

Leisure Quarterly Market Intelligence Report

The latest insight from the leisure vehicle industry
April – June 2023.



APRIL - JUNE 2023

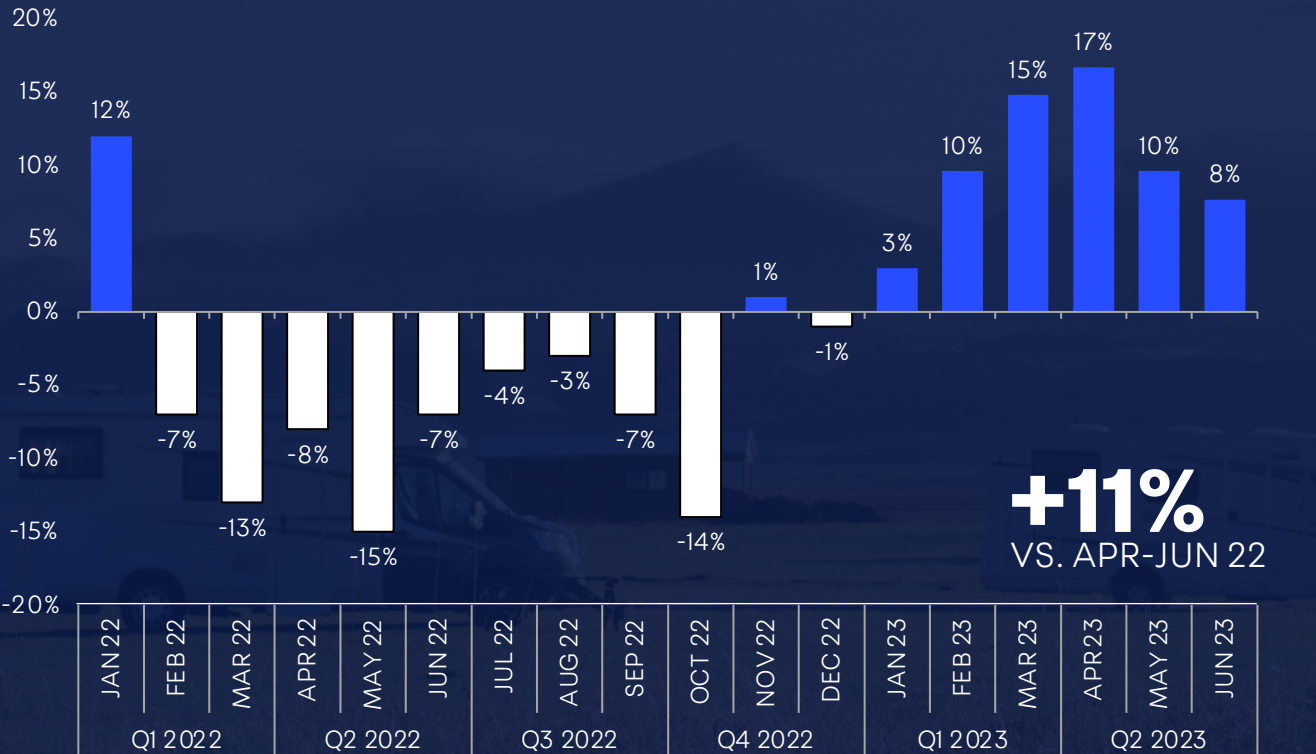
 AutoTrader

AUTO TRADER MOTORHOMES & CARAVANS VISITS AND ADVIEWS

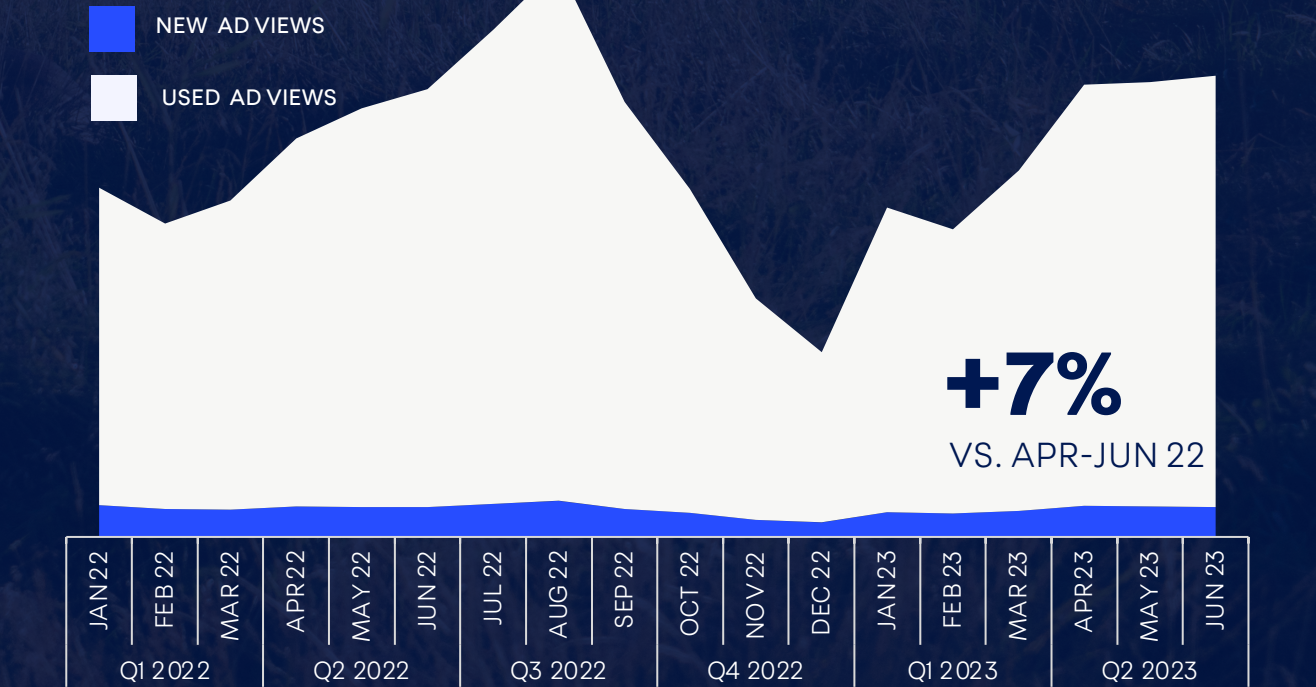
2023 got off to a great start, with combined visits to Auto Trader Motorhomes and Caravans consistently outperforming the same period last year. The leisure industry continues to thrive, with visits up 11% year on year during April – June 2023.

There is high interest in leisure vehicles with combined advert views between April – June 2023 up +7% vs the same period last year*. It's reassuring to see that despite the economic backdrop, the research phase remains consistent with previous years, with 72% of consumers looking to purchase within the next 3 months.

AUTO TRADER MOTORHOMES AND CARAVANS COMBINED VISITS (YEAR-ON-YEAR)



NEW AND USED MOTORHOMES AND CARAVANS COMBINED AD VIEWS
SPLIT BY NEW & USED



*Comparing Apr-Jun21 to Apr-Jun22 **Auto Trader Motorhome and Caravan on site research April 2023

Motorhome Market Report

A deep dive into the motorhome market
April – June 2023.



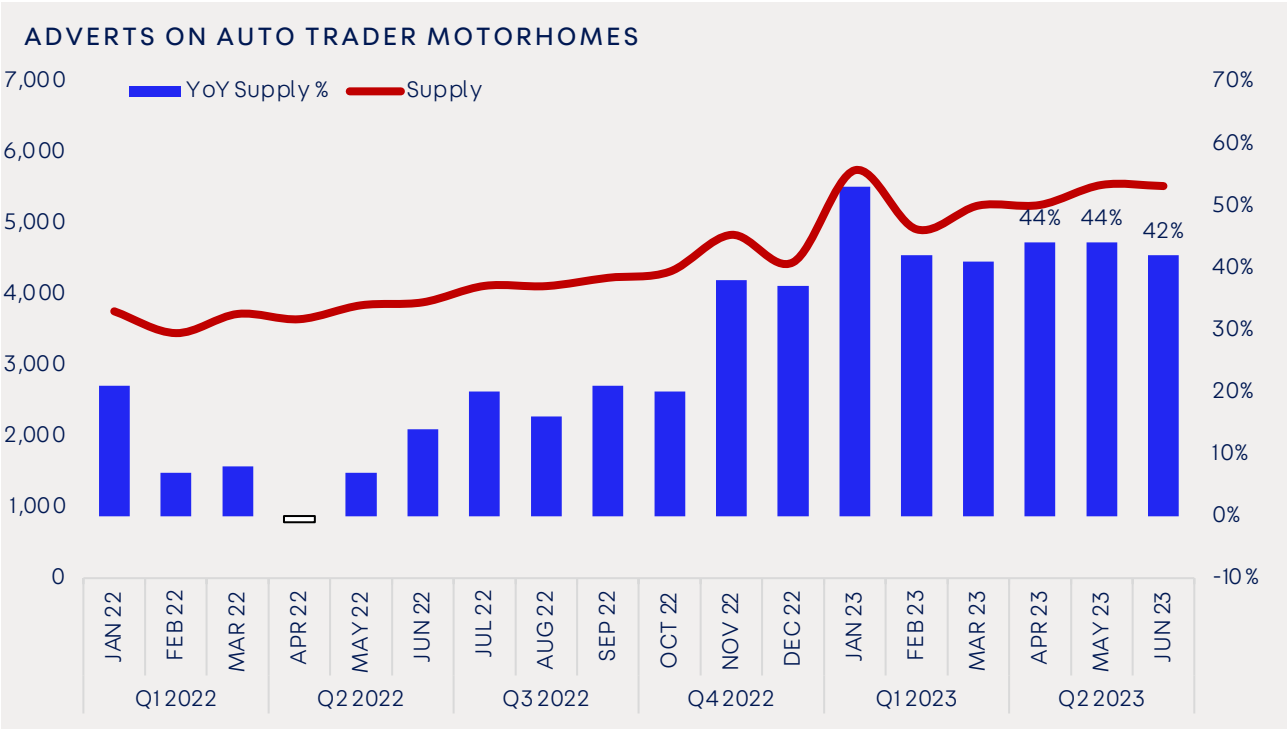
APRIL - JUNE 2023

 AutoTrader

USED MOTORHOME SUPPLY

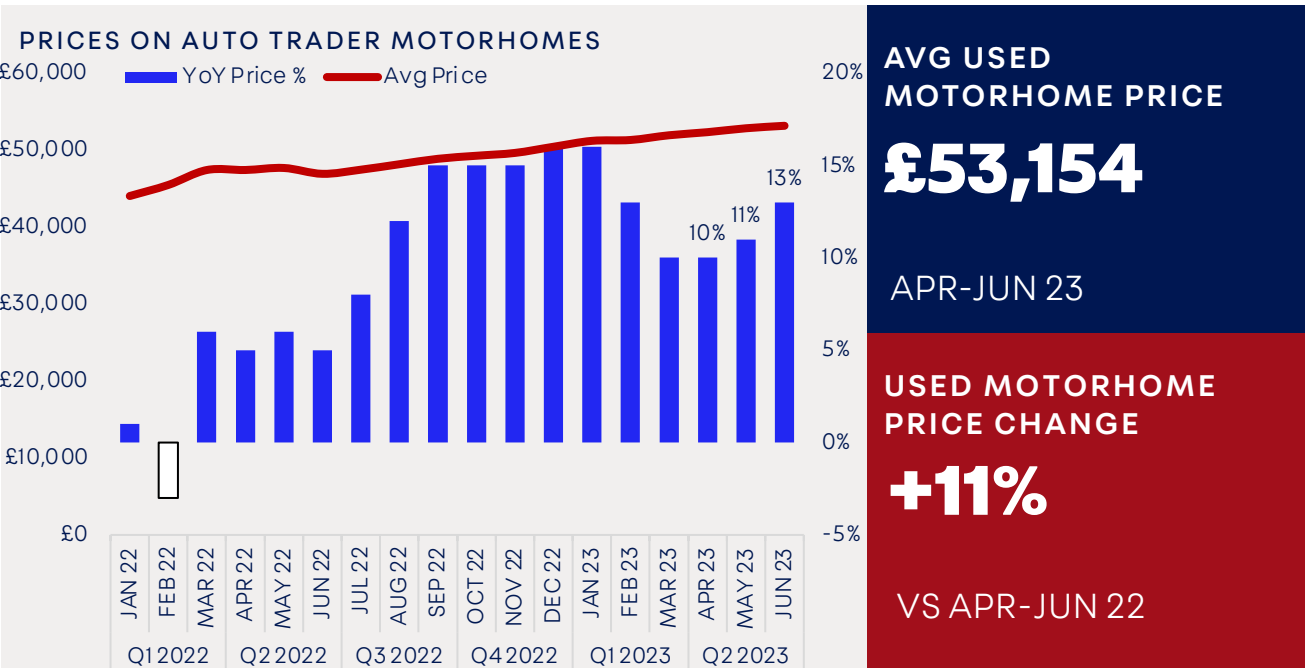
Bouncing back from the supply constraints of the last three years, supply is up 43% year on year* and 1% up versus the pre pandemic average**.

Buyers are spoilt for choice with a significant number and variety of used motorhomes in the marketplace, maintaining the strong start to the year.



USED MOTORHOME PRICING

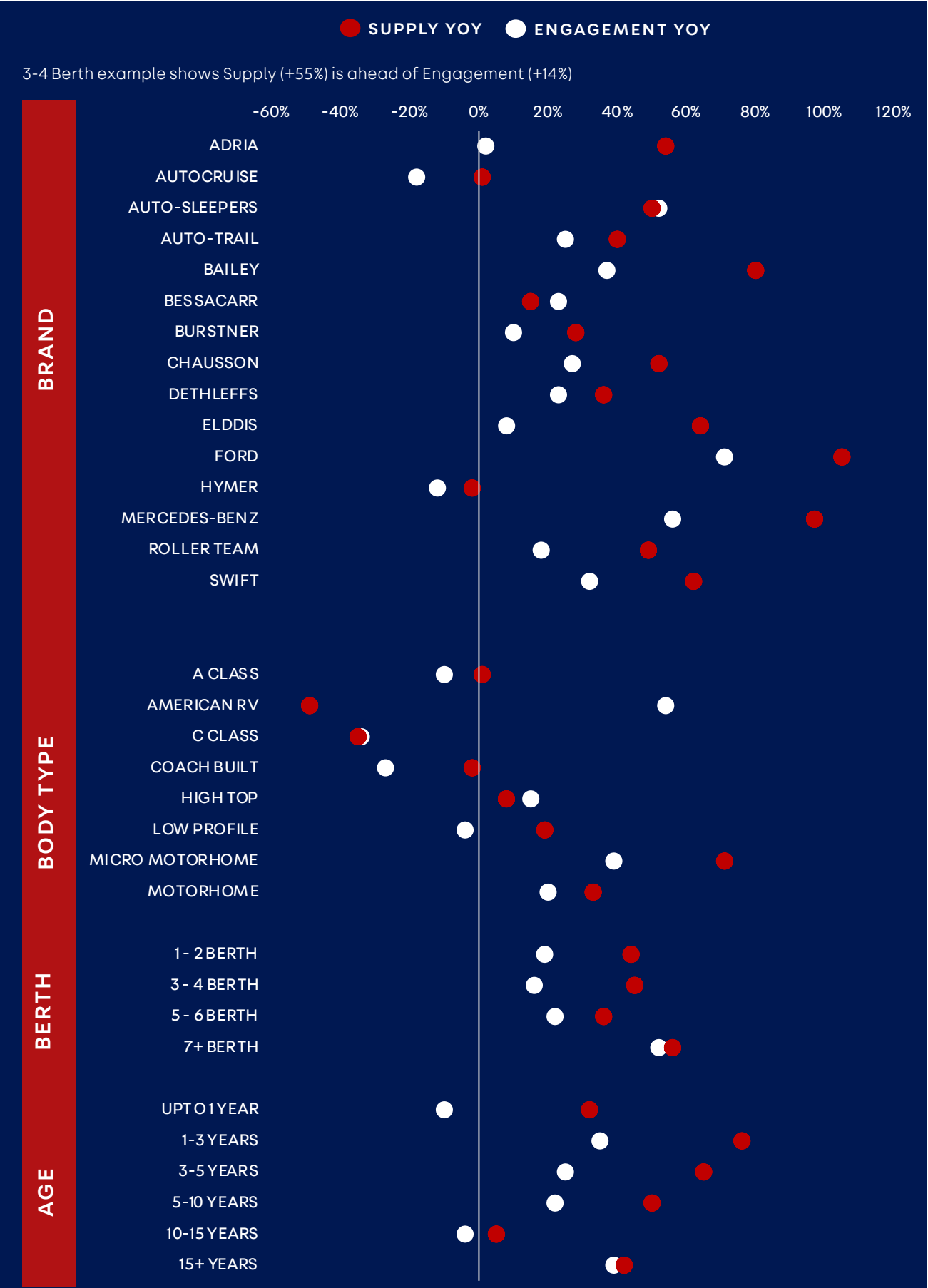
The average retail price of a used motorhome continues to grow and is at its highest level recorded*** in excess of £53, 000, 42% higher than pre pandemic average*. This is likely a result of newer, higher value motorhomes coming to market.



When reporting on motorhomes, campervans are excluded as they are reported further on. Pricing is not adjusted for mix.
*verses Apr - Jun 22 **Jan-19-Mar20 ***Records started in Jan 19

USED MOTORHOME SUPPLY & ENGAGEMENT MOVEMENT (YOY GROWTH)

Charts show Supply (red dots), Engagement (white dots).



Engagement is based on advert views on Auto Trader Motorhomes. Comparing Jan-Mar 22 vs Jan-Mar 23.

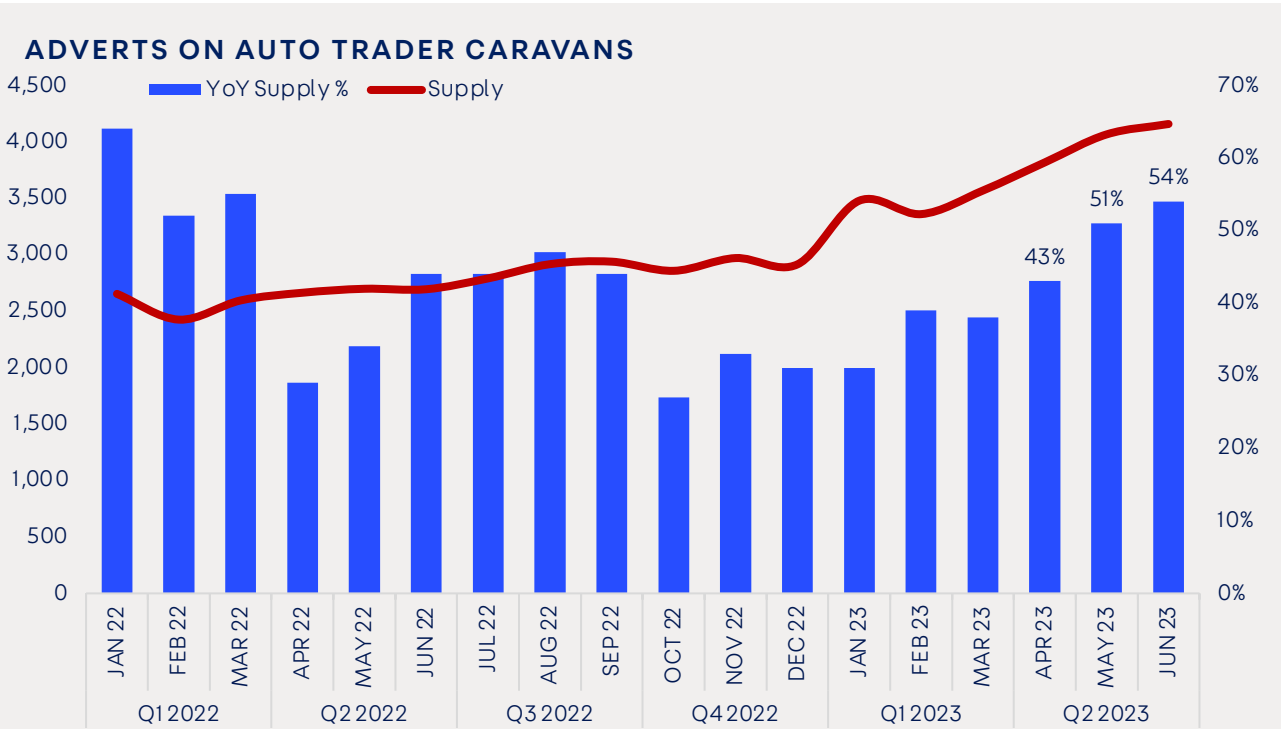
Caravan Market Report

A deep dive into the caravan market
April – June 2023.



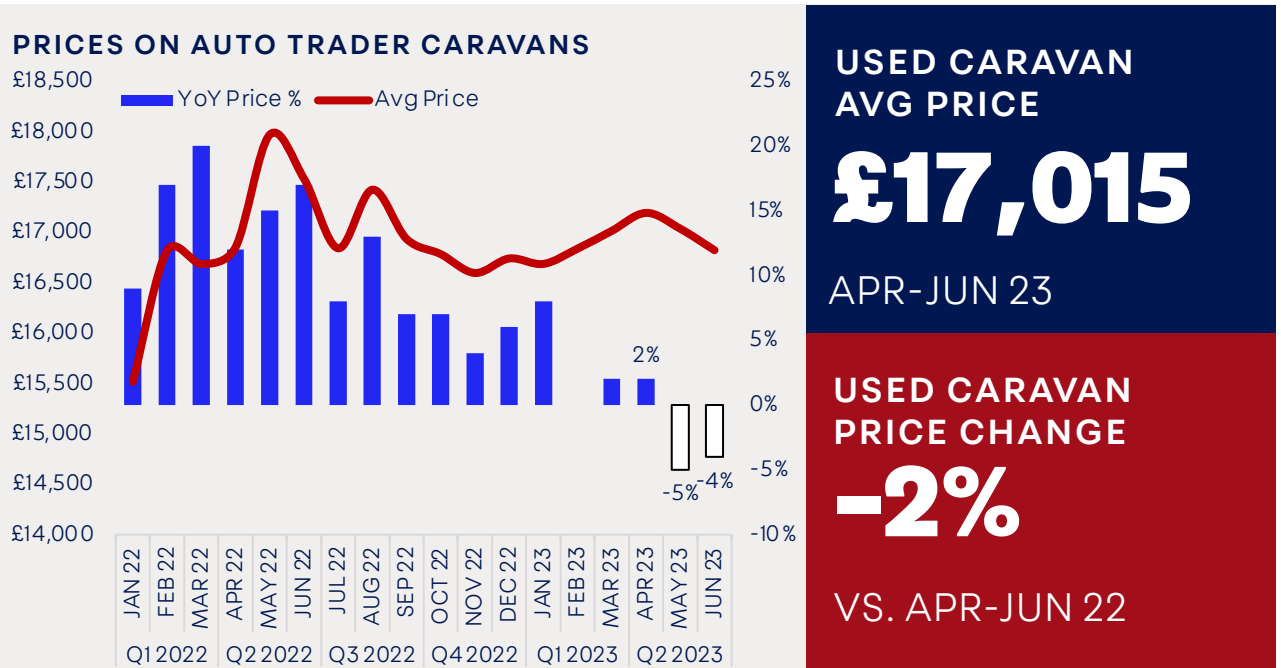
USED CARAVAN SUPPLY

Supply of used caravans remained fairly resilient during the pandemic, especially when compared with motorhomes and campervans. It has since soared, with a remarkable 49% year on year growth and caravan supply is now 19% higher than pre-pandemic average.*



USED CARAVAN PRICING

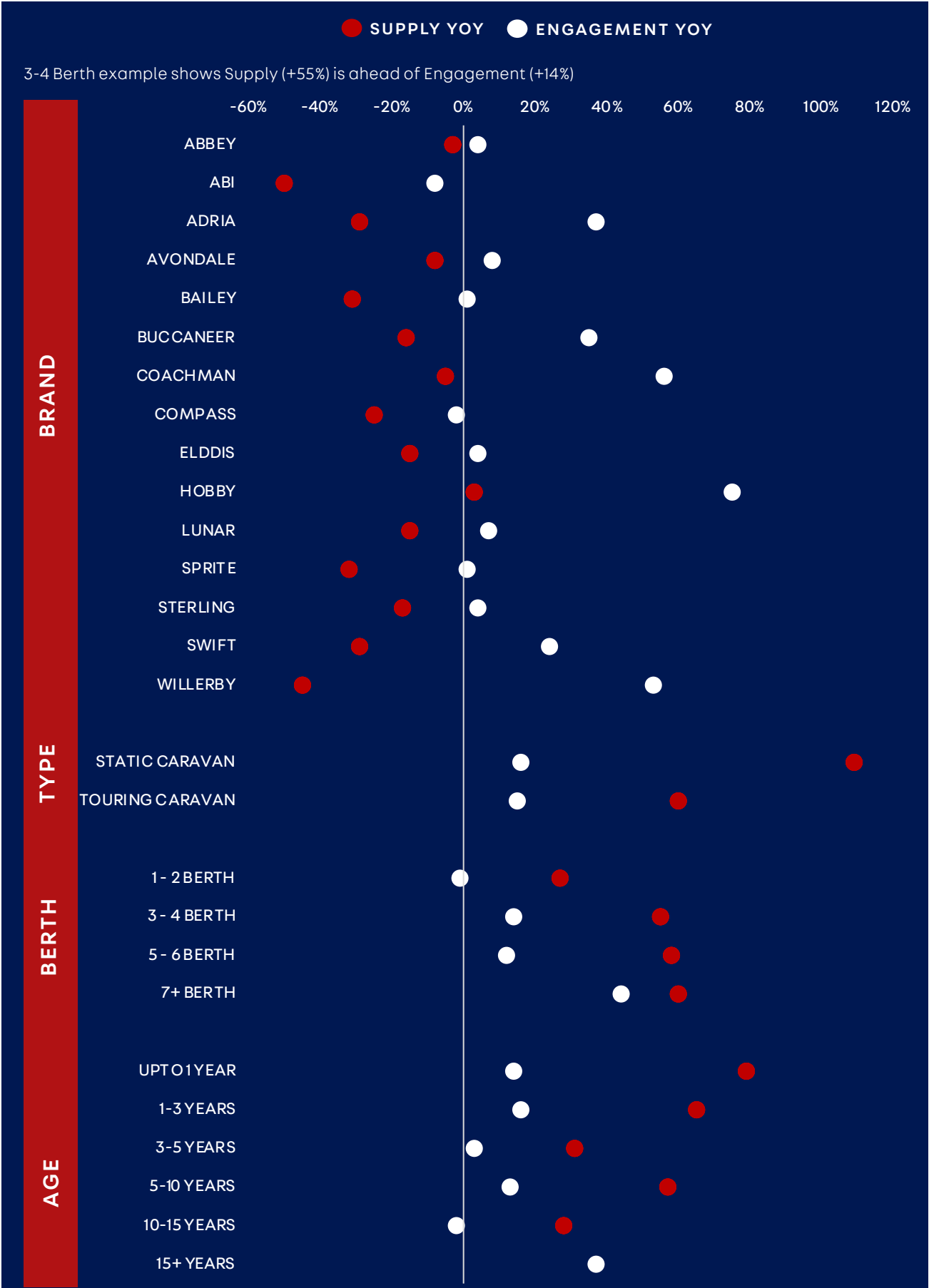
Since the start of the pandemic used caravan prices climbed steadily upwards, reaching their peak in May 2022. Prices are now starting to settle, slightly behind the highs of last year, driven by fewer 1-3 year old caravans in the market and more 15+ year old caravans which are typically cheaper.



Pricing is not adjusted for mix. **Jan-19-Mar20

USED CARAVANS SUPPLY & ENGAGEMENT MOVEMENT (YOY GROWTH)

Charts show Supply (red dots), Demand (blue dots).



Engagement is based on advert views on Auto Trader Caravans. Comparing Jan-Mar 22 vs Jan-Mar 23.

Campervans Market Report

A deep dive into the campervan market
April – June 2023.

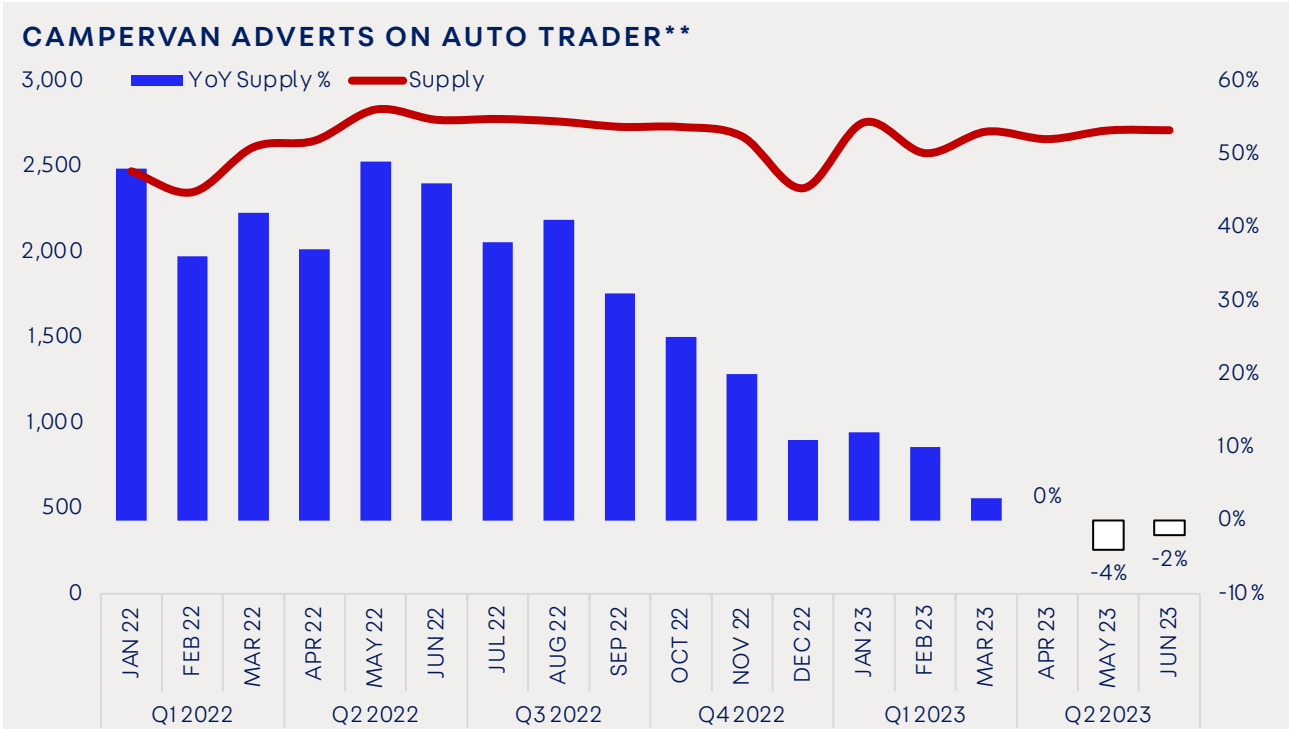


APRIL – JUNE 2023

 AutoTrader

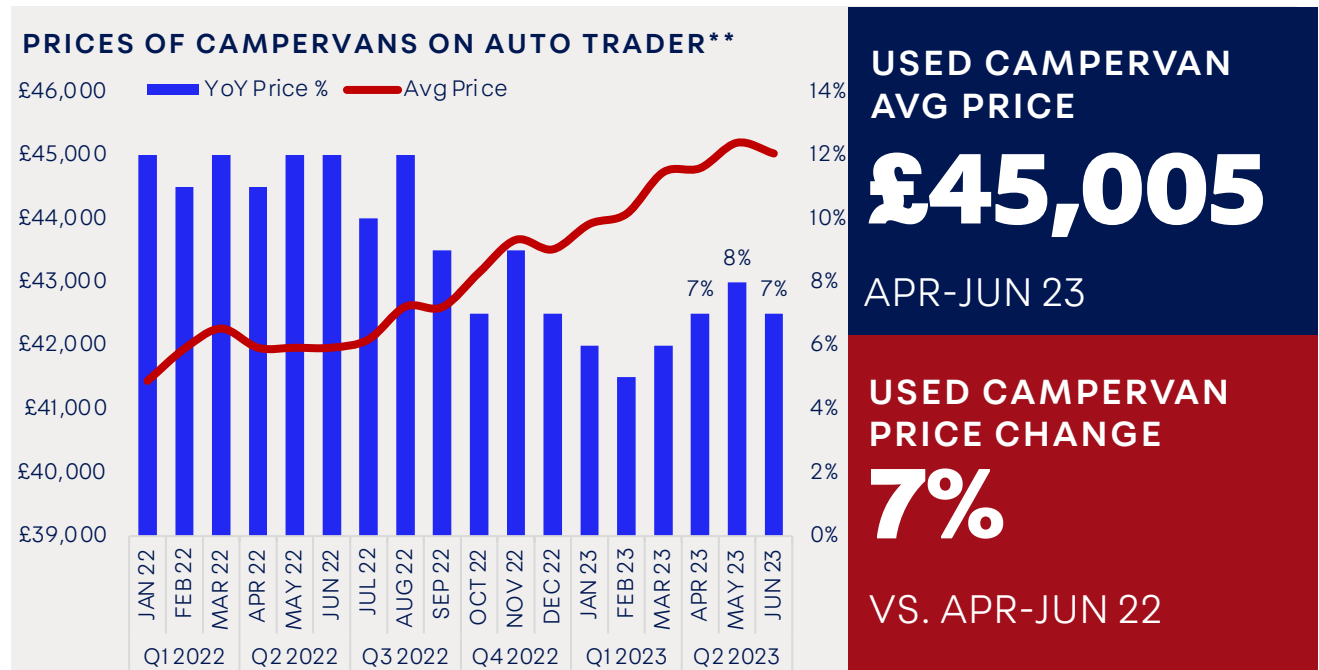
USED CAMPERVAN SUPPLY

With 50% more campervans in the market than pre-pandemic, supply is looking strong. A shortage of 3-5 year old panel vans available for conversion is however causing a slight drop in year on year supply.



USED CAMPERVAN PRICING

The average price of a used campervan has surged 44% above pre-pandemic levels, resulting in an all-time high average price of £45,005* despite fewer nearly new campervans coming into market.

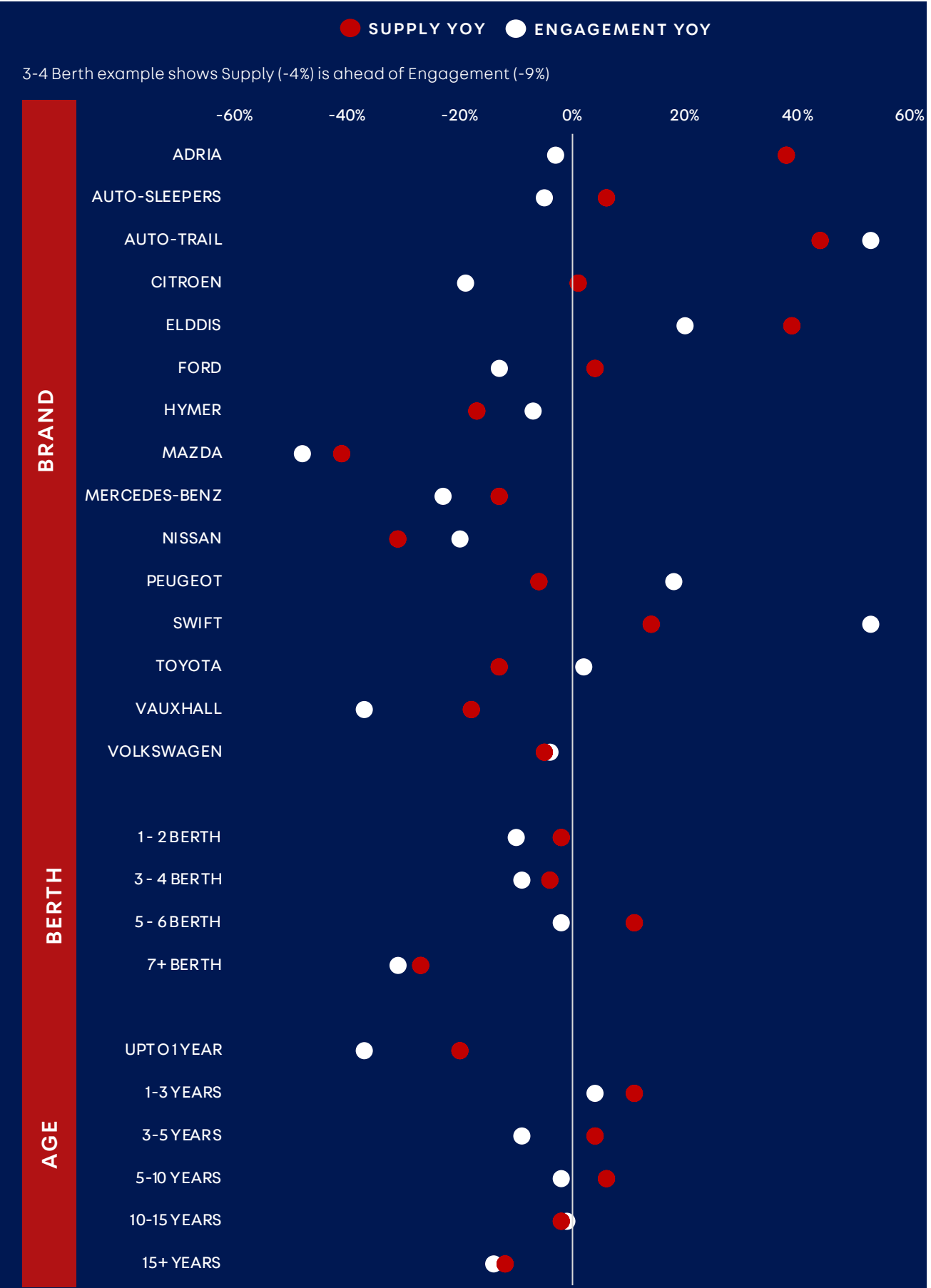


*Changes in price are reflected by a changing stock mix entering the market *Records started in Jan 19

**Details on Campervans are taken from Auto Trader Motorhomes

USED CAMPERVAN SUPPLY & ENGAGEMENT MOVEMENT (YOY GROWTH)

Charts show Supply (red dots), Engagement (white dots) movements.



Engagement is based on campervan advert views on Auto Trader Motorhomes Comparing Jan-Mar 22 vs Jan-Mar 23.
Age is based on age of the chassis of the campervan.