



Australian Government
Tourism Research Australia



**TOURISM
RESEARCH
AUSTRALIA**

**EVALUATING THE
CARAVAN PARK AND
SELF-CONTAINED
TRAVELLER SECTOR IN
WESTERN AUSTRALIA**

OCTOBER 2013



INTRODUCTION

Caravan parks are an important component of Australia's tourism industry, providing a range of accommodation types and other services to meet the needs of a wide cross section of visitors. In 2010, it was estimated that 506,600 people stayed in a caravan park in Western Australia (WA), equating to approximately 4,209,100 visitor nights with an average length of stay of 8.3 nights. This represented around 9 per cent of the total number of tourists to the state.¹

A review of the industry by Tourism Western Australia (TWA) identified a need to understand the type of visitor that uses caravan parks and camping grounds. In particular, TWA was interested in obtaining a deeper understanding of the behaviour and requirements of caravan and camping visitors to inform product development priorities and improvements.

As a result, in 2012–13, Tourism Research Australia (TRA) partnered with TWA to conduct research to gain an up-to-date understanding of the current and emerging characteristics and behaviours of caravan park users and those who travel in a relatively self-contained fashion in recreation vehicles.

HOW WE CONDUCTED THIS STUDY

The study had a three-stage approach as follows:

- **Industry consultation:** In-depth interviews were conducted with 11 representatives from the caravan park and self-contained visitors sectors in WA to shape the subject areas for the study.
- **Caravan park user² survey:** Interviews with caravan park users were conducted across all five tourism regions in WA. A total of 252 face-to-face interviews and 29 self-completion questionnaires were undertaken between January and May 2013.
- **Self-contained traveller³ survey:** An online survey was available between March and May 2013. Completed surveys used in this report were obtained from 213 visitors.



² Defined as short-term holiday makers staying for a month or less in at least one of WA's caravan parks.

³ For the purpose of this survey, self-contained travellers refers to those travelling in campervans, motorhomes, caravans and recreational vehicles that have their own ablution, bathing and cooking amenities, with minimal need to access formal camping and caravan parks and who spent over three nights in a self-contained vehicle in free or low cost accommodation. This includes designated rest areas, on the side of the road and in national parks.

¹ Source: Tourism Research Australia – National and International Visitor Survey YE Dec 2010

STAKEHOLDER VIEWS ON THE CARAVAN AND CAMPING INDUSTRY

Industry operators were asked what they thought were the key requirements for each park user segment, and the barriers to growth for WA caravan parks.

MEETING THE NEEDS OF CARAVAN PARK USERS

Resort-style park users need chalets and facilities such as pools, playgrounds, food, booking services for tours and late checkout.

Basic park users need lot dimensions sufficient in size to accommodate large recreational vehicles. They don't need facilities such as camp kitchens and BBQs.

BARRIERS TO GROWTH

- **Variable tourist demand**
Some areas can only grow caravan park visitor numbers by an overall increase in visitor numbers to the region.
- **Seasonality**
The seasonal nature of tourism means it is difficult for caravan park operators to see how more visitors could be attracted outside of peak visitation periods.
- **Regulations**
Many caravan park operators considered restrictions as a result of multiple regulations and acts to be a barrier to upgrading their existing facilities. It was also felt that the interpretation of the regulations varied between different local governments.
- **Low return on investment and land availability**
A number of operators mentioned the lack of available, cost effective sites as a barrier to building new parks.

CARAVAN PARKS

VIEWS OF CARAVAN PARK USERS

The respondents to the caravan park survey were more likely to be older (42% were 60+ years), empty nesters (55%) and from Western Australia (41%). They had a long length of stay in WA on their last holiday, staying on average 50 nights.

FACILITIES SOUGHT

The sample was evenly split between those who preferred resort-style facilities (46%) and those who preferred basic facilities (41%).

Those aged 60 years or over were more likely to prefer to stay in caravan parks with only basic facilities (52% preferred to stay in parks with basic facilities compared to 36% that preferred a resort-style caravan park). Those travelling with families were more likely to prefer resort-style parks (72% preferred to stay in resort-style caravan parks compared to 24% who preferred to stay in parks with basic facilities).

For those who stated a preference for resort-style parks, a swimming pool was the most sought after facility. For those who stated a preference for basic facilities, amenities were seen as the most important. Shade trees were also important for this segment.

Interestingly, Wi-Fi was not seen as important by either segment.

FIGURE 1: FACILITIES SOUGHT BY RESORT-STYLE PARK USERS

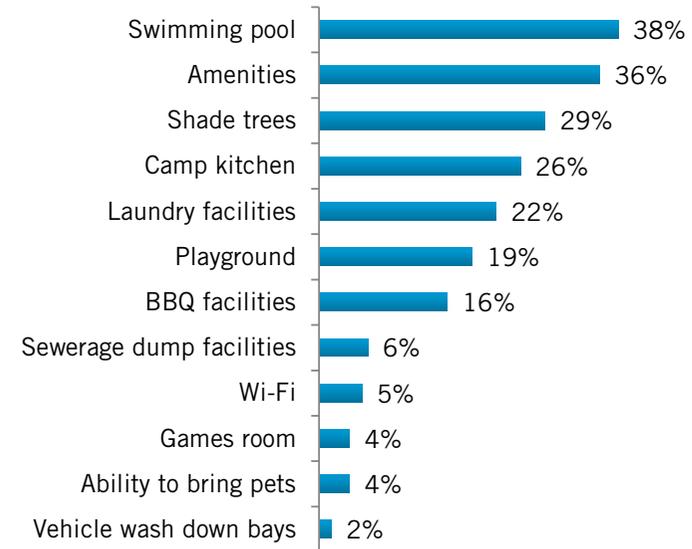
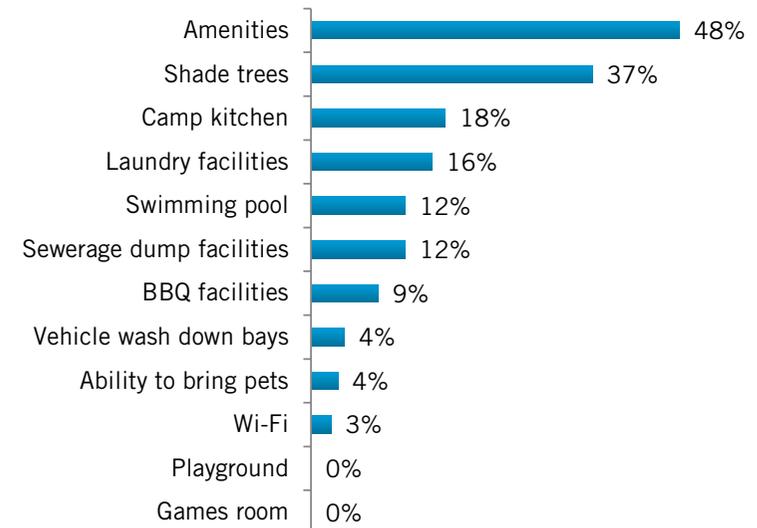


FIGURE 2: FACILITIES SOUGHT BY BASIC PARK USERS



CARAVAN PARK RATINGS

Caravan park users who preferred resort-style accommodation rated their experience significantly better than those who preferred basic accommodation.

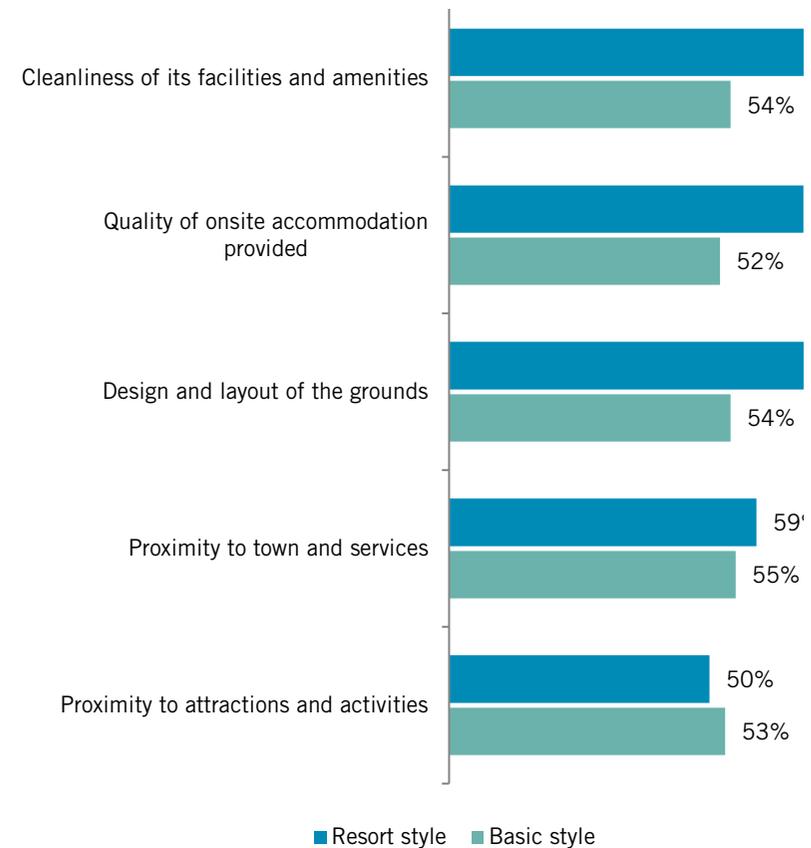
FIGURE 3: RATINGS OF WA CARAVAN PARKS



South West caravan parks were rated the highest, with 44% of all respondents rating the parks as excellent. The lowest rating was in the Golden Outback where 16% of respondents rated the park as poor or fair.

Those preferring resort-style parks rated the caravan parks well on cleanliness of facilities and amenities and the design and layout of the grounds (70% rating the park as very good or excellent in each case). The basic-style users rated the parks lower on all aspects, with only just above one in two respondents saying the parks were very good or excellent on every aspect.

FIGURE 4: SATISFACTION WITH ASPECTS OF CARAVAN PARKS



More than half (60%) of the respondents who had travelled or planned to travel to other states on their current holiday perceived WA caravan parks to be more expensive than other states. Despite this, the majority of respondents considered the caravan park they were staying at to be good value.

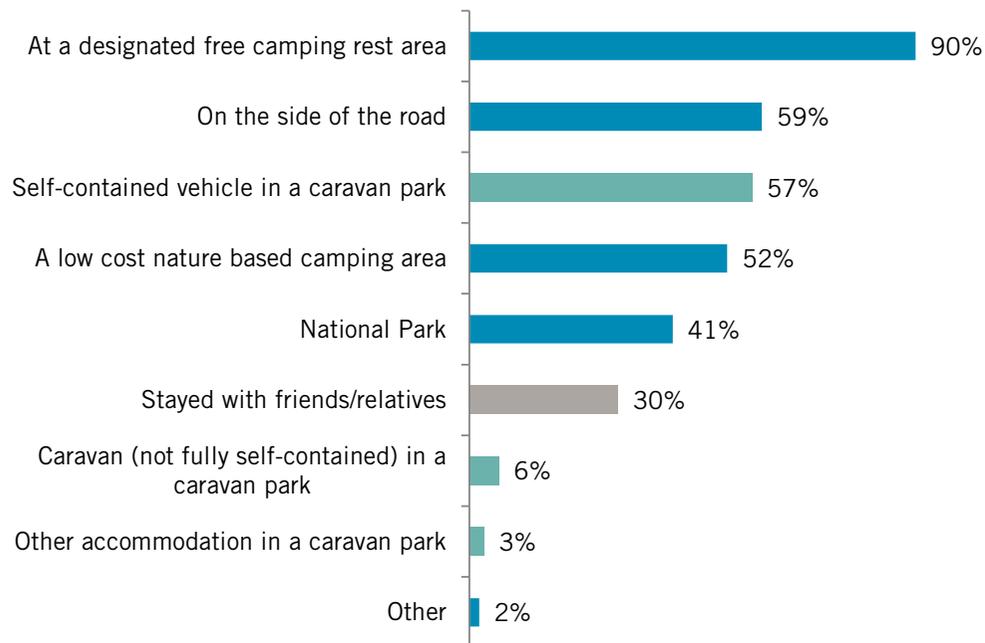
SELF-CONTAINED TRAVELLERS

The respondents to the 'self-contained' survey were mostly older (72% were 60+ years), empty nesters (92%) and from Western Australia (71%). They had a long length of stay in WA on their last holiday, staying on average 79 nights.

In a typical week, 61% of the respondents reported spending some nights in a caravan park.

On their most recent trip to WA, nine in ten respondents stayed at a designated free camping rest area. Six in ten respondents spent their nights on the side of the road.

FIGURE 5: TYPES OF ACCOMMODATION USED ON THEIR LAST HOLIDAY



REASONS

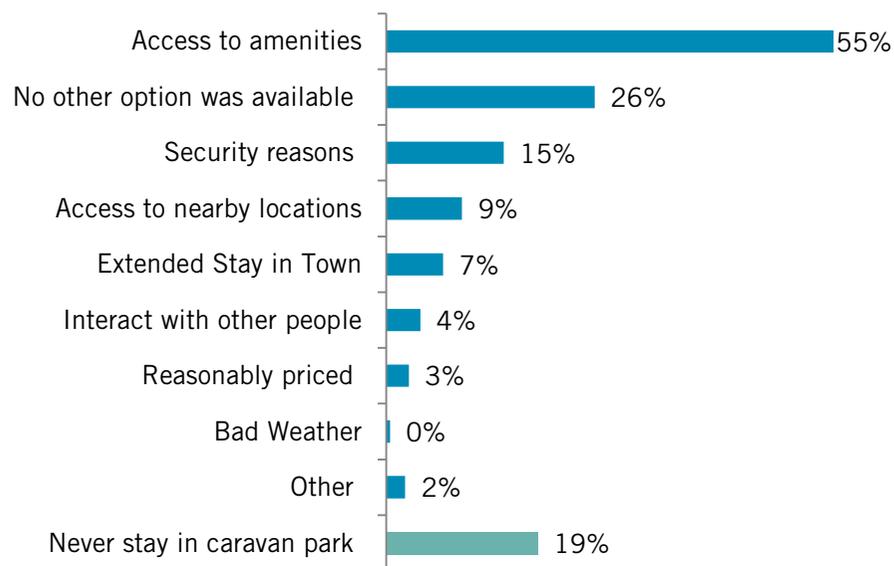
WHY THEY USED CARAVAN PARKS

Across the state, the main reason self-contained travellers chose to stay in a caravan park was to access amenities such as showers and power.

When asked what facilities they sought, nearly eight in 10 respondents mentioned laundry facilities (79%) and sewerage dump points (78%). Ablution blocks were mentioned by 64% of respondents.

One in four respondents reported that there was no other option available other than to stay in a caravan park.

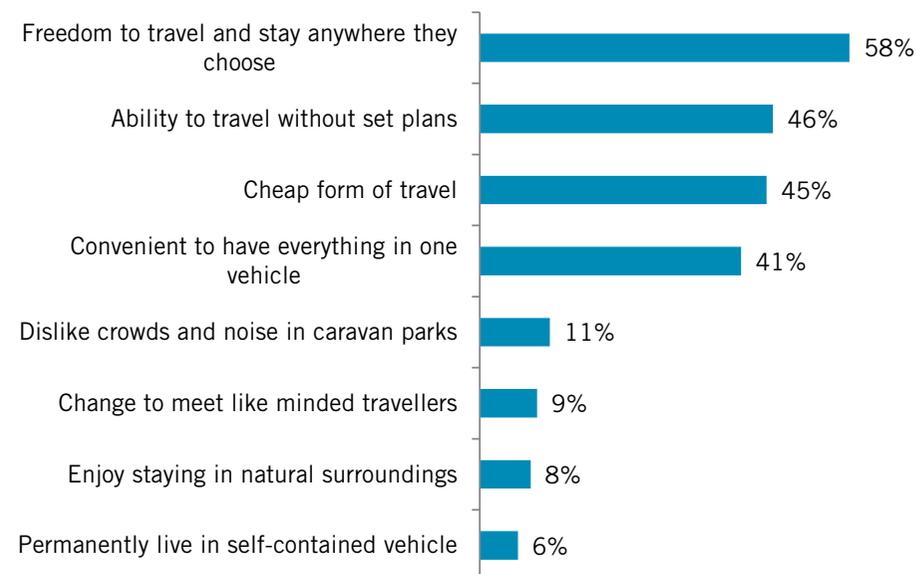
FIGURE 6: REASONS FOR STAYING IN A CARAVAN PARK



WHY THEY TRAVELLED SELF-CONTAINED

Freedom was a key motivator to travelling 'self-contained'. Cost was a significant factor with 45% of respondents saying they travelled that way because it was cheap. One in ten reported the crowds and noise in caravan parks puts them off.

FIGURE 7: REASONS TO TRAVEL SELF-CONTAINED



USE OF FACILITIES FOR SELF-CONTAINED TRAVELLERS

The majority of respondents reported using rubbish facilities, overnight and day rest bays, free sewerage dump facilities and potable water. In contrast, few respondents reported using 'pay-to-use' sewerage dump facilities and vehicle wash down bays.

Experiences with these facilities in WA were mixed.

Equal numbers of respondents reported overnight rest bays exceeded expectations as those who said they were below expectations. Experiences with access to potable water were more likely to be below expectations (29%) than above (20%).

Out of the five facilities surveyed (Figure 9), only one (sewerage dump facilities – no cost) recorded higher results for 'Better than expected' (29%) than for 'Worse than expected' (26%).

FIGURE 8: USE OF FACILITIES IN WA

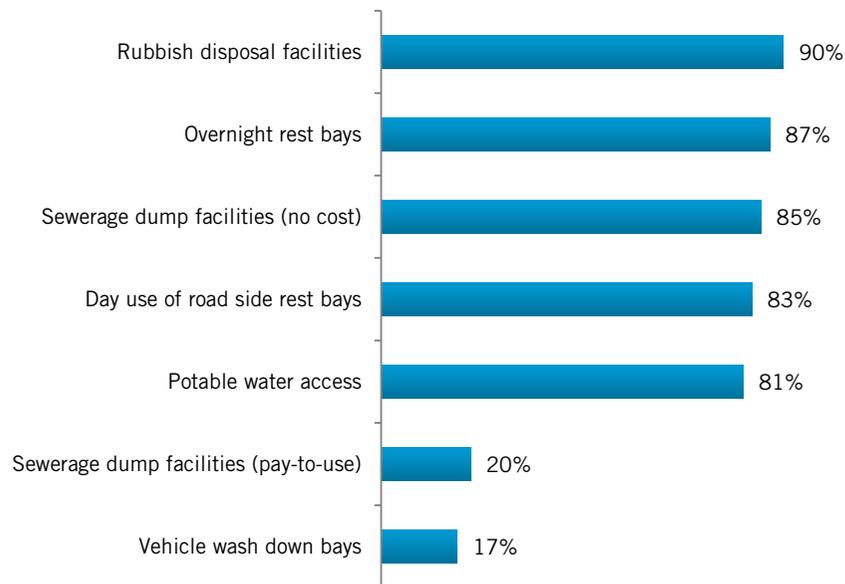
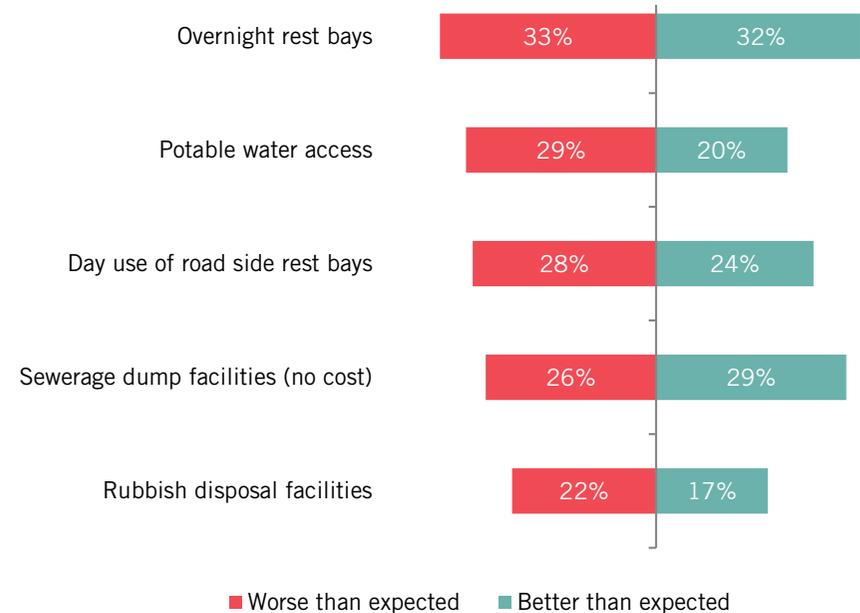


FIGURE 9: EXPERIENCE WITH FACILITIES IN WA



WILLINGNESS TO PAY

Overnight rest bays: Just over half (55%) of respondents said they would not be willing to pay anything for overnight rest bays. If a fee was charged, respondents would be prepared to pay \$5.19 (on average) to use an overnight rest bay.

Day use roadside rest bays: Respondents were not willing to pay for day use roadside rest bays, with 84% not willing to pay anything for the facility.

Sewerage dump facilities: If a fee was charged, respondents would pay on average \$3.55 for sewerage dump facilities. Two-thirds of respondents would be willing to pay for such a facility.

Potable water access: Similar to sewerage dump facilities, two-thirds of respondents would be willing to pay for potable water. On average, respondents would pay \$3.92 to access potable water.

