



**Australian Government**  
**Tourism Research Australia**



**TOURISM  
RESEARCH  
AUSTRALIA**

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

**Executive Summary**

**JULY 2013**

## INTRODUCTION

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Caravan and camping visitors make up a significant proportion of visitors to and within Western Australia, particularly in regional areas of the state. They are typically categorised into two markets according to the type of accommodation they mostly choose:

- Caravan park users (both resort style and basic accommodation types)
- Self-contained travellers (e.g. visitors 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 national parks).

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.

Tourism Research Australia (TRA) and TWA commissioned this research project to address these objectives. The research approach is outlined at the end of this document.

The results reported here are based on the responses from 281 caravan park users and 213 self-contained travellers. The results should be considered indicative only as this sample may not represent the entire population.

## KEY FINDINGS

**TABLE 1 MARKET SIZE AND COMPOSITION**

	CARAVAN PARK USERS		SELF-CONTAINED TRAVELLERS (staying in caravan parks)
	CARAVAN PARK USERS	SELF-CONTAINED TRAVELLERS	
Market size <sup>1</sup>	490,164	133,076	100,391
Average length of stay (nights)		50	79
Market diversity (two most common travel groups)	Couples (63%) Family group (18%)		Couples (75%) Friends (7%)
Regional dispersal (number of regions visited)		3	2.4
Average daily spend on tourism activities	\$39.94* (accounts for 42% of daily spend)		\$17.92** (accounts for 22% of daily spend)

<sup>1</sup>Derived from National Visitor Survey (year ended March 2013 and results from this survey. \*Tourism spend for caravan park users includes accommodation, tours and entertainment. Other spend includes food and drink and transport.\*\*Tourism spend for self-contained travellers includes paid accommodation, tours and other transport, entertainment and entrance fees and shopping. Other spend includes food and drink, fuel and maintenance, parking, sewage dump points and personal care.

## CARAVAN PARK USERS

### VISITOR PROFILE

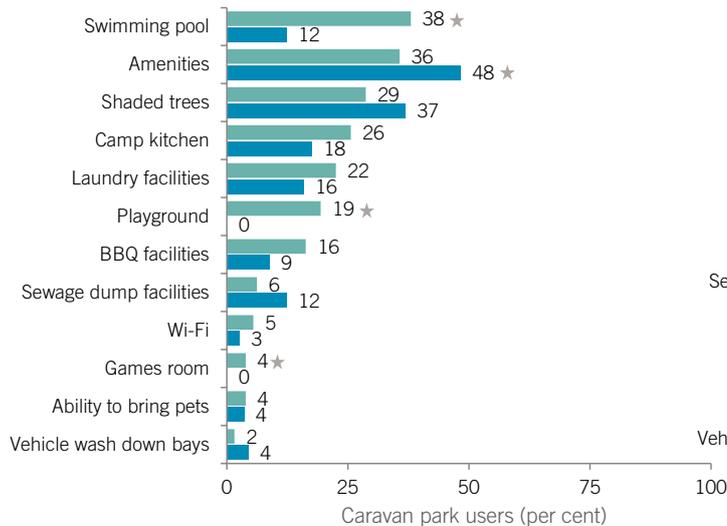
- The majority of grey nomads (60 years and older) preferred to stay in a basic caravan park – 52% preferred to stay self-contained compared to 36% who preferred a resort style caravan park. Those travelling with families had a stronger preference for a resort style park (72%) compared to 24% who preferred the self-contained style.

### VISITOR EXPECTATIONS AND SATISFACTION

- Before choosing where to stay caravan park users investigated different facilities available in a park. The majority of facilities that visitors were seeking were available at the parks where they were staying, indicating the needs of the majority of caravan park users were being met (Chart 1).
- One in ten visitors did not stay in their preferred accommodation location, with the majority citing full occupancy as the main barrier.
- Those preferring resort style accommodation rated their experience more highly (49% rate their experience as excellent) than those with a preference for basic accommodation types (23% rated their experience as excellent), see Chart 2.
- South West performs significantly higher than other regions (Chart 3).

## CHART 1: FACILITIES SOUGHT IN CARAVAN PARKS

Facilities that caravan park users seek



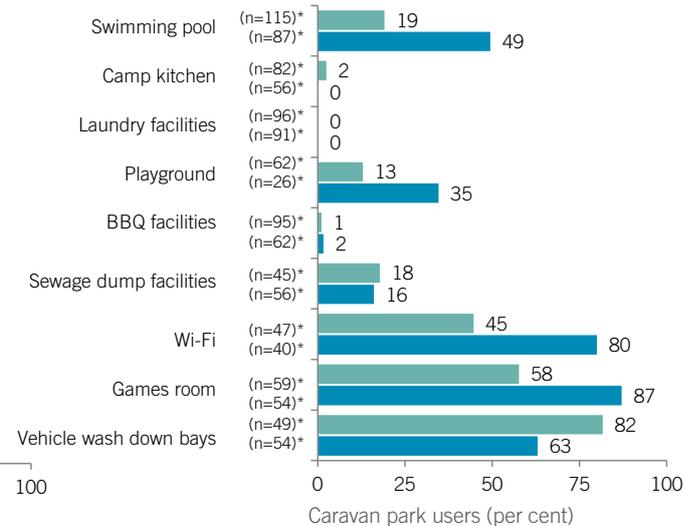
Prefer resort style accommodation (n=128)

Prefer basic style accommodation (n=112)

★ Significant difference at the 95% confidence interval

Q What facilities do you look for when choosing a caravan park to stay at?

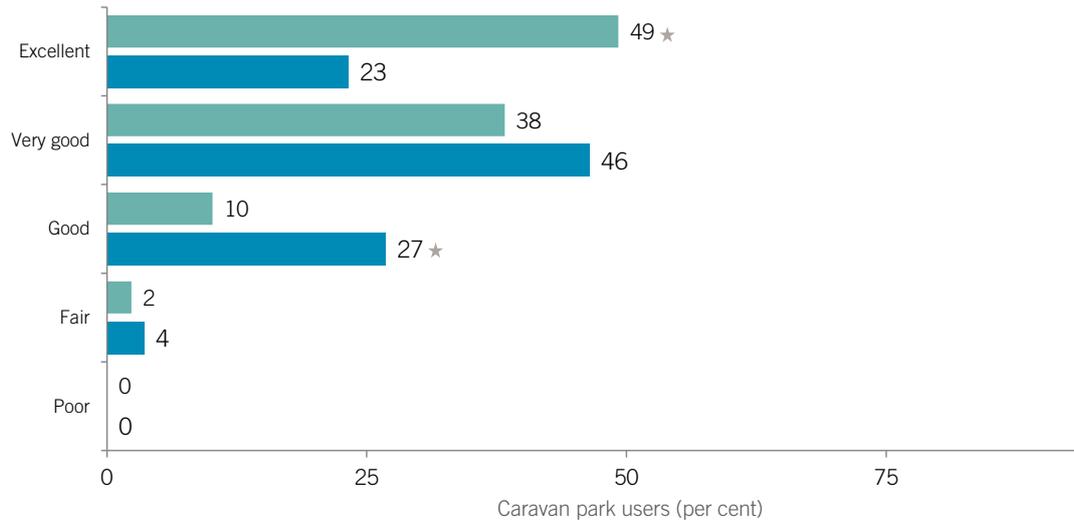
Facilities that were not available at the park



Q Using this scale, how would you rate the facilities and services available at this caravan park? – It was not available at this park

Please note: 'Other' mentions are not shown and 'don't knows' have been excluded from the data

CHART 2 RATING WA CARAVAN PARKS



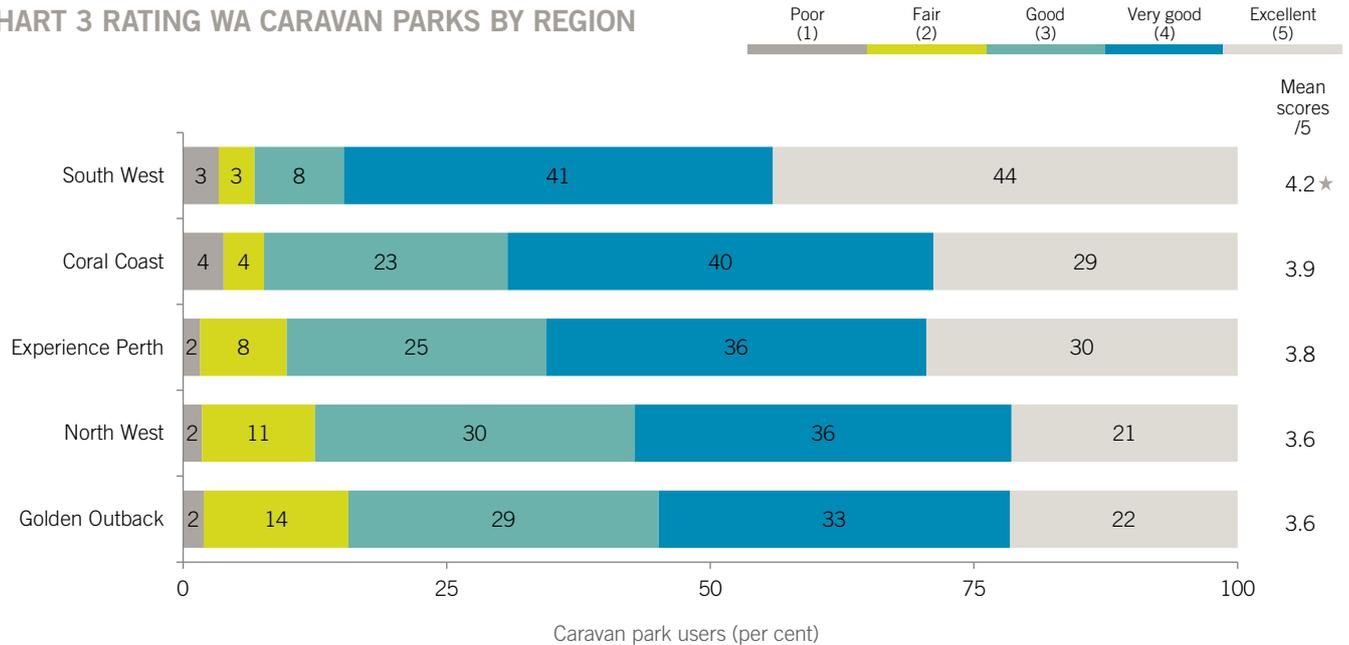
Prefer resort style accommodation (n=128)

Prefer basic style accommodation (n=112)

★ Significantly higher than the total at the 95% confidence interval

Q How would you rate your experience in this caravan park?

CHART 3 RATING WA CARAVAN PARKS BY REGION



★Significantly higher than the total at the 95% confidence interval

Q How would you rate your experience in this caravan park?

\* Please note: don't knows have been excluded from the data

## ECONOMIC VALUE OF CARAVAN PARK USERS TO WA

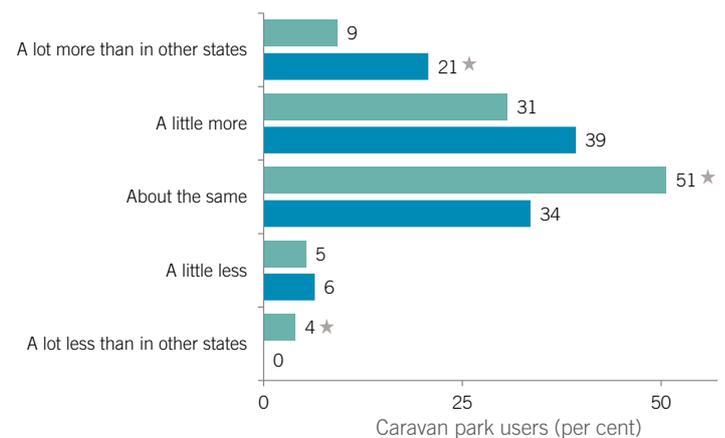
TABLE 2 SPEND BY CARAVAN PARK USERS

	% OF PEOPLE SPENDING	ALL USERS	PREFER RESORT STYLE ACCOMMODATION	PREFER BASIC ACCOMMODATION
	n = 281	n = 281	n = 129	n = 114
Accommodation	100	\$22.86	\$26.47	\$19.37
Food and drink	99	\$21.27	\$24.35	\$19.74
Transport	96	\$25.91	\$24.81	\$25.30
Tours	45	\$10.07	\$10.86	\$10.35
Entertainment	63	\$2.01	\$2.95	\$1.40
Average caravan park user		\$82.27	\$89.42	\$76.16
WA visitor		\$106.31		

Source: TRA Regional Expenditure Estimates  
YE March 2013

- The average spend of caravan park users on activities linked to tourism was \$82.27 (Table 2).
- Resort style caravan park users drove up the average spend, with visitors in this group spending on average \$89.42 a day compared to basic caravan park users who spent \$76.16 a day.
- Those who travelled to other Australian states and regions during their holiday rated the cost of WA caravan parks lower in comparison (Chart 4). The majority of visitors at each price point suggested the accommodation was good value.

#### CHART 4 COMPARATIVE COST OF ACCOMMODATION



■ Have not travelled and do not plan to travel to other states on this holiday (n=125)

■ Have travelled or plan to travel to other states on this holiday (n=156)

\*Significantly higher than the total at the 95% confidence interval

Q Based on your knowledge on the cost to stay in caravan parks in other Australian state of similar standard to this one, would you say this caravan park costs?

## SELF-CONTAINED TRAVELLERS

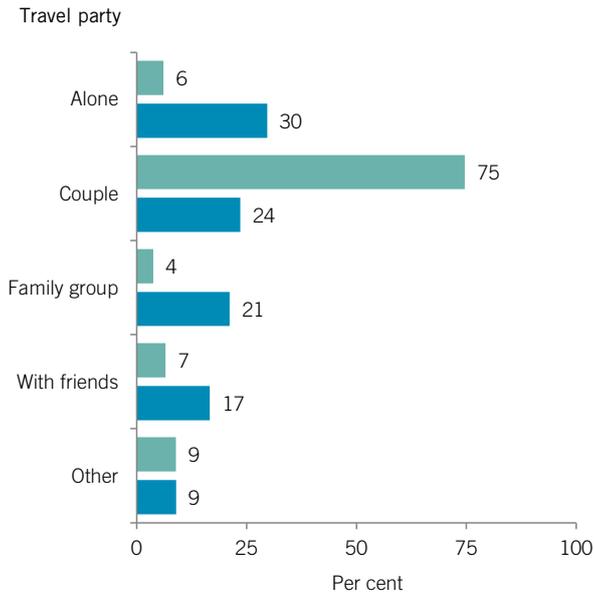
### VISITOR PROFILE

- The majority of self-contained travellers travelled as a couple, and had a very long length of stay in WA (just under 80 nights) (Chart 5).

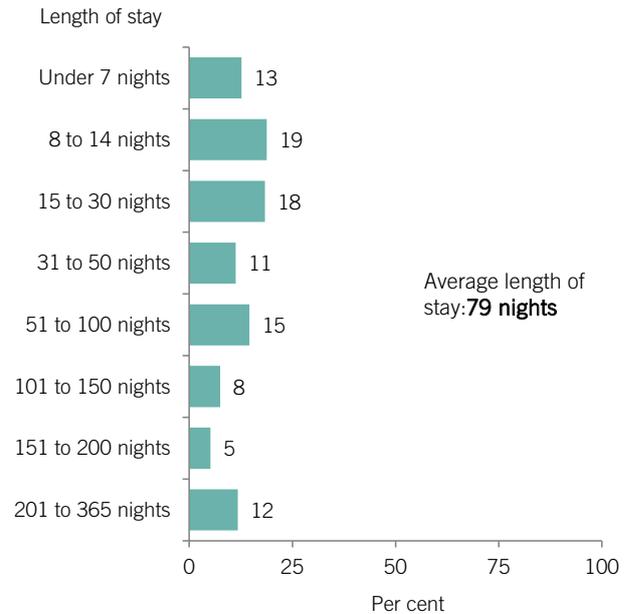
### VISITOR BEHAVIOUR

- The majority (62%) of self-contained travellers stayed in paid accommodation (caravan parks) during their holidays (Chart 6).
- The use of most facilities was high, with only sewage dump facilities (pay to use) and vehicle wash down bays showing low usage rates.
- Very few self-contained travellers were prepared to pay to use day road-side rest bays and rubbish dump facilities (Chart 7). There was a higher willingness to pay to use sewage dump facilities, potable water and vehicle wash down bays.
- Self-contained travellers were keen to see more sewage dump facilities and appropriate parking in key places around Western Australia (Table 3).

### CHART 5 TRIP CHARACTERISTICS

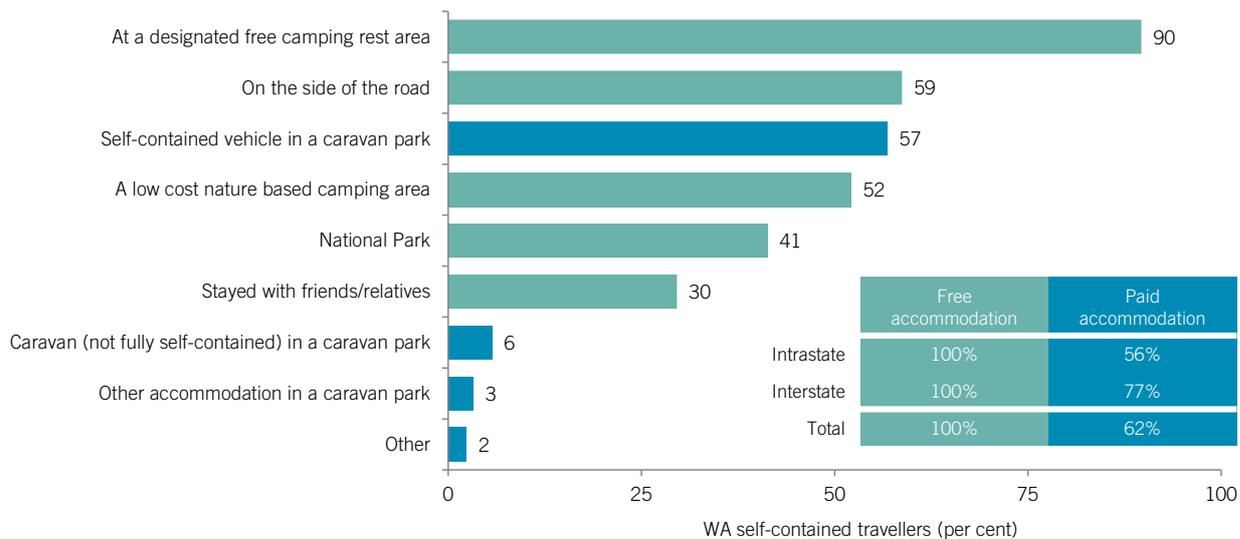


■ Self-contained travellers (n=213)  
■ WA visitor (n=10,642) Source: NVS/IVS, YE March 2013  
 Q Who are you travelling with on this trip?



Q How many nights, in total, did you stay in WA on your last WA holiday in a self-contained vehicle?

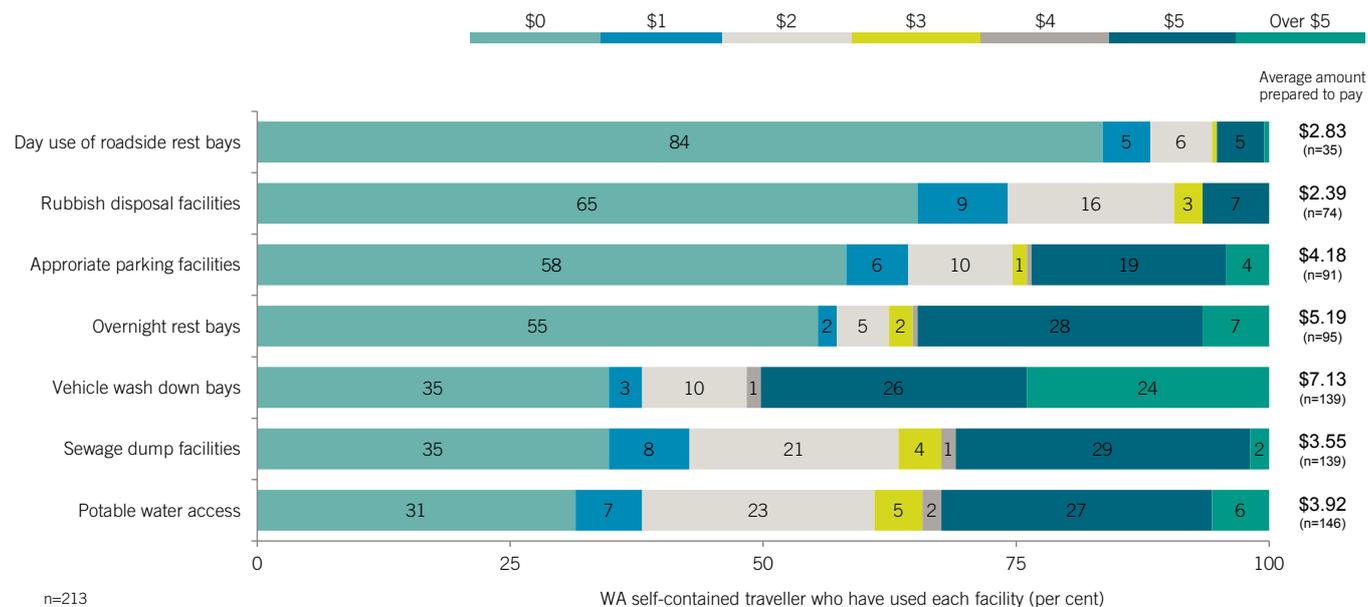
CHART 6 TYPES OF ACCOMMODATION USED



n=213

Q What type of accommodation did you use on your last self-contained holiday?

CHART 7 WILLINGNESS TO PAY FOR FACILITIES



Q If a fee was charged to use the following facilities, what would be the maximum amount you would be prepared to pay on each occasion to use these facilities and services to ensure they were more widely available while on a holiday in a self-contained vehicle?

TABLE 3 FACILITIES SOUGHT BY REGION

	EXPERIENCE PERTH	SOUTH WEST	CORAL COAST	GOLDEN OUTBACK	NORTH WEST
	Per cent				
Rubbish disposal facilities (n=213)	17	23	27	27	33
Appropriate parking facilities (n=213)	38	46	40	33	37
Sewage dump facilities (n=213)	37	54	48	46	51
Wash down facilities (n=213)	12	17	22	27	30

Q Based on your own experience, where do you think there should be more facilities?

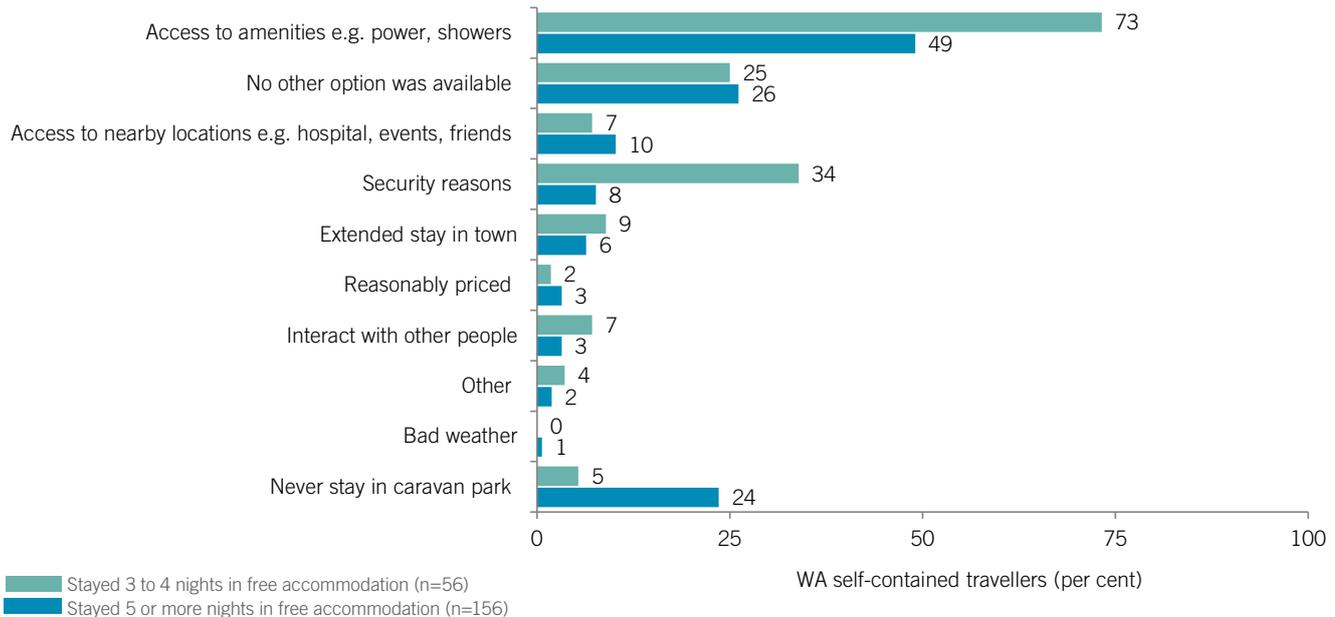
## MOTIVATIONS FOR CHOOSING CARAVAN PARK ACCOMMODATION

- Access to amenities was the key motivating factor for all self-contained travellers. This included laundry facilities, showering, using power to recharge electronic devices and access to water fill points and sewage dump facilities (Chart 8).
- For those staying in paid accommodation more frequently (3 or 4 nights per week), security was also a key motivator.

## ECONOMIC VALUE OF SELF-CONTAINED TRAVELLERS TO WA

- Basic caravan park users and self-contained travellers spent, on average, similar amounts per day. On average, basic caravan park users spent \$76.16 a day while self-contained travellers spent \$78.03 (Table 4).
- The majority of expenditure focused on vehicle costs (i.e. fuel and maintenance) and essential living costs (i.e. food and drink), which together accounted for 71% of all expenditure. Expenditure on tourism activities was low.

## CHART 8 REASONS FOR CHOOSING TO STAY IN A CARAVAN PARK



Q Whilst on holiday in a self-contained vehicle, some travellers stay in a caravan park. Why would you stay in a caravan park while on holiday in a self-contained vehicle?

TABLE 4 SPEND BY SELF-CONTAINED TRAVELLERS

	% OF PEOPLE SPENDING	AVERAGE DAILY SPEND	AVERAGE TRIP SPEND*
	n = 213	n = 213	n = 213
Food and drink	90%	\$14.14	\$1,047.49
Fuel and maintenance	90%	\$41.32	\$2,525.60
Parking	14%	\$0.42	\$36.25
Paid accommodation	79%	\$6.00	\$418.15
Tours and other transport	52%	\$3.97	\$279.56
Sewage dump points	12%	\$0.06	\$5.05
Entertainment and entrance fees	78%	\$3.16	\$198.33
Shopping	83%	\$4.79	\$284.67
Personal care (i.e. hair and beauty, medical)	70%	\$1.91	\$171.06
Other	44%	\$2.26	\$185.64
Average self-contained visitor		\$78.03	\$5,150.80
WA visitor		\$106.31	\$843.23
Source: TRA Regional Expenditure Estimates (YE March 2013)			

\*Average trip spend has been estimated by multiplying average daily spend by average length of stay.

## RECOMMENDATIONS

### CONSIDERATIONS FOR THE SELF-CONTAINED MARKET

- There is an opportunity for caravan park operators to investigate financially viable models allowing self-contained travellers to access key facilities (e.g. washing machines, power outlets, wash down facilities) without them actually occupying a site.
- The following concepts could be reviewed to determine their viability:
  - Opening free facilities during peak season only.
  - Local Government Areas (LGAs) to commission caravan park operators to manage low cost accommodation facilities.
  - Installing pay per use facilities in rest areas where there is no caravan park or alternative facility in close proximity.

## RESEARCH APPROACH

A three-stage approach was designed to answer the research objectives.

### STAGE ONE: INDUSTRY STAKEHOLDERS (QUALITATIVE)

In-depth interviews were conducted between 5 December 2012 and 8 January 2013 with 11 representatives from the caravan park and self-contained visitors sectors in WA:

- 5 interviews were conducted with caravan park operators
- 4 interviews were conducted with stakeholders in the self-contained visitor sector
- 2 interviews were conducted with state-wide stakeholders.

Results from stage one fed into the development of questionnaires to be used in stages two and three.

## STAGE TWO: CARAVAN PARK USERS (QUANTITATIVE)

A face-to-face survey was conducted between January and May 2013 with 252 caravan park users across the five regions of WA. Interviews were conducted in each region during peak season to address the effects of seasonality on the sample.

In addition, 29 hard copy self-completion surveys were completed to ensure a wide reach of caravan parks and a sample that is representative of the population.

The sample breakdown is outlined below (Tables 1 and 2). Caravan parks were selected based on location and available facilities to ensure an even spread of resort style and basic accommodation types.

## STAGE THREE: SELF-CONTAINED TRAVELLERS (QUANTITATIVE)

Between March and May 2013, 477 online surveys were conducted. A multi-faceted approach was taken to promote the survey to ensure a diverse sample. This approach included promotions in the Campervan Motorhome Club of Australia (CMCA) magazine, on the CMCA website, flyers distributed at the WA and NSW Caravan and Camping shows, flyers distributed at the CMCA National Rally and emails to the CMCA member's base.

Self-contained travellers were defined as visitors 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 national parks. Using this definition, a final sample of 213 self-contained visitors was obtained.

**TABLE 1: FACE-TO-FACE SURVEYS WERE CONDUCTED AT 16 CARAVAN PARKS ACROSS WA**

DATE	LOCATION/TOWN	CARAVAN PARKS	SAMPLE SIZE
9/10/16/17 February	Perth	Big4 Perth International Tourist Park (Hale Road) Karrinyup Waters Park Central Caravan Park (Ascot)	n=50
16/17 February	Busselton	Amblin Caravan Park Beachlands Holiday Park Mandalay Holiday Resort Peppermint Park Eco Village	n=51
16/17 March	Coral Bay/Exmouth	Exmouth Cape Holiday Park Aspen Park Ningaloo Caravan and holiday Resort Peoples Park Caravan Village	n=50
13/14 April	Esperance	Pink Lake Tourist Park Esperance Bay Holiday Park Esperance Seafront Caravan Park	n=50
18/19 May	Broome	Cable Beach Caravan Park Palm Grove Caravan Park Roebuck Bay Caravan Park	n=51

TABLE 2: HARD COPY SURVEYS WERE DISTRIBUTED TO 17 CARAVAN PARKS ACROSS WA

LOCATION/TOWN	CARAVAN PARKS	SAMPLE SIZE
Kununurra	Discovery Holiday Parks - Lake Kunnunara Town Caravan Park Ivanhoe Village Caravan Park Kimberleyland Holiday Park Caravan Park	n=6
Kalbarri	Kalbarri Anchorage Kalbarri Tudor Holiday Park	n=2
Perth	Mandurah Caravan & Tourist Park Miami Holiday Park Dawesville Caravan Park Holiday Village Belvedere Caravan Park	n=10
Albany	Middleton Beach Holiday Park Albany Albany's Emu Beach Holiday Park Albany Happy Days Caravan Park Albany Holiday Park	n=10
Kalgoorlie	Prospector Holiday Park Kalgoorlie Discovery Holiday Parks - Kalgoorlie Kalgoorlie Caravan Park	n=1

