

Caravan and Camping

# BUSINESS CONDITIONS 2023 JULY



# CARAVAN INDUSTRY BUSINESS CONDITIONS

## INTRODUCTION

The Caravan Industry Business Conditions report is a six-monthly analysis of the performance, outlook, and sentiment of Australia's caravan industry.

Insights are collected from industry businesses on their operational performance over the previous six months, and their outlook for the next. Special issues relating to the economy and business topics are explored including supply chains, energy and employment.

Supporting this survey data, the report pulls together latest accommodation, visitor economy, manufacturing, international trade, Google Trend, economic indicators, ReviewPro and Near data to provide a detailed barometer on the performance of the caravan industry.

This report is representative of responses from a range of industry players, including caravan parks, dealerships, RV manufacturers, RV importers, repairers, original equipment manufacturers, industry suppliers and consultants, and land lease communities.

Survey period for this report was 12 July - 6 August 2023. A total of 101 businesses participated in the survey.

### TABLE OF CONTENTS

NATIONAL ECONOMY PERFORMANCE .....	1
INDUSTRY PERFORMANCE .....	3
INDUSTRY CONDITIONS .....	5
INDUSTRY CONSTRAINTS .....	9
INDUSTRY OUTLOOK .....	12
CONSUMER MOVEMENT INDEX .....	14
CONSUMER INTEREST .....	15
CARAVAN PARK SENTIMENT .....	16
SAMPLE PROFILE .....	17

Note: Questions relating to supply chains were only addressed to RV Manufacturers, RV Importers and Original Equipment Manufacturers.

Cover image: GoRV



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



# NATIONAL ECONOMY PERFORMANCE

## ECONOMIC INDICATORS

### ECONOMY IS COOLING



JULY 2023

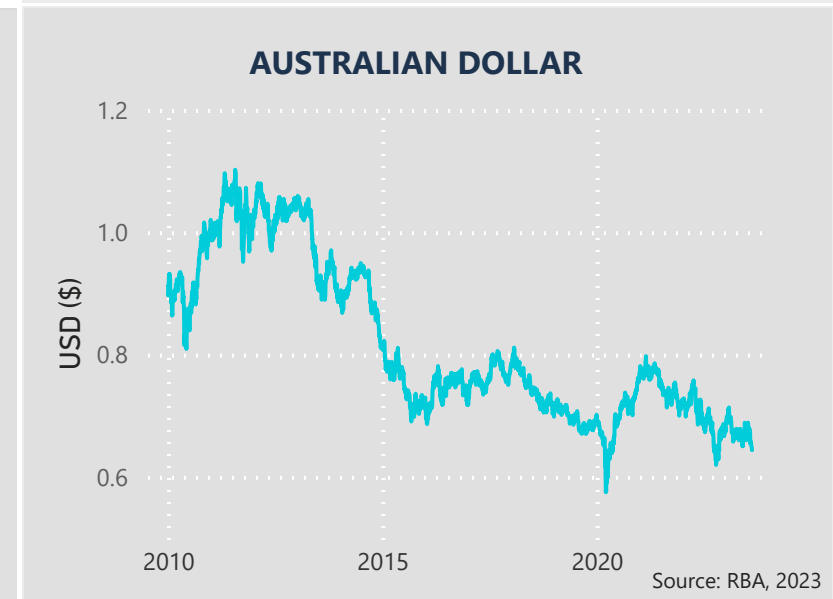
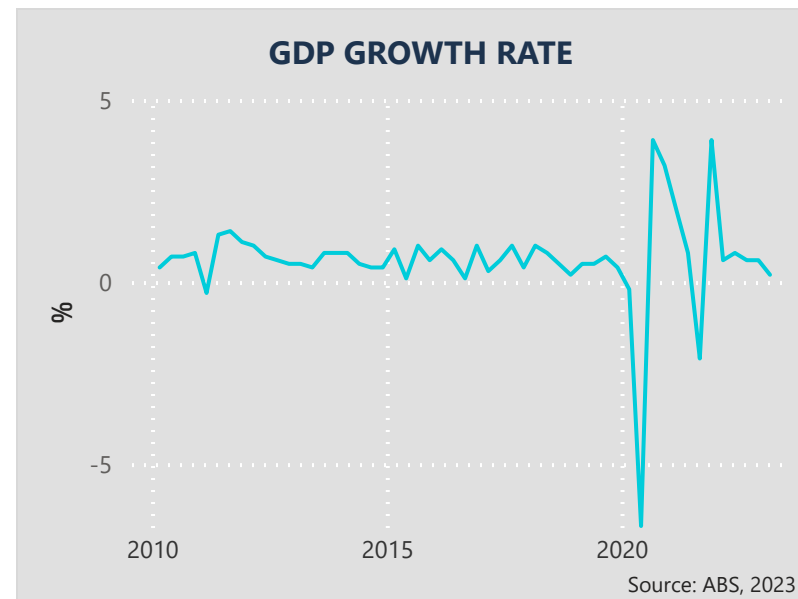
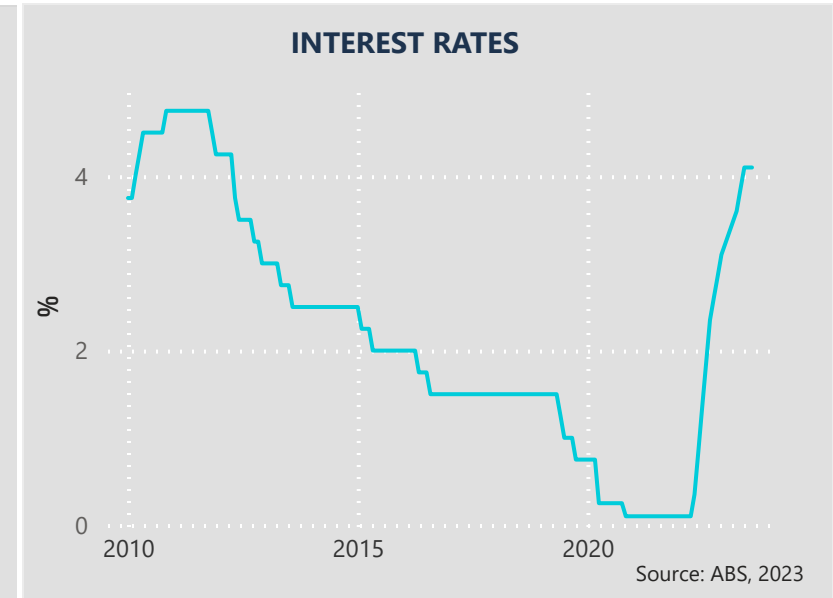
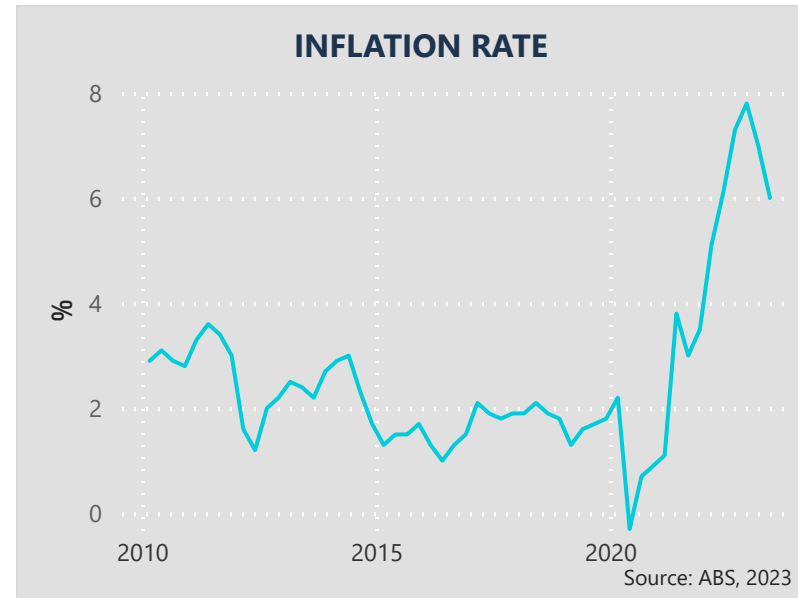
The global economy is expected to remain weak for the rest of 2023 as increases in central bank policy rates to fight inflation are a strain on economic activities. With the war in Ukraine's ongoing impacts on supply chains, energy and commodity prices, and a slow recovery of the Chinese economy, inflation may remain high, triggering further monetary policy by central banks.

While the Australian economy remained resilient throughout 2022, the first signs of stress are appearing as the impact of inflation and rising interest rates flow through the economy. Retail spending has slowed as consumers are reducing household expenses, and businesses are faced with tightening debt and equity markets, rising costs and wage increases.

For now, economists are at odds about whether Australia is heading for a recession or will avoid a recession, referring to Australia's strong labour market and a boost from exports. In addition, the thawing of Australia-China relations as well as efforts by the Federal Government to strengthen economic ties with India and Europe will support Australian businesses in managing supply chain issues and diversifying markets.

For the caravan and camping industry, inflation and interest rate increases might result in a decline in consumer demand as well as increased capital and operational costs. This combination will be especially challenging for businesses who are unable to pass cost increases through to consumers. As business conditions remain complex, it will be important for businesses to plan and prepare for likely changes in the marketplace.

Reference: [International Monetary Fund](#)



# NATIONAL ECONOMY PERFORMANCE

## CONSUMER INDICATORS

### CONSUMER CONFIDENCE REMAINS WEAK

JULY 2023

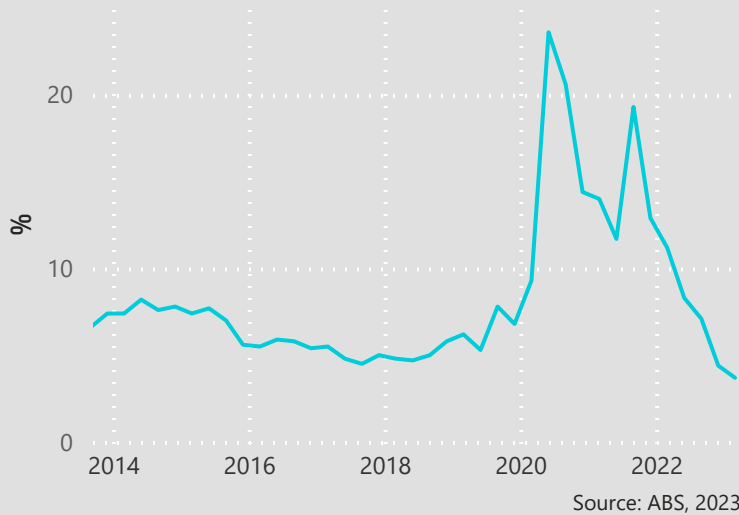
Although the Westpac-Melbourne Institute Consumer Sentiment Index rose by 2.7% in July to 81.3% - likely the result of a fall in inflation - consumers remain deeply pessimistic. This is reflective of ongoing pressures on household budgets due to cost-of-living increases, fears of future interest rate hikes and concerns about the near-term outlook of the Australian economy.

The 'time to buy a major household item' and the 'time to buy a dwelling' indexes remain in the extremely weak 70-80 range as pessimists outnumber optimists. In addition, the household savings ratio has declined further, to 3.7% in March 2023, which is the lowest level since the late 2000's. This suggests that the impact of cost-of-living and interest rate hikes on consumer spending has intensified, with more Australians dipping into savings accumulated during the first years of the pandemic to ease financial pressures. In the short-term, households are likely to feel more pressures as the impact of the RBA's interest rate hikes haven't been fully felt by households yet. On a positive note, unemployment remains on historic low levels and wage growth supports household budgets.

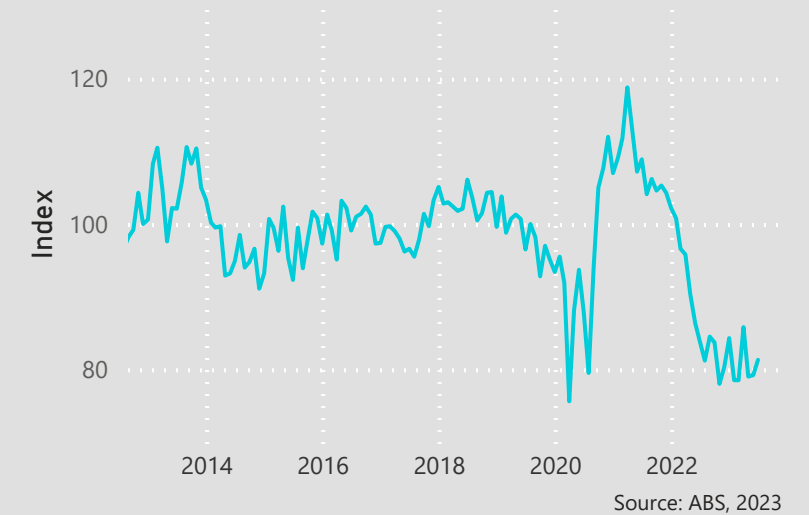
It is expected that until inflation falls to much lower levels and interest rates are definitely on hold, sentiment is unlikely to increase substantially. For the RV trade sector this might mean a softening of orders as consumers delay a purchase or upgrade of a recreational vehicle. Yet, demand is expected to remain above pre-pandemic levels as the current financial strain is felt less for the 60+ market. In addition, with its value-for-money proposition, caravan and camping remains an attractive option for consumers looking for budget-friendly holidays.

Reference: [Westpac Research](#)

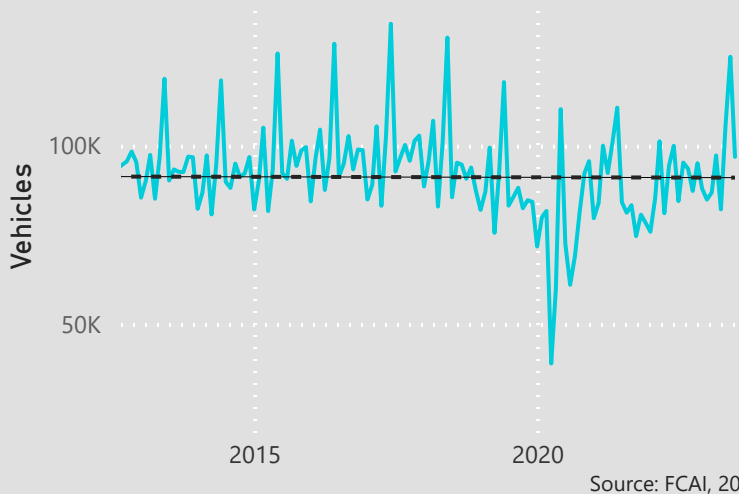
#### HOUSEHOLD SAVING AS % OF DEBT



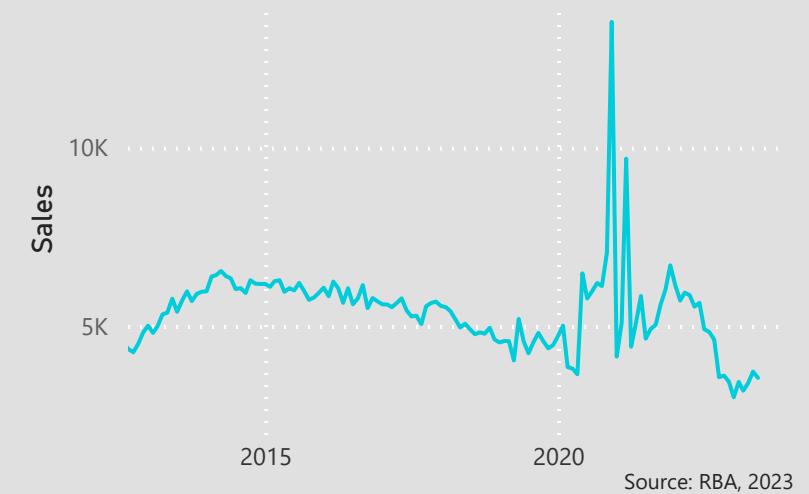
#### AUSTRALIAN CONSUMER CONFIDENCE



#### TOTAL NEW VEHICLE SALES



#### NEW HOME SALES



# INDUSTRY PERFORMANCE

## MONTHLY VISITOR ECONOMY

### STRONG DEMAND FOR CARAVAN AND CAMPING

#### AND CAMPING

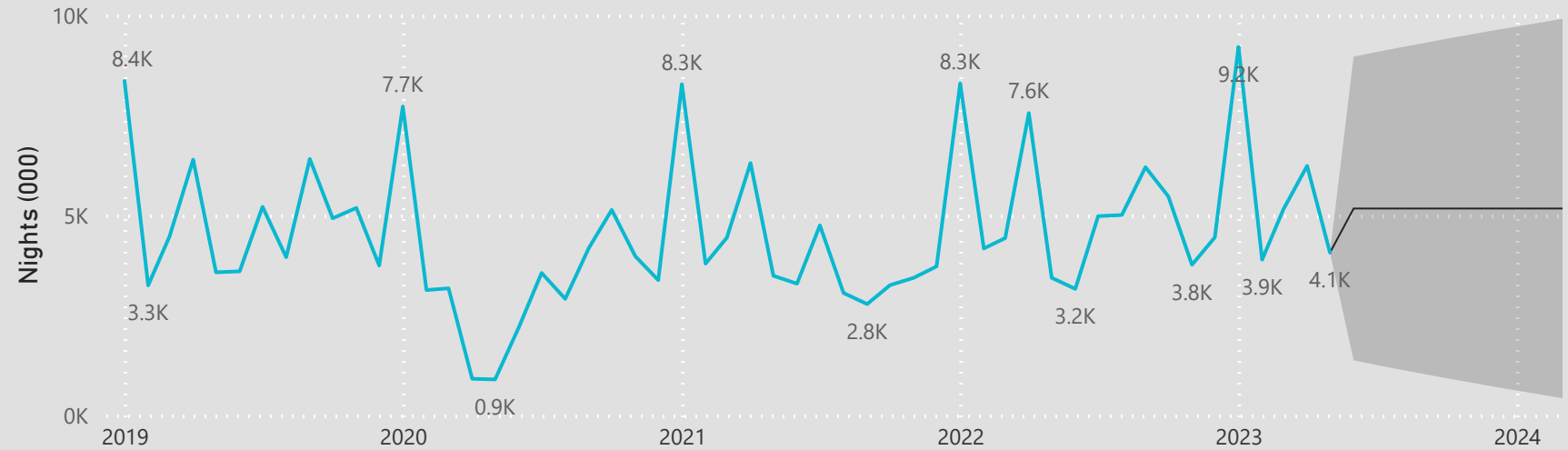
JANUARY 2019 TO JULY 2023

Yearend March 2023 visitor economy results marked a new milestone for the caravan and camping sector in Australia, with 15.5 million overnight trips resulting in 62.3 million visitor nights. This represents an increase of 24% and 22% respectively compared to the previous year and was driven by robust growth across all visitor segments.

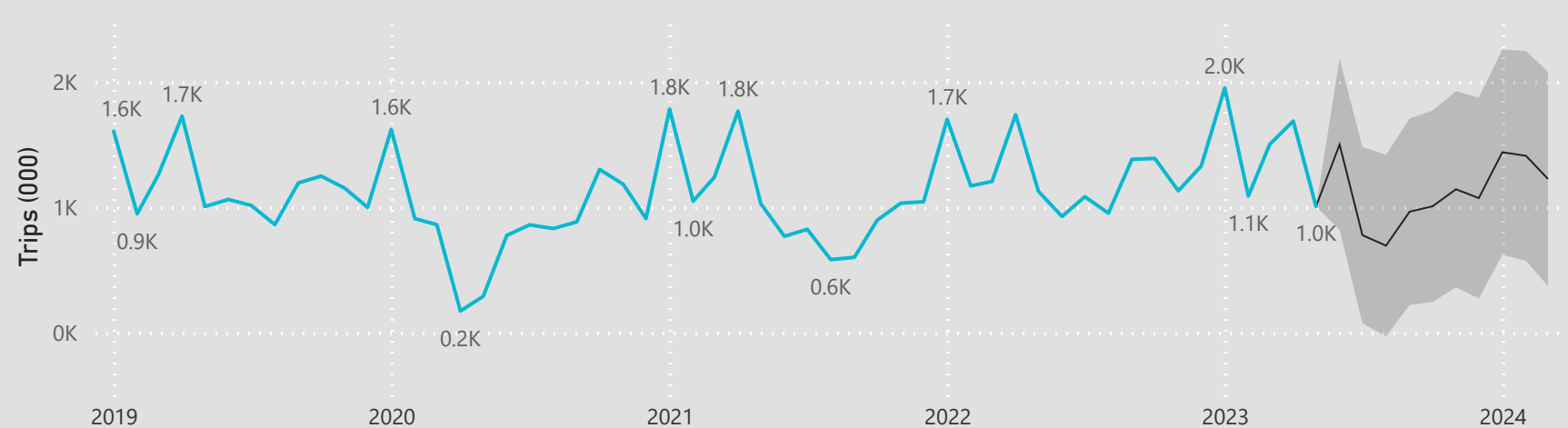
Notably, interstate trip figures exceed pre-pandemic levels for the first time, which demonstrates an increase in confidence of caravan and campers to venture out further. This also extends to international travel, with increased interest for short-haul international holidays and cruising. Nevertheless, as the cost-of-living crisis bites, domestic travel is unlikely to experience a significant drop in demand as it offer a more cost-effective alternative to tighter household budgets.

Moreover, caravan and camping is uniquely positioned to adapt products and services to consumers' changing travel behaviours, which will help to sustain the industry's competitiveness and appeal to different markets.

#### NATIONAL CARAVAN AND CAMPING NIGHTS



#### NATIONAL CARAVAN AND CAMPING TRIPS



Source: Tourism Research Australia, 2023

# INDUSTRY PERFORMANCE

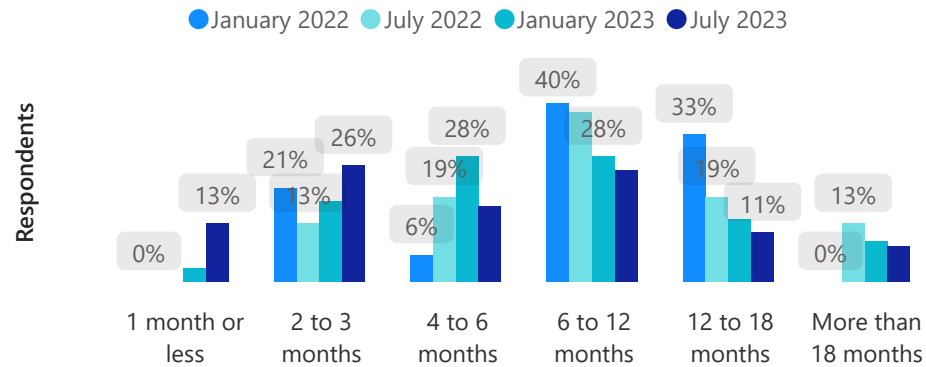
## MANUFACTURING AND INTERNATIONAL TRADE

### RECREATIONAL VEHICLE PRODUCTION

JANUARY 2012 TO JUNE 2023

Despite economic headwinds, local RV production continued to grow in June 2023, with a total of 2,913 units manufactured for the month, reflecting a 25% increase from June 2022. Over the past 12 months, local production amounted to 30,995 units, an increase of 27% or 6,592 additional units compared to the previous period. A first sign that production growth might slow down are order books which contracted for the first time in two years, potentially a sign of a shift in the market landscape.

#### ORDER BOOK LEAD TIME

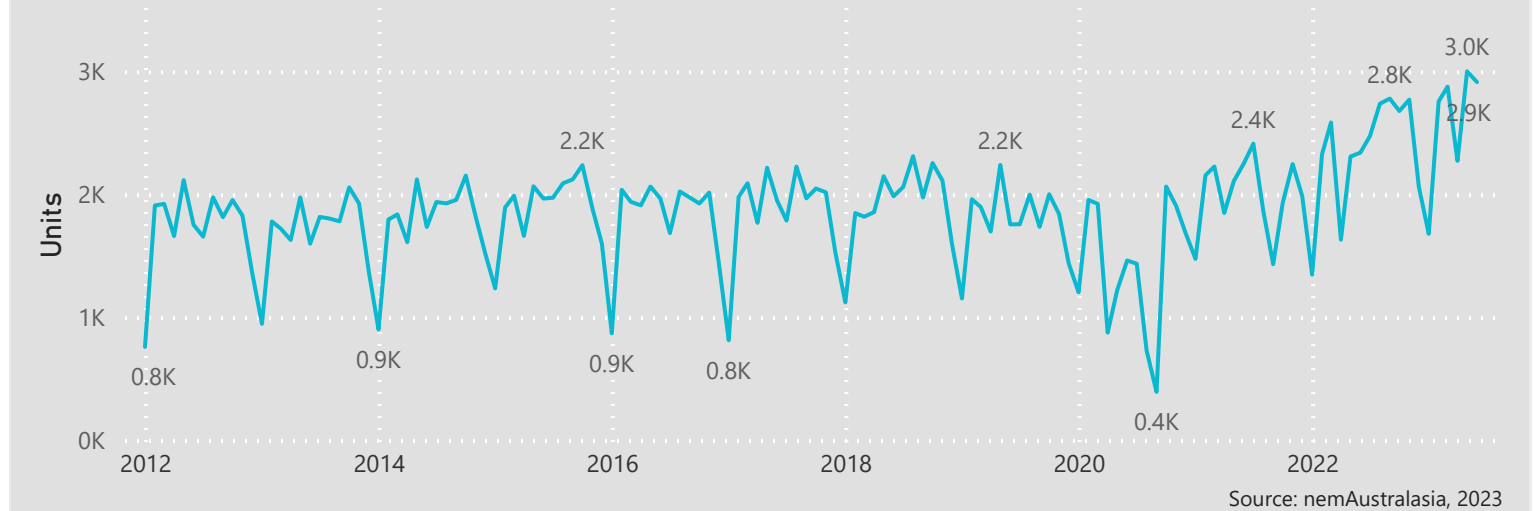


### CARAVAN TRAILER IMPORTS

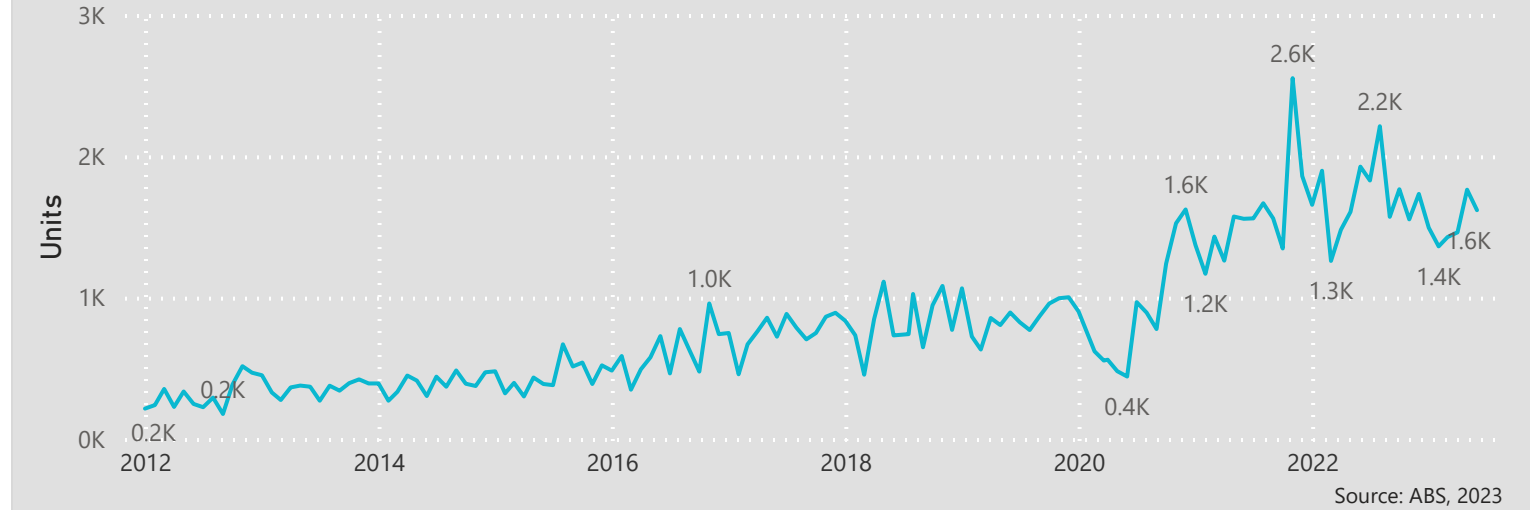
JANUARY 2012 TO JUNE 2023

A total of 1,619 caravan trailer units were imported into Australia in June 2023, a decrease of 16% compared to June 2022. Over the past 12 months, a total of 19,801 caravan trailers arrived in Australia, which was 2.8% lower than the previous period. While import volume has been falling since February 2023 from a rolling annual perspective, average gross weight and FOB (Freight on Board) continues to trend upwards.

#### MONTHLY RV PRODUCTION



#### MONTHLY CARAVAN IMPORTS



# INDUSTRY CONDITIONS

JANUARY TO JUNE 2023 COMPARED TO JULY TO DECEMBER 2022

## BUSINESS CONDITIONS TRENDING DOWNWARDS

**JULY 2023**

Over the last six months, business conditions for the industry have worsened. While survey results in January 2023 were mixed, as of July 2023, indicators clearly trend downwards. Almost half (47%) of respondents reported a deteriorating business environment, compared to a minority (21%) of businesses experiencing improved business conditions.

Similarly, as per the majority of respondents, total sales/revenue as well as profitability trended downwards since the beginning of the year in comparison to the preceding six months (July to December 2022).

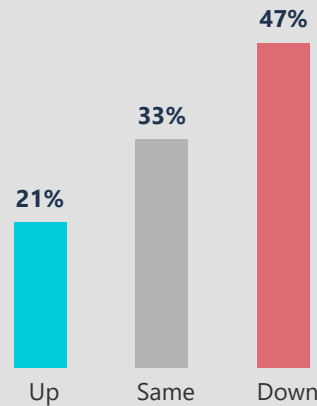
This shift is likely a reflection of increases in operational costs, in particular in wages, overheads, and materials. While inflation, labour shortages and supply chain issues continue to put pressures on business operations, lead time of orders/bookings has been falling, affecting sales and profits.

However, across the industry, the pain has been distributed unequally. While most (42%) caravan parks have been able to improve profitability through increases in selling prices, manufacturers and dealerships have been hit by decreases in profits (49%), as increases in operational costs outweigh increases in selling prices. This demonstrates the effects of price risk that stem from long-term fixed sales prices and short-term variable input prices.

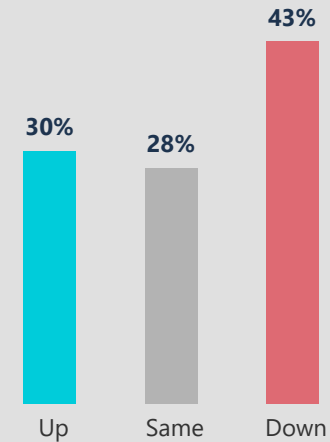
As a result of increased selling prices, caravan parks (52%) saw total sales/revenues increase over the last six months, while bookings remained stable. In contrast, 54% of surveyed manufacturers reported a decline in orders. This can be seen as a sign of a potential shift in the market, with consumer demand coming down from the exceptionally high level seen following the first two years of the COVID-19 pandemic.



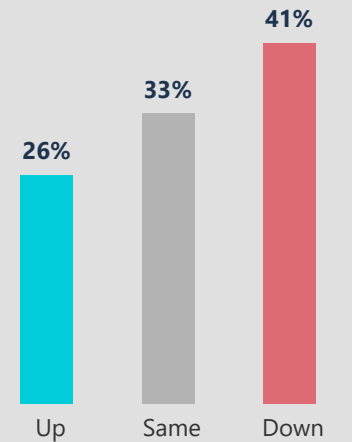
### GENERAL BUSINESS CONDITIONS



### TOTAL SALES/REVENUE



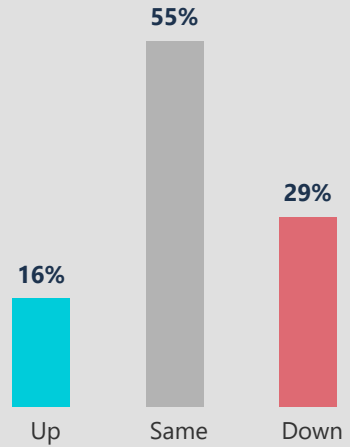
### PROFITABILITY



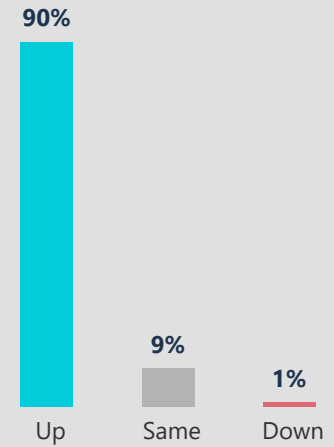
# INDUSTRY CONDITIONS

JANUARY TO JUNE 2023 COMPARED TO JULY TO DECEMBER 2022

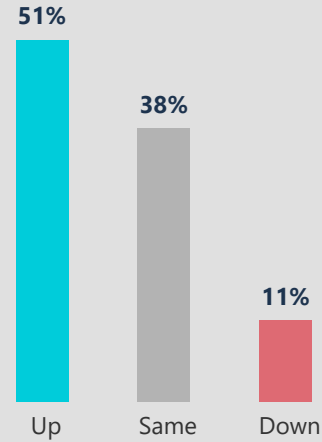
## EMPLOYMENT LEVELS



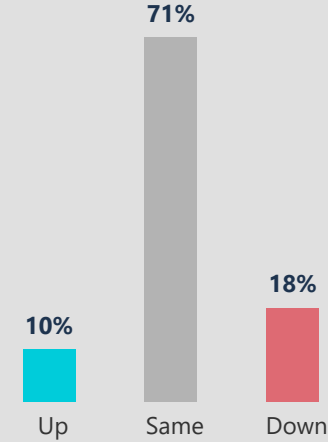
## COST OF MATERIALS



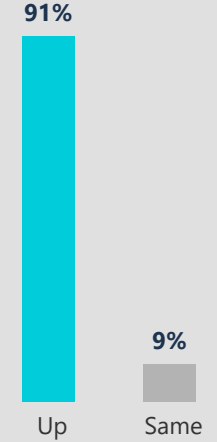
## AVERAGE SELLING PRICE



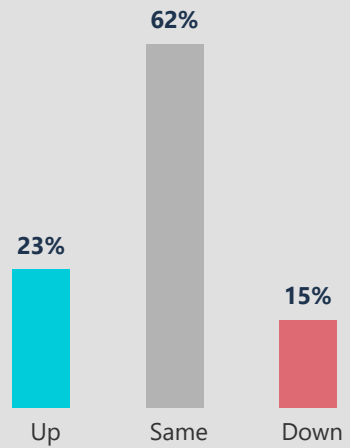
## EXPORT SALES



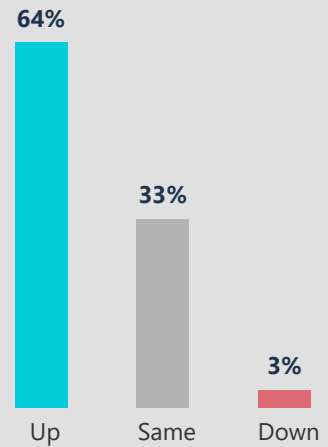
## COST OF OVERHEADS



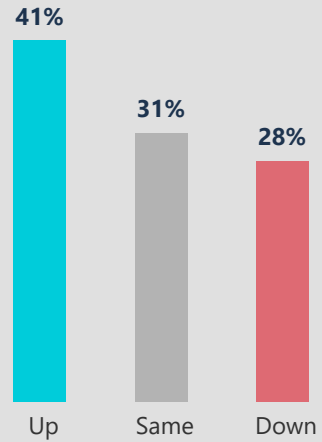
## TRAINING EXPENDITURE



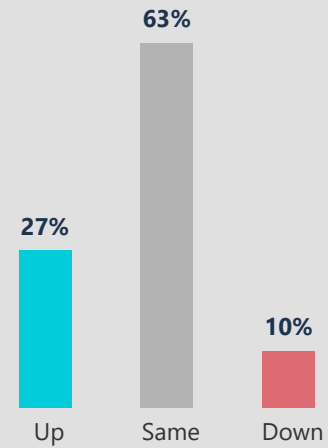
## AVERAGE WAGES



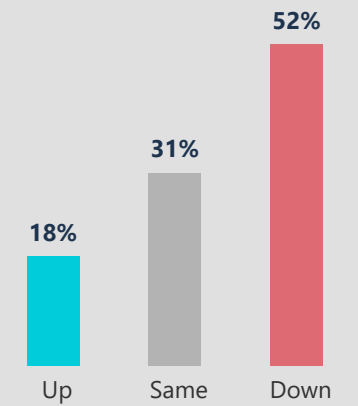
## CAPITAL EXPENDITURE



## OVERTIME WORKED



## ORDERS/BOOKINGS RECEIVED





# INDUSTRY CONDITIONS

## LABOUR

### LABOUR MARKET CHALLENGES PERSIST

JULY 2023

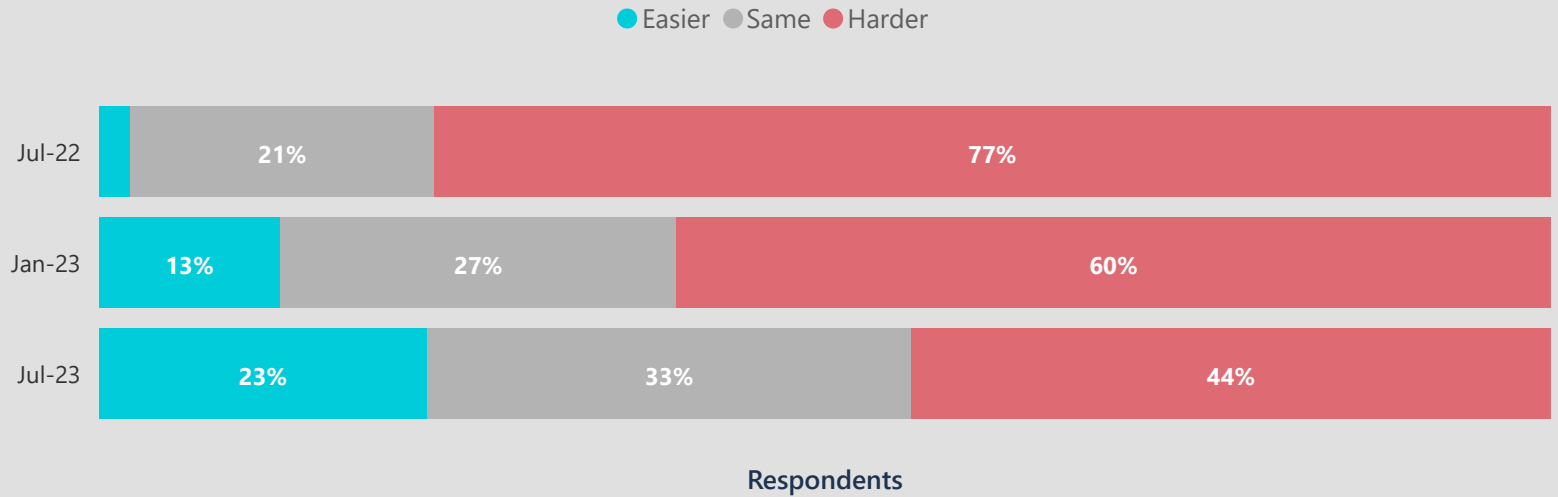
The unemployment rate rose by 0.2% to 3.7% in July 2023 as a result of layoffs at major companies, including Commonwealth Bank and Telstra. At the same time, there were 387,000 more people employed compared to a year ago and the unemployment rate remains at a 49-year low where it has been for the last year despite 12 interest rate hikes and a significant increase in the working age population of 600,000 people.

While the labour market remains resilient, there are signs of being in the early stages of a slowdown as leading market indicators, such as job advertisements, job vacancies and hiring intentions, have fallen significantly. This suggests that job growth will slow down in the next months which is in line with expectations of an unemployment rate of 4.5% by July 2024 and 140,000 more Australians losing their jobs until 2025.

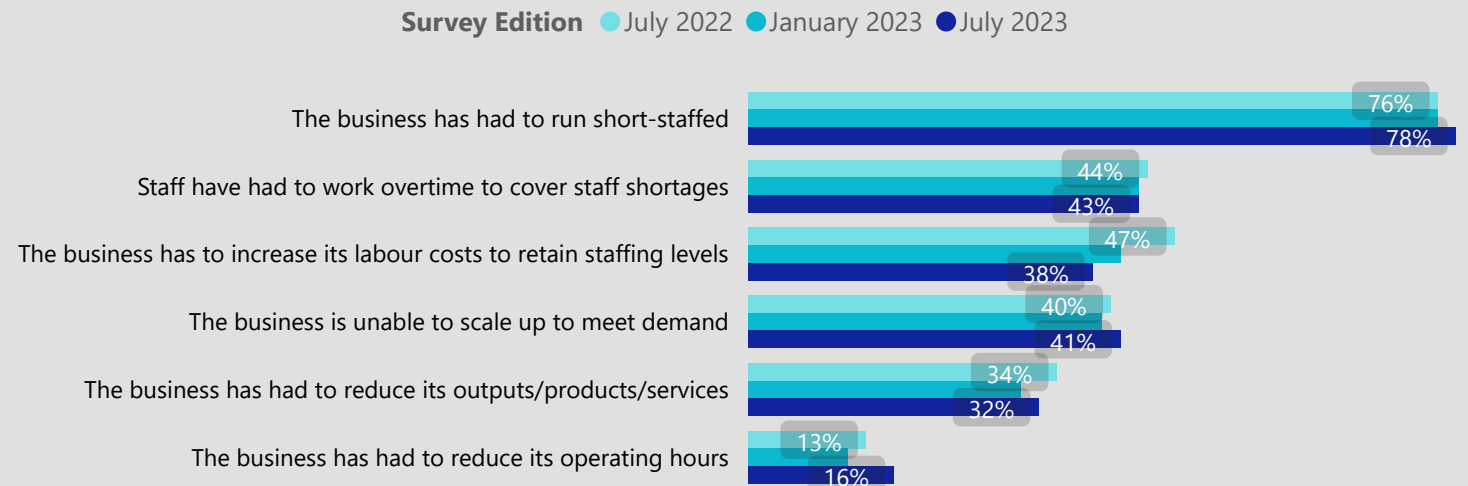
According to the July Business Sentiment Survey, the proportion of businesses struggling to source labour over the last six months has decreased. However, the impact of labour shortages on day-to-day operations remains significant, with many businesses running short-staffed (78%), using overtime to cover shortages (43%) and increasing wages to retain employees (38%). In addition to increased labour expenses are costs of lost business, as businesses are unable to meet demand (41%) or are forced to scale back (32%) due to labour shortages.

Building on the outcomes of the Jobs and Skills Summit held in September 2022, the Federal government plans to release an [Employment White Paper](#) by the end of September 2023, providing a roadmap for a better-trained and more productive workforce for Australia. It is expected to include policies for building more resilient supply chains and improving labour supply through reducing barriers to work, training and migration.

### EASE OF SOURCING LABOUR OVER LAST SIX MONTHS COMPARED TO PREVIOUS



### IMPACT OF LABOUR SHORTAGE ON DAY-TO-DAY OPERATIONS



# INDUSTRY CONDITIONS

## SUPPLY CHAINS

### SUPPLY CHAIN DISRUPTIONS EASING

JULY 2023

The latest survey data indicates that supply chain disruptions have receded notably, with two thirds (63%) of businesses reporting little or no disruptions to supply chains, compared to 51% of respondents in the survey in January 2023.

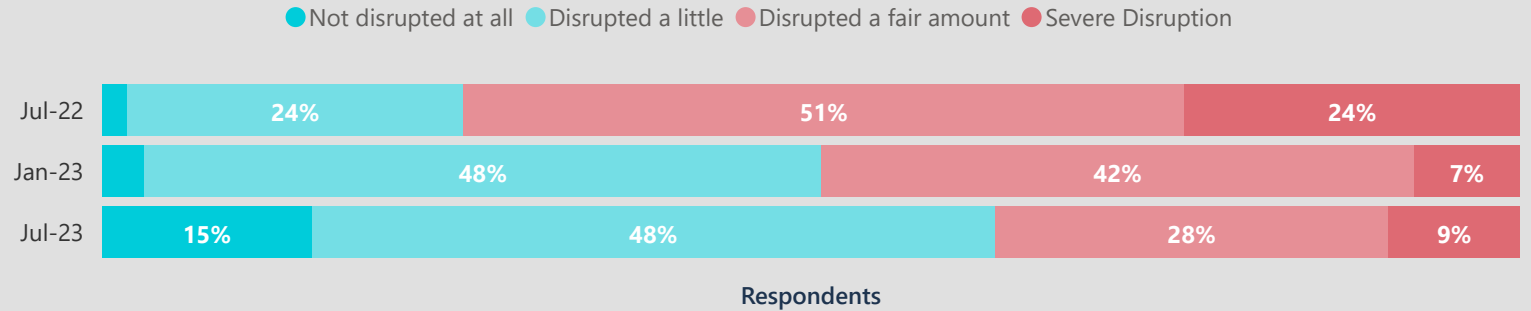
As of July 2023, the top three supply chain issues affecting businesses were increased freight costs (69%), delays in shipping (58%), and increased costs in overseas production/supplies (56%). Compared to the survey conducted in January 2023, the percentages of participants being affected by these issues decreased significantly.

Most noticeable was the decline of participants reporting increased freight costs as an issue from 98% in January 2023 to 69% in July 2023. This makes sense as logistics costs have been decreasing, mainly due to a decline in consumer spending, which had been the driver of rising freight costs over the last two years. Despite the fall, elevated freight costs remain a major pain point for the Australian industry.

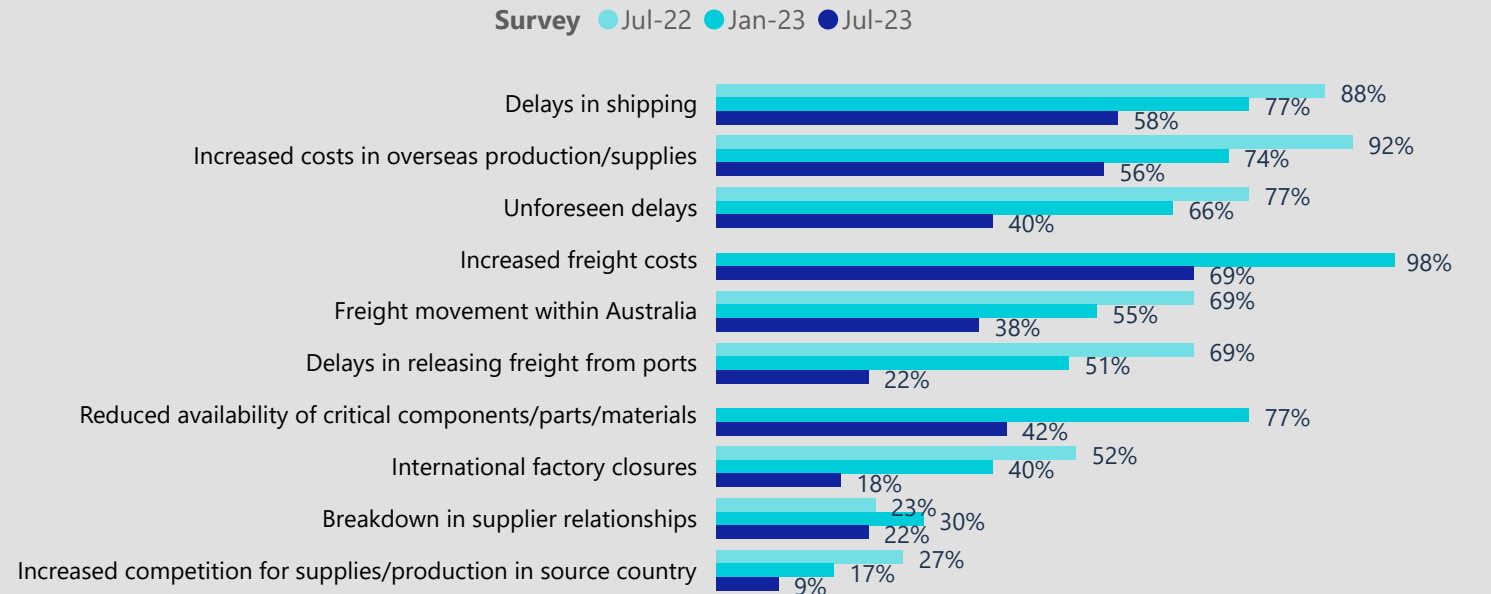
With consumer demand for goods decreasing, freight volumes have fallen too, and as a direct consequence, congestion has eased. This is reflected in fewer disruptions due to shipping delays (58% in July down from 77% in January 2023) or delays in releasing freight from ports (22% in July compared to 51% in January 2023).

Overall, the data from the July 2023 survey indicates that challenges and uncertainties around supply chains remain amidst a global economy struggling with inflation and geopolitical conflicts. Nevertheless, it also shows that freight market conditions have improved notably.

### CURRENT LEVEL OF SUPPLY CHAIN DISRUPTION



### SUPPLY CHAIN ISSUES



Two new responses were added in January 2023 survey

# INDUSTRY CONDITIONS

## ECONOMIC CONSTRAINTS

### DEMAND, INTEREST RATES MOST RESTRICTING

JULY 2023

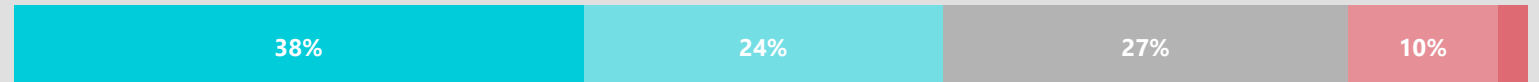
Among the economic challenges faced by businesses in the caravan and camping sector, the level of demand and economic activity was the most prevalent constraint in the July 2023 industry survey. The majority of businesses (43%) reported a moderate constraint, which was comparable to 44% in the survey conducted in January 2023. In contrast, the proportion of respondents experiencing a major constraint was up from 23% in January to 29% in July 2023. Similarly, the share of respondents reporting a critical constraint increased 4ppts to 9% in July 2023. This shift towards elevated degrees of constraint might be a sign of slowing consumer demand as consumers are juggling tighter household budgets due to cost-of-living pressures.

Similar to consumers, businesses are increasingly feeling the effects of the RBA's interest rate hikes. Over the last six months, the cash rate increased from 3.1% in December 2022 to 4.1% in July 2023. Similarly, the proportion of respondents reporting major or critical constraints due to interest rates increased from 39% in January's survey to 52% in July. At the same time, the share of respondents experiencing minor or no constraints halved, falling from 31% to 16%.

Conversely, the impact of exchange rate fluctuations and commodity price volatility, as well as climatic conditions (drought, flooding, fire) on the industry has lessened since the start of the year. Nonetheless, these constraints remain significant for a number of businesses, which highlights the importance of sound risk management strategies and plans to reduce adverse effects of volatile exchange rates and commodity prices, as well as unpredictable weather events.

### CLIMATIC CONDITIONS

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



### EXCHANGE RATES & COMMODITY PRICES

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



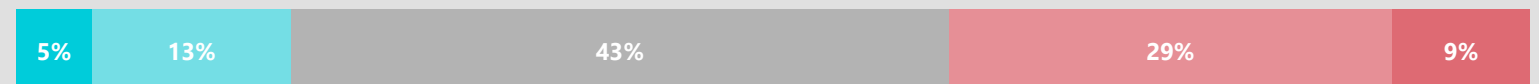
### INTEREST RATES

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



### LEVEL OF DEMAND/ECONOMIC ACTIVITY

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



# INDUSTRY CONDITIONS

## OPERATIONAL CONSTRAINTS

### SUPPLIER AND ENERGY COSTS ARE MAJOR CHALLENGES



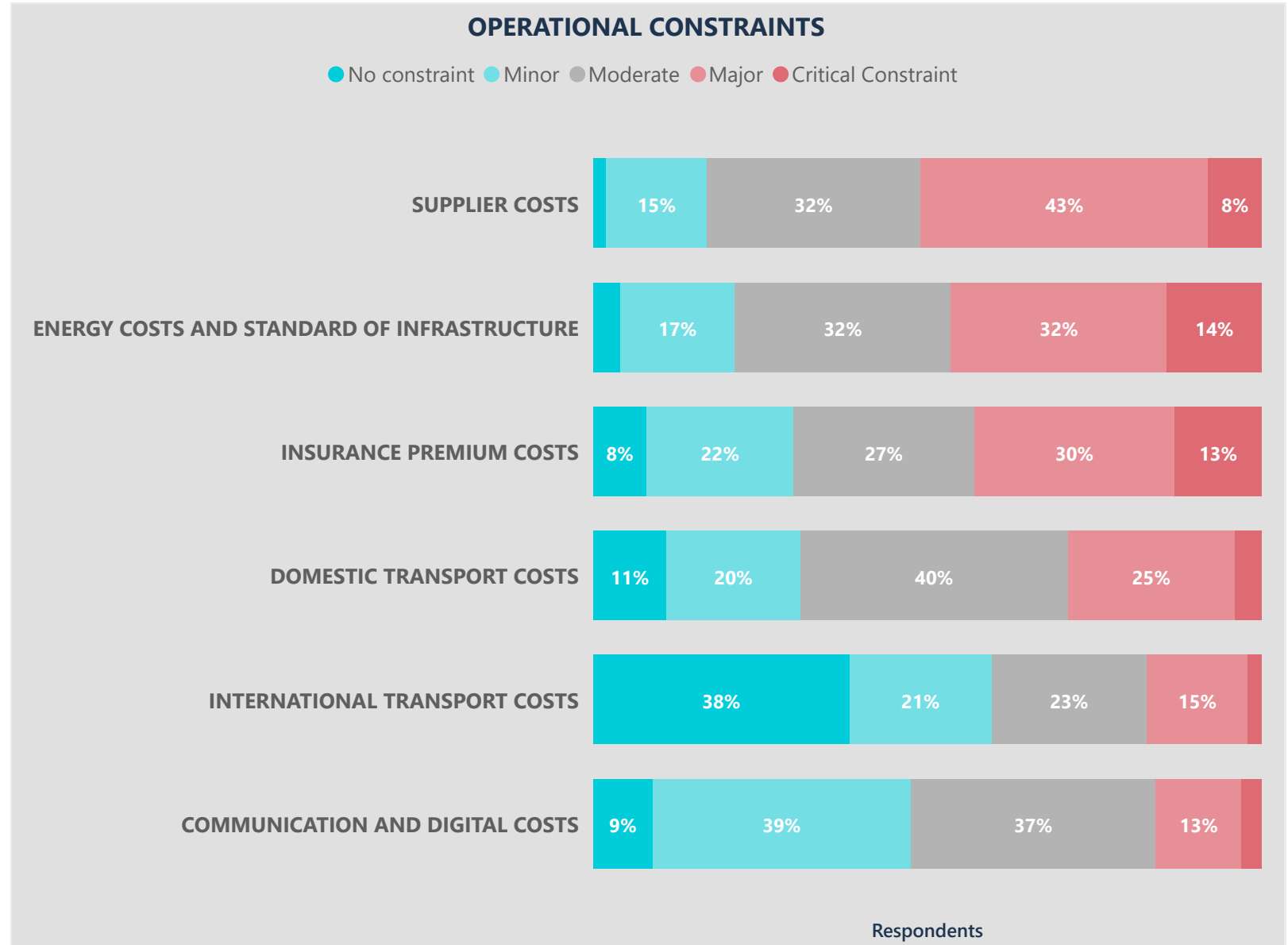
JULY 2023

In addition to economic challenges, the sector finds itself dealing with several operational issues. According to respondents, supplier costs, energy costs and infrastructure standards, and insurance premiums had the strongest impact on day-to-day operations and business finances as of July 2023.

The most pressing issue were supplier costs, which represented a moderate to critical constraints to 87% of respondents. Energy costs and infrastructure standards affected 78% of respondents, whereas insurance costs were a moderate to critical challenge to 70% of surveyed businesses.

In contrast, results on the impact of transport costs and communication and digital costs are more mixed, with some respondents facing moderate to major challenges in these areas while others experienced only minor or no constraints.

Across the industry, businesses are affected by different operational issues and to a varying degree. While most caravan park operators were managing the impacts of insurance premium costs (30% critical constraint) and energy costs (21% critical constraint), trade businesses were predominantly affected by supplier costs, energy costs, and transport costs.



# INDUSTRY CONDITIONS

## WORKFORCE CONSTRAINTS

### WAGE COST CONSTRAINTS INTENSIFYING

JULY 2023

Despite an increase in the unemployment rate in July 2023, the labour market continues to be tight with wages growing at 3.6% over the year to June 2023. This environment is reflected in the survey results, with a significant proportion of respondents reporting constraints due to wage costs as well as labour market shortages.

According to the July business sentiment survey, 80% of respondents experienced a moderate to critical constraint due to indirect wage costs, such as superannuation and workers' compensation.

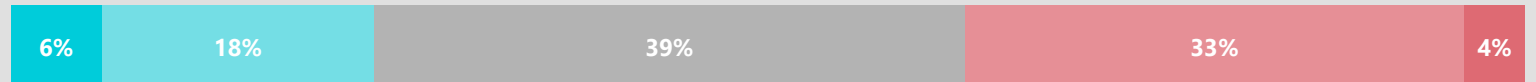
Direct wage costs were a moderate to major constraint for a similarly significant proportion of respondents, at 76%. The share of respondents experiencing major to critical constraints due to direct wages was up 3 points from the January's survey, which reflects the ongoing challenges of inflationary pressures on wages.

Another issue caravan and camping businesses are facing stems from retaining and recruiting suitably qualified staff, with 45% of respondents experiencing a major or critical constraint. This suggests that the shortage of talent in the industry has important impacts on business operations and staff management.

Access to upskilling and training programs was another area of concern, although the proportion of businesses reporting moderate to major constraints in this area was lower, at 56%. Nonetheless, this result shows the importance of training programs as a solution to workforce issues.

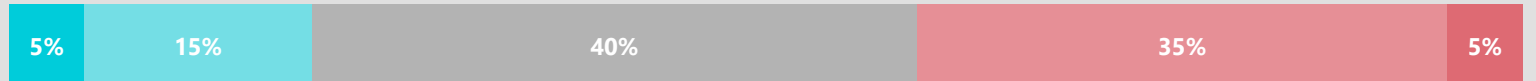
#### DIRECT WAGE COSTS

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



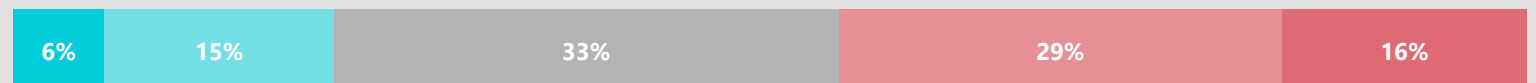
#### INDIRECT WAGE COSTS

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



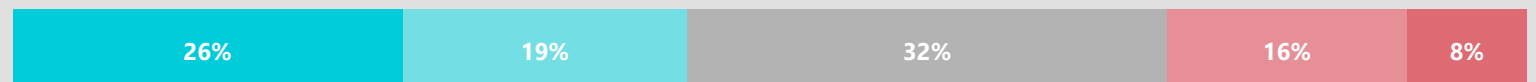
#### RETAINING AND RECRUITING SKILLED STAFF

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



#### ACCESS TO UPSKILLING AND TRAINING PROGRAMS

● No constraint ● Minor ● Moderate ● Major ● Critical Constraint



# INDUSTRY OUTLOOK

## BUSINESS OUTLOOK JULY TO DECEMBER 2023 v JANUARY TO JUNE 2023

### ECONOMIC OUTLOOK INCREASINGLY GLOOMY

#### JULY 2023

In the July 2023 survey, businesses expressed a more pessimistic view on the Australian economy over the next six months, with 81% of respondents expecting a weaker economic environment in the short-term. This is in line with broader economic forecasts, with mixed projections about an Australian recession.

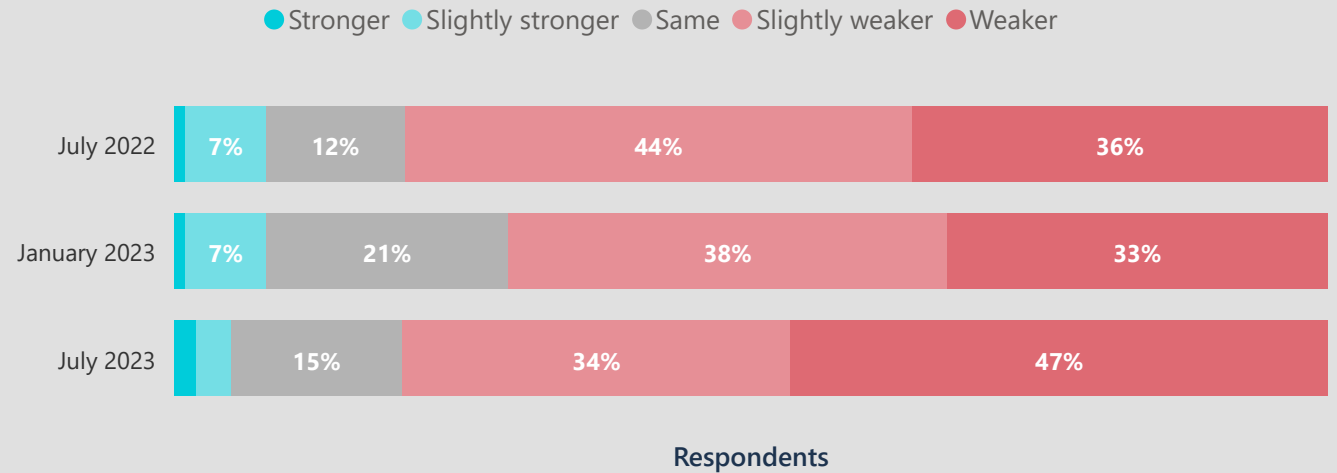
More than half (51%) of respondents expect general business conditions to deteriorate over the next six months, while a minority (15%) predict an improving environment. This pattern was similar for sales/revenue, profitability and orders/bookings, with the majority of respondents anticipating a decline in these indicators.

Till the end of the year, the majority of businesses see average wage costs rise, while employment levels, overtime, and training costs are expected to remain on current levels.

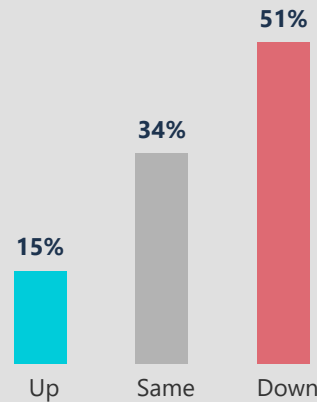
While eight in ten respondents expect further increases in cost of material and overheads, the majority (49%) are likely to keep selling prices steady, although one third (32%) of respondents are looking to increase their average selling prices.

Overall, businesses predict tightening business conditions characterised by falling profits as a result of softening consumer demand and increases in operational costs.

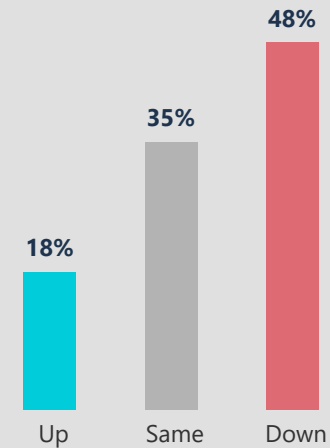
### EXPECTATION OF AUSTRALIAN ECONOMY PERFORMANCE OVER NEXT SIX MONTHS



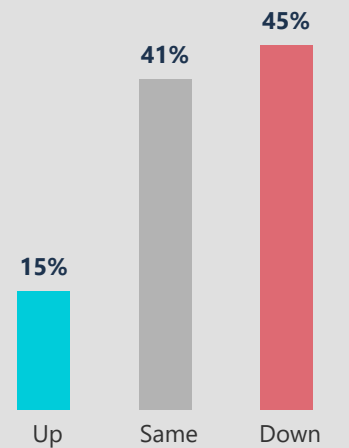
#### GENERAL BUSINESS CONDITIONS



#### TOTAL SALES/REVENUE



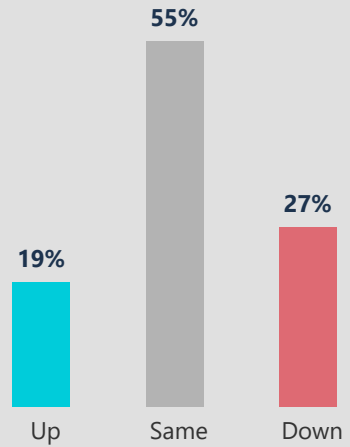
#### PROFITABILITY



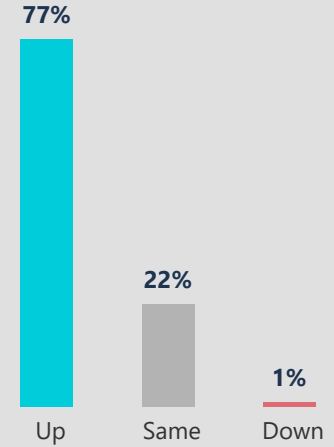
# INDUSTRY OUTLOOK

BUSINESS OUTLOOK JULY TO DECEMBER 2023 v JANUARY TO JUNE 2023

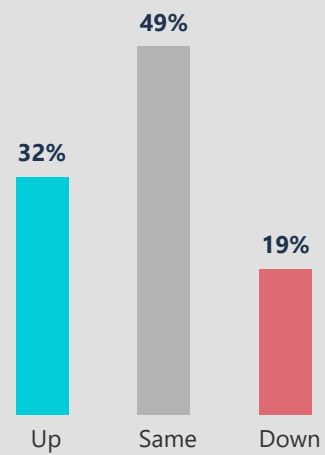
## EMPLOYMENT LEVELS



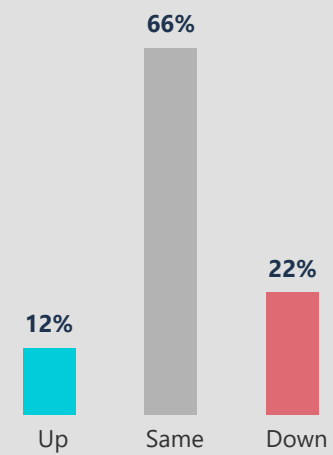
## COST OF MATERIALS



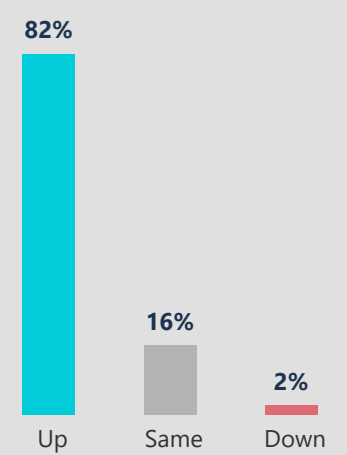
## AVERAGE SELLING PRICE



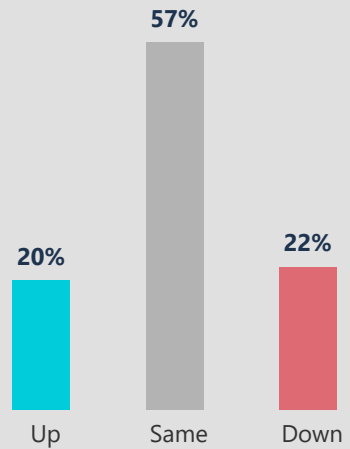
## EXPORT SALES



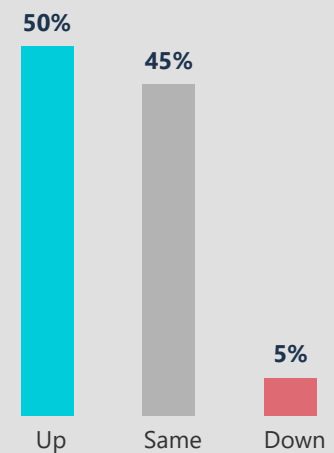
## COST OF OVERHEADS



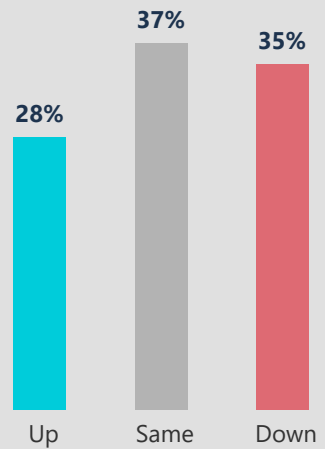
## TRAINING EXPENDITURE



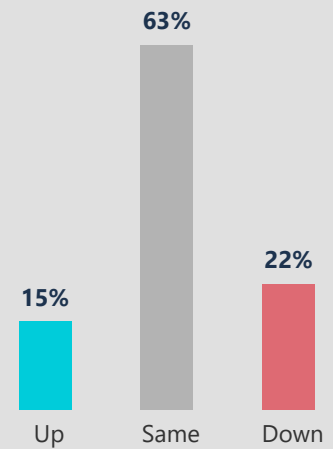
## AVERAGE WAGES



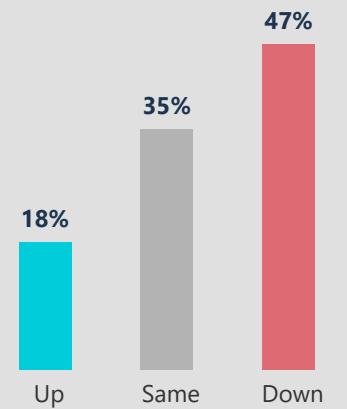
## CAPITAL EXPENDITURE



## OVERTIME WORKED



## ORDERS/BOOKINGS RECEIVED



# CONSUMER MOVEMENT INDEX

## MOBILE POSITIONING INSIGHTS

### INCREASED VISITOR MOVEMENT

JANUARY 2019 TO MAY 2023

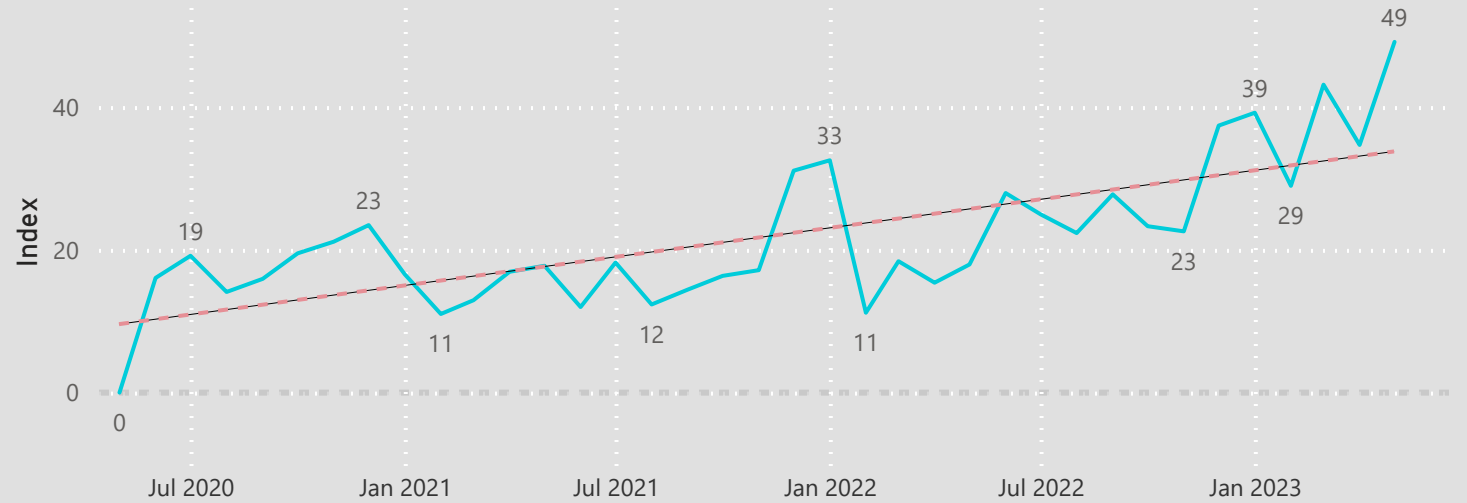
Using mobile positioning data from 2.9 million mobile devices cross-analysed with 1,500 geofences located around caravan parks, we can identify travel behaviour of Australians who stay overnight in caravan parks and stay for less than 35 days. These figures, compared with a total population of mobile devices in use, are then standardized on an index with a figure over 0 indicating increased travel, whilst anything below 0 indicating a decline in movement.

Since May 2020, we have seen a population increase in movement of caravan and campers with the index reaching 49 points in May 2023, the highest value so far, which the index trending upwards over the last three years.

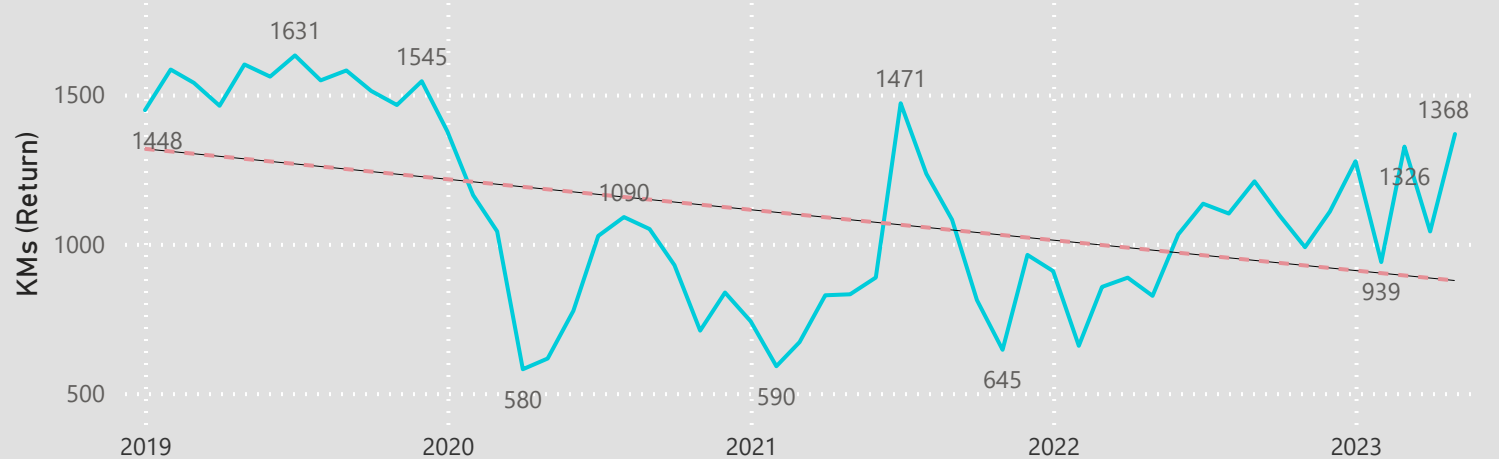
Average distance travelled is calculated by mapping common evening location (home) against the total kilometres travelled during each trip undertaken. Measured as the crow flies and as a return trip, average distance has significantly decreased since the beginning of the pandemic as a result of state border closures and the loss of north/south migration markets over recent years.

As of May 2023, average distance was 1,368 km. While this is 15% below 2019 levels, it represents the highest distance travelled in the month of May since March 2020 and given the ongoing cost-of-living crisis it is a sign of resilience.

#### CARAVAN PARK VISITOR MOVEMENT INDEX



#### CARAVAN PARK VISITOR AVERAGE DISTANCE TRAVELLED



Data source: Near, 2023



# CONSUMER INTEREST

## NATIONAL WEEKLY TREND

### INCREASED INTEREST IN CARAVAN AND CAMPING

JANUARY 2020 TO JULY 2023

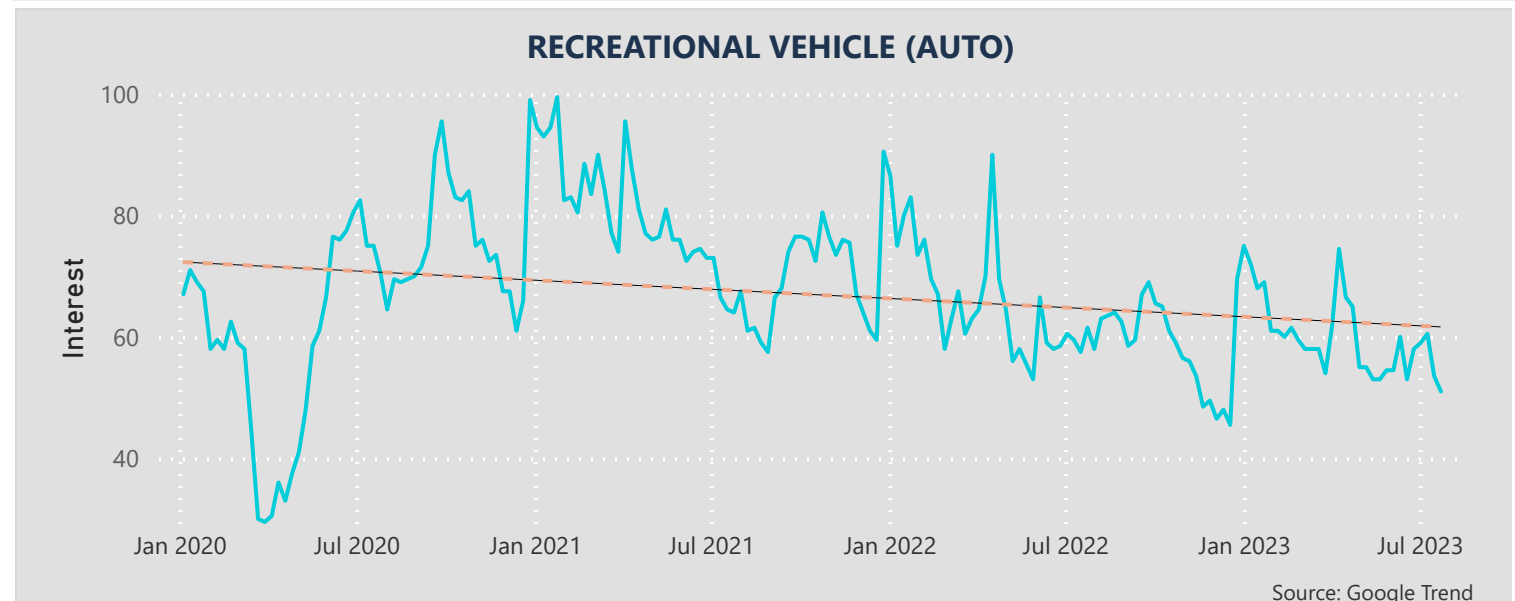
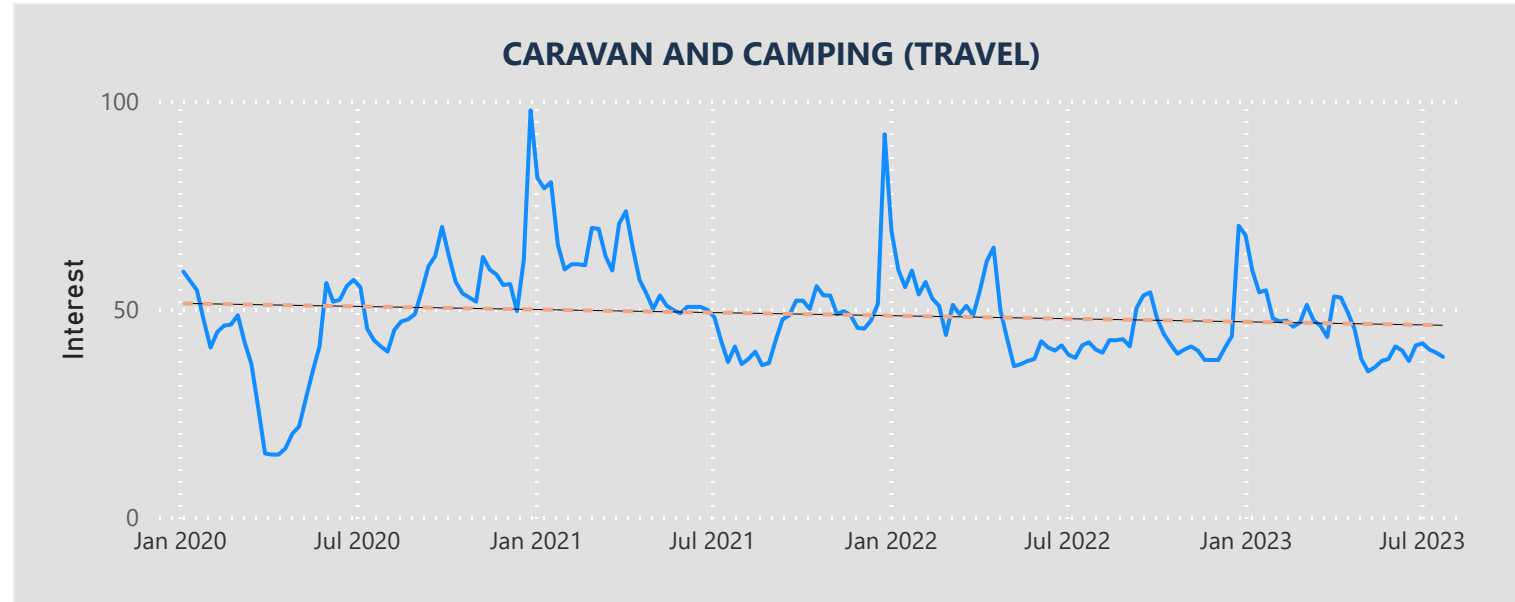
Google Trends analyses the popularity of top search queries in Google Search across various regions and topics to provide a scale of interest on a topic's proportion of all searches in the same place and time. The data is indexed to 100, where 100 is the maximum search interest for the time and location. In short, trend data shows if there has been increased interest in a topic compared to the previous point in time.

Two Google Trend topics are examined. The first topic is caravan and camping in Australia as defined as a travel category. This identifies interest in Australians looking to go caravan and camping for the purposes of travel. The second topic is recreational vehicles (including caravans) as an automotive category. This identifies Australians seeking information on purchasing/selling vehicles, servicing, and other related searches.

After a significant drop in interest following the COVID-19 outbreak, search volume for recreational vehicles and caravan travel rebounded quickly in the second half of 2020, indicating pent-up demand post lockdowns. Trend data shows that search interest has been strongest during holiday periods, which reflects both the competitiveness and popularity of caravan and camping.

As of July 2023, interest in caravan and camping travel was recorded at 38.5 index points, which is comparable to July 2022's level and as such a sign of resilience given that economic conditions have since become more challenging. Nonetheless, overall trend indicates a decline in search interest, which is likely a result of financial pressures on non-discretionary items such as travel.

Conversely, automotive RV search interest has been trending down noticeably since 2020, falling to 51.0 index points at the end of July 2023, which might indicate a slowdown in consumer demand for vehicles. This is of course coming down from extraordinary high levels fueled by the COVID-19 pandemic.



Source: Google Trend

# CARAVAN PARK REPUTATION

## CUSTOMER SATISFACTION

### NATIONAL ONLINE CUSTOMER REVIEWS

AUGUST 2022 TO JULY 2023

In partnership with Shiji ReviewPro, we release a set of measurements to understand consumer satisfaction.

In a competitive market, ensuring that the caravan and camping visitor economy has a strong reputation supports industry growth, connecting with new markets as well as meeting the needs of existing segments.

Drawing upon 880,242 online reviews from 1000 caravan parks over the past 12 months, 75% of consumers had a positive experience when staying in a caravan park leading to a Global Review Index™ (GRI) score of 85.0%. This is down 0.2% from the previous year.

The highest GRI scores were achieved for service, location, and cleanliness, whereas the lowest score (84.1%) was obtained for value. Domestic tourism faces competition in terms of value perception from international destinations, such as Bali, Southeast Asia, and Fiji which offer consumers strong value propositions.

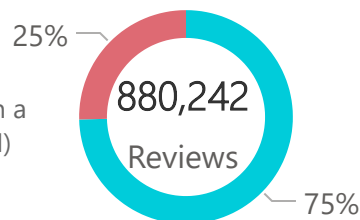
Booking.com remains the largest source of reviews for caravan parks, with 186,753 reviews recorded in the last 12 months. Google reviews are the second largest review source (170,388 reviews) and is fastest growing (+26,279 reviews compared to the same period last year).



GRI Score

85.0%

Index



● Positive (%) ● Negative (%)

\*GRI is calculated by an algorithm that generates a numerical score from 0 to 100 and is based on the Overall Score of a review. Refer to: [https://go.reviewpro.com/s/article/What-is-the-Global-Review-Index?language=en\\_US](https://go.reviewpro.com/s/article/What-is-the-Global-Review-Index?language=en_US)

### GRI™ BY SEGMENTS

Group	Reviews	GRI	Change
Couple	28871	83.0%	-0.0
Group	5577	83.0%	+0.0
Family	33160	82.9%	-0.0
Solo	6830	82.7%	+0.0
Business	1641	79.1%	-0.0

Department	Reviews	GRI	Change
Location	24,737	90.1%	+0.7
Service	25,212	90.1%	+0.7
Cleanliness	22,386	87.1%	+0.5
Room	22,268	86.3%	+0.7
Value	24,724	84.1%	+1.1

### TOP SOURCES OF REVIEWS

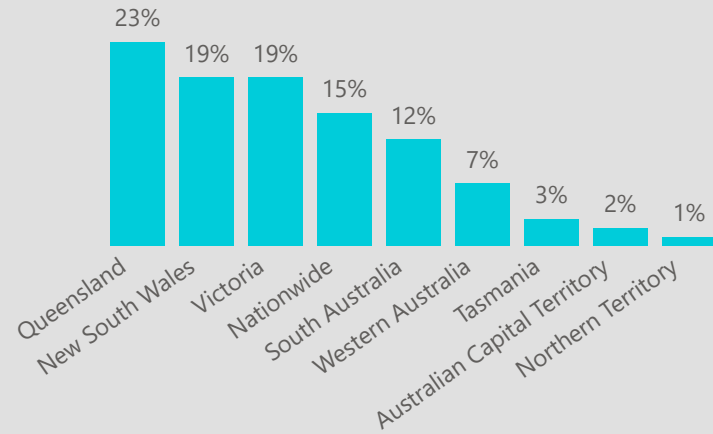
SOURCE	Reviews	Reviews Change	GRI %
Booking.com	186753	17619	83.2%
Google	170388	26279	85.8%
Tripadvisor	63663	-10993	83.6%
Expedia	8318	-5301	86.1%
Facebook	5406	-12387	0.0%
Agoda	3952	1325	86.8%
Hotels.com	2281	-519	88.0%
Trip.com	338	210	88.7%
Holidaycheck	216	216	0.0%
Ctrip	51	0	79.8%
UKCampsite	23	-69	0.0%
Traveloka	11	5	0.0%
Stayz	8	-27	0.0%

Source: Shiji ReviewPro, 2023

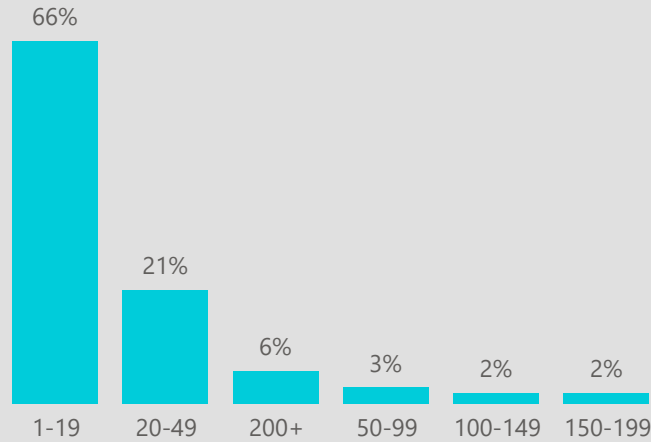
# SURVEY SAMPLE

## RESPONDENT PROFILE

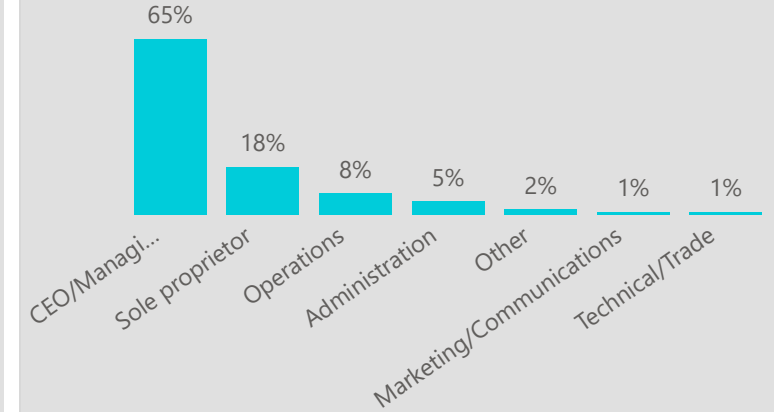
### STATE AND TERRITORY OF BUSINESS



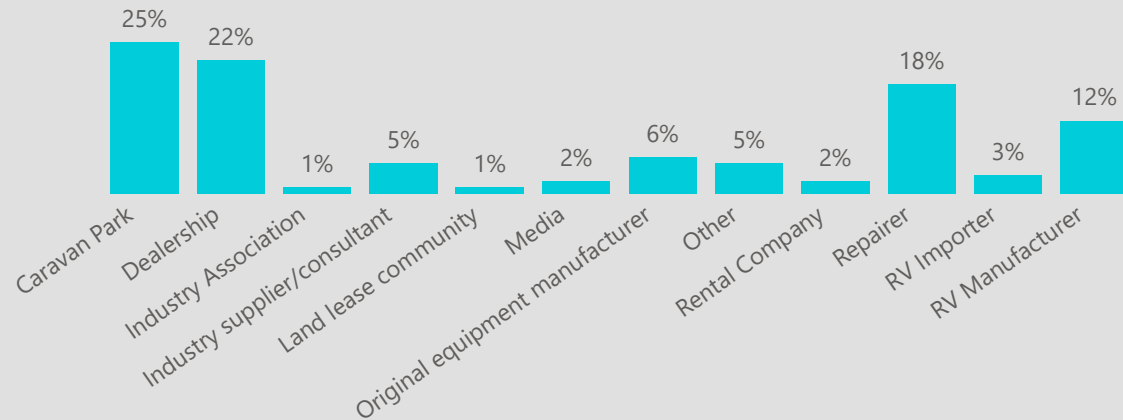
### STAFF EMPLOYED



### RESPONDENT POSITION



### BUSINESS TYPE



### ANNUAL TURNOVER RANGE





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, affiliates, 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.