



2023 LEISURE VEHICLE UPDATE

(INCLUDING USER HABITS) – CARAVAN AND MOTORHOME CLUB MEMBER RESEARCH

We collected 200,000 hours of valuable feedback from over 8,000 members

There were positive increases from the 2016 leisure vehicle survey. Owners' satisfaction with their vehicles and purchasing experience has improved, as has the build quality of vehicles, allowing leisure vehicle owners to spend more time touring and enjoying the great outdoors.

BUILD QUALITY HAS IMPROVED

Caravans



Motorhomes and Campervans



Net promoter score is up!
Members reported they would repurchase from the same manufacturer

Caravans

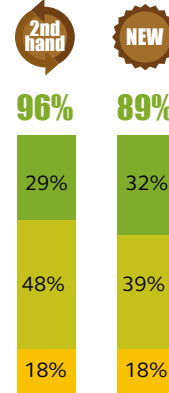
34
+ 27% increase

Motorhomes and Campervans

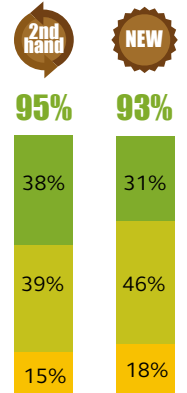
40
+ 33% increase

SATISFACTION IS HIGH,
ESPECIALLY AMONG
SECONDHAND OWNERS

Caravans



Motorhomes and Campervans



■ Extremely Good ■ Very Good ■ Good

Caravans

81% Overall positive buying experience
81% Positive staff experience
89% Positive sales staff experience

SATISFACTION WITH DEALERSHIPS HAS INCREASED



87%

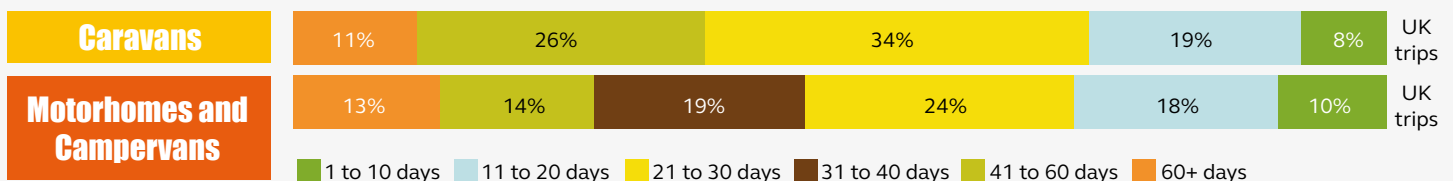
are happy with their dealership maintenance service

Motorhomes and Campervans

78% Overall positive buying experience
77% Positive staff experience
85% Positive sales staff experience

USAGE TRENDS HAVE BECOME MORE PRONOUNCED SINCE THE LAST LEISURE VEHICLE SURVEY

Leisure vehicle owners enjoy spending longer periods away in their outfits, caravanners spend longer away than motorhomers (**47%** of caravanners spent 41+ days touring / **70%** motorhomers and campervanners spent 21+ days touring)



■ 1 to 10 days ■ 11 to 20 days ■ 21 to 30 days ■ 31 to 40 days ■ 41 to 60 days ■ 60+ days

Club research shows different behaviours from leisure vehicle owners. Caravanners take fewer trips per year, but enjoy staying longer. Campervanners and motorhomers take more trips, but stay for shorter durations. Motorhomers and campervanners are more spontaneous, they book closer to departure, whereas caravanners book further ahead.

LEISURE VEHICLE OWNERS ARE MORE SATISFIED THAN EVER BUT WOULD STILL LIKE TO SEE CONTINUOUS IMPROVEMENT AND INNOVATION

Caravanners want to see more availability of...



- Longer and more comfortable beds
- Built-in Wi-Fi
- Solar panels for heating or AC
- Under bed storage
- Automatic levelling systems
- User friendly kitchen layouts
- Increased payloads



Motorhomers and Campervanners want to see more availability of...

- Self-sufficient off-grid capability
- Comfortable beds
- User friendly kitchen layouts
- Pop-up roof
- Improved insulation for noise/temperature
- Improved fuel economy
- Fully integrated audio/video systems

INTERNAL LAYOUT IS STILL TOP PRIORITY FOR OWNERS WHEN BUYING, WHETHER NEW OR SECONDHAND

Caravans						Motorhomes and Campervans					
1st	2nd	3rd	4th	4th	5th	1st	2nd	3rd	3rd	3rd	4th
Internal layout	Fixed Bed layout	Berth	Design	Range/ Model	Make	Internal layout	Design	Range/ Model	Fixed Bed layout	Berth	Age

WHAT MEMBERS LOVE ABOUT THEIR LEISURE VEHICLES

Owners reflected positively on particular aspects of their leisure vehicles and the associated brands. Below are some of the key areas mentioned by Club members where brands excelled

Positive attributes - Caravans	Caravan Brands	Positive attributes - Motorhomes and Campervans	Motorhome and Campervan Brands
Quality	Compass, Coachman, Lunar	Quality	Volkswagen, Erwin Hymer Group (Laika, Carado, Niesmann + Bischoff), Rapido
Value for money	Sterling, Lunar, Buccaneer	Value for money	Rapido, Autohomes, Bessacarr
Luxury	Buccaneer, Bessacarr, Coachman	Luxury	Carthago, Hymer, Frankia
Positive design/layout	Sprite, Sterling, Coachman	Positive design/layout	Bessacarr, Elddis, Bailey of Bristol
Comfortable	Avondale, Buccaneer, Eriba	Range of models	Swift, Auto Sleeper, Bailey of Bristol
Reliable	Knaus Tabbert, Burstner, Adria	Sports/recreation suitability	Swift, Roller Team, Volkswagen
Usability	Burstner, Bailey of Bristol, Sprite	Positive service experience	Volkswagen, Bailey of Bristol, Elddis
		Usability	Bessacarr, Volkswagen, Ace