In 2015, caravan and camping visitors accounted for

15% of total domestic visitors in Western Australia &

5.56 million domestic visitor nights in Western Australia

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 2015, 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

Statistics reported in this document are sourced from Tourism Research Australia’s International and National Visitor Surveys. In January 2014, improvements were made to the National Visitor Survey methodology. Consequently, domestic visitation estimates from 2014 onwards are not comparable to estimates for 2013 and prior. Therefore, estimates for 2013 and prior are provided for the international caravan and camping market only. More information about the change in methodology can be read at tourismwa.gov.au.
WHAT ARE THE LATEST INDUSTRY AND VISITOR TRENDS?

Domestic caravan and camping visitors:

- In 2015, caravan and camping visitors accounted for 15% of total domestic visitors and 13% of total domestic visitor nights in WA.
- In 2015, 1.26 million domestic visitors spent 5.56 million nights in caravan or camping accommodation in WA. This represents growth of (+) 3.0% in domestic visitors and a (-) 7.1% drop in domestic visitor nights spent in caravan or camping accommodation in WA compared to 2014.
- Consequently, the average length of stay in caravan and camping accommodation dropped from 4.9 nights in 2014 to 4.4 nights in 2015.
- Domestic caravan and camping visitors spent the majority of their trip to/within WA in caravan and camping accommodation (82% of nights).

International caravan and camping visitors:

- International caravan and camping visitors to WA accounted for 7% of total international visitors and 3% of total international visitor nights in 2015.
- The number of international caravan and camping visitors saw strong growth in 2015, up (+) 10.1%, or 5,400 additional visitors compared to 2014.
- After dropping off in 2014, the number of international visitor nights spent in caravan and camping accommodation in 2015 returned to levels seen in 2013.
- The average length of stay in caravan and camping accommodation by international visitors to WA is 16.5 nights.
- Looking at long term trends, international caravan and camping visitation has remained relatively stable over the last decade, with a ten year annual average growth rate of (+) 1.1% in visitor numbers and (+) 2.1% in visitor nights. These growth rates are behind those of total international visitors to WA (+3.5% for total visitors, and +6.4% for total visitor nights).
- Unlike domestic visitors, international caravan and camping visitors only spent around a quarter of their time in WA (27% of nights) in caravan and camping accommodation.

Table 1: International visitors and nights spent in caravan or camping accommodation

<table>
<thead>
<tr>
<th>INTERNATIONAL</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>10 Year Average annual change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight trips (’000)</td>
<td>53.0</td>
<td>57.8</td>
<td>58.8</td>
<td>54.1</td>
<td>58.6</td>
<td>57.3</td>
<td>52.1</td>
<td>52.2</td>
<td>53.3</td>
<td>58.7</td>
<td>1.1%</td>
</tr>
<tr>
<td>Nights in caravan or camping (million)</td>
<td>0.8</td>
<td>0.9</td>
<td>0.9</td>
<td>0.7</td>
<td>0.8</td>
<td>1.0</td>
<td>0.8</td>
<td>1.0</td>
<td>0.9</td>
<td>1.0</td>
<td>2.1%</td>
</tr>
<tr>
<td>Average stay in caravan or camping (nights)</td>
<td>15.2</td>
<td>15.0</td>
<td>15.0</td>
<td>13.6</td>
<td>13.9</td>
<td>17.5</td>
<td>16.1</td>
<td>18.5</td>
<td>16.0</td>
<td>16.5</td>
<td>Up 1.3 nights from 10 yrs ago</td>
</tr>
<tr>
<td>% of total nights spent in caravan or camping accommodation</td>
<td>33%</td>
<td>29%</td>
<td>26%</td>
<td>24%</td>
<td>27%</td>
<td>31%</td>
<td>25%</td>
<td>28%</td>
<td>27%</td>
<td>27%</td>
<td>Down 6% from 10 yrs ago</td>
</tr>
</tbody>
</table>
WHO WERE THE CARAVAN AND CAMPING VISITORS TO WA?

Domestic caravan and camping visitors:

- In 2015, nine in ten (91%) 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 2015, 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 (37%), as an adult couple (23%), or as a family group (21%).
- In comparison to other domestic visitors, caravan and camping visitors were significantly more likely to be travelling for holiday/leisure purposes, with almost four in five (78%) travelling for this purpose (compared to 32% 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 2015 were aged under 35.
- International visitors who stayed in caravan or camping accommodation mainly travelled alone (49%) or as an adult couple (30%).
- International caravan and camping visitors were mostly from Western countries, namely Germany (18%), the UK (12%), France (10%), New Zealand (9%), and the USA (9%). Visitors to WA from Eastern countries were less likely to use caravan or camping accommodation.
- Almost all international caravan and camping visitors (93%) were travelling for holiday/leisure purposes, whereas less than half (45%) of international visitors to WA staying in other accommodation were visiting for a holiday.

Caravan and camping accommodation is more popular amongst younger international visitors, with half aged under 35.
WHAT ACTIVITIES DID THEY DO?

Domestic caravan and camping visitors:

- In 2015, domestic caravan and camping visitors were more likely than other visitors to undertake outdoor or nature based activities (61%, compared to 34%), and sports or active outdoor activities (46%, compared to 23%). 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 outdoor 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 (98%, compared to 83%), active outdoor/sports activities (74%, compared to 37%), arts/heritage activities (70%, compared to 51%), and Indigenous cultural activities (37%, compared to 15%).

“International caravan and camping visitors were typically more active than other visitors”

WHICH REGIONS DID THEY VISIT?

Domestic caravan and camping visitors:

- In 2015, the vast majority (91%) 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 (43%). Australia’s Coral Coast was the second most popular region, attracting 22% of visitors. Visitation to the other tourism regions was relatively similar – each attracting about 15% of domestic caravan and camping visitors.

International caravan and camping visitors:

- Similar to the domestic market, the majority (80%) 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.

- Many international caravan and camping visitors to WA visit more than region. In 2015, Australia’s Coral Coast received 47% of visitors, Australia’s South West received 43%, and Australia’s North West received 41%. Experience Perth and Australia’s Golden Outback were least popular amongst international caravan and camping visitors (31% and 26% 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>39%</td>
<td>52%</td>
<td>92%</td>
<td>91%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>36%</td>
<td>25%</td>
<td>89%</td>
<td>69%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>33%</td>
<td>18%</td>
<td>85%</td>
<td>70%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>32%</td>
<td>9%</td>
<td>67%</td>
<td>21%</td>
</tr>
<tr>
<td>Visit national parks / state parks</td>
<td>26%</td>
<td>7%</td>
<td>87%</td>
<td>51%</td>
</tr>
<tr>
<td>Fishing</td>
<td>22%</td>
<td>6%</td>
<td>20%</td>
<td>8%</td>
</tr>
<tr>
<td>Visit friends &amp; relatives</td>
<td>19%</td>
<td>43%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Picnics or BBQs</td>
<td>17%</td>
<td>5%</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:

• Consistent with the previous year, in 2015 three in five (63%) total caravan and camping visitor nights were spent in caravan parks, while the remaining nights (37%) 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 (21%).

![Figure 1: Type of accommodation by proportion of caravan and camping nights – Domestic](image)

International caravan and camping visitors:

• Almost two thirds (64%) of international caravan and camping visitor nights in 2015 were spent in caravan parks. This proportion was an (-) 8% decrease from 2014 (73%).

• The proportion of international visitor nights spent in a National Park remained stable from 2014 to 2015 (9% and 10% respectively).
WHAT OTHER ACCOMMODATION DID THEY STAY IN?

Domestic caravan and camping visitors:

- Domestic caravan and camping visitors in 2015 spent the majority of their nights in the State in caravan or camping accommodation (82%). Other types of accommodation used during their trip included rented houses/units (8% of nights) and the homes of friends or relatives (5% of nights).

International caravan and camping visitors:

- Converse to domestic visitors, international caravan and camping visitors spent just 27% of their nights in WA in caravan or camping accommodation. These visitors also stayed in rented houses/units (27%), backpacker / hostel accommodation (15%) and homes of friends or relatives (13%).

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: tra.gov.au/publications/publications-list.html


- For more information about visitors to Western Australia, please see Tourism Western Australia’s ‘Fast Facts’. The latest Fast Facts can be downloaded from: tourism.gov.au/research-reports

- If you have any questions about this snapshot, please contact the Research Team at research@westernaustralia.com

Data Sources: Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) 2005 to 2015. (unpublished data). All figures refer to persons over the age of 15 years.