

Caravan And Camping

STATE OF INDUSTRY

2022



**Caravan
Industry**

Association of Australia



— DOMESTIC CARAVAN & CAMPERS —

50.6

MILLION
NIGHTS
+23%

12.6

MILLION
TRIPS
+19%

7.4

BILLION
VISITOR EXPENDITURE
+29%



30-54 YEAR
MARKET TAKES
47% OF TRIPS



55+ YEAR
MARKET SPENDS
43% OF NIGHTS

— RV MANUFACTURING —



23,931
RVS MANUFACTURED
IN AUSTRALIA IN 2021



95%
TOWABLES
PRODUCED

— REGISTRATIONS —



772,598
RV REGISTRATIONS
(+4%)



30.1^{RV}
REGISTRATIONS/
1,000 PEOPLE
(+1 RV REGISTRATION)

— ECONOMIC VALUE OF THE INDUSTRY —

CARAVAN PARKS | MANUFACTURING AND TRADE | VISITOR EXPENDITURE

\$23.8 BILLION IN ECONOMIC IMPACT TO THE
AUSTRALIAN ECONOMY ANNUALLY

CARAVAN PARK PERFORMANCE



CABINS

52%

OCCUPANCY

\$1.3 BILLION
REVENUE



POWERED SITES

44%

OCCUPANCY

\$898 MILLION
REVENUE



UNPOWERED SITES

12%

OCCUPANCY

\$66 MILLION
REVENUE

NATIONAL PERFORMANCE

89%

OF DOMESTIC CARAVAN
AND CAMPING TRIPS
TAKE PLACE IN
REGIONAL AREAS

NORTHERN TERRITORY

2,183
 360,704
 1,324,824

QUEENSLAND

201,477
 2,813,536
 11,600,926

WESTERN AUSTRALIA

110,057
 1,737,187
 7,907,829

NEW SOUTH WALES

182,764
 3,559,302
 13,050,113

SOUTH AUSTRALIA

60,224
 1,292,964
 4,606,318

VICTORIA

185,507
 2,964,193
 10,588,874

TASMANIA

24,419
 410,785
 1,428,704



REGISTRATIONS



DOMESTIC TRIPS



DOMESTIC NIGHTS

Caravan & Camping Industry Performance



Australians' strong desire for recreational vehicles broke four-decade long manufacturing records and saw the visitor economy strong rebound post 2020.

In 2021, the caravan and camping industry continued to be a major driver of Australia's visitor economy and manufacturing sectors. While the broader tourism industry remained constrained due to international border closures and global travel restrictions, the caravan and camping visitor economy strongly rebounded from 2020, generating 12.6 million trips and \$7.4 billion in visitor expenditure. This propelled the caravan and camping sector to become the largest provider of accommodation for the purposes of a holiday in Australia.

Australians' strong desire for recreational vehicles broke four-decade long manufacturing records with over 23,931 units produced. A significant 42% rebound from 2020 and 12% higher compared to pre-pandemic conditions in 2019. This demand was further complemented by record supply of imported caravan trailers. With 18,917 units brought into the country in 2021 – a 79% increase from the previous year. This resulted in over 42,000 recreational vehicles entering the market for the year!

What is most notable, was that the industry achieved record heights under a backdrop of Covid-19 travel restrictions, state border closures, business lockdowns, international supply chain disruptions and a reduced labour force. This highlights the resilience of the industry in times of crisis and the importance the sector has in helping to support Australia's economy when other sectors falter.





The past two years has also demonstrated the vital importance that caravan parks, manufacturers and rental companies have in supporting communities and society. Whether it be caravans provided to farmers to protect their workers from covid, providing motorhomes to remote communities as medical support units, or caravan parks providing temporary housing solutions during natural disasters. Time and time again, the caravan and camping industry steps up to support communities and local economies.

Looking forward, the framing conditions for the industry remain complex. From a pandemic perspective, there is little appetite for Federal or State governments to move back to the harshest of covid-19 restrictions that have been seen over the last two years. Yet, the industry remains disposed to the pandemic's impacts including reduced workforce and operational capabilities, global supply chain disruption and tightening economic conditions. At the time of writing, the conflict in Ukraine has further fractured supply chains and the global economy.

The big challenge for industry operators in 2022 will be managing economic conditions and the impact that rising inflation will have on consumer confidence. Interest rates will increase in Australia reducing discretionary spend; the USA is looking likely to enter a recession; China's supply chains remain impacted due to their covid-19 policy; and the EU is grappling with energy and commodity shortages which is increasing oil, gas, and raw material costs.

These backdrop to the global economy, whilst volatile, provide conditions more favourable for domestic caravan and camping as Australians seek familiarity, and safety of travel closer to home. As the last two years have shown, Australians don't stop travelling, they just change how they travel. As a competitive advantage, the caravan and camping industry remains uniquely positioned to offer product, services and experiences that can adapt to differing economic conditions.