INTRODUCTION

Domestic and international visitors stay in a range of accommodation while travelling in Western Australia (WA). This snapshot profiles the domestic and international visitors to WA who stayed in caravan and camping accommodation in 2016, covering the following:

- recent trends
- demographics
- travel behaviour (including travel party, purpose of visit, and activities participated in)
- regions visited
- type of accommodation used

Throughout this snapshot, ‘caravan and camping visitors’ refers to visitors who stayed in caravan or camping accommodation in WA, either commercial sites (caravan parks, camping grounds, or cabins), or non-commercial sites (National Park, crown land, caravan or camping by the side of the road or on private property), for at least one night of their trip to/within WA. ‘Other visitors’ are defined as visitors to/in WA who did not stay in caravan or camping accommodation when visiting.

CHANGE IN NATIONAL VISITOR SURVEY METHODOLOGY

In January 2014, the NVS methodology was improved to bring the survey sample more in line with the Australian population. Consequently, domestic estimates for 2014 onwards are not comparable to estimates for 2013 and prior. More information on the change to the NVS methodology is available on the Tourism WA corporate website.

In September 2016, TRA confirmed there was a methodology issue with the NVS impacting the domestic estimates for all States and Territories. TRA have now corrected the issue and all domestic estimates from the commencement of the dual frame data collection (2014 to 2016) have been back cast and reissued. Revisions have been made for all States and Territories and across all purposes of travel, although WA was one of the most impacted states. 2014 and 2015 estimates have seen the most significant revisions; only minor revisions were required for the 2016 estimates as they were not as impacted by the methodology issue. By correcting this methodology issue the revised estimates, and estimates produced by the NVS moving forward, more accurately reflect the Australian population and domestic travel across the country.
WHAT ARE THE LATEST INDUSTRY AND VISITOR TRENDS?

Domestic caravan and camping visitors:

- In 2016, caravan and camping visitors accounted for 16% of total domestic visitors and 15% of total domestic visitor nights in WA.
- In 2016, 1.54 million domestic visitors spent 6.75 million nights in caravan or camping accommodation in WA. This represents a decrease of (-) 2.9% in domestic visitors and a (-) 7.5% decrease in domestic visitor nights spent in caravan or camping accommodation in WA compared to 2015.
- Consequently, the average length of stay in caravan and camping accommodation has dropped from 4.6 nights in 2015 to 4.4 nights in 2016.
- Domestic caravan and camping visitors spent the majority of their trip to/within WA in caravan and camping accommodation (87% of nights).

International caravan and camping visitors:

- International caravan and camping visitors to WA accounted for 8% of total international visitors and 3% of total international visitor nights in 2016.
- The number of international caravan and camping visitors reached its highest point in the past ten years, increasing by (+) 24.0% to 72,800 visitors, 14,100 additional visitors compared to 2015.
- The number of international visitor nights spent in caravan and camping accommodation continued to increase, up (+) 2.4% to 994,000 nights.
- The average length of stay in caravan and camping accommodation by international visitors to WA is 13.7 nights.
- Looking at long term trends, international caravan and camping visitation has seen modest growth over the last decade, with a ten year annual average growth rate of (+) 2.6% in visitor numbers and (+) 1.5% in visitor nights. These growth rates are behind those of total international visitors to WA (+4.3% for total visitors, and +5.2% for total visitor nights).
- Unlike domestic visitors, international caravan and camping visitors only spent three in ten of their nights in WA (30%) in caravan and camping accommodation.

<table>
<thead>
<tr>
<th>Table 1: International visitors and nights spent in caravan or camping accommodation</th>
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</thead>
<tbody>
<tr>
<td>Overnight trips</td>
</tr>
<tr>
<td>Nights in caravan or camping</td>
</tr>
<tr>
<td>Average stay in caravan or camping (nights)</td>
</tr>
<tr>
<td>% of total nights spent in caravan or camping accommodation</td>
</tr>
</tbody>
</table>
WHO WERE THE CARAVAN AND CAMPING VISITORS TO WA?

Domestic caravan and camping visitors:
• In 2016, nine in ten (94%) domestic caravan and camping visitors were intrastate visitors, with the remainder from interstate.
• For domestic visitors, caravanning and camping in WA is not limited to a particular age group. In 2016, domestic caravan and camping visitors covered a spread of age groups relatively evenly.
• Domestic caravan and camping visitors were most likely to travel with friends and relatives (35%), as an adult couple (24%), or as a family group (19%).
• In comparison to other domestic visitors, caravan and camping visitors were significantly more likely to be travelling for holiday purposes, with almost three in four (73%) travelling for this purpose (compared to 33% of other visitors). Additionally, caravan and camping visitors were significantly less likely to be travelling to visit friends and relatives or for business purposes.

International caravan and camping visitors:
• Unlike the domestic market, caravan and camping in WA is more popular amongst younger international visitors. Half (53%) of all international caravan and camping visitors in 2016 were aged under 35.
• International visitors who stayed in caravan or camping accommodation mainly travelled alone (42%) or as an adult couple (33%).
• Two in three international caravan and camping visitors were from European countries, namely Germany (20%), the UK (15%), Switzerland (8%) and France (7%). 8% were from the USA.
• Almost all international caravan and camping visitors (96%) were travelling for holiday purposes, whereas only half of international visitors to WA staying in other accommodation were visiting for a holiday.
WHAT ACTIVITIES DID THEY DO?

Domestic caravan and camping visitors:
• In 2016, domestic caravan and camping visitors were more likely than other visitors to undertake outdoor or nature-based activities (56%, compared to 36%), and sports or active outdoor activities (43%, compared to 21%). Caravan and camping visitors were more likely than other visitors to go to the beach and visit national parks, and were more likely to participate in activities such as bushwalking and fishing.

International caravan and camping visitors:
• International caravan and camping visitors were typically more active than other international visitors. They were more likely to participate in nature-based activities (99%, compared to 83%), active outdoor/sports activities (74%, compared to 38%), arts/heritage activities (76%, compared to 52%), and Indigenous cultural activities (46%, compared to 15%).

WHICH REGIONS DID THEY VISIT?

Domestic caravan and camping visitors:
• In 2016, the vast majority (92%) of all domestic visitor nights in caravan and camping accommodation were spent in regional WA. This compares with visitor nights in other accommodation, where just 64% were spent in regional WA.
• Australia’s South West received the greatest number of domestic caravan and camping visitors (37%). Australia’s Coral Coast was the second most popular region, attracting 23% of visitors, followed by Australia’s Golden Outback (22%). Experience Perth and Australia’s North West attracted a similar proportion (15% and 11%, respectively).

International caravan and camping visitors:
• Similar to the domestic market, the majority (89%) of all international visitor nights in caravan and camping accommodation were spent in regional WA. This compares to visitor nights in other accommodation where just 19% were spent in regional WA.
• In 2016, Australia’s Coral Coast received 53% of visitors, Australia’s South West received 42%, and Australia’s North West received 37%. Australia’s Golden Outback and Experience Perth were least popular amongst international caravan and camping visitors (31% and 29% respectively).

Table 2: Activities undertaken in WA

<table>
<thead>
<tr>
<th>Activity</th>
<th>Domestic Caravan and Camping Visitors</th>
<th>Domestic Other Visitors</th>
<th>International Caravan and Camping Visitors</th>
<th>International Other Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out at a restaurant and/or cafe</td>
<td>45%</td>
<td>58%</td>
<td>95%</td>
<td>91%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>36%</td>
<td>26%</td>
<td>89%</td>
<td>65%</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>29%</td>
<td>22%</td>
<td>89%</td>
<td>69%</td>
</tr>
<tr>
<td>Bushwalking or rainforest walks</td>
<td>27%</td>
<td>8%</td>
<td>69%</td>
<td>22%</td>
</tr>
<tr>
<td>Visit national or state parks</td>
<td>24%</td>
<td>9%</td>
<td>88%</td>
<td>54%</td>
</tr>
<tr>
<td>Fishing</td>
<td>23%</td>
<td>6%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>20%</td>
<td>22%</td>
<td>62%</td>
<td>37%</td>
</tr>
<tr>
<td>Visit friends &amp; relatives</td>
<td>17%</td>
<td>46%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Ranked by top activities for domestic caravan and camping visitors.
WHICH TYPES OF CARAVAN AND CAMPING ACCOMMODATION DID THEY STAY IN?

Domestic caravan and camping visitors:

- In 2016 two in three (66%) caravan and camping visitor nights were spent in caravan parks, up from 59% in 2015, while the remaining nights (34%) were spent in non-commercial caravan and camping accommodation.
- Domestic visitors staying in a caravan park and travelling with a caravan contributed the greatest number of domestic caravan and camping visitor nights (27%).

International caravan and camping visitors:

- Almost two thirds (62%) of international caravan and camping visitor nights in 2016 were spent in caravan parks, a proportion relatively consistent with 2015 (64%).
- There was a notable decrease in proportion of nights spent in a caravan park in cabin accommodation, and a notable increase in proportion of nights spent in a caravan park in motorhome / campervan accommodation. The proportion of nights spent camping in national parks increased from 10% to 15% year on year.

Figure 1: Type of accommodation by proportion of caravan and camping nights – Domestic

66% total domestic caravan and camping visitor nights in 2016 were spent in caravan parks.
Figure 2: Type of accommodation by proportion of caravan and camping nights – International

What other accommodation did they stay in?

Domestic caravan and camping visitors:

- Domestic caravan and camping visitors in 2016 spent the majority of their nights in WA in caravan or camping accommodation (87%). Other types of accommodation used during their trip included homes of friends or relatives (5% of nights) and hotels, resorts, motels or motor inns (4%).

International caravan and camping visitors:

- Converse to domestic visitors, international caravan and camping visitors spent just 30% of their nights in WA in caravan or camping accommodation. These visitors also stayed in rented houses/units (28%), homes of friends or relatives (17%) and other private accommodation (10%).

More information

- In 2012–13, Tourism Research Australia partnered with Tourism Western Australia to conduct research to gain a detailed understanding of the characteristics and behaviours of caravan park users and those who travel in self-contained recreation vehicles, and identify emerging trends. The report (titled “Evaluating the Caravan Park and Self-Contained Traveller Sector in Western Australia”) can be downloaded from: www.tra.gov.au/Research/View-all-publications/All-Publications/all-publications


- For more information about visitors to Western Australia, please see Tourism Western Australia’s ‘Fast Facts’ and domestic and international visitor profiles. These can be downloaded from: www.tourism.wa.gov.au/research-reports

Data Sources: Tourism Research Australia, National Visitor Survey (NVS) and International Visitor Survey (IVS) 2007 to 2016. (unpublished data) All figures refer to persons over the age of 15 years.