

Australia Recreational Vehicle - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Australia Recreational Vehicle Market size is estimated at USD 2.93 million in 2025, and is expected to reach USD 4.29 million by 2030, at a CAGR of 7.90% during the forecast period (2025-2030).

As the number of campgrounds rises, so does the allure of recreational travel in Australia. Both higher- and middle-income Australians are fueling this growing demand for recreational vehicles.

While the COVID-19 pandemic dealt a blow to the tourism, recreation, and leisure sectors, leading to a dip in recreational vehicle sales, the market is gradually bouncing back. Many consumers are now opting for camper vans, fully-equipped towable RVs, and hotels. Additionally, with a surge in rental services across Australia, the market is poised for further growth.

Renowned for its diverse landscapes, vibrant cities, and rich cultural tapestry, Australia has always been a magnet for travelers. Recently, the nation has witnessed a pronounced uptick in travel and tourism demand.

Today's Australian travelers are on a quest for deeper, more meaningful experiences. They're shifting focus from conventional tourist spots to genuine interactions that immerse them in local culture, nature, and community. There's a discernible trend towards sustainable and responsible travel. Modern travelers are increasingly aware of their environmental footprint, gravitating towards eco-friendly options that not only reduce their carbon impact but also uplift local communities.

The off-road trend is gaining momentum in the vehicle segment, further boosting the popularity of recreational vehicles. In response, manufacturers are enhancing towable RVs for off-roading, catering to consumers venturing into diverse terrains. Additionally, many modern recreational vehicles come equipped with built-in battery packs. These not only provide power during

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boondocking or blackouts but can also harness solar energy for recharging. While these batteries are currently beneficial, advancements in battery technology promise even greater energy storage, faster recharging, and enhanced efficiency.

Australia Recreational Vehicle (RV) Market Trends

Travel Trailers Dominate Australia's RV Market Growth

In the Australian RV market, travel trailers have taken the lead, thanks to their blend of versatility and affordability. These trailers allow users to create a stationary living space while still using their vehicle for other needs. This feature is especially attractive to families and outdoor lovers who want the freedom to explore without the limitations of bulkier RVs.

Moreover, the introduction of new models and innovations-like solar power, WiFi, and lightweight designs-promise to drive sales even higher. This uptick is, in part, due to the youth's growing enthusiasm for outdoor activities and a general rise in travel and tourism across Australia.

Recent advancements include lightweight materials for better fuel efficiency, advanced batteries for longer off-grid use, and smart systems for user comfort. Australian manufacturers are swiftly adopting these technologies to cater to the market's evolving needs. Additionally, strategic partnerships and expansions play a crucial role in shaping the market dynamics. For example,

- In November 2023, Thor Industries unveiled a concept for EV charging stations tailored for electric RVs. This station aims to cater to the diverse needs of electric recreational vehicles (eRVs), from compact travel trailers to expansive Class A motorhomes.

Yet, amidst this growth, the segment grapples with challenges like inventory shortages, escalating material costs, and intensified competition from rental RVs. In response, manufacturers are refining production processes, diversifying floorplan options, and focusing on the mid-market price bracket. Meanwhile, dealers face challenges with limited inventories, resulting in extended wait times for new travel trailer orders.

Private Application Dominates Australian RV Consumption Landscape

Individuals and families, seeking leisure travel and the comforts of home, typically make up the direct buyer segment of the caravan and motorhome market. Their preferences, emphasizing amenities, design, and technology, play a pivotal role in shaping market trends.

Moreover, the RV Industry Association reports a notable uptick in RV ownership among younger generations, with 18-34-year-olds constituting 22% of RV owners in 2022, a significant rise from 8.47% in 2018??.

There's a burgeoning appetite for outdoor adventures and camping, capitalizing on the nation's stunning landscapes. The recent pivot towards domestic travel, especially post-travel restrictions, has intensified the demand for private RVs, as families and individuals seek safe, flexible travel alternatives.

Modern Australian RV buyers are placing a premium on comfort, technology, and sustainability. Features like Wi-Fi, advanced navigation, and eco-friendly additions such as solar panels and electric powertrains are becoming standard. This evolving consumer preference is driving manufacturers to weave smart technologies and sustainable solutions into their offerings.

While professional dealers dominate sales, online platforms have seen a surge in peer-to-peer RV trading, catering to

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value-conscious buyers and facilitating individual sales. Yet, dealers play an indispensable role, offering financing, trade-ins, maintenance, and personalized service. They adeptly manage low inventories, even as buyers are willing to wait 9-12 months for new factory orders. The market for used RVs, particularly those with modern features, remains robust.

Given these dynamics, the private RV market is poised to maintain its leadership position throughout the forecast period.

Australia Recreational Vehicle (RV) Industry Overview

The Recreational Vehicle Market is fiercely competitive, with numerous manufacturers vying for attention through distinctive product features. To bolster their market share, companies are increasingly turning to mergers, acquisitions, partnerships, and collaborations. For instance,

- In January 2024, Tourism Holdings Ltd (THL) made headlines with its acquisition of Camperagent RV, the top RV dealer in South Australia. This move underscores THL's ambition to deepen its footprint and diversify its offerings in the Australian RV landscape. Given the RV sector's rising significance in Australia's tourism, this acquisition not only amplifies THL's portfolio but also promises a richer array of RV products and services for Australian consumers.
- In September 2022, the Australian Competition & Consumer Commission (ACCC) scrutinized the merger between Tourism Holdings Rentals Limited (THL Group Australia Pty Ltd) and Apollo Tourism & Leisure Ltd. This merger, a pivotal move in the RV market, seeks to amalgamate the assets of THL and Apollo, potentially birthing a dominant force in Australia's RV arena. The ACCC's oversight guarantees the merger's compliance with competitive norms, safeguarding the market's competitive landscape.

Industry frontrunners are channeling investments into R&D, pioneering lightweight materials to trim vehicle weight and boost fuel efficiency.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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