

CARAVAN AND CAMPERVAN DATA REPORT 2016*

Released October 2016



COMMISSIONED BY:



FINANCIALLY SUPPORTED BY:



Mr S Lamont, CEO
Caravan Industry Association of Australia Ltd
Suite 6
Level 1, 214 Graham Street
Port Melbourne VIC 3207

18 October 2016

Dear Stuart

COMPILATION REPORT

We have prepared the following analysis based upon information listed below:

- Motor Vehicle Census: Campervans and Caravans by Make, Model, Postcode, Tare, GVM, Vehicle Body Type and State, At 31 January 2016: January 2016 Copyright © Commonwealth of Australia 2016 (including prior releases)
- Australian Bureau of Statistics – Australian Demographic Statistics, 3101.0, Population by Age and Sex Tables, At March 2016, Released at 11.30am (Canberra time) 22 September 2016 (including prior releases)
- Vehicle Standard (Australian Design Rule – Definitions and Vehicle Categories) 2005 Amendment 7, January 2014, Copyright © Commonwealth of Australia 2014


The analysis must be read in conjunction with this compilation report. The analysis has been prepared at the request of the Caravan Industry Association of Australia Ltd for their exclusive use and benefit. We do not accept responsibility to any other person for the content of this analysis. It is the responsibility of the Caravan Industry Association of Australia Ltd to ensure that the information meets their requirements.

Our procedures use accounting expertise to collect, classify and summarise information provided to create the accompanying report and do not include verification or validation processes. No audit or review has been performed and accordingly no assurance is expressed.

To the extent permitted by law, neither the firm nor any member or employee of the firm undertakes responsibility in any way whatsoever to any person (other than the Caravan Industry Association of Australia Ltd) in respect of the report, including any errors or omissions therein. No person should rely on the report with without having a review or audit conducted.

Yours sincerely

BDO Advisory (SA) Pty Ltd



Matthew Laming


Director

REPORT SUMMARY

KEY HIGHLIGHTS FOR 2016....

 **554,344**
CARAVANS

REGISTERED AT 31 JANUARY 2016

 **4.9%**
GROWTH

STEADY GROWTH OF 4.9% FROM 2015.
25.5% GROWTH OF CARAVAN AND CAMPERVAN
REGISTRATIONS SINCE 2011

 **6210**
POSTCODE

HAS THE HIGHEST COMBINED NUMBER OF
COMBINED CARAVAN AND CAMPERVAN
REGISTRATIONS

 **500KG –**
1,000KG

THE MOST COMMON WEIGHT RANGE FOR
REGISTERED CARAVANS

60,957 
CAMPERVANS

REGISTERED AT 31 JANUARY 2016

17.8 
YEARS

THE AVERAGE AGE OF CAMPERVANS IN AUSTRALIA

65%
DIESEL 

65% OF REGISTERED CAMPERVANS RUN ON DIESEL

3 – 5 
TONNES

THE MOST COMMON WEIGHT RANGE FOR REGISTERED
CAMPERVANS



WHAT ARE CARAVANS & CAMPERVANS

- Campervans as defined by the Australian Bureau of Statistics are self-propelled motor vehicles containing an area primarily used for accommodation. This definition would include vehicles commonly referred to as motorhomes.
- Caravans are defined as 'any enclosed trailer designed primarily for human occupation whilst stationary' (Vehicle Standard (Australian Design Rule – Definitions and Vehicle Categories) 2005 (Cth)).

AUSTRALIAN CARAVAN AND CAMPERVAN DATA GENERAL COMMENTS

- Combined Campervan and Caravan registrations reached a total of 615,301 at 31 January 2016.
- Comparing campervan and caravan registrations at 31 January 2015 with those at 31 January 2016 shows an increase of 28,716 or 4.9%.
- The total number of campervans registered in Australia at 31 January 2016 was 60,957 compared to 58,375 in 2015 which equates to a 4.4% increase.
- The total number of caravans registered in Australia at 31 January 2016 was 554,344 compared to 528,210 in 2015 which equates to a 4.9% increase.
- The graph below shows the percentage increase of all motor vehicle and caravan registrations in Australia between 31 January 2015 and 31 January 2016.

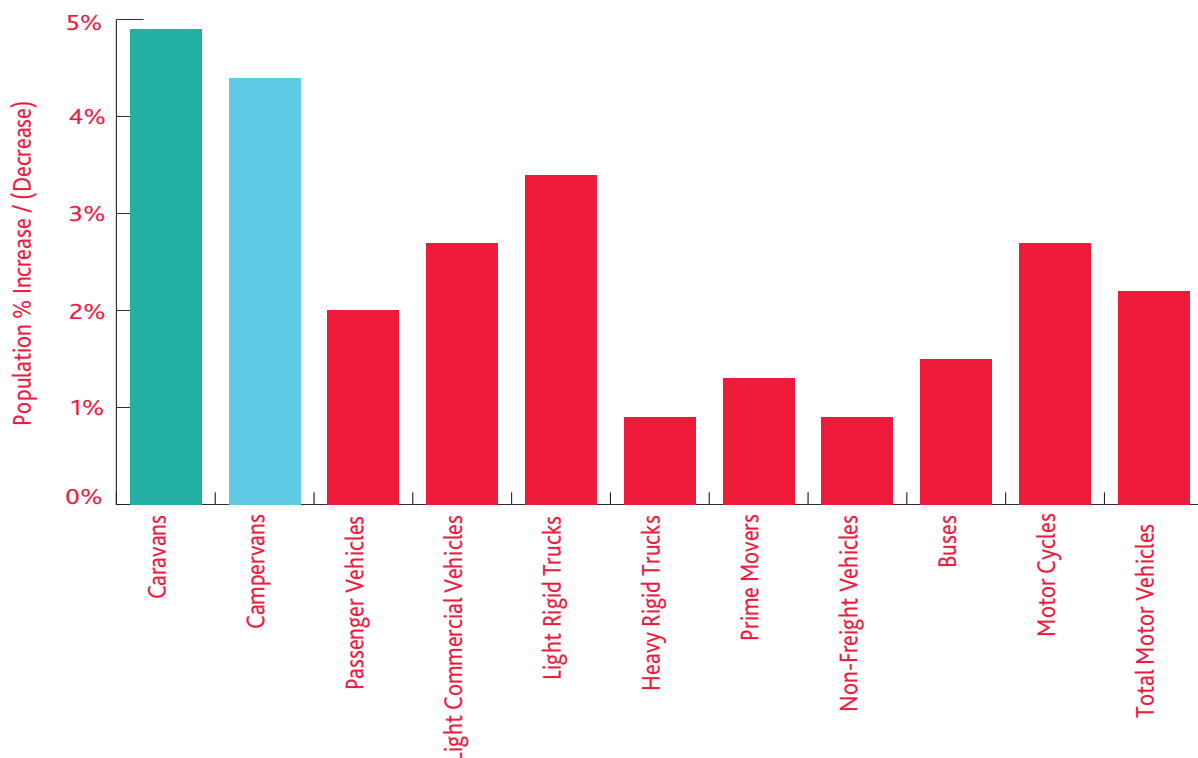


FIGURE 1: Annual registration change % by vehicle types 2015 - 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

- Queensland had the largest fleet of Caravans and Campervans in Australia, accounting for approximately 160,774 registered vehicles of the total 615,301 in Australia. This equates to 26.1% of the total fleet.

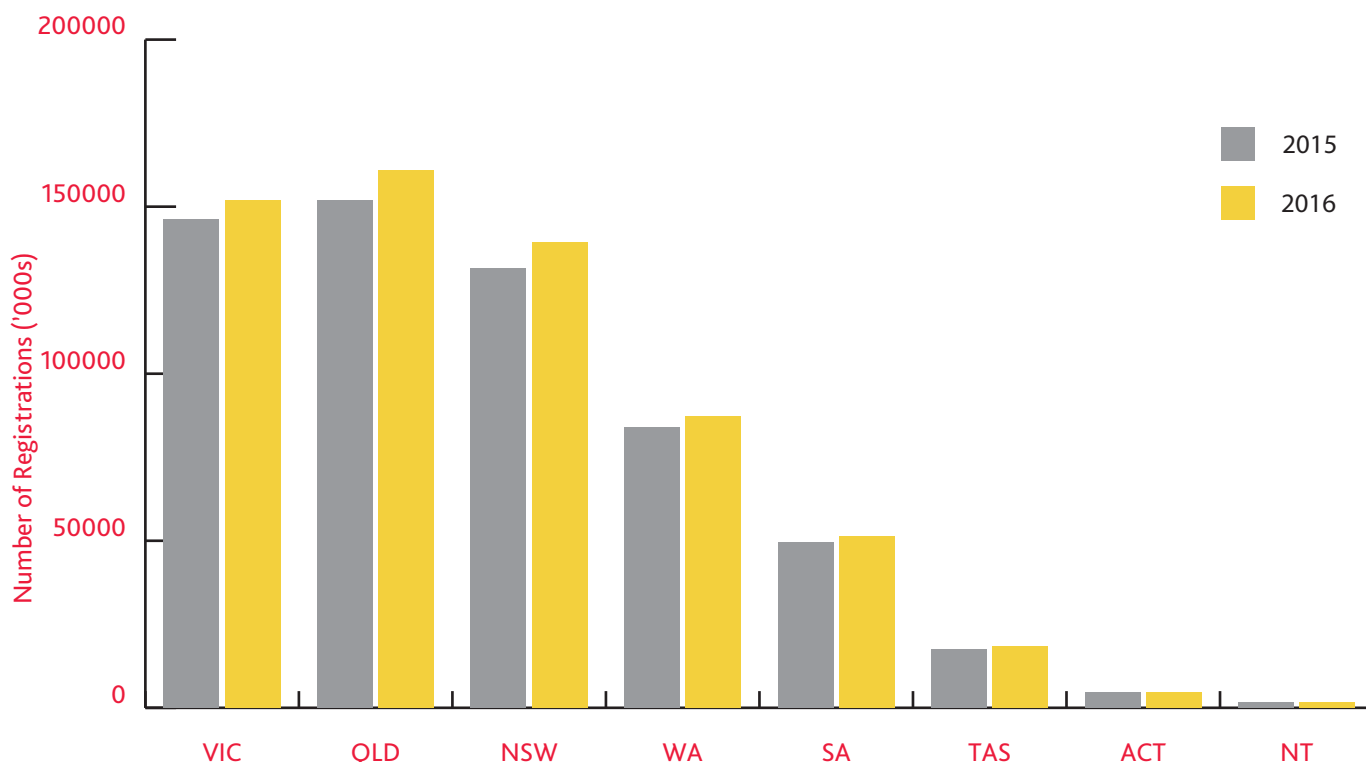


FIGURE 2: Total campervan and caravan registrations 2015 V 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

- The number of caravans registered in Australia has increased by 30.7% since 2011.
- Campervan registrations have also increased by 20.3% since 2011, showing a continuing upward trend in the volume of recreational vehicle registrations over the past 5 years.
- Queensland had the largest percentage of registered Caravans in Australia in 2016 at 26%, which was unchanged from 2015.
- New South Wales had the highest percentage of registered campervans in 2016 at 25.7% of all registered campervans. This was an increase from 22.3% in 2015.
- Queensland reported the highest overall increase in total registrations between 2015 and 2016 at 31.4% of the total increase across Australia. New South Wales followed relatively closely behind at 26.9% with a reasonably significant gap to the other states and territories.
- Consistent with the trend identified in 2015, both Queensland and New South Wales had two of the fastest growth rates again being 5.94% and 5.87% respectively. However, somewhat surprising was the growth identified in the Northern Territory, with total registrations rising by 7.49% from the prior year.





Figure 3: Increase/Decrease in registrations by state as a percentage of Australia 2011, 2015, 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

- New South Wales accounted for 58.1% of the increase in Campervan registrations across Australia for the year ended 31 January 2016, up from 44.6% in the prior year. This evidences a continuing trend of growing demand for Campervans in New South Wales.
- The number of campervans registered in Western Australia and Tasmania defied the national trend and declined slightly from the prior year, but by less than 1%.
- Tasmania had the highest combined Caravan and Campervan registrations per 1,000 people in Australia at 35.45 per 1,000, up from 34.03 in the prior year.
- Western Australia, Queensland and South Australia all recorded similar results above 30 registrations per 1,000 people at 33.69, 33.64 and 30.28 respectively.

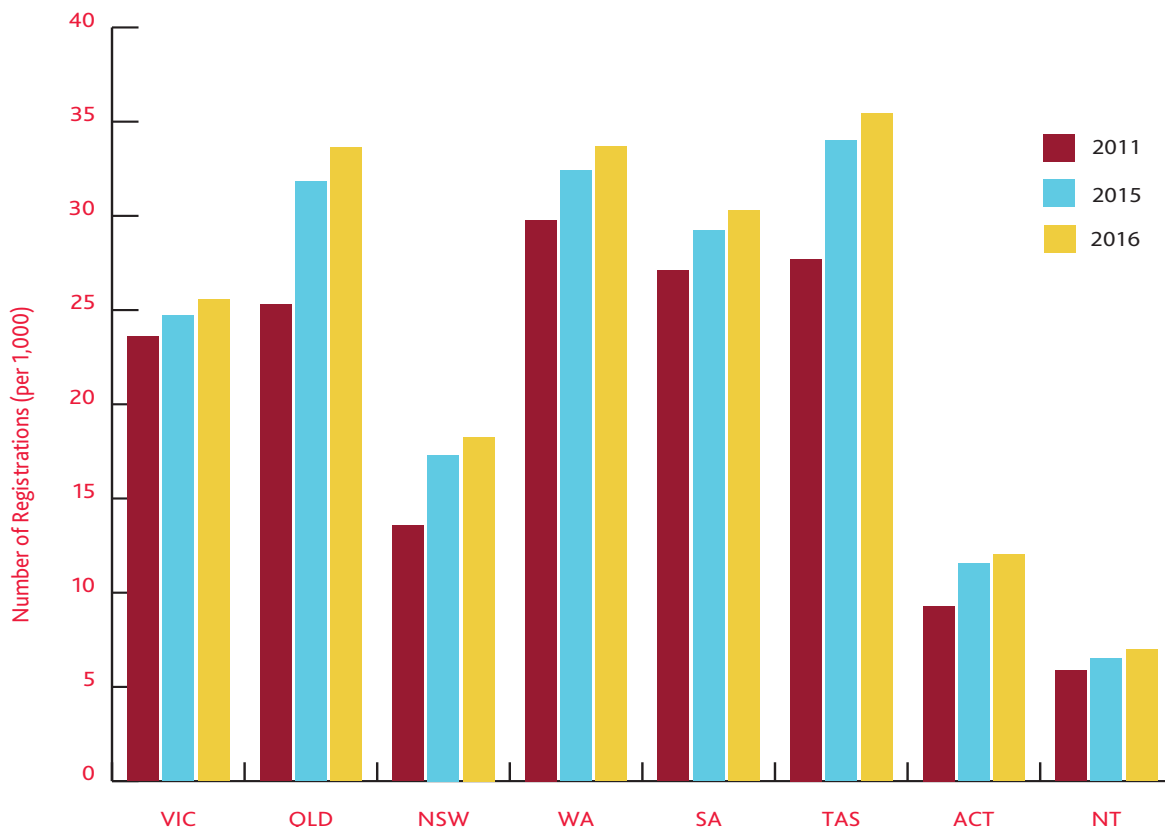


FIGURE 4: Total campervan and caravan registrations per 1,000 people 2015 v 2016 (Source: ABS Catalogue 3101.0 & 9309.0; Motor Vehicle Census)

- Compared with population changes, registration activity for Caravans and Campervans has steadily increased over the past 5 years, most notably in Queensland and Tasmania.
- Between 2015 and 2016 the ratio of Caravan to Campervan registrations stayed materially the same, with Campervans at 9.9% and Caravans at 90.1% of the total registrations.
- Consistent with prior years, Tasmania had almost three times as many registered Campervans per head of population than the other states and territories.

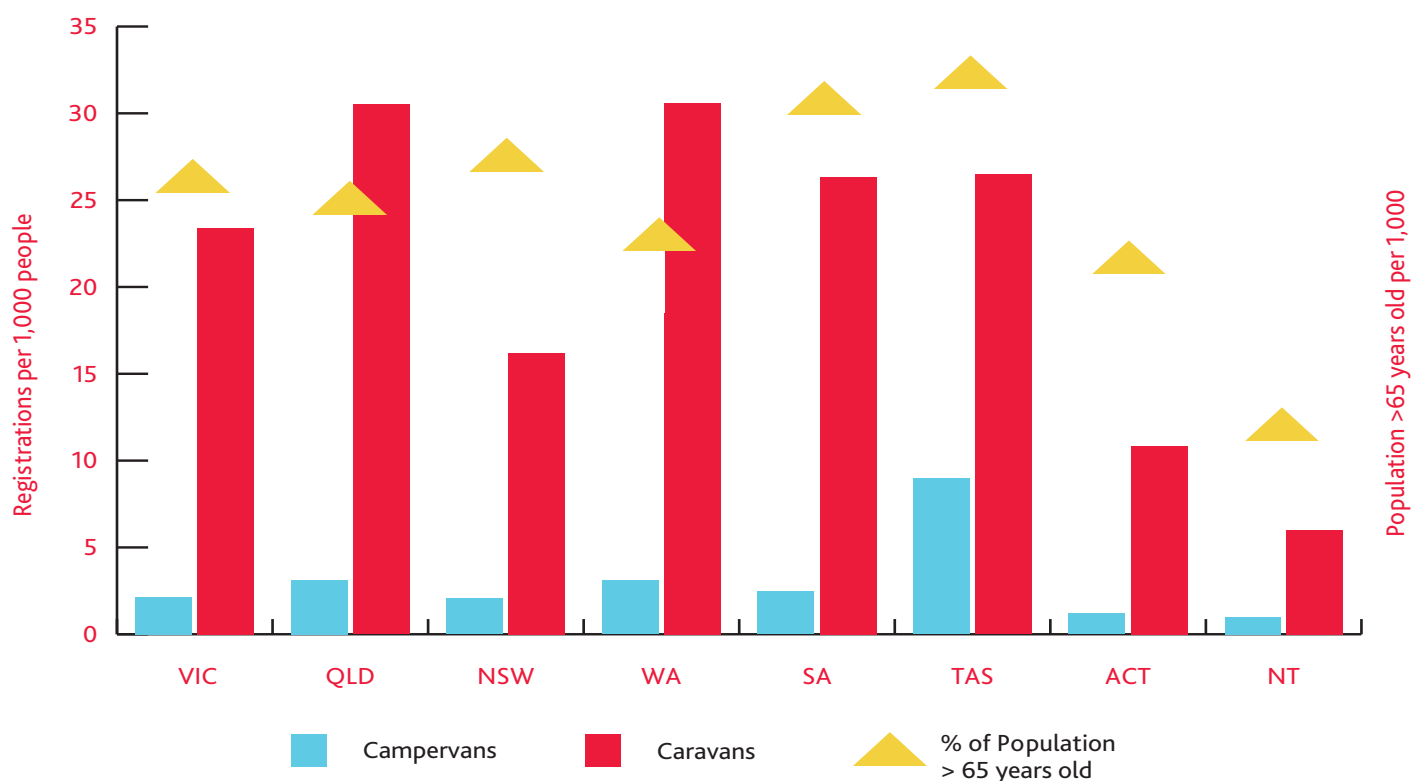


FIGURE 5: 2016 caravan and campervan registrations per 1,000 people with population over 65 years old per 1,000 people (ABS Catalogue 3101.0; ABS Catalogue 9309.0; Motor Vehicle Census)

- Tasmania had the highest number of registered campervans per 1,000 people and the greatest percentage of population older than 65 years of age.
- Total caravan and motor vehicle registrations in Australia numbered approximately 18.9 million at 31 January 2016, an increase of 2.2% when compared with total caravan and motor vehicle registrations at 31 January 2015. This trend is consistent with prior year growth in the overall increase in the quantity of motor vehicles registered.

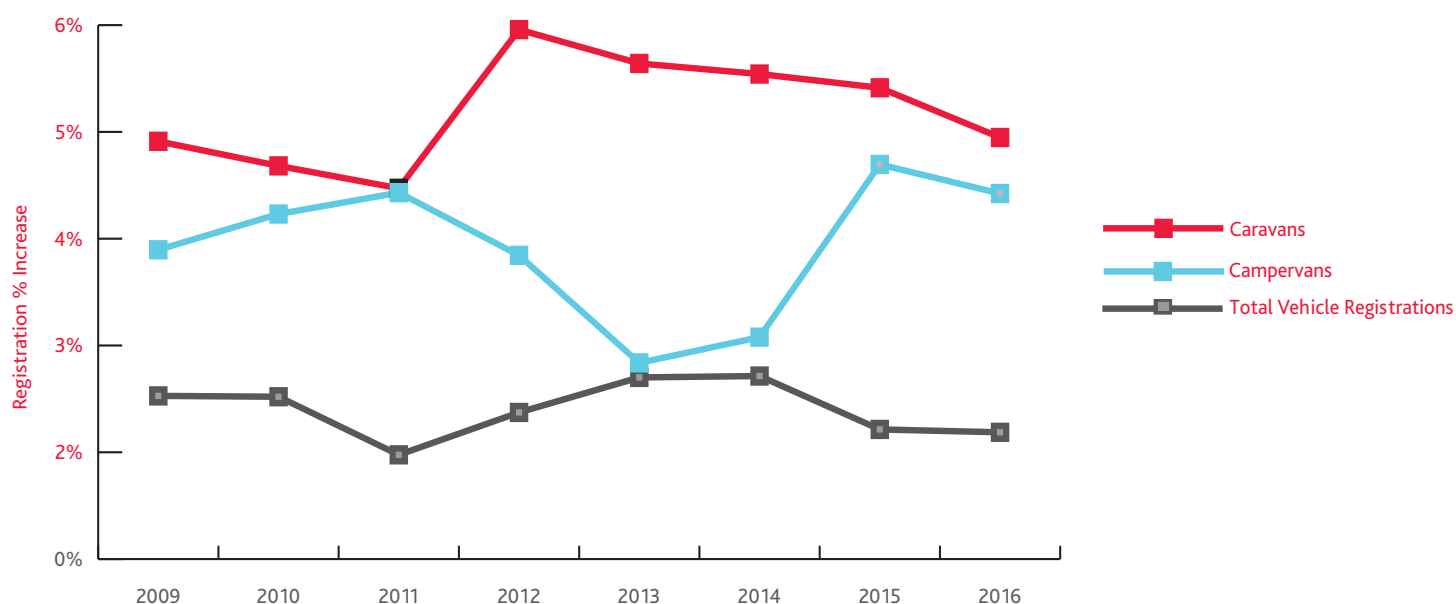


FIGURE 6: Annual % increase in registrations for the years 2009 - 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

AGE OF AUSTRALIAN CAMPERVANS

- The average age of Australian campervans at 31 January 2016 stayed the same compared with the prior year, increasing very slightly from 17.9 years in 2016 to 17.8 years in 2015. This reflects a relatively steady trend over the past 6 years.
- Queensland had, on average, the youngest fleet at 14.7 years while Western Australia had the oldest at 23 years. This is also consistent with the prior year.
- The average age of the total motor vehicle fleet has remained relatively stable over the last 6 years, and stayed the same in 2016, at 11.4 years of age.
- Queensland, New South Wales and Victoria had average fleet ages of less than 17.5 years. South Australia, Western Australia and Tasmania all had average fleet ages of 20 years or more which has remained consistent since 2014. These results indicate quite a noticeable gap between the large eastern states and the others.
- From 2007 to 2016 the average age of Campervans in Victoria fell by over 9%. During the same period both Western Australia and Tasmania's average age has increased by over 8% with South Australia's average age increasing by over 3%.
- As at January 2016, approximately 38% of Campervans in Australia were manufactured in the last 12 years, which did not materially change from the 2015 year. Therefore, based on very simplistic analysis of the averages, in the order of 2/3 of the campervan population may be due for replacement in the coming years. This figure remained materially consistent with 2014 and 2015 Motor Vehicle Census data.

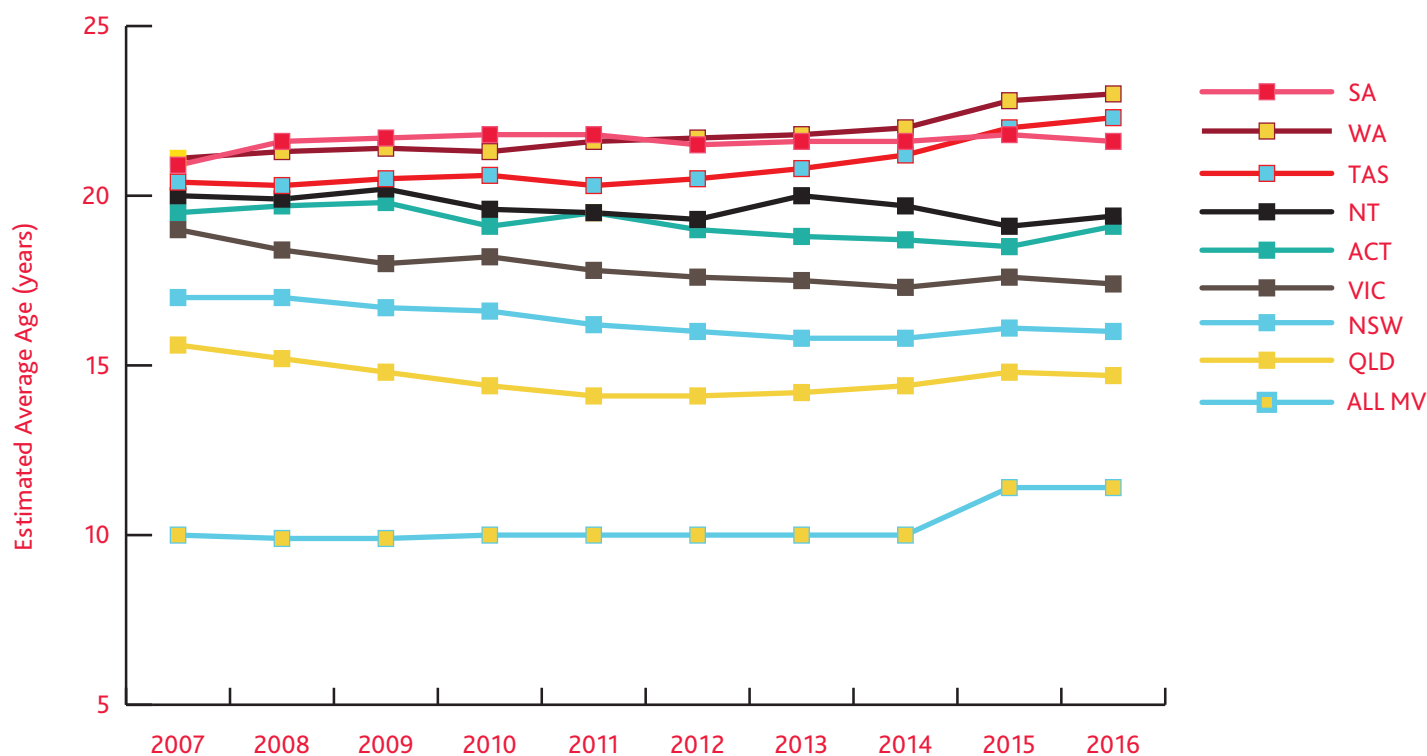


FIGURE 7: Estimated average age of campervans to 31 January 2016 (Source: ABS Catalogue 9309.0)

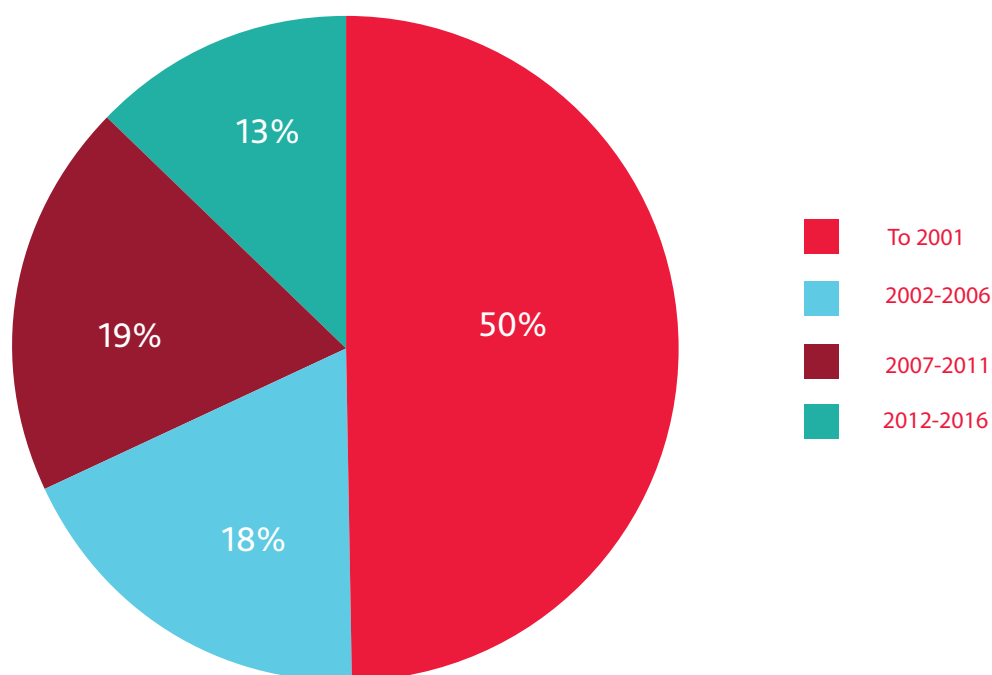


FIGURE 8: Registered campervans % by period of manufacture (Source: ABS Catalogue 9309.0)

AUSTRALIAN CAMPERVAN FUEL TYPE

- In 2016, 65% of registered campervans used diesel fuel, consistent with the prior year and up from 49% in 2006.

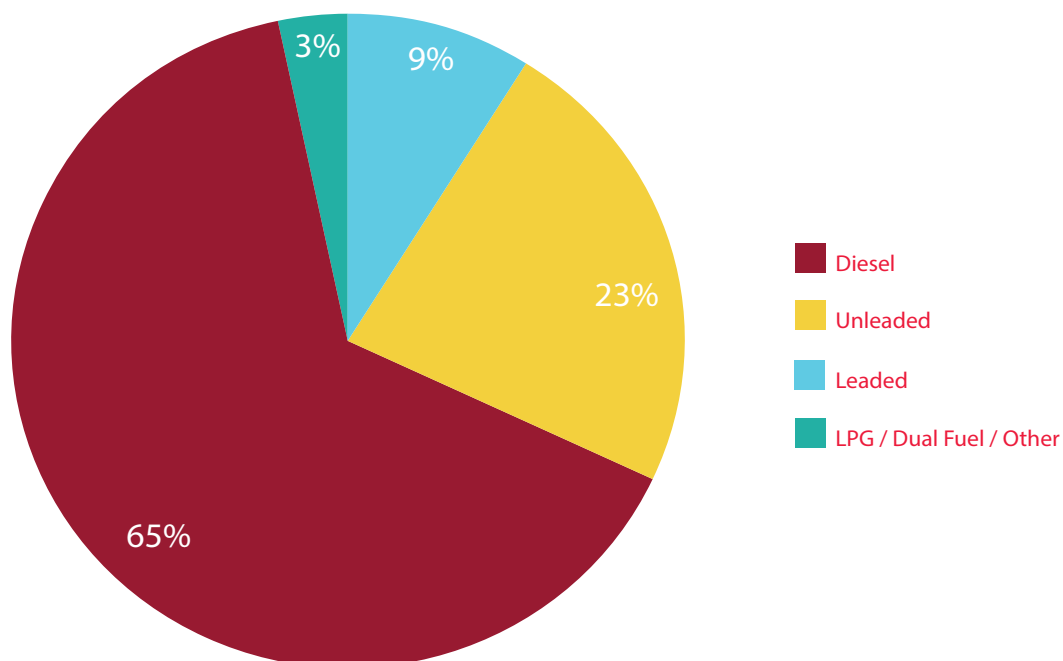


FIGURE 9: 2016 Australian campervans population by fuel type by % (Source: ABS Catalogue 9309.0)

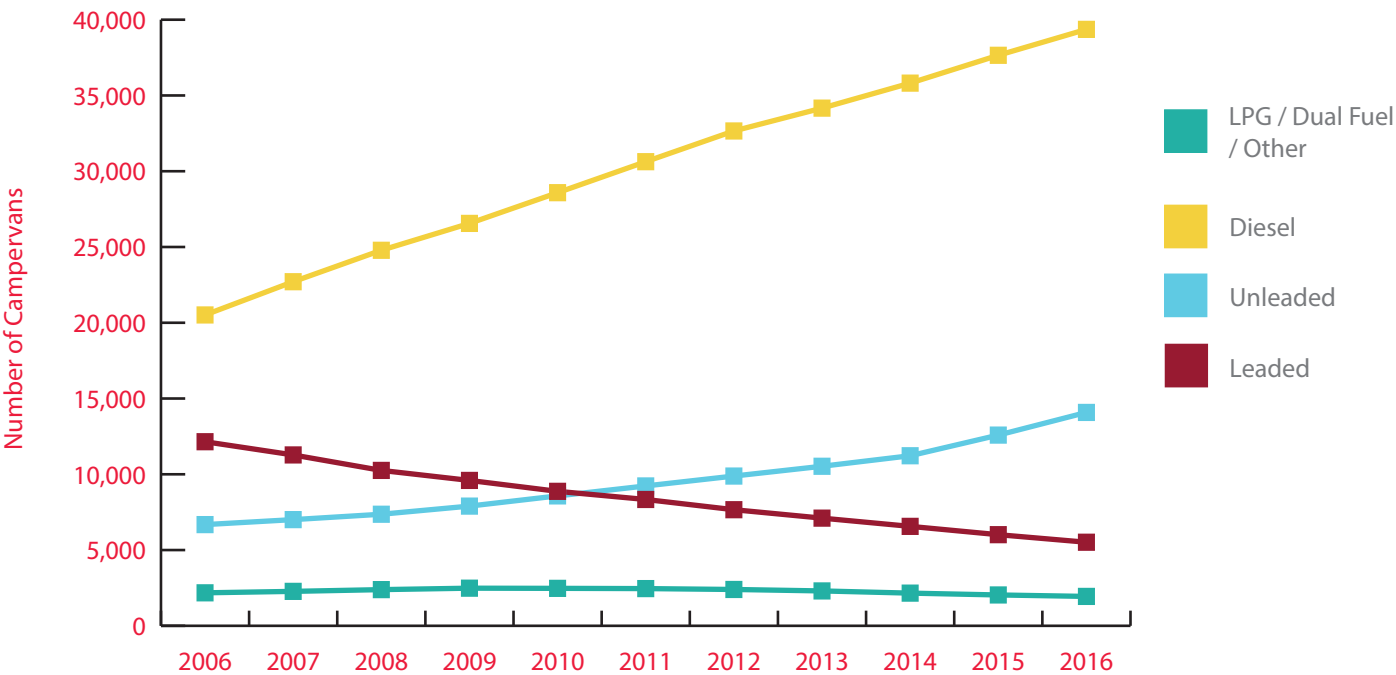


FIGURE 10: Campervan registrations by fuel type 2006 - 2016 (Source: ABS Catalogue 9309.0)

CARAVAN AND CAMPERVAN WEIGHT DATA CAMPARISONS

- Australian Bureau of Statistics data suggests that people are tending towards caravans in the weight range 2 to 2.5 tonne, being the largest growth area in 2016. The largest percentage of registered caravans continues to be in the 500 kilogram to 1 tonne category, with over 67% weighing less than 1.5 tonne. This decreased slightly from nearly 70% in 2015 and 72% in 2014.
- Over the past 5 years there has been a consistent trend towards increasing the quantity of caravan registrations recorded between 1.5 and 2 tonnes. This trend is also reflected in the graph below.

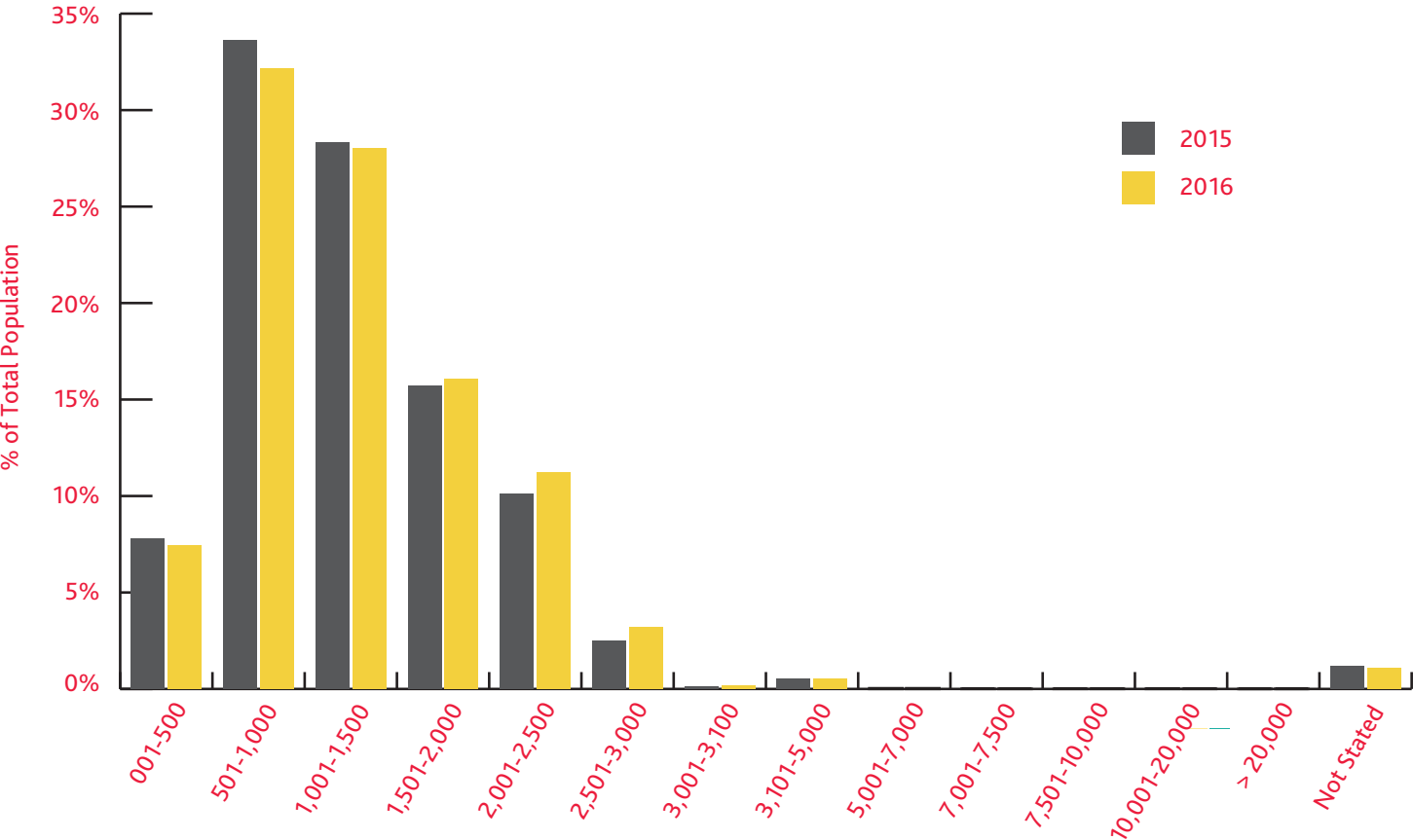


FIGURE 11: Caravan % of population by weight class 2015 v 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

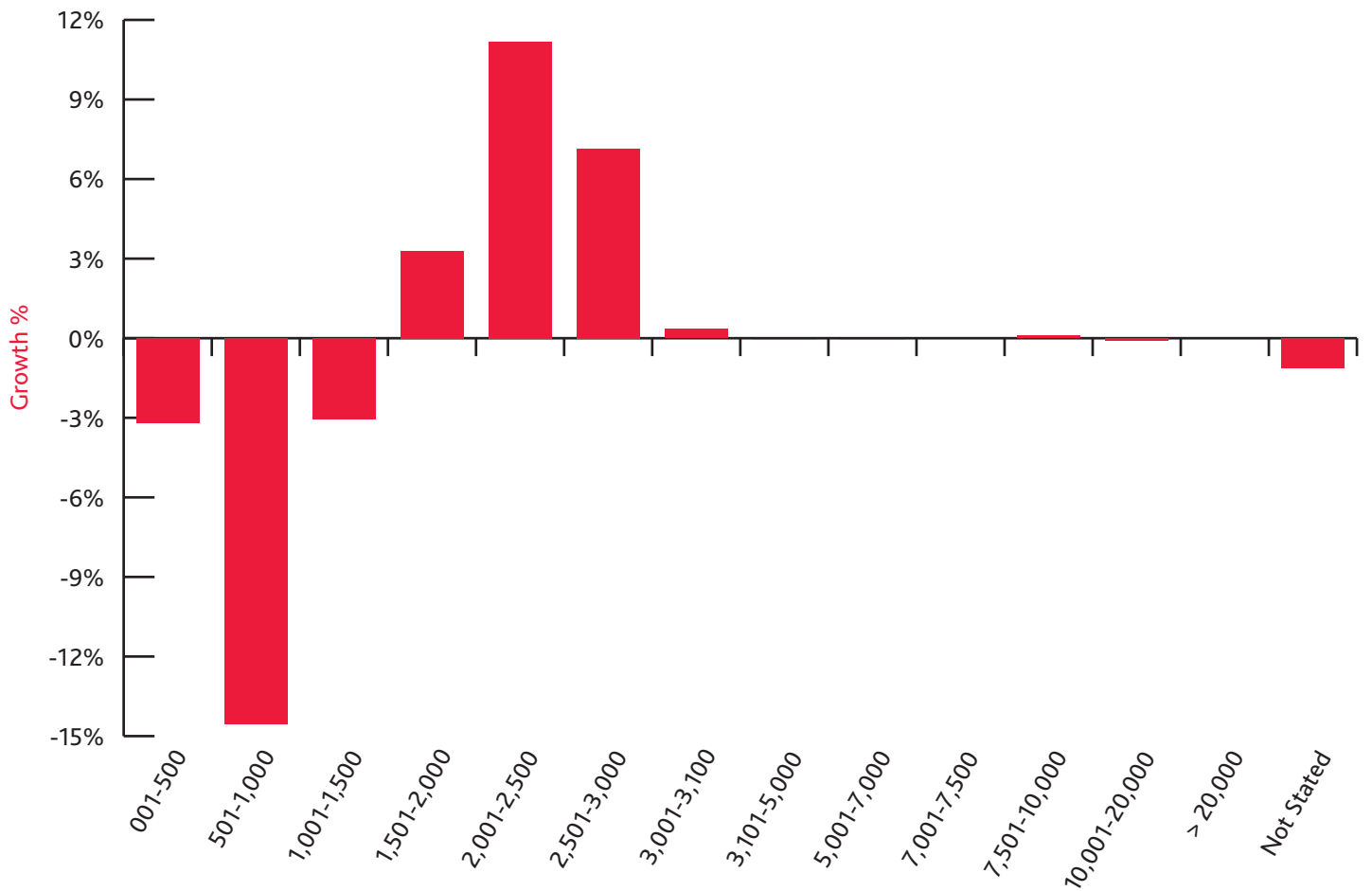


FIGURE 12: Caravan population % change in distribution of weight class 2015 v 2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)



- Approximately 74% of the population of registered campervans weighed (Tare) between 1,500 and 5,000 kilograms, an increase of 1% from 2015. The largest movement between 2015 and 2016 was in registered campervans with a tare weight of between 1,501 and 2,000 kilograms, which is consistent with the prior year. This differs slightly to 2014 when there was a preference towards heavier campervans weighing between 3 and 5 tonnes.

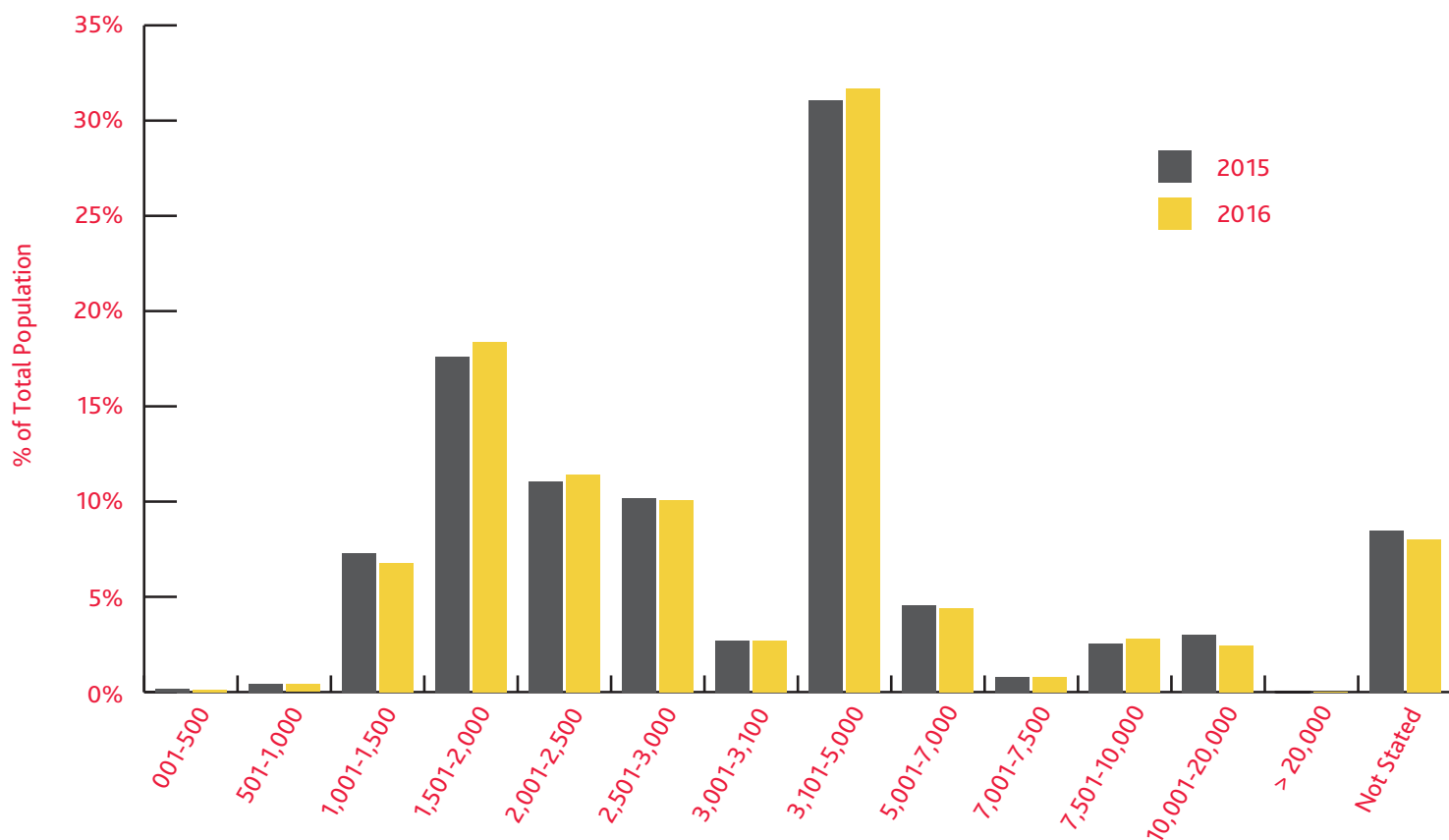


FIGURE 13: Campervan registrations by tare range 2015 v 2016 comparison (Source: ABS Catalogue 9309.0; Motor Vehicle Census)



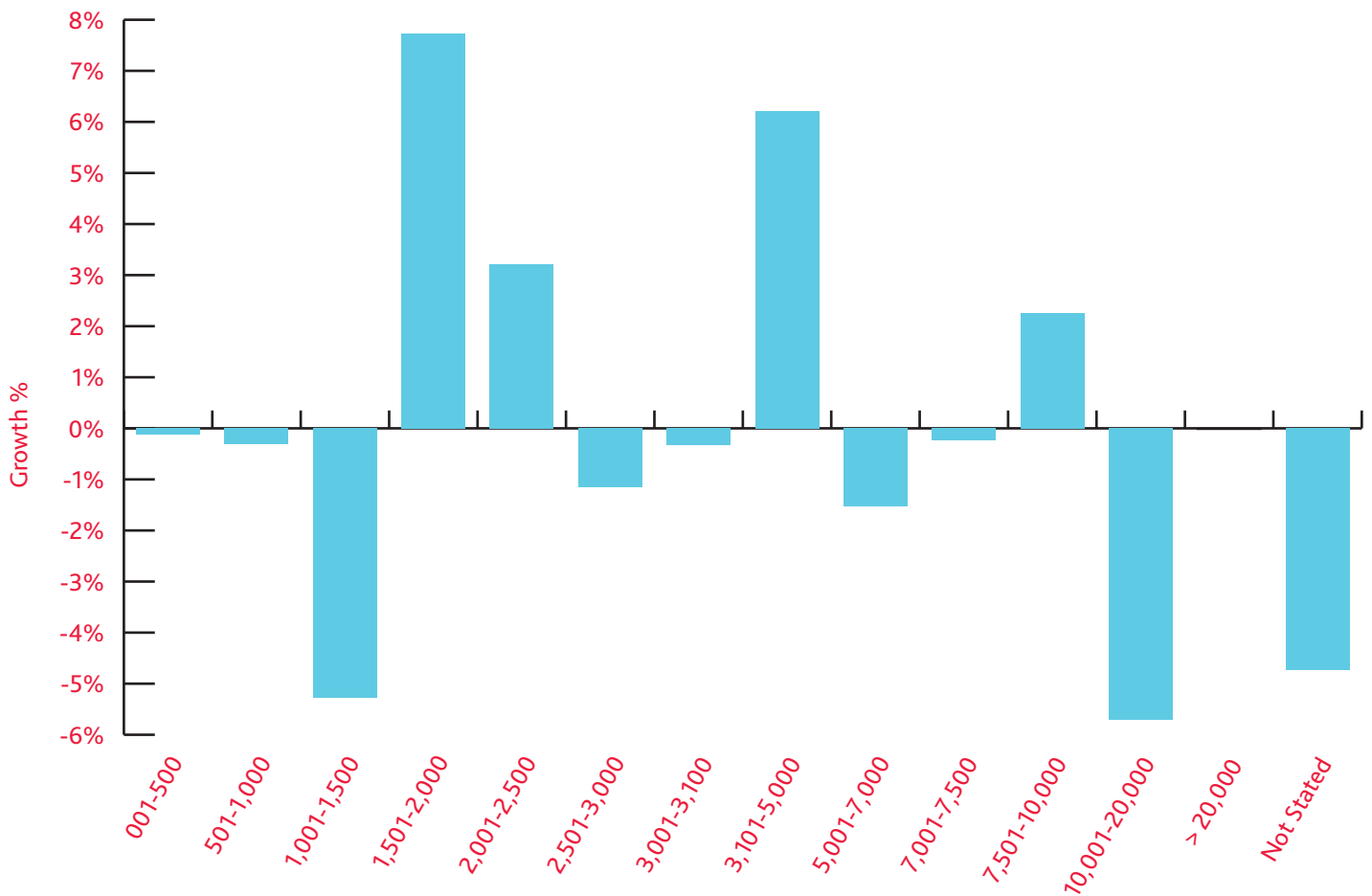


FIGURE 14: Campervan population % change in distribution of class from 2015-2016 (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

REGISTRATION DENSITY

- Of all postcodes, Mandurah, Western Australia (located 73km south of Perth, postcode 6210) had the highest combined number of Caravan and Campervan registrations recorded, being 5,217. This represents a 4.7% increase on 2015 data, which followed a 5.3% increase on 2014 data and a similar 4.7% increase in 2013, indicating consistent growth of just under 5% over the past 3 years.
- Notable variances in postcode registrations can be attributed largely to changes in the registered location of recreational vehicle stock belonging to hire companies.

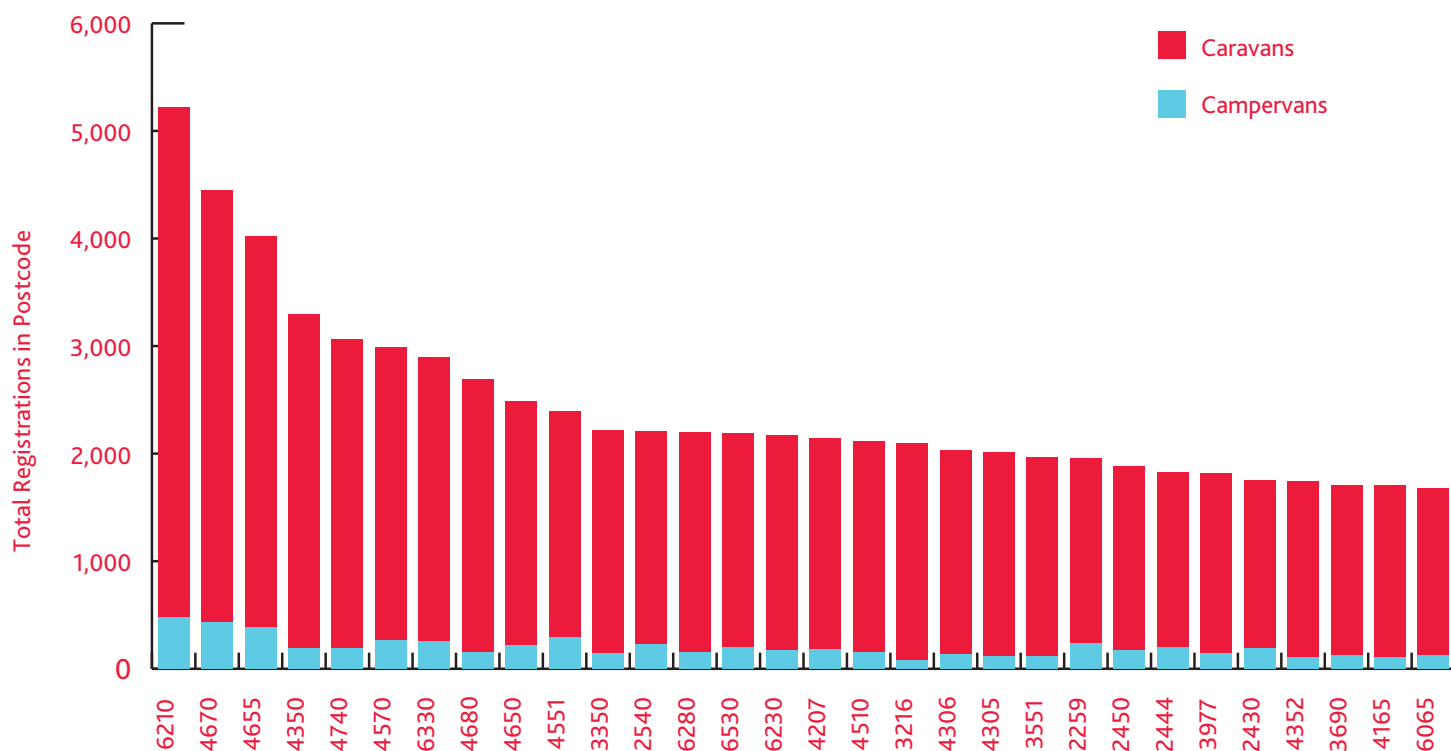


FIGURE 15: 2016 Caravan and Campervan registration density by top 30 postcodes (Source: ABS Catalogue 9309.0; Motor Vehicle Census)



- Consistent with the prior year, Braybrook in Victoria (postcode 3019) had the highest number of campervans registered, being 1,380. Interestingly this represented a decrease of 1.7% from 2015 which followed a 7% decrease from 2014 data.
- Campervan rental business operations established in individual postcode areas, and the potential for stock to move between locations may be factors contributing to reasonably significant fluctuations in volume. For instance, Victoria Airport West (postcode 3042) had the highest increase in campervan registrations in 2016, recording 188 registrations, compared with 13 registrations in 2015.
- Overall, campervan registrations increased for the year to 31 January 2016, on trend with prior years.

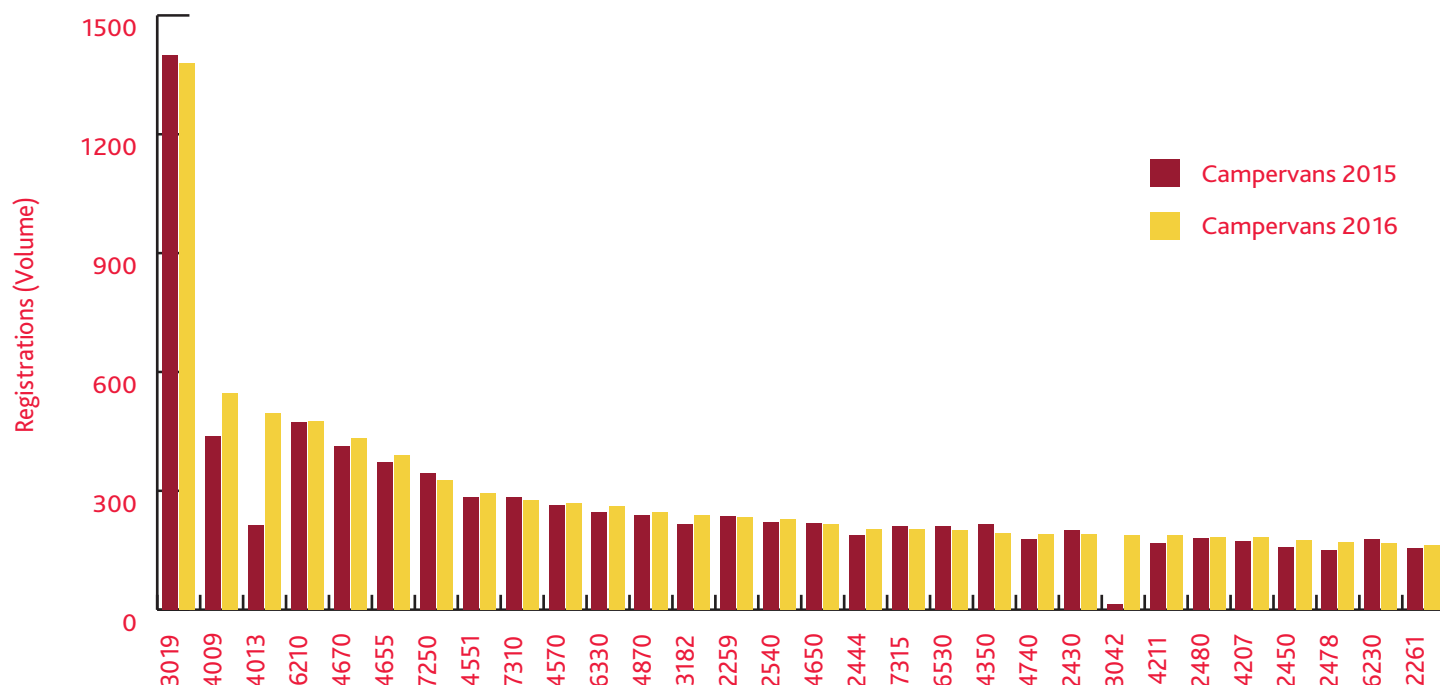


FIGURE 16: Campervan registration density by top 30 postcodes, 2016 to 2015 comparison (Source: ABS Catalogue 9309.0; Motor Vehicle Census)

- Across the board, caravan registrations increased in 2016 with the top 30 most registered postcodes all recording increases from 2015.
- Following Mandurah in Western Australia, Bundaberg in Queensland was the postcode region recording the second highest volume of caravan registrations in 2016. This remains consistent with prior year data.
- Overall, 8 of the top 10 postcodes by caravan registration volume in 2016 were located in Queensland.

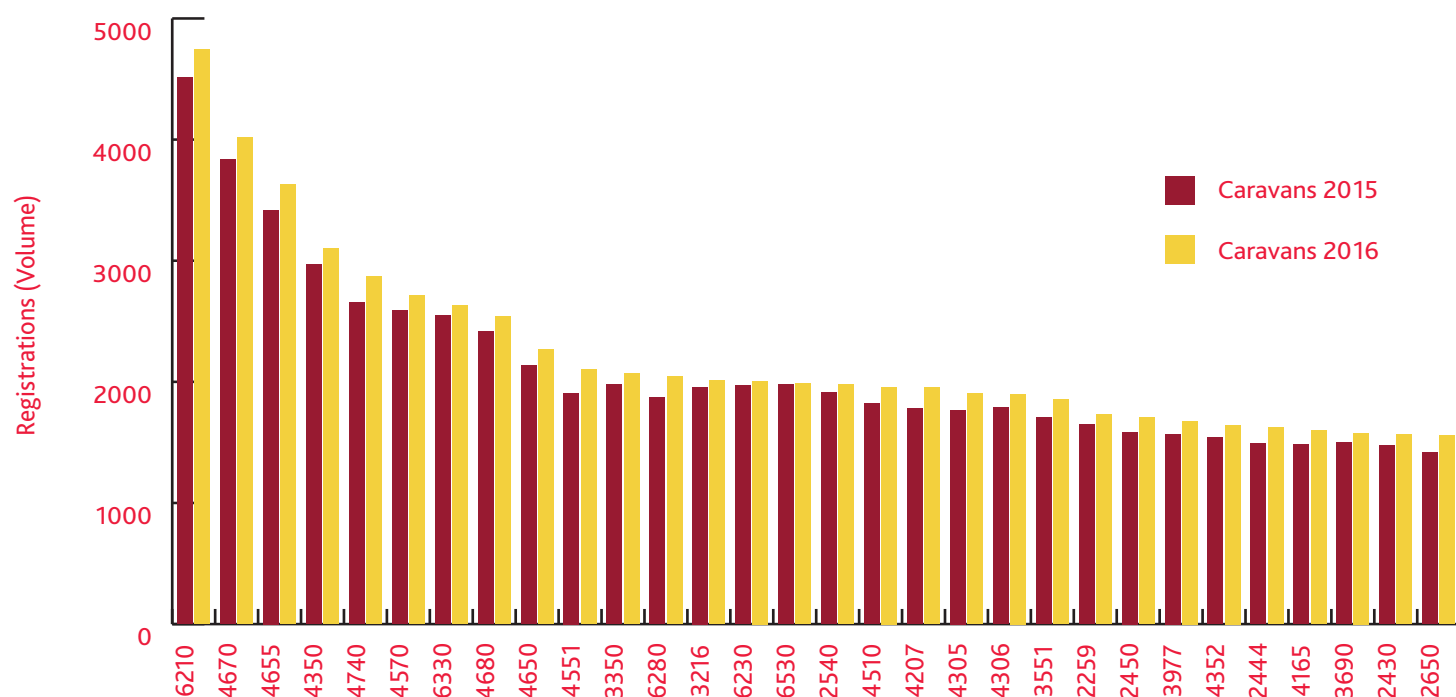


FIGURE 17: Caravan registration density by top 30 postcodes, 2016 to 2015 comparison (Source: ABS Motor Vehicle Census)

EXTRACT OF ABS DATA

	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA	PERCENTAGE OF CLASS TO TOTAL
Campervans	12,795	14,953	15,675	8,019	4,182	4,627	464	242	60,957	9.9%
Caravans	139,104	145,821	123,542	79,246	47,264	13,663	4,238	1,466	554,344	90.1%
Total 2016	151,899	160,774	139,217	87,265	51,446	18,290	4,702	1,708	615,301	
Campervans	12,389	14,247	14,175	8,071	4,168	4,635	453	237	58,375	10.0%
Caravans	133,873	137,518	117,323	75,744	45,426	12,922	4,052	1,352	528,210	90.0%
Total 2015	146,262	151,765	131,498	83,815	49,594	17,557	4,505	1,589	586,585	

% OF THE TOTAL POPULATION - 2016	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
Campervans	21.0%	24.5%	25.7%	13.2%	6.9%	7.6%	0.8%	0.4%	100.0%
Caravans	25.1%	26.3%	22.3%	14.3%	8.5%	2.5%	0.8%	0.3%	100.0%
Total	24.7%	26.1%	22.6%	14.2%	8.4%	3.0%	0.8%	0.3%	100.0%

% INCREASE/(DECREASE) 2016 V 2015	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
Increase/(decrease) in Campervan registrations	3.28%	4.96%	10.58%	-0.64%	0.34%	-0.17%	2.43%	2.11%	4.42%
Increase/(decrease) in Caravan registrations	3.91%	6.04%	5.30%	4.62%	4.05%	5.73%	4.59%	8.43%	4.95%
Increase/(decrease) in Total registrations	3.85%	5.94%	5.87%	4.12%	3.73%	4.17%	4.37%	7.49%	4.90%

MARKET SHARE OF INCREASE 2016 V 2015	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
Increase/(decrease) in Campervan registrations	15.7%	27.3%	58.1%	-2.0%	0.5%	-0.3%	0.4%	0.2%	100.0%
Increase/(decrease) in Caravan registrations	20.0%	31.8%	23.8%	13.4%	7.0%	2.8%	0.7%	0.4%	100.0%
Increase/(decrease) in Total registrations	19.6%	31.4%	26.9%	12.0%	6.4%	2.6%	0.7%	0.4%	100.0%

INCREASE/(DECREASE) 2016 V 2015	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
Increase/(decrease) in Campervan registrations	406	706	1,500	(52)	14	(8)	11	5	2,582
Increase/(decrease) in Caravan registrations	5,231	8,303	6,219	3,502	1,838	741	186	114	26,134
Increase/(decrease) in Total registrations	5,637	9,009	7,719	3,450	1,852	733	197	119	28,716

(Source: ABS Catalogue 9309.0; Motor Vehicle Census)

EXTRACT OF ABS DATA

	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
Population 2016 ('000)	5,944	4,779	7,620	2,590	1,699	516	391	244	23,783
Population 2015 ('000)	5,915	4,767	7,597	2,587	1,696	516	390	244	23,712
Population 2014 ('000)	5,842	4,722	7,518	2,573	1,686	515	386	245	23,487

2016 REGISTERED VEHICLES PER 1,000 PEOPLE	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
2016 Campervans per 1,000 people	2.15	3.13	2.06	3.10	2.46	8.97	1.19	0.99	2.56
2016 Caravans per 1,000 people	23.40	30.51	16.21	30.60	27.82	26.48	10.84	6.01	23.31
Total Campervan and Caravans per 1,000	25.56	33.64	18.27	33.69	30.28	35.45	12.03	7.00	25.87
Population >65 years old per 1,000 people	149.94	143.55	156.89	131.37	174.32	183.12	121.58	68.66	149.99
% of population >65 years old	14.99%	14.35%	15.69%	13.13%	17.40%	18.31%	12.16%	6.87%	15.00%

2015 REGISTERED VEHICLES PER 1,000 PEOPLE	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
2015 Campervans per 1,000 people	2.09	2.99	1.87	3.12	2.46	8.98	1.16	0.97	2.46
2015 Caravans per 1,000 people	22.63	28.85	15.44	29.28	26.78	25.04	10.39	5.54	22.28
Total Campervan and Caravans per 1,000	24.72	31.84	17.31	32.40	29.24	34.02	11.55	6.51	24.74

2016 INCREASE/DECREASE FROM 2015	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
2016 Campervans per 1,000 people	0.06	0.14	0.19	(0.02)	0.00	(0.01)	0.03	0.02	0.10
2016 Caravans per 1,000 people	0.77	1.66	0.77	1.32	1.04	1.44	0.45	0.47	1.03
Total Increase/Decrease per 1,000	0.84	1.80	0.96	1.29	1.04	1.43	0.48	0.49	1.13

TOTAL MOTOR VEHICLE REGISTRATIONS	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUSTRALIA
2016 (inc. Caravans)	4,820,445	4,000,028	5,497,970	2,288,050	1,411,953	471,281	292,546	159,176	18,941,449
Caravans and Campervans as a % of total registrations	3.15%	4.02%	2.53%	3.81%	3.64%	3.88%	1.61%	1.07%	3.25%

(Source: ABS Catalogue 3101.0; ABS Catalogue 9309.0; Motor Vehicle Census)



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