

Caravan Park

TOURISM REGION
PERFORMANCE

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

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 approximately \$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 and industry to be aware of trends and opportunities in the market.

This report provides insights into the performance of commercial caravan park accommodation in tourism regions.

METHOD

Deidentified data is provided from over 400 caravan parks across 68 tourism regions. This data is collected directly through Newbook, RezExpert and RMS property management systems and statistically compiled by BDO. Tourism Regions with 4 or more caravan parks (sample) providing data are reported. Any blank figures have no annual comparative.

To become a participant in this project, please contact Caravan Industry Association of Australia research@caravanindustry.com.au

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



State and Territory Comparison



CABINS

State	Occupancy	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
NSW	52%	10%	\$85	14%	\$163	4%	160
NT	80%	9%	\$148	27%	\$185	17%	8
QLD	73%	-6%	\$124	-2%	\$169	4%	92
SA	58%	-1%	\$79	10%	\$137	11%	39
TAS	48%	-6%	\$60	-8%	\$125	-2%	12
VIC	41%	-11%	\$61	-9%	\$147	2%	81
WA	63%	-5%	\$129	6%	\$203	11%	50
Total	58%	2%	\$95	8%	\$165	5%	442



POWERED SITES

State	Occupancy	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
NSW	38%	8%	\$16	12%	\$43	3%	160
NT	57%	46%	\$38	85%	\$65	27%	8
QLD	84%	0%	\$44	5%	\$53	5%	92
SA	35%	0%	\$13	6%	\$36	6%	39
TAS	25%	-22%	\$9	-19%	\$37	3%	12
VIC	19%	-2%	\$7	12%	\$39	15%	81
WA	59%	6%	\$33	18%	\$56	11%	50
Total	51%	7%	\$25	16%	\$49	8%	442

Top 10 Tourism Regions by Occupancy



CABINS

Tourism Region	State	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Whitsundays	QLD	87%	-3%	\$172	2%	\$198	5%	6
Central NSW	NSW	83%	47%	\$101	44%	\$123	-2%	5
Capricorn	QLD	81%	11%	\$111	10%	\$137	-1%	7
Australia's North West	WA	78%	6%	\$173	8%	\$222	3%	8
Adelaide	SA	78%	7%	\$105	8%	\$136	1%	9
Sunshine Coast	QLD	77%	8%	\$142	20%	\$185	12%	11
Queensland Country	QLD	76%		\$105		\$138		9
Fraser Coast	QLD	76%	-16%	\$95	-5%	\$125	14%	5
Outback Queensland	QLD	75%	-3%	\$99	-3%	\$131	-0%	8
Tropical North Queensland	QLD	74%	-6%	\$151	1%	\$203	8%	14
Total		78%	2%	\$129	4%	\$165	2%	82



POWERED SITES

Tourism Region	State	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Sunshine Coast	QLD	96%	2%	\$54	9%	\$56	7%	11
Whitsundays	QLD	93%	-2%	\$52	6%	\$56	8%	6
Capricorn	QLD	91%	3%	\$43	14%	\$48	11%	7
Fraser Coast	QLD	90%	-3%	\$53	13%	\$59	16%	5
Gold Coast	QLD	87%	-1%	\$50	2%	\$57	3%	13
Tropical North Queensland	QLD	84%	9%	\$47	19%	\$56	9%	14
Townsville	QLD	80%	2%	\$36	6%	\$46	4%	9
Bundaberg	QLD	79%	58%	\$37	122%	\$47	41%	4
Australia's Coral Coast	WA	76%	4%	\$46	16%	\$60	12%	8
Central NSW	NSW	72%	64%	\$26	55%	\$36	-5%	5
Total		86%	4%	\$47	10%	\$55	6%	82

New South Wales and ACT Tourism Region Comparison



CABINS

New South Wales	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Blue Mountains	Low Sample, Not Reported						3
Capital Country	52%	48%	\$96	102%	\$184	37%	5
Central Coast	50%	-6%	\$93	-7%	\$188	-1%	8
Central NSW	83%	47%	\$101	44%	\$123	-2%	5
Hunter	60%	13%	\$75	13%	\$126	0%	12
New England North West	Not Reported This Month Due To TRA Tourism Region Changes						7
North Coast NSW	61%	26%	\$97	24%	\$158	-1%	53
Outback NSW	Low Sample, Not Reported						3
Riverina	Low Sample, Not Reported						3
Snowy Mountains	Low Sample, Not Reported						2
South Coast	33%	-7%	\$50	-9%	\$152	-2%	45
Sydney	60%	7%	\$86	2%	\$144	-4%	7
The Murray	Not Reported This Month Due To TRA Tourism Region Changes						7
Total	52%	10%	\$85	14%	\$163	4%	160



POWERED SITES

New South Wales	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Blue Mountains	Low Sample, Not Reported						3
Capital Country	44%	14%	\$17	19%	\$39	4%	5
Central Coast	22%	30%	\$8	39%	\$36	6%	8
Central NSW	72%	64%	\$26	55%	\$36	-5%	5
Hunter	39%	2%	\$16	-1%	\$42	-3%	12
New England North West	Not Reported This Month Due To TRA Tourism Region Changes						7
North Coast NSW	58%	24%	\$25	27%	\$43	3%	53
Outback NSW	Low Sample, Not Reported						3
Riverina	Low Sample, Not Reported						3
Snowy Mountains	Low Sample, Not Reported						2
South Coast	13%	17%	\$5	14%	\$37	-3%	45
Sydney	45%	9%	\$20	20%	\$45	11%	7
The Murray	Not Reported This Month Due To TRA Tourism Region Changes						7
Total	38%	8%	\$16	12%	\$43	3%	160

Queensland Tourism Region Comparison



CABINS

Queensland	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Brisbane	Low Sample, Not Reported						2
Bundaberg	47%	-4%	\$62	-15%	\$132	-12%	4
Capricorn	81%	11%	\$111	10%	\$137	-1%	7
Fraser Coast	76%	-16%	\$95	-5%	\$125	14%	5
Gladstone	Low Sample, Not Reported						2
Gold Coast	66%	-12%	\$149	-11%	\$224	2%	13
Mackay	Low Sample, Not Reported						1
Outback Queensland	75%	-3%	\$99	-3%	\$131	-0%	8
Queensland Country	76%		\$105		\$138		9
Sunshine Coast	77%	8%	\$142	20%	\$185	12%	11
Townsville	73%	-2%	\$88	16%	\$122	19%	9
Tropical North Queensland	74%	-6%	\$151	1%	\$203	8%	14
Whitsundays	87%	-3%	\$172	2%	\$198	5%	6
Total	73%	-7%	\$124	-4%	\$169	3%	91



POWERED SITES

Queensland	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Brisbane	Low Sample, Not Reported						2
Bundaberg	79%	58%	\$37	122%	\$47	41%	4
Capricorn	91%	3%	\$43	14%	\$48	11%	7
Fraser Coast	90%	-3%	\$53	13%	\$59	16%	5
Gladstone	Low Sample, Not Reported						2
Gold Coast	87%	-1%	\$50	2%	\$57	3%	13
Mackay	Low Sample, Not Reported						1
Outback Queensland	62%	-20%	\$27	-20%	\$44	0%	8
Queensland Country	58%		\$22		\$38		9
Sunshine Coast	96%	2%	\$54	9%	\$56	7%	11
Townsville	80%	2%	\$36	6%	\$46	4%	9
Tropical North Queensland	84%	9%	\$47	19%	\$56	9%	14
Whitsundays	93%	-2%	\$52	6%	\$56	8%	6
Total	84%	-2%	\$45	2%	\$53	4%	91

South Australia Tourism Region Comparison



CABINS

South Australia	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Adelaide	78%	7%	\$105	8%	\$136	1%	9
Adelaide Hills	Low Sample, Not Reported						2
Barossa	Low Sample, Not Reported						1
Clare Valley	Low Sample, Not Reported						1
Eyre Peninsula	Low Sample, Not Reported						2
Fleurieu Peninsula	42%	-9%	\$54	-11%	\$128	-2%	5
Flinders Ranges and Outback	Low Sample, Not Reported						2
Kangaroo Island	Low Sample, Not Reported						1
Limestone Coast	47%	21%	\$57	23%	\$121	2%	4
Murray River, Lakes and Coorong	Low Sample, Not Reported						3
Riverland	58%	54%	\$78	72%	\$134	12%	6
Yorke Peninsula	Low Sample, Not Reported						3
Total	58%	-1%	\$79	10%	\$137	11%	39



POWERED SITES

South Australia	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Adelaide	67%	11%	\$27	15%	\$40	4%	9
Adelaide Hills	Low Sample, Not Reported						2
Barossa	Low Sample, Not Reported						1
Clare Valley	Low Sample, Not Reported						1
Eyre Peninsula	Low Sample, Not Reported						2
Fleurieu Peninsula	11%	-16%	\$4	1%	\$31	20%	5
Flinders Ranges and Outback	Low Sample, Not Reported						2
Kangaroo Island	Low Sample, Not Reported						1
Limestone Coast	20%	16%	\$6	22%	\$30	5%	4
Murray River, Lakes and Coorong	Low Sample, Not Reported						3
Riverland	35%	140%	\$12	172%	\$36	13%	6
Yorke Peninsula	Low Sample, Not Reported						3
Total	35%	0%	\$13	6%	\$36	6%	39

Tasmania Tourism Region Comparison



CABINS

Tasmania	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
East Coast	Low Sample, Not Reported						1
Hobart and the South	45%	-10%	\$54	-13%	\$120	-3%	5
Launceston and the North	Low Sample, Not Reported						2
North West	Low Sample, Not Reported						2
West Coast	Low Sample, Not Reported						2
Total	48%	-6%	\$60	-8%	\$125	-2%	12



POWERED SITES

Tasmania	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
East Coast	Low Sample, Not Reported						1
Hobart and the South	25%	-25%	\$10	-11%	\$40	19%	5
Launceston and the North	Low Sample, Not Reported						2
North West	Low Sample, Not Reported						2
West Coast	Low Sample, Not Reported						2
Total	25%	-22%	\$9	-19%	\$37	3%	12

Victoria Tourism Region Comparison



CABINS

Victoria	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Ballarat	Low Sample, Not Reported						1
Bendigo Loddon	46%	-13%	\$73	-24%	\$161	-13%	5
Central Highlands	33%	-29%	\$53	-35%	\$160	-7%	4
Central Murray	Low Sample, Not Reported						1
Geelong and the Bellarine	30%	-7%	\$55	-20%	\$187	-14%	7
Gippsland	28%	-19%	\$46	-18%	\$164	1%	7
Goulburn	74%	46%	\$89	36%	\$121	-7%	5
Great Ocean Road	39%	-14%	\$47	-13%	\$122	0%	11
High Country	38%	-35%	\$73	-19%	\$191	24%	9
Lakes	45%	-9%	\$55	-5%	\$123	4%	8
Mallee	Low Sample, Not Reported						2
Melbourne	Low Sample, Not Reported						2
Murray East	Low Sample, Not Reported						1
Peninsula	Low Sample, Not Reported						3
Phillip Island	39%	28%	\$62	24%	\$160	-3%	8
Western Grampians	65%	0%	\$78	8%	\$121	7%	4
Wimmera	Low Sample, Not Reported						1
Yarra Valley and Dandenong Ranges	Low Sample, Not Reported						1
Total	41%	-13%	\$61	-10%	\$147	4%	80



POWERED SITES

Victoria	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Ballarat	Low Sample, Not Reported						1
Bendigo Loddon	21%	-32%	\$9	-36%	\$44	-6%	5
Central Highlands	13%	-8%	\$5	-1%	\$39	9%	4
Central Murray	Low Sample, Not Reported						1
Geelong and the Bellarine	23%	18%	\$10	11%	\$44	-6%	7
Gippsland	13%	-5%	\$6	-0%	\$43	5%	7
Goulburn	28%	46%	\$11	67%	\$38	15%	5
Great Ocean Road	16%	-3%	\$5	2%	\$34	5%	11
High Country	13%	-39%	\$5	1%	\$41	67%	9
Lakes	14%	23%	\$5	45%	\$35	17%	8
Mallee	Low Sample, Not Reported						2
Melbourne	Low Sample, Not Reported						2
Murray East	Low Sample, Not Reported						1
Peninsula	Low Sample, Not Reported						3
Phillip Island	8%	-27%	\$5	10%	\$53	50%	8
Western Grampians	34%	9%	\$13	12%	\$38	3%	4
Wimmera	Low Sample, Not Reported						1
Yarra Valley and Dandenong Ranges	Low Sample, Not Reported						1
Total	19%	-5%	\$8	11%	\$39	17%	80

Western Australia Tourism Region Comparison



CABINS

Western Australia	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Australia's Coral Coast	59%	-9%	\$160	-5%	\$270	4%	8
Australia's Golden Outback	64%	-12%	\$103	24%	\$161	41%	8
Australia's North West	78%	6%	\$173	8%	\$222	3%	8
Australia's South West	57%	0%	\$107	21%	\$188	20%	14
Destination Perth	68%	-6%	\$105	2%	\$153	9%	12
Total	63%	-5%	\$129	6%	\$203	11%	50

POWERED SITES

Western Australia	Occup.	Annual % Change	RevPAR	Annual % Change	ADR	Annual % Change	Sample
Australia's Coral Coast	76%	4%	\$46	16%	\$60	12%	8
Australia's Golden Outback	52%	2%	\$21	9%	\$40	7%	8
Australia's North West	67%	5%	\$44	21%	\$66	15%	8
Australia's South West	22%	44%	\$9	40%	\$41	-3%	14
Destination Perth	63%	6%	\$28	14%	\$44	7%	12
Total	59%	6%	\$33	18%	\$56	11%	50



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