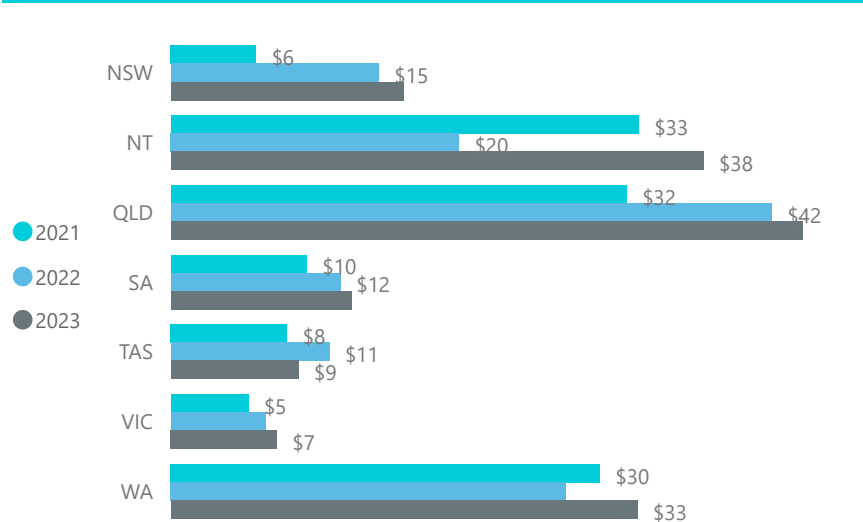
Powered Site Occupancy by State Latest Month



Powered Site RevPAR (\$)

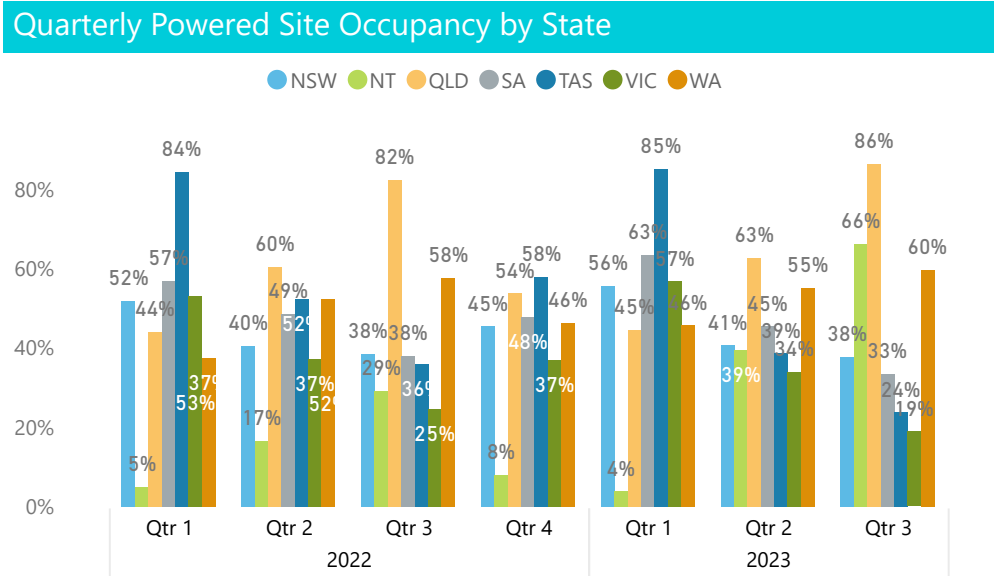
Year	2023		
State	June	July	August
NSW	\$16	\$17	\$16
NT	\$44	\$51	\$38
QLD	\$39	\$48	\$44
SA	\$14	\$13	\$13
TAS	\$10	\$9	\$9
VIC	\$11	\$8	\$7
WA	\$33	\$37	\$33
Avg	\$24	\$27	\$25

Powered Site RevPAR by State Latest Month

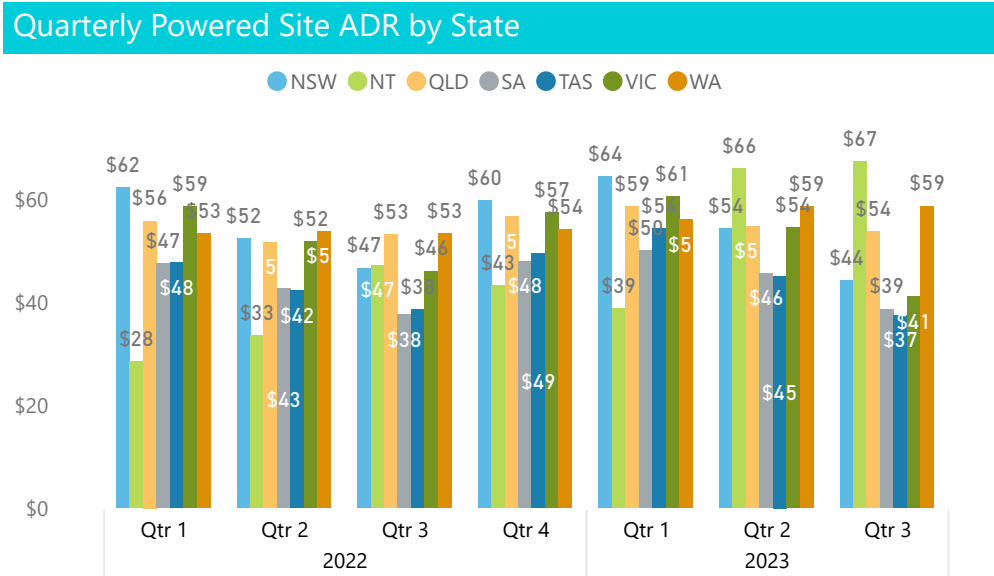


Powered Sites - Quarterly Comparison

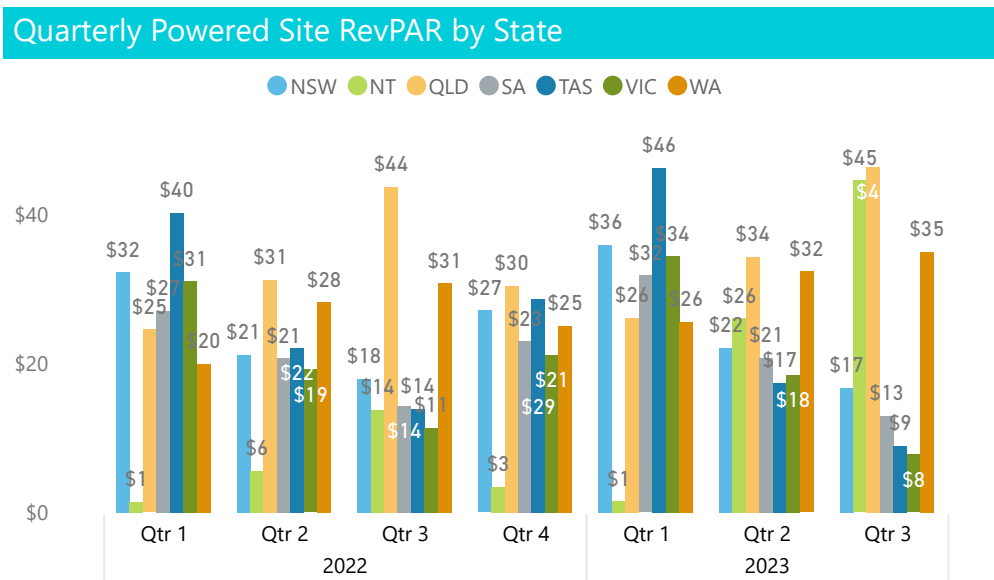
Powered Site Qtr Occupancy (%)			
Quarter	Qtr 3		
State	2021	2022	2023
NSW	18%	38%	38%
NT	62%	29%	66%
QLD	74%	82%	86%
SA	33%	38%	33%
TAS	29%	36%	24%
VIC	20%	25%	19%
WA	60%	58%	60%
Avg	39%	49%	51%



Powered Site Qtr ADR (\$)			
Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$42	\$47	\$44
NT	\$48	\$47	\$67
QLD	\$48	\$53	\$54
SA	\$35	\$38	\$39
TAS	\$38	\$38	\$37
VIC	\$44	\$46	\$41
WA	\$53	\$53	\$59
Avg	\$47	\$49	\$51



Powered Site Qtr Rev PAR (\$)			
Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$7	\$18	\$17
NT	\$30	\$14	\$45
QLD	\$36	\$44	\$46
SA	\$12	\$14	\$13
TAS	\$11	\$14	\$9
VIC	\$9	\$11	\$8
WA	\$32	\$31	\$35
Avg	\$18	\$24	\$26

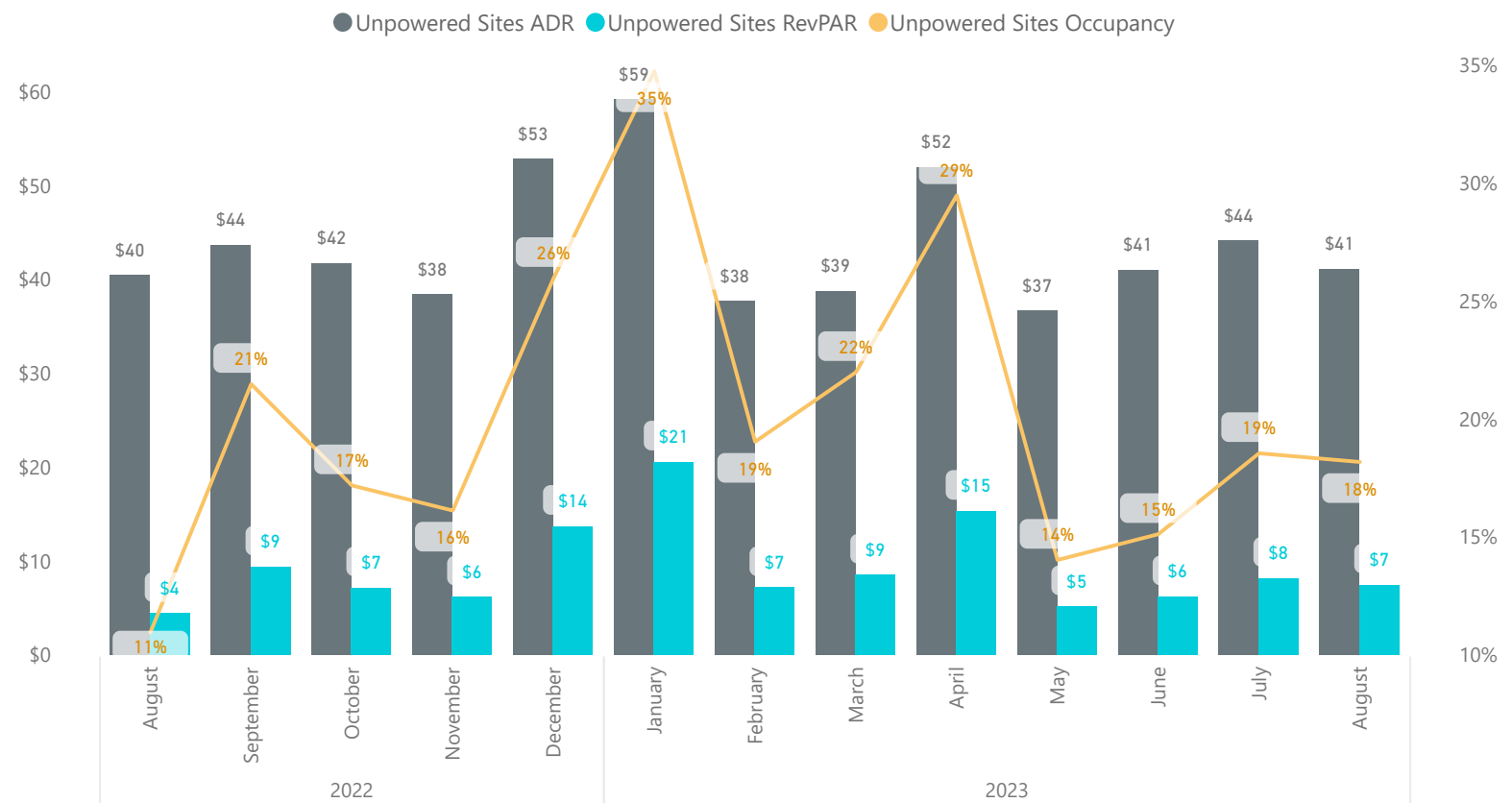


Unpowered Sites - Monthly Summary

\$41	18%	\$7
Unpowered Sites ADR	Unpowered Sites Occupancy	Unpowered Sites RevPAR
2%	66%	69%
Change from Previous Year	Change from Previous Year	Change from Previous Year

State	ADR	ADR % Change	Occupancy	Occupancy % Change	RevPAR	RevPAR % Change
NSW	\$41	-3%	15%	176%	\$6	168%
NT	\$49	69%	21%	-38%	\$11	4%
QLD	\$40	4%	30%	2%	\$12	6%
SA	\$31	10%	9%	66%	\$3	83%
TAS	\$28	-2%	5%	6%	\$1	4%
VIC	\$25	12%	3%	-14%	\$1	-4%
WA	\$50	3%	33%	3%	\$17	6%
Total	\$41	2%	18%	66%	\$7	69%

Unpowered Sites Performance Indicators

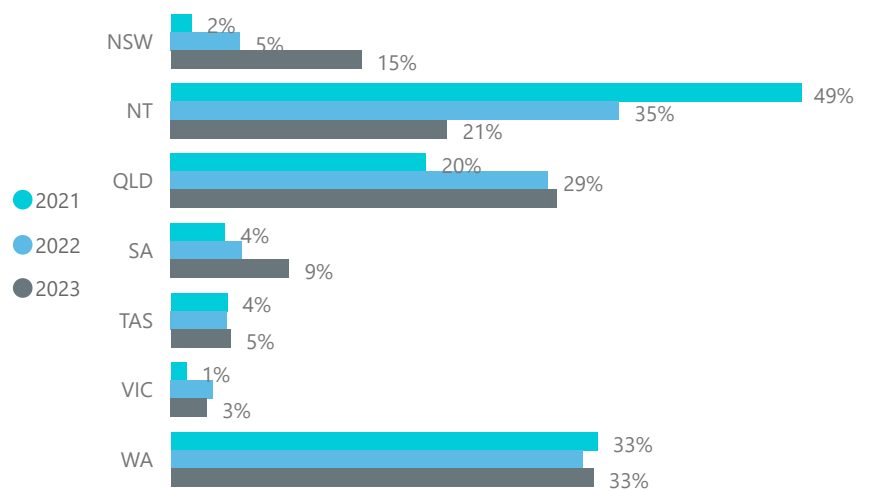


Unpowered Sites - Monthly Comparison

Unpowered Site Occupancy (%)

Year	2023		
State	June	July	August
NSW	13%	15%	15%
NT	26%	36%	21%
QLD	24%	30%	30%
SA	8%	6%	9%
TAS	5%	3%	5%
VIC	4%	2%	3%
WA	26%	37%	33%
Avg	15%	19%	18%

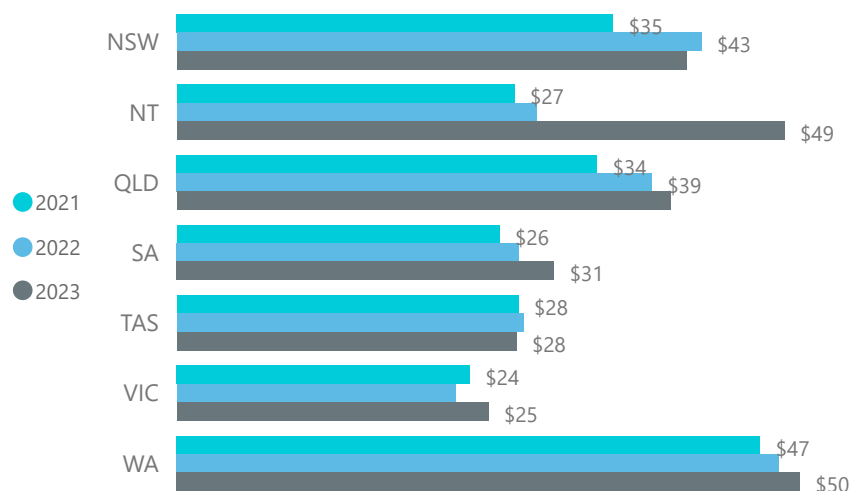
Unpowered Site Occupancy by State Latest Month



Unpowered Site RevPAR (\$)

Year	2023		
State	June	July	August
NSW	\$37	\$44	\$41
NT	\$52	\$54	\$49
QLD	\$40	\$42	\$40
SA	\$40	\$34	\$31
TAS	\$27	\$31	\$28
VIC	\$41	\$25	\$25
WA	\$49	\$55	\$50
Avg	\$41	\$44	\$41

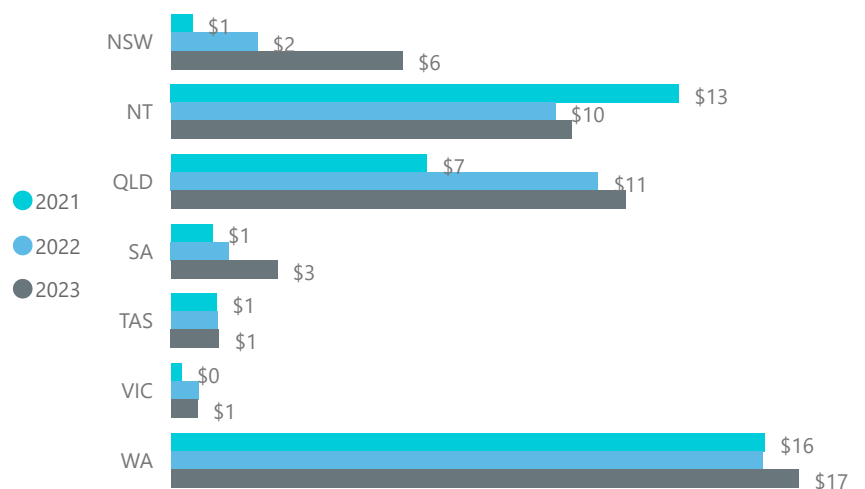
Unpowered Site ADR by State Latest Month



Unpowered Site RevPAR (\$)

Year	2023		
State	June	July	August
NSW	\$5	\$6	\$6
NT	\$13	\$19	\$11
QLD	\$10	\$13	\$12
SA	\$3	\$2	\$3
TAS	\$1	\$1	\$1
VIC	\$2	\$1	\$1
WA	\$13	\$21	\$17
Avg	\$6	\$8	\$7

Unpowered Site RevPAR by State Latest Month

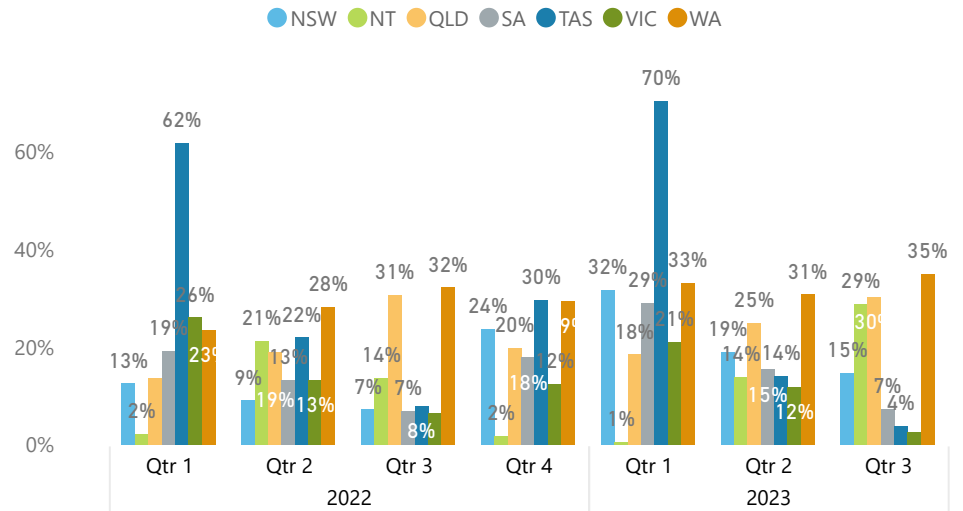


Unpowered Sites - Quarterly Comparison

Unpowered Site Qtr Occupancy (%)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	2%	7%	15%
NT	42%	14%	29%
QLD	24%	31%	30%
SA	6%	7%	7%
TAS	4%	8%	4%
VIC	2%	6%	3%
WA	34%	32%	35%
Avg	9%	14%	18%

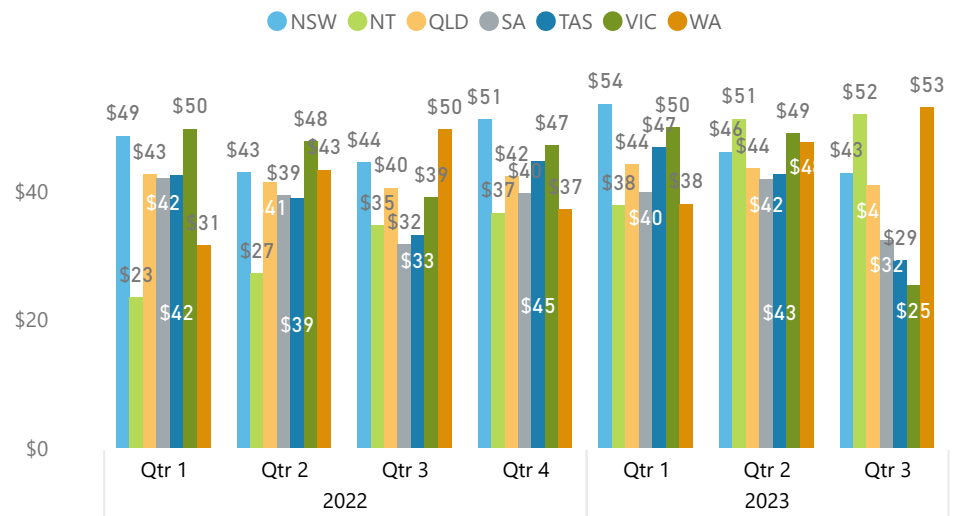
Quarterly Unpowered Site Occupancy by State



Unpowered Site Qtr ADR (\$)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$39	\$44	\$43
NT	\$29	\$35	\$52
QLD	\$37	\$40	\$41
SA	\$29	\$32	\$32
TAS	\$31	\$33	\$29
VIC	\$38	\$39	\$25
WA	\$49	\$50	\$53
Avg	\$40	\$42	\$43

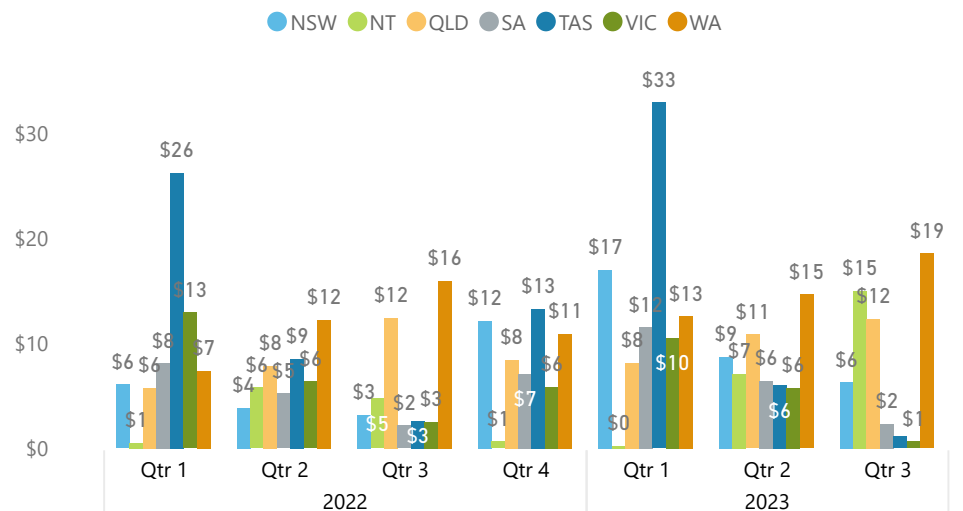
Quarterly Unpowered Site ADR by State



Unpowered Site Qtr Rev PAR (\$)

Quarter	Qtr 3		
State	2021	2022	2023
NSW	\$1	\$3	\$6
NT	\$12	\$5	\$15
QLD	\$9	\$12	\$12
SA	\$2	\$2	\$2
TAS	\$1	\$3	\$1
VIC	\$1	\$3	\$1
WA	\$17	\$16	\$19
Avg	\$4	\$6	\$8

Quarterly Unpowered Site RevPAR by State





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