



Fast Facts for Caravan Park Operators

Tourism Research Australia (TRA) in partnership with Tourism Western Australia (TWA) commissioned a study to identify and measure the key factors that are likely to affect demand and supply of caravan accommodation in Western Australia both now and in the future.

To download the full report, go to <http://www.tourism.wa.gov.au/caravanresearch>. Alternatively collect the Fact Sheets that provide snapshots of the key findings.

Overview

- There are two broad segments of caravanners. 56% are 'Travellers' where they use caravan parks for accommodation as part of a longer road trip. These consist of **Grey Nomads** (40%), **International Travellers** (3%) and **Freedom Seekers** (13%). They tend to stay in many different parks but for a shorter period of time.
- 44% are 'Holiday Makers' where the caravan park is the actual holiday destination. These are **Families** (13%), **Winter Drifters** older age group (+55yrs) (21%) and **Intrastate Holidaymakers** (10%). Their length of trip is shorter than Travellers but they tend to stay longer at individual caravan parks.
- The majority of visitors to WA travel in an anti-clock wise direction. Entering from the North West and exiting in the South West.
- The main travel entry point to WA for visitors visiting other states in Australia was Kununurra / North West Australia (50% entry; 20% exit) and Eucla / South West Australia (42% entry / 58% exit).
- **Travellers** spend a small proportion of nights in one caravan park due to their extended holiday. **Families** and **Intrastate Holidaymakers** spend just under a week at a caravan park, however a greater proportion of their trip was at a single caravan park as the destination of their trip.
- On average **Winter Drifters** spent 16 nights at the caravan park, but a smaller proportion of nights compared to the other Holiday Makers.
- The top three reasons for visitors staying in caravan parks are the price, atmosphere and extra facilities.
- The key barriers to staying were unclean amenities and noise.



Expectations of Caravan Park Users

- Three highest rated expectations: cleanliness of the toilet and shower facilities, a friendly / approachable operator and the general appearance of the park.
- Visitors thought that the standard of the facilities and amenities (29%) needed the most improvement at caravan parks in WA, which was consistent across visitor groups.
- Generally visitors expected to pay more for better resort facilities, updated newer facilities, a tourist atmosphere, the park being family orientated, providing activities and a good location.
- Users were concerned that the price is getting too expensive for the type of accommodation offered, however prices are similar to Eastern States parks.
- Individual market segments such as Grey Nomads, Winter Drifters and Families have different motivations which drive their decision making. Separate fact sheets have been prepared which outline the different needs of the different segments and how this relates to caravan park operators.

Issues for Caravan Park Operators

- There is a general concern amongst operators that increasing operating costs will price caravan parks out of the market with the most significant being electricity, water rates, land tax and charges and wages.
- There is high management turnover in the industry. Burn-out is an issue particularly in the North West with high demand in peak season.
- Overall, operators thought that keeping good staff was less difficult than recruiting good staff. More operators thought that it was easier to keep good permanent staff compared to good casual staff.
- Owners recognised the importance of clean communal facilities with just over half (57%) of caravan park staff cleaning the communal facilities at least twice a day.
- 42% of operators said that they intended to increase facilities in their caravan park in the next five years. Importantly no caravan park operator intended to decrease the number of facilities provided. Operators in the South West region (36%) were the most likely to intend to 'definitely increase'.



The Future Outlook

- Intrastate Holidaymakers were more likely (70%) than the other visitor segments to believe that their usage of caravan parks would increase in the next five years.
- 43% of visitors said that the increasing cost of fuel would not affect their usage of caravan parks in the future.
- Statistics from the ABS depict that in 1997 there was a significant reduction in the number of caravan parks available in WA and that there has been very few caravan parks established since.
- Despite the decline post 1997, the total capacity of caravan parks in WA has been largely maintained, due to an increase in the average number of sites per caravan park (from 81 sites in Sept Quarter 1985 to 130 sites in Sept Quarter 2006).
- 56% of caravan parks had the potential to increase the number of sites on their land, particularly in the South West, Coral Coast and Golden Outback.
- Overall the majority of operators said that the number of sites would remain the same in the next five years. Of those who had potential land available to increase the number of sites, 46% indicated that they were going to increase the number of sites.
- Overall the number of tourist accommodation sites will increase relative to permanents, particularly in the Golden Outback, Perth and the South West.
- The vast majority (82%) of caravan park operators said that there was no possibility of the caravan park being redeveloped for residential accommodation. Of concern was the proportion of caravan parks that were very likely to be redeveloped in the South West (12%), Coral Coast (6%) and Perth (5%).

The report Understanding the Caravan Industry in WA has identified some potential strategies to increase supply of caravan park sites in WA as well as support and protect existing parks. These strategies are currently being considered by the State Government.