

2024/2025

CARAVAN AND MOTORHOME VISITOR PROFILE



Cosy Corner South
Bay of Fires
© Sean Scott Photography

TASMANIA
COME DOWN FOR AIR



Market insights

This profile focuses on interstate and overseas visitors traveling around the state in caravans, campervans, or motorhomes, providing insights on this market's demographics, behaviours, and decision drivers when choosing where to visit. It excludes camping trips taken by visitors and Tasmanians that did not use one of these vehicles.

- Caravan and motorhome visitors are important contributors to Tasmania's visitor economy as they tend to stay longer and disperse more into regional areas, supporting businesses and communities, creating jobs and boosting economies throughout the state.
- Interstate and international visitors who travelled around in a campervan, motorhome or caravan, directly spend over \$210m in Tasmania annually.[†]
- 58% of the caravan and motorhome visitors fly to the state and then hire a campervan or motorhome, while 42% arrive via the Spirit of Tasmania, bringing over their own vehicle*.
- These visitors stay around 25 nights on average with those who bring their own more likely to stay longer (45 nights), with those flying and hiring on shorter trips (11 nights)*.
- They seek out great caravan parks and campgrounds that offer a range of clean and functional facilities, such as BBQs, playgrounds, toilets and showers, and dump points.[‡]
- Tasmanians are important travellers in this market, having the highest rate of campervan, motorhome, and caravan registrations per capita nationally with 25,415 registrations, or 44 vehicles per 1,000 residents in 2023, with ownership rates growing[§]

[†] Tasmanian Visitor Survey, year ending September 2024

* Interstate and international visitors whose main form of transport within Tasmania was a car/4WD towing a caravan, or campervan or motorhome

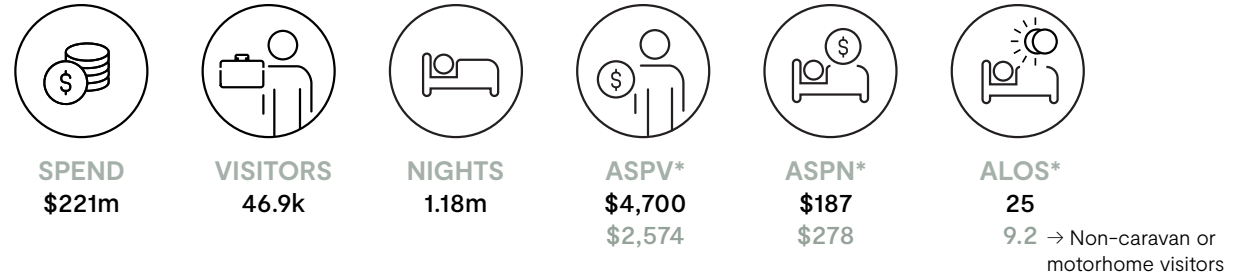
[‡] BDA marketing survey of caravan and motorhome owners from mainland Australia, July 2022

[§] CIAA (2023). State of the Industry Report 2023

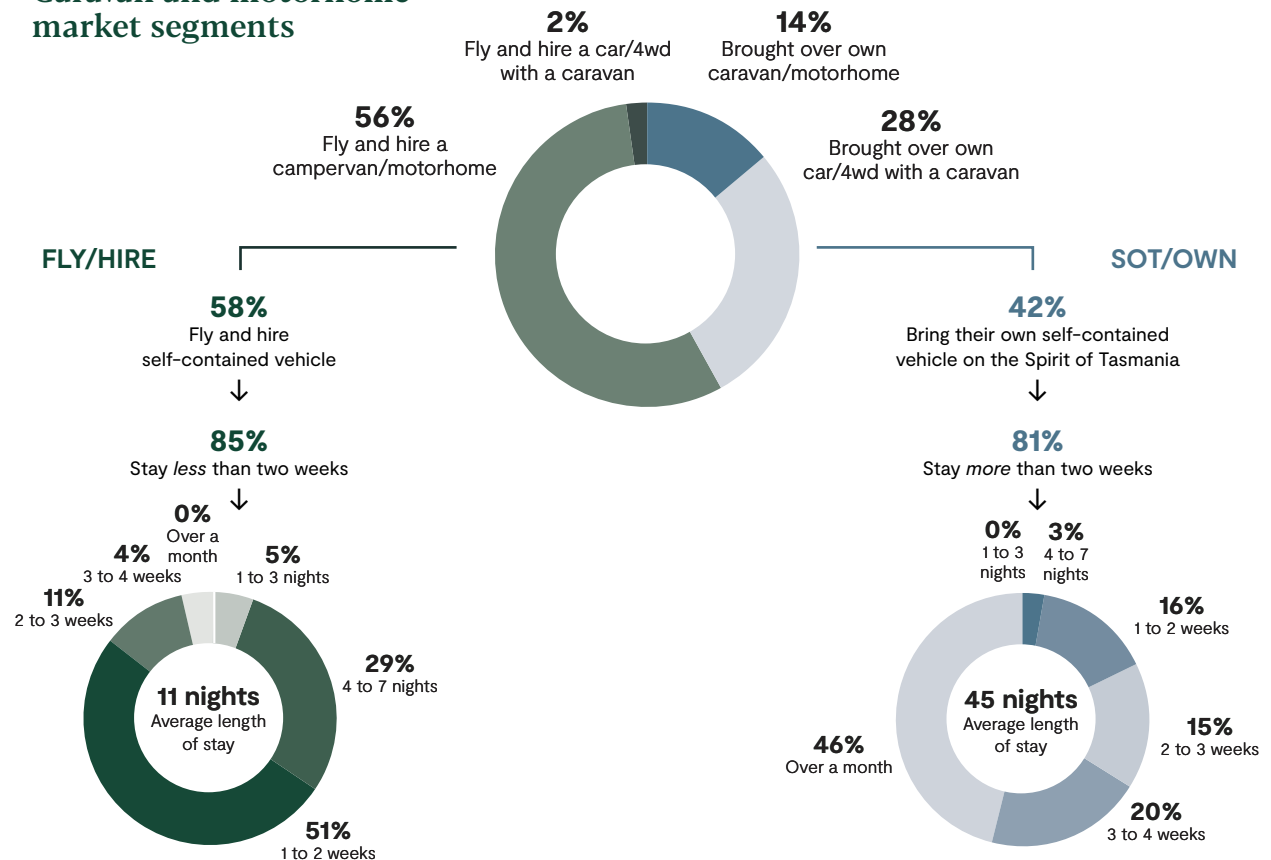
Market Profile

Tasmanian Visitor Survey, YE September 2024

Total caravan / motorhome market



Caravan and motorhome market segments



*ASPV – average spend per visitor. ASPN – average spend per night. ALOS – average length of stay (nights).

Market Profile

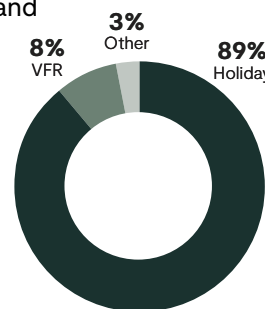
— who they are

Tasmanian Visitor Survey, YE September 2024

- Almost all caravan and motorhome visitors are in Tasmania for a holiday (89%), with most of the remainder visiting friends or relatives who live in the state (8%).
- They're most likely to be from interstate (82%) and to bring their own vehicle (51%), while international visitors fly and hire (97%).
- The majority of visitors are aged between 45–64 (44%). Those who fly and hire tend to be younger (49% under 45), with older visitors more likely to bring their own vehicle on the Spirit (37% aged over 65).
- Most travel with their partner (60%), with the remainder travelling with their families with children, small groups of friends or other families, or alone.
- Visitors bringing their own vehicle over to Tasmania are more likely to be from households earning under \$100k annually (56%), as many in this group are retirees enjoying longer-term travelling around Australia.
- Visitors who fly and rent a campervan or motorhome are more likely to be living in households earning more than \$100k (63%).
- Almost two-thirds (65%) of fly-and-hire visitors are first-time visitors to the state, whereas more than two-thirds (69%) of visitors who brought their own vehicle over had been to the state before.

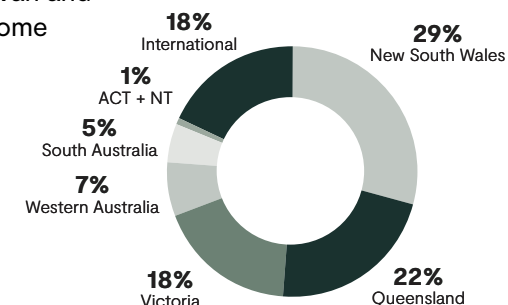
Purpose of visit

All caravan and motorhome visitors

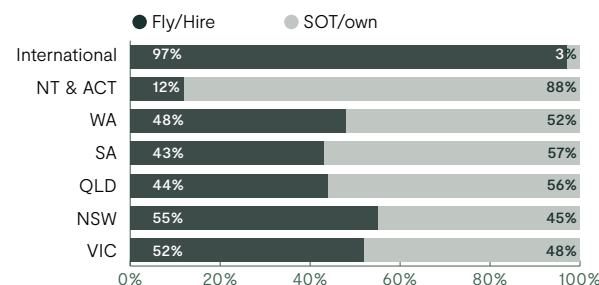


Origin

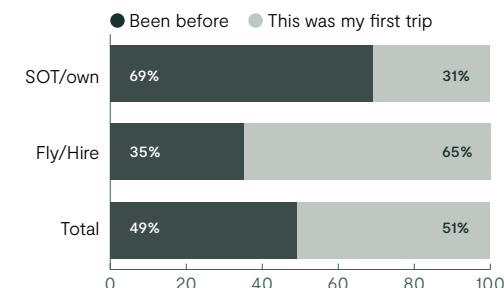
All caravan and motorhome visitors



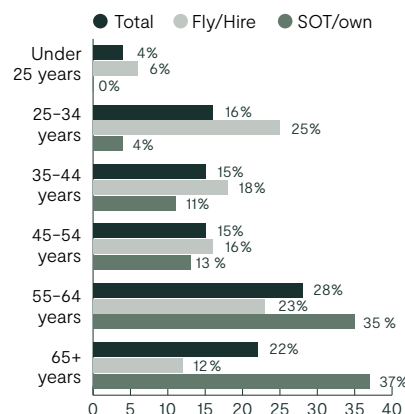
Share of market segments per origin



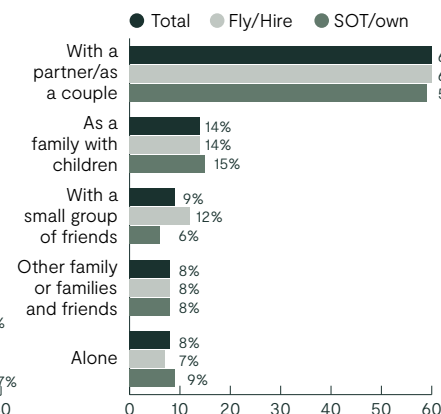
Return visitors



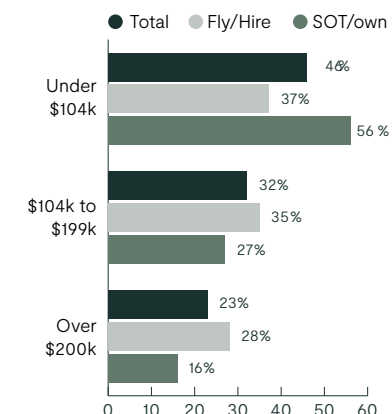
Age



Travel party



Household income



Market Profile – when they visit and where they go

Tasmanian Visitor Survey, YE September 2024

- Summer is the most popular time to visit (48%). Autumn is also popular with visitors who bring their own caravan, campervan or motorhome to Tasmania (35%), while those who fly and rent one lean towards Spring (23%).
- All visitors who tour the state in a caravan, campervan or motorhome spend the majority of their time dispersed around the regions, though those who bring their own more likely to visit the West Coast, and those who fly and rent more likely to explore the East Coast.
- Most nights are spent in their self-contained vehicles (77%), though around a quarter (23%) of their stay is spent in other types of accommodation, such as at a friend or relative's home, in short-stay properties or a cabin in a caravan park.
- Though most visitors to Tasmania include a visit to Hobart, caravan and motorhome visitors are far more likely to spend time in regional areas compared to the average visitor to the state.

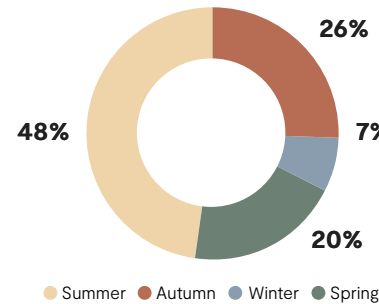
Share of nights spent outside Hobart City:

- Caravan and motorhome: 98%
- Average visitor to Tasmania: 68%

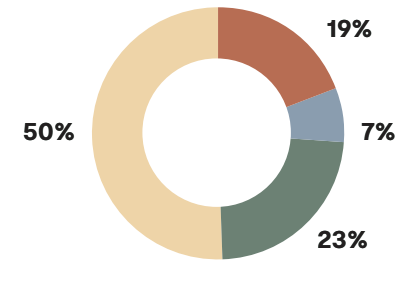


Stanley Cabin and Tourist Park © Rob Burnett

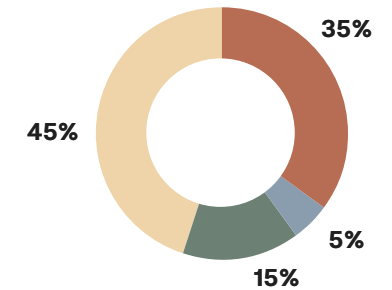
Season of Visit – Total



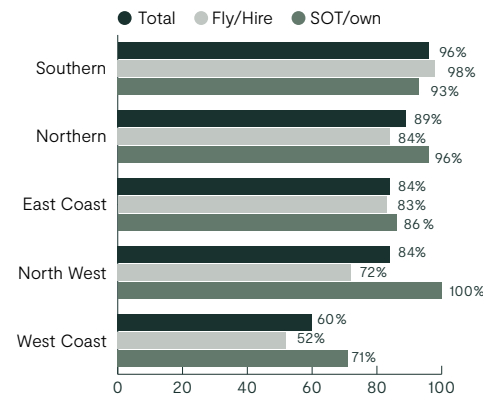
Fly/Hire



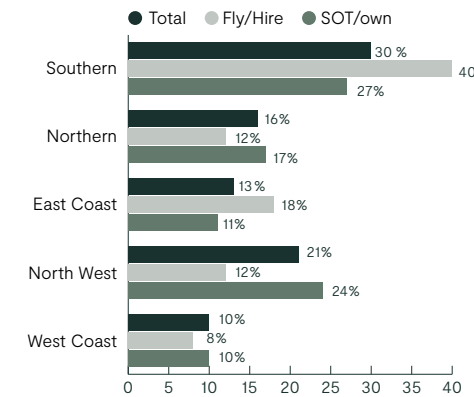
SOT/own



Regional Visitation – Visitors

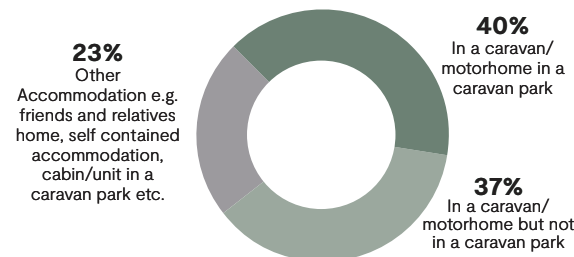


Regional Visitation – Nights



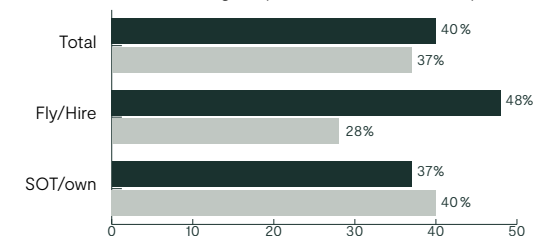
Accommodation

All caravan and motorhome visitors



Accommodation

● Share of nights spent in a caravan park
● Share of nights spent outside of a caravan park



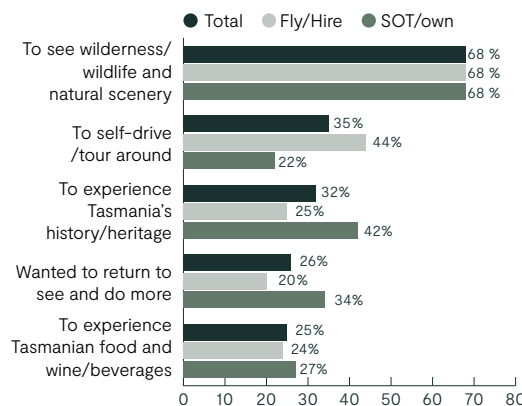
Market Profile – why they come and what they do

Tasmanian Visitor Survey, YE September 2024

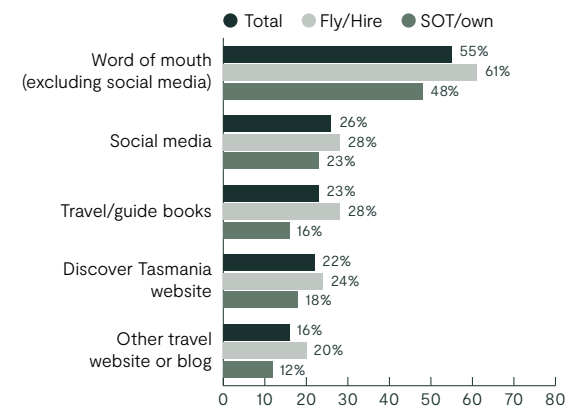
- Caravan and motorhome visitors are drawn to Tasmania to experience its wilderness and wildlife (68%), history and heritage (32%) and food and beverages (25%).
- For those who were on their first trip to the state, ‘heard good things and wanted to visit’ is a very important influence for their visit, and those who had been before were keen to ‘return to see and do more’.
- Most are inspired by what they hear from others about Tasmania (‘word of mouth’, 55%), followed by social media (26%) and travel and guide books (23%). As visitors who fly and rent are more likely to be on their first trip to the state, they’re also more likely to use all types of information sources to plan their trip.
- Visitors enjoy a variety of activities, from walks in nature to trying local coffee shops, with those who bring their own vehicle more likely to browse at markets and visit historic sites and attractions.
- The broad range of top attractions visited around the state reflects their high rate of dispersal, with natural areas leading built sites, aligning with the types of activities they seek.



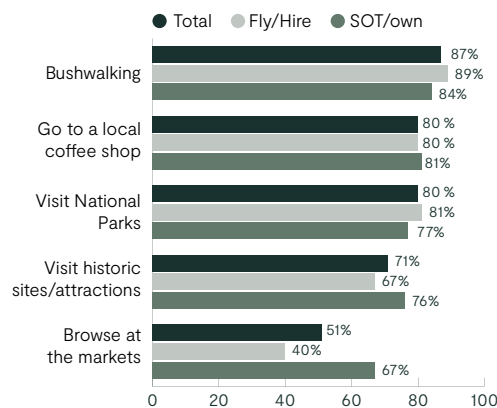
Influences to visit Tasmania



Inspiration sources to visit Tasmania

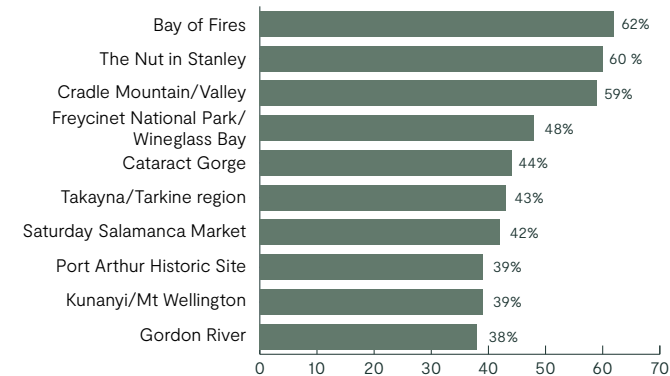


Activities



Attractions

All caravan and motorhome visitors



Bakers Point Campground, Narawntapu National Park © S. Group

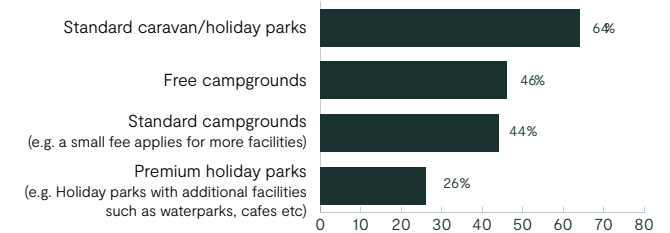
Mainland caravan and motorhome owner market insights

BDA marketing survey of caravan and motorhome owners from mainland Australia, July 2022

- ‘Great’ parks and campgrounds were the most important factors for mainlanders choosing caravan or motorhome holiday destinations, followed by ease of access and a flexible range of places to stay.
- Most prefer standard parks ahead of premium parks, though having free options during their trips is also important as they are often here for longer trips.
- Cleanliness and overall condition, experiences for children and a range of in-park facilities are most sought after for mainlanders intending to visit Tasmania with their caravan or motorhome.
- For campgrounds, they seek locations that offer availability of toilets, showers and powered sites.

Location preference

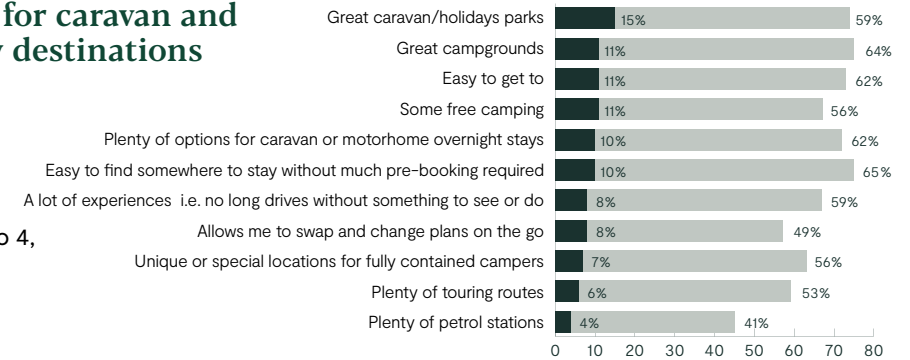
Q. What type of location or campground do you usually prefer when travelling with your caravan or motorhome?



Importance factors for caravan and motorhome holiday destinations

Q. Thinking about choosing a holiday destination to travel with your caravan or motorhome, which of the following factors is most important to you? (rank up to 4, with 1 as most important)

● No.1 ● Top 5

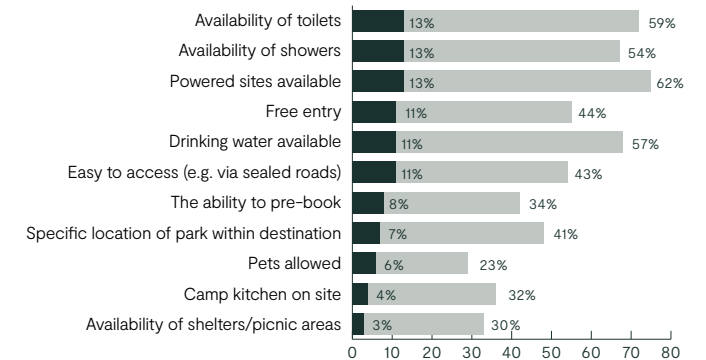


Importance factors for campgrounds in Tasmania

Q. Which of the following is most important to you when thinking about campgrounds for a holiday to Tasmania in your caravan or motorhome? (rank up to 5, with 1 as most important).

Asked only of those intending to visit Tasmania.

● No.1 ● Top 5

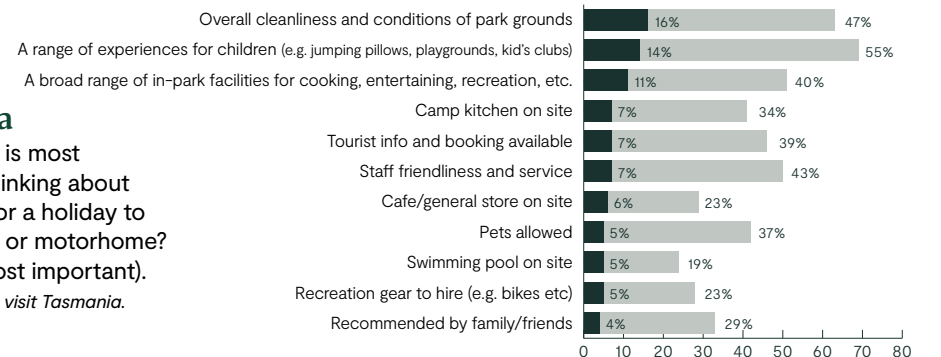


Importance factors for caravan/holiday parks in Tasmania

Q. Which of the following is most important to you when thinking about caravan / holiday parks for a holiday to Tasmania in your caravan or motorhome? (rank up to 5, with 1 as most important).

Asked only of those intending to visit Tasmania.

● No.1 ● Top 5



Touring Queenstown © Paul Fleming



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