A Strategic Approach to Caravan and Camping Tourism in Western Australia

February 2012

Prepared for
Tourism WA

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ACRONYMS

The following is a table of frequently used acronyms:

Acronym	Meaning
ABS	Australian Bureau of Statistics
ACC	Australia's Coral Coast Tourism Region
AGO	Australia's Golden Outback Tourism Region
ANW	Australia's North West Tourism Region
ASW	Australia's South West Tourism Region
CIA	Caravan Industry Association
CMCA	Campervan and Motorhome Club of Australia
CRVA	Caravan, RV & Accommodation Industry of Australia
DEC	Department of Environment and Conservation
DLG	Department of Local Government
EP	Experience Perth Tourism Region
LGA	Local Government Area
RDC	Regional Development Commission
RTO	Regional Tourism Organisation
Tourism WA	Tourism Western Australia
TR	Tourism Region
TRA	Tourism Research Australia
WA	Western Australia
WAITOC	Western Australian Indigenous Tourism Operators Committee
WALGA	Western Australian Local Government Association

EXECUTIVE SUMMARY

Caravan parks are of vital importance in Western Australia's tourism accommodation mix. Every year almost five million site nights are utilised by local, interstate and international visitors, who spend $163 million[1]in caravan parks and campgrounds whilst enjoying the experience of travelling this vast state.

Caravan parks are an essential facility for many travellers and tourists, particularly in regional Western Australia where overland travel represents the only practical means of moving between many of Western Australia's geographically dispersed attractions. Caravan or camping visitors spend more nights in regional Australia than visitors using other forms of accommodation.

The number of caravan and camping nights has remained stable over the past 10 years, despite a recorded decrease in the number of caravan or camping establishments[2]. Caravan parks and campgrounds provide a range of accommodation options and other tourism services to meet the needs of a wide cross section of travellers.

Nationally, visitors using caravan parks and campgrounds spend around $1.31 billion annually, generating employment for around 10,650 people[3]. According to the National Visitor Survey, in the year ended June 2011, 5,299,000 domestic visitors stayed overnight in Western Australia. Of these, 508,000 or 10 percent of total domestic visitors stayed in a caravan park or commercial campground. They stayed for a total of 3,431,000 nights. A further 291,000 or 5 percent of the domestic overnight visitors stayed in a caravan or camped on private property for a total of 1,539,000 nights. [4]

The International Visitor Survey indicates around 71,000 international visitors spent 882,000 nights in caravan or camping accommodation in 2011, with little change over the past five years.[5]

According to IBIS World, Western Australia's market share of domestic and international caravan and camping visitor nights is 10 percent and 11 percent respectively, with 11.2 percent of the national number of caravan and camping business locations and 9.8 percent of the national population.[6]

Over the past decade, there have been a significant number of caravan park closures in Western Australia due to ever-increasing land values and higher operating costs resulting in caravan parks providing lower yields relative to other land uses. Some traditional caravan parks have been converted into permanent affordable accommodation, or 'lifestyle villages', while others have been developed for higher use tourist or residential accommodation.

Partly in response to these issues, the Western Australian Government Economics and Industry Parliamentary Standing Committee undertook an inquiry into the Provision, Use and Regulation of Caravan Parks and Campgrounds in Western Australia (the Inquiry) in 2009. The Inquiry made fifty-seven recommendations regarding these matters.

On 25 May 2010, the Government tabled its response to the Inquiry. This provides direction for the future development of caravan parks and campgrounds in Western Australia. The Inquiry uncovered a strong divergence in stakeholder priorities and perception of needs. There were conflicting views on how caravan and camping capacity and what facilities should be delivered in the future. Many of the much needed changes contained in the Inquiry recommendations have not yet been implemented, in part due to the complex nature of the issues, difficulties caused by lack of multifaceted government agency collaboration and cultural the shift required to resolve the issues.

Tourism WA must work collaboratively with other agencies in driving the required changes to overcome some of the entrenched impediments, which are currently holding this sector back. Governments of the other States of Australia are currently considering reforms especially in the area of improving provision of, and fee recovery for, facilities for camping on public land. If Western Australia does not move to meet consumer demand, whilst also nurturing existing caravan park supply, the State will fall further behind in the competitive tourism landscape.

The Supply/Demand Gap Analysis provided within this report gives a snapshot of the current situation with regard to caravan and camping in Western Australia and

[1] ABS Tourist Accommodation, Small Area Data, Western Australia, Sep 2009 - June 2010 Table 10 caravan parks by small area, Western Australia
[2] Snapshots 2009 Caravan or Camping In Australia 2009 - Tourism Research Australia
[3]Tourism Research Australia 2010
[4]NVS - Travel by Australians: June Quarter 2011 19, TRA. Canberra
[5] Tourism Research Australia (Unpublished) 2011
[6] IBIS World Caravan Parks and Campgrounds in Australia July 2011

explores the impediments to, and opportunities for development of new caravan and camping facilities in the region.

The issues identified are segmented into the various groups - consumer, industry and government. For consumers, the availability and cost of caravan and camping sites during periods of high seasonal demand is a major issue. The restrictions placed on camping outside of licensed caravan parks is also of significant concern, particularly to those travellers with self-contained recreational vehicles who consider that they should be permitted to camp on all public land.

According to consumer caravan and camping membership organisations[7], many potential visitors claim to bypass Western Australia in favour of the Eastern States, which are perceived to be more caravan and camping 'friendly'. The Campervan and Motorhome Club of Australia (CMCA), with its 60,000 members, is very active in lobbying for change to restrictive camping regulations. Although not officially endorsed by the club, some members boycott towns they regard as 'unfriendly' and there is discussion on boycotting the whole of Tasmania, over regulatory changes that they consider detrimental to their lifestyle. Combined with the membership of the various caravan club organisations under the 'Motouring' banner, the CMCA has considerable market power.

CMCA recently stated in its monthly member's magazine, *Wanderer*, that member users of 'free camping' are prepared to pay an appropriate fee for if it resulted in better facilities, safety and security.

The Caravan Industry Association of Western Australia (CIAWA) is the peak industry organisation for caravan parks, recreation vehicle manufacture and related equipment distribution throughout the state. Whilst the latter are very consumer aware, caravan parks are perceived by consumers to be protectionist, out of touch with the market and failing to deliver in line with expectations.

Some major caravan park chains, marketing groups and larger independent operators provide excellent customer service and are responsive to the changing environment, though some of the small operators lack the commercial skills and professionalism required to remain competitive. Customer service, yield management, cost control, online booking and marketing skills are not consistent across the sector. There is an urgent need for the caravan parks industry to establish formal skills training and qualifications.

[7] CMCA (WA) Consultation Meeting 27 October 2011

The issues for caravan park operators are primarily related to untimely and restrictive planning approvals, Caravan Parks and Camping Grounds Regulations, unfair competition and increasing operating costs. There is also increasing demand for residential sites and worker's accommodation within caravan parks. Industry leaders consulted indicated the industry was close to crisis point due to indecision and 'red tape' associated with land access and the development approval process.

Government issues concerning compliance and governance of the industry and it's consumers, as well as supplying and maintaining facilities to fill gaps in commercial service provision is both time-consuming and costly. This is in part due to the pressures of other higher priority demands in a boom State. Local government authorities are often too under resourced to provide planning approval decisions in a timely manner. There are also complaints from industry that local government appears to abdicate its role of ensuring travellers comply with the regulations by not camping in unauthorised areas (whilst consumer's complain they are heavy handed in moving them on).

Wider issues uncovered during the audit process include a lack of accurate records regarding the number and type of caravan and camping sites and out-dated statistical data on caravan park and campground occupancy and sites nights (previously collected and published by the Australian Bureau of Statistics). This will become a major issue for prospective investors and developers, as the latest data (June 2010) dates and becomes less relevant for preparing feasibility studies and business cases.

This report has identified gaps in the provision of caravan and camping infrastructure, particularly in coastal locations. The following priority localities have been identified as having a critical gap between supply and quality, relative to demand and expectations:

- Exmouth
- Shark Bay
- Carnarvon/ Coral Bay
- Esperance
- Upper Gascoyne
- Broome
- Derby -West Kimberley
- Wyndham-East Kimberley
- Gingin/ Lancelin
- Ashburton
- Port Hedland
- Roebourne/Karratha
- Augusta/Margaret River
- Busselton
- Mandurah
- Murray
- Rockingham

The recommendations were developed with a single primary aim – to make Western Australia the preferred caravan and camping holiday destination and deliver on expectations through a sustainable supply framework. As many of the most desirable locations are in highly seasonal remote and regional areas it requires innovative concepts and solutions to match supply with demand.

Other considerations were to provide access and equity in the holiday choices of the whole population, add capacity and sustainability to regional communities and exploit the unique cultural and natural tourism attractions that Western Australia has on offer.

Opportunities to expand the caravan and camping infrastructure and improve yields for the sector in the State have been identified. In some cases this simply involves better utilisation of the State's existing infrastructure, including national parks and reserves, farms and pastoral stations and roadside rest areas. Other strategies are more complex and may require legislative change.

Long-term strategic marketing concepts are presented to provoke creative debate on how Western Australia must overcome obstacles of distance and associated costs of travel compared to its Eastern States rivals.

Wherever practicable, the strategies align with the findings and recommendations of the Inquiry and the Economics and Industry Standing Committee Report No. 10, of 20 October 2011.

The development of the strategic report has not been constrained by the knowledge of the potential barriers to change that will benefit the sector. To expect that the strategic report could achieve improved outcomes, relative to the current situation, without radical change would be to condemn the strategies to failure.

The strategic report proposes actionable solutions to address the issues identified, these are:

- Recommendation 1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand
- Recommendation 2: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable
- Recommendation 3: Identify Opportunities to Access Western Australia's Conservation Estate
- Recommendation 4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities
- Recommendation 5: Partner with Indigenous Australian's to Develop Caravan and Camping Infrastructure on Indigenous Land
- Recommendation 6: Provide Better Guidelines for the Development of Caravan Parks to Local Government
- Recommendation 7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry
- Recommendation 8: Raise the Bar on Skills for the Caravan and Camping Sector
- Recommendation 9: Improve Data to Support Decision Making
- Recommendation 10: Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector
- Recommendation 11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom

CURRENT PROFILE OF THE CARAVAN PARK INDUSTRY

Status of the Caravan and Camping Industry Sector

Australia

Tourism Research Australia's National and International Visitor Surveys estimate 8.2 million domestic visitors (40.9 million nights) and 321,400 international visitors (4.5 million nights) stayed overnight in caravan or camping accommodation across Australia in 2009. There has been virtually no annual change or fluctuations over the last 10 years in spite of total domestic visitation dropping 6 percent over the same period. Whilst the number of international visitors has grown by around one percent for the last 10 years, the number of international visitor nights has declined by one percent (average annual change). This indicates more international caravan and camping visitors are coming to Western Australia, though staying for shorter durations.[8]

Caravan and camping accommodation accounted for 16 percent of total domestic nights and 12 percent of total domestic visitors in 2009. Domestic caravan and camping visitors spent an average of $117 per night and international visitors spent $115 per night, compared to other domestic and international visitors who spend $176 and $253 per night respectively.[9]

According to IBIS World, "the industry is largely sensitive to trends in domestic overnight travel and international visitor arrivals. Overall demand originating from these groups is driven by growth in household disposable income and the frequency and length of holidays taken. The continuing escalation in overseas travel by Australians due to the strong exchange rate is also dampening domestic travel demand.

The industry is estimated to generate $1.31 billion in revenue during 2011-12, up 1.1% for the year due to steady demand from domestic and international tourism. This growth also contributes to an estimated average annual growth rate of 1.3% for the five years through 2011-12. The industry is forecast to comprise about 1,435 long-term and short-term stay enterprises, down 0.2% from the previous year, largely due to the closure of caravan parks as property values increased and owners sold assets. Industry employment is expected to increase by 0.7% to around 10,650 workers in 2011-12.

Over the next five years through 2016-17, total industry revenue is expected to increase by 1% per annum to around $1.38 billion. Site numbers and site capacity levels are expected to continue to decline at a slow, steady rate in future years. Domestic visitor numbers are anticipated to remain relatively stable, while international visitor numbers will decline due to the high Australian dollar."[10]

IBIS World reported that caravan parks and campgrounds weathered the recent economic downturn better than most others in the wider accommodation sector due to a combination of lower pricing, growth in site tariffs and increased demand for better-quality facilities, such as cabins, which command higher rates.

IBIS World noted that "in 2006-07 and 2007-08, higher fuel prices directly affected domestic travel patterns and cheap domestic airfares led to a rise in interstate travel and less use of motor vehicles for towing caravans. Furthermore, Australians travelling overseas and interstate travellers were more likely to take advantage of combined cheap airfare and accommodation packages at hotels and resorts, rather than staying at caravan parks. For 2007-08, total caravan park establishments fell by 0.8% and total site capacity by 0.2% to 233,500. Site nights occupied rose 1.8% to 45.1 million as the average site occupancy rate increased only marginally to 53%."[11]

Industry outlook

IBIS World predicts that "future industry revenue levels are expected to rise due to the continuing availability and popularity of better quality on-site cabins and units at higher nightly tariffs. Some caravan park owners are expected to take advantage of high land prices and sell their properties. This will result in both decreases in actual site capacity and increases in occupancy rates in existing caravan parks.

Less seasonal patterns of use compared with powered and unpowered sites and an increasing use of RVs by tourists on extended holiday trips will also aid growth for industry operators over the next five years. Use of long-term caravan park sites will spike further, due to ongoing reduced affordability of residential housing, for either purchase or rental. A further rise in profit margins is anticipated from industry

[8]Caravan or Camping in Australia Snapshots 2009 Tourism Research Australia. 2010
[9]Caravan or Camping in Australia Snapshots 2009 Tourism Research Australia. 2010

[10]IBIS World Caravan Parks and Campgrounds in Australia July 2011
[11]IBIS World Caravan Parks and Campgrounds in Australia July 2011

consolidation and higher rates, with higher profit margins, for cabins in caravan parks."[12]

Growth
There are a wide range of factors which affect growth, some of which cannot be foreseen. The following indicators are taken into account in the preparation of this study:

- IBIS World projects that over the five years through 2016-17, real industry revenue will rise "at an average annualised rate of 1% to total $1.38 billion. Moderate economic growth expected from 2011-12 is forecast to result in low growth in domestic and international tourism levels, and consequently in demand for caravan park accommodation. Initial revenue growth of 0.8% is expected in 2012-13.[13]

- Recreational Vehicle Manufacturers Association Australia (RVMAA) showed growth in production of motorised recreational vehicles nationally of 24.0% from 2009 to 2010 and growth of towable recreational vehicles of 35.1% over the same period.

- The Department of Planning and Infrastructure reported a drop in registrations of caravans and camper trailers of 6.8 percent in Western Australia from 2009 to 2010 (November Year to Date).

- The Department of Environment and Conservation (DEC) park entry visits show a constant annual growth rate of 5.11 percent from 2001/02 to 2010/11 for visits to DEC managed National and Regional Parks, though some of this growth may be attributable to changes in methodology for collecting data (and capturing an increased proportion of visits), it is still a good indication of growth.

- Australian Bureau of Statistics Data for Western Australia showed growth in site nights occupied of 7.0 percent from 2005 to 2009/10 (Data only available for comparison over 4.5 year period due to changes in collection and publication methodology).

- The Broome Accommodation Study[14] prepared by Kadar Pearson and Partners for Tourism WA in 2006 forecast that yield for Caravans, Camping and Cabins in Broome would grow by around 36 percent over the next four (4) years. KPP forecast that demand will not increase from 2005 levels. This report was released prior the decision to proceed with the LNG Gas Hub at James Price Point, approximately 60 kilometres north of Broome. There is likely to be a significant impact on demand for caravan sites from contractors and workers associated with the construction and operations phases of the LNG project.

- The Kununurra Accommodation Study[15] prepared by Kadar Pearson and Partners (KPP) in 2009 forecast that demand for Caravans, Camping and Cabins in Kununurra in a low growth scenario would increase by zero percent over the next five (5) years and increase by 20.2 percent in a medium growth scenario and by 38.1 percent in a high growth scenario.

[12] IBIS World Caravan Parks and Campgrounds in Australia July 2011
[13] IBIS World Caravan Parks and Campgrounds in Australia July 2011
[14] Broome Accommodation Study, Kadar Pearson and Partners. Tourism WA, 2006.
[15] Kununurra Accommodation Study, Kadar Pearson and Partners. 2009.

Western Australia

According to the National Visitor Survey, in the year ended June 2011, 5,299,000 domestic visitors stayed overnight in Western Australia. Of these, 508,000 or 10 percent of total domestic visitors stayed in a caravan park or commercial campground. They stayed for a total of 3,431,000 nights. A further 291,000 or 5 percent of the domestic overnight visitors stayed in a caravan or camped on private property for a total of 1,539,000 nights. [16]

According to the International Visitor Survey, in the year ended June 2011, there were 720,000 international visitors to Western Australia.[17] Tourism Research Australia reported that 71,105 (just under 10 percent) of international visitors stayed a total of 882,484 nights in a caravan park or commercial campground or camped on the side of the road, on private property or on crown land or in a national park.[18]

Year ended June 2011	Domestic Overnight Visitors	Domestic Visitor Nights	International Overnight Visitors	International Visitor Nights
All visitors[19],[20]	5,299,000	24,221,000	720,000	22,264,501
Caravan park or commercial campground[21]	508,000	3,431,000	49,813	679,262
Caravan or camping on private property, by side of road, crown land etc[22]	291,000	1,539,000	21,292	203,222

Share of domestic and international visitor nights and population

All states other than Queensland have a share of Australia's caravan and camping visitor nights largely proportional to their population.

Western Australia (in line with most of the other states) has just under 10 percent of the national population, and hosts 10 percent of the domestic caravan and camping visitor nights and 11 percent of the International caravan and camping visitor nights.

Queensland has just under 20 percent of Australia's population though hosts 27 percent of the domestic caravan and camping visitor nights and 22 percent of the international caravan and camping visitor nights, as detailed in the table below[23]:

State/territory	Share of Domestic Visitor Nights (%)	Share of International Visitor Nights (%)	Business locations: caravan parks campgrounds -%	Population (%)
NSW	30	35	33.4	33.5
VIC	19	22	24.3	24.7
QLD	27	22	16.1	19.4
SA	7	4	9.3	7.6
Western Australia	**10**	**11**	**11.2**	**9.8**
TAS	3	2	2.2	2.4
NT	2	2	3.1	1.0
ACT	2	2	0.4	1.6
Total	**100**	**100**	**100**	**100**

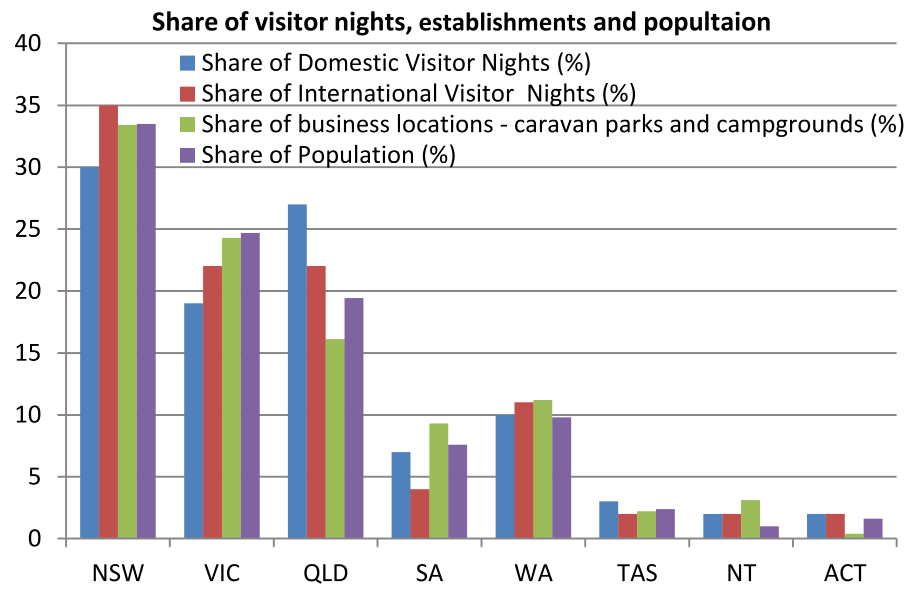
Western Australia has a significantly larger proportion of caravan and camping establishments per capita than Queensland, as does South Australia, Northern Territory and New South Wales. This could be attributed to having widely geographically dispersed tourism attractions across the state, suiting Western Australia to caravan and camping visitation.

IBIS World reports that "86% of total domestic visitor nights are spent in regional caravan parks. Country areas also account for 74% of international total visitor nights spent in caravan parks."[24]

[16] NVS - Travel by Australians: June Quarter 2011 19, TRA. Canberra.
[17] International Visitors in Australia: June Quarter 2011, TRA Canberra.
[18] Tourism Research Australia 2011 (unpublished data).
[19] NVS - Travel by Australians: June Quarter 2011 19, TRA. Canberra.
[20] International Visitors in Australia: June Quarter 2011, TRA Canberra.
[21] Tourism Research Australia 2011 (unpublished data).
[22] Tourism Research Australia 2011 (unpublished data).

[23] IBIS World Caravan Parks and Campgrounds in Australia July 2011
[24] IBIS World Caravan Parks and Campgrounds in Australia July 2011

Distribution of Caravan and Camping Establishments and Population[25]



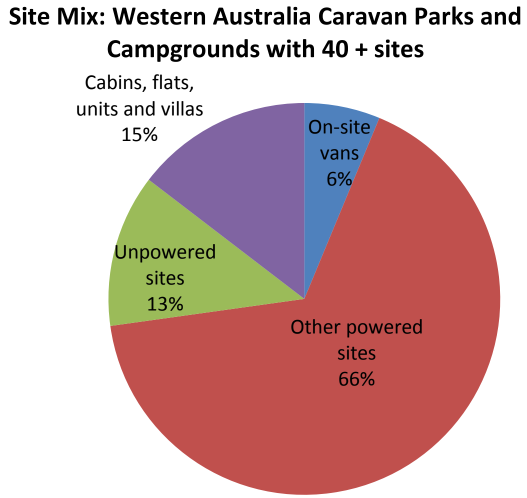
Site mix

According to the ABS, there are 193 caravan park and campground establishments with 40 sites or more. The average caravan park has 86 powered sites in Western Australia with ANW and Coral Coast having 118 and 103 powered sites per establishment (consecutively). AGO had an average of just 51 powered sites per establishment.

Powered sites made up 66 percent of the overall site types for caravan parks and campgrounds in Western Australia as at June 2010. Cabins, Flats and Villas were 15 percent and unpowered sites 13 percent, onsite vans make up 6 percent of overall capacity, as per the following graph[26]:

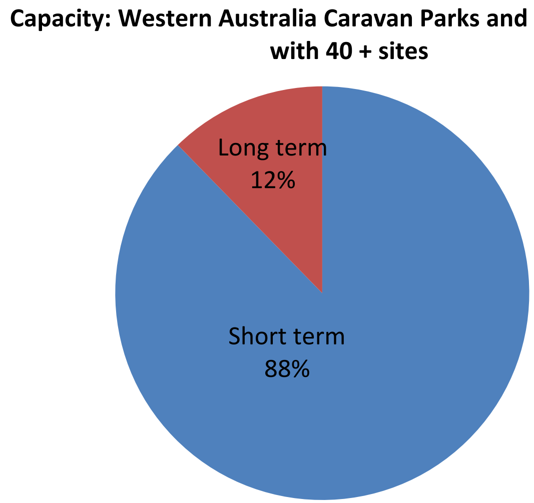
[25]IBIS World Caravan Parks and Campgrounds in Australia July 2011

[26] ABS- Tourist Accommodation, Small Area Data, Western Australia June 2010



Short term and long term sites

12 percent of all caravan and campground capacity in Western Australia is taken up by long term residents with 88 percent available for short stay.[27]



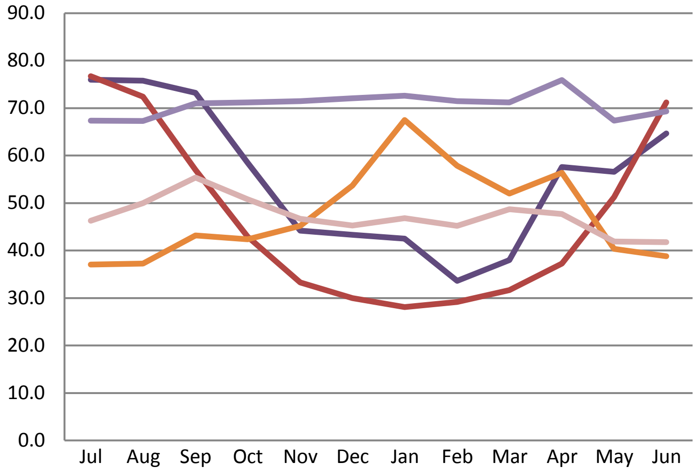
[27] ABS- Tourist Accommodation, Small Area Data, Western Australia June 2010

Visitor Statistics - Tourism Regions

In the 2009/10 financial year, the Experience Perth (EP) Tourism region had the highest number of site nights with just over 1.4 million site nights occupied of all caravan parks and commercial campgrounds with 40 or more sites. This was followed by Australia's South West (ASW) with slightly under 1.2 million and Australia's Coral Coast (ACC) with just over a million. Australia's North West (ANW) had 944,000 and Australia's Golden Outback (AGO) had 355,000.EP also enjoyed the least seasonal variation with a monthly maximum occupancy of 75.9 percent and a minimum occupancy of 67.3 percent. Australia's North West had the highest seasonal variation in occupancies.[28]

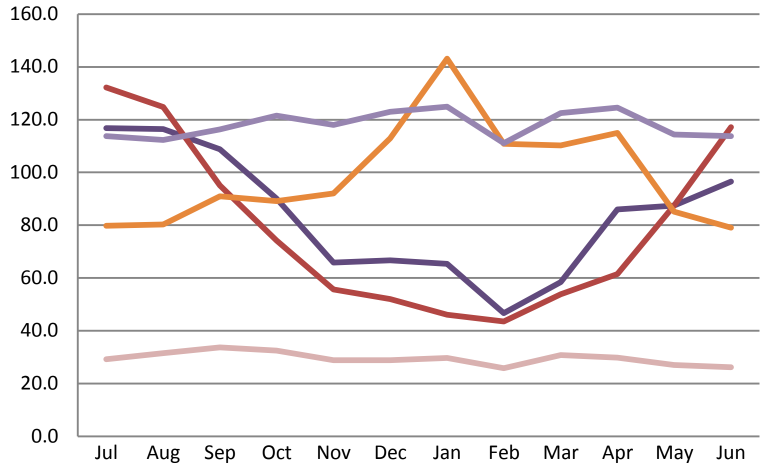
2009/10	Site nights occupied '000	Site occupancy rate %	Takings $'000
Australia's Coral Coast	1,005.3	55.3	30,820
Australia's North West	943.8	46.8	49,628
Australia's South West	1,188.7	47.7	37,817
Experience Perth	1,416.0	70.7	36,295
Australia's Golden Outback	354.6	47.2	8,905

2009/10 Site Occupancy %
Caravan parks with 40 or more powered sites (Source: ABS)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Australia's Coral Coast	76.0	75.8	73.2	58.5	44.2	43.3	42.5	33.6	38.0	57.6	56.6	64.7
Australia's North West	76.7	72.4	57.0	42.9	33.3	30.0	28.1	29.2	31.7	37.3	51.3	71.2
Australia's South West	37.1	37.3	43.2	42.4	45.2	53.7	67.5	57.9	52.0	56.4	40.4	38.8
Experience Perth	67.4	67.3	71.0	71.2	71.5	72.1	72.6	71.5	71.2	75.9	67.4	69.3
Australia's Golden Outback	46.3	50.0	55.4	50.8	46.7	45.3	46.8	45.2	48.7	47.7	41.9	41.8

2009/10 Site nights occupied ('000)
Caravan parks with 40 or more powered sites (Source: ABS)



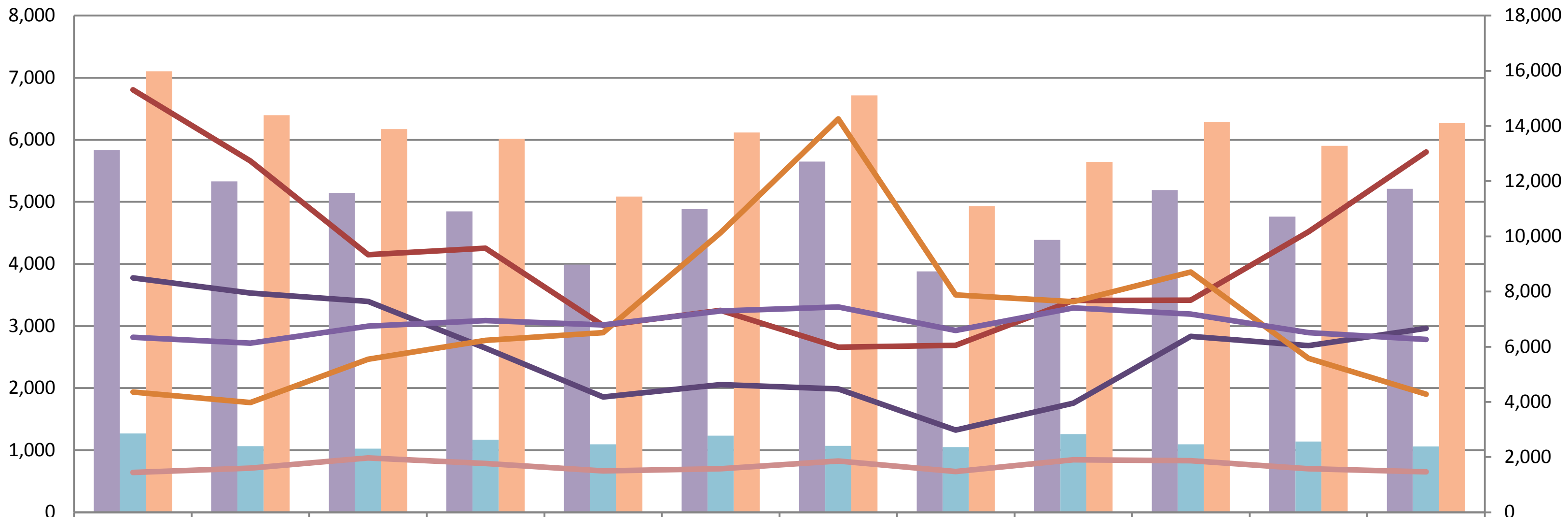
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Australia's Coral Coast	116.8	116.4	108.8	90.1	65.9	66.7	65.4	46.7	58.5	86.0	87.4	96.6
Australia's North West	132.2	124.8	95.1	74.3	55.7	52.0	46.1	43.6	53.9	61.5	87.4	117.2
Australia's South West	79.8	80.3	91.0	89.2	92.0	112.9	143.1	110.8	110.3	115.0	85.2	79.1
Experience Perth	113.8	112.3	116.3	121.5	118.0	123.0	124.9	111.1	122.5	124.5	114.4	113.7
Australia's Golden Outback	29.3	31.6	33.7	32.5	28.9	28.9	29.7	25.9	30.9	29.9	27.1	26.2

[28] ABS- Tourist Accommodation, Small Area Data, Western Australia Sep 2009, Dec 2009, Mar 2010, June 2010

Takings from accommodation

Demand and consequently takings from accommodation fluctuates significantly particularly in the North West, South West and Coral Coast. This can affect the viability of caravan parks, particularly those with a higher proportion of short stay sites as per the table below[29]:

Takings from accommodation ($'000) - caravan parks with 40 or more powered sites (Source: ABS)



	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10
Caravan parks - short term (right axis)	13,126	11,998	11,580	10,910	8,982	10,979	12,707	8,735	9,873	11,680	10,710	11,720
Caravan parks - long term (right axis)	2,859	2,399	2,307	2,632	2,465	2,781	2,403	2,363	2,832	2,468	2,567	2,387
All Caravan parks (right axis)	15,984	14,397	13,887	13,542	11,448	13,760	15,111	11,099	12,705	14,148	13,277	14,106
Australia's Coral Coast	3,777	3,533	3,399	2,644	1,860	2,056	1,985	1,324	1,760	2,836	2,683	2,963
Australia's North West	6,804	5,659	4,148	4,254	3,010	3,254	2,660	2,688	3,414	3,416	4,517	5,804
Australia's South West	1,938	1,766	2,465	2,769	2,892	4,503	6,335	3,503	3,392	3,871	2,480	1,903
Experience Perth	2,821	2,726	2,999	3,088	3,018	3,245	3,305	2,928	3,293	3,192	2,895	2,785
Australia's Golden Outback	644	714	876	787	668	702	827	656	846	832	702	651

[29] ABS- Tourist Accommodation, Small Area Data, Western Australia Sep 2009, Dec 2009, Mar 2010, June 2010

"Hot Spots" - High Demand Areas

Peak season availability in the north of Western Australia is the most significant issue, this is heavily constrained by land availability, the impacts of seasonality on viability and the high demand from workers taking up capacity. Coastal locations in the remainder of the state are also a hot spot, as are localities within close proximity to the Peth metropolitan region.

> *"They want to come to the coast because that is the iconic place that is promoted on behalf of Western Australia. They want to go down to the Margaret River wine areas. But where they have no alternative they are prepared, with some very good promotion, to do the inland areas."[30]*

[30] Submission to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: Campervan and Motorhome Club of Australia.

High Occupancy Areas based on demand data supplied by ABS[31]

Local Government Areas sorted by average annual occupancy 2009/10

LGA - 2009/10	Site nights occupied	Av Occupancy %	Takings from accommodation
Rockingham (C)	180,994	92.2	3,390
Armadale (C)	50,959	89.5	1,035
Mandurah (C)	262,172	85.8	3,996
Roebourne (S)	79,625	78.3	6,428
Port Hedland (T)	172,438	74.0	12,958
Geraldton-Greenough (C)	201,875	73.9	4,362
Harvey (S)	149,148	73.4	2,526
Murray (S)	80,938	72.0	1,621
Swan (C)	167,776	71.0	5,011
Esperance (S)	139,980	70.1	3,692
Kalgoorlie/Boulder (C)	104,689	70.0	2,322
Bunbury (C)	131,093	64.9	4,021

Local Government Areas sorted by highest number of site nights occupied for 2009/10

LGA - 2009/10	Site nights occupied	Av Occupancy %	Takings from accommodation
Busselton (S)	288,941	49.9	11,747
Carnarvon (S)	266,769	55.1	10,685
Mandurah (C)	262,172	85.8	3,996
Broome (S)	223,008	42.9	7,925
Albany (C)	206,813	47.7	6,835
Geraldton-Greenough (C)	201,875	73.9	4,362
Augusta-Margaret River (S)	184,881	43.0	6,514
Exmouth (S)	184,565	52.4	5,223
Rockingham (C)	180,994	92.2	3,390
Wyndham-East Kimberley (S)	179,162	39.6	5,448

[31] ABS Survey of Tourist Accommodation

Priority camping Areas for International visitors based on demand data supplied by Tourism Research Australia

The data presented in the following table is sourced from survey data supplied by Tourism Research Australia (TRA). Much of the data for regional Western Australia has too small a sample size to be reliable. This is highlighted with blue shading and blue figures as per the legend following the table. The data in black text is extrapolated from a sample of at least 40 surveys and is thus considered more reliable. TRA data is the only data which shows figures for people staying in caravan parks with less than 40 sites which is excluded from the Australia Bureau of Statistics (ABS) data, and also reflects those staying outside of licenced caravan parks. It is not considered as reliable as ABS data, though is effective at gauging trends and delving into demand in more detail than is possible with the data from ABS.

International visitors

	Caravan park or commercial Campground International Visitors					Caravan or camping by side of road, on private property, on crown land, or in a national park International Visitors				
Year ending June	**2007**	**2008**	**2009**	**2010**	**2011**	**2007**	**2008**	**2009**	**2010**	**2011**
Carnarvon (S)	11,879	11,457	12,265	12,575	9,938	2,499	1,847	3,481	2,753	1,617
Augusta Margaret River (S)	9,615	10,246	10,508	10,342	8,678	1,559	1,048	2,107	1,605	2,140
Northampton (S)	9,414	9,063	9,268	8,685	8,608	2,189	1,488	3,090	1,770	1,534
Shark Bay (S)	12,587	10,918	13,815	13,324	8,472	2,064	2,149	2,796	1,997	1,791
Broome (S)	12,176	13,238	10,710	9,869	8,053	4,045	2,055	3,223	2,222	2,336
Exmouth (S)	9,819	9,008	8,483	10,800	7,440	2,827	2,180	3,389	2,683	2,595
Geraldton			4,118	7,676	6,903			1022	1205	1087
Albany (C) Central	8,629	9,949	7,716	7,686	5,934	1,036	628	1,900	954	1,863
Dandaragan (S)	7,803	7,454	6,143	7,059	5,739	880	1,369	1,271	602	599
Ashburton (S)	6,555	6,760	8,120	4,690	5,404	3,632	6,427	5,119	6,941	4,805
Wyndham East Kimberley (S)	8,917	10,381	8,957	6,309	5,010	3,978	2,242	3,555	3,296	2,765
Fremantle (C) Remainder	5,337	4,927	4,006	3,616	4,916	212	119	484	526	468
Busselton (S)	5,183	6,439	5,701	4,601	4,617	809	712	384	1,324	503
Esperance (S)	5,011	7,213	5,239	4,389	4,492	877	852	2,098	3,085	2,521
Port Hedland (T)	5,519	5,166	5,697	4,296	4,426	1,143	1,176	2,258	1,610	1,070
Perth (C) Remainder	7,073	6,998	6,180	4,350	4,096	1,787	913	1,173	1,507	999
Derby West Kimberley (S)	7,599	6,862	7,119	4,250	3,385	3,042	1,776	2,952	2,141	1,083
Halls Creek (S)	6,665	5,580	5,865	2,941	3,055	4,134	1,799	5,173	2,600	2,147
Manjimup (S)	4,647	5,504	3,762	4,693	3,017	1,464	1,042	967	791	1,198
Bunbury (C)	3,034	3,654	3,226	3,457	2,315	232	312	471	479	406

Legend:

* Blue Text: Data with a sample size less than 40 is deemed unreliable and should be used with caution
* Blue Text with Blue Shading: Data with a sample size less than 20 is deemed unreliable and should be used with caution

International visitor nights[32]

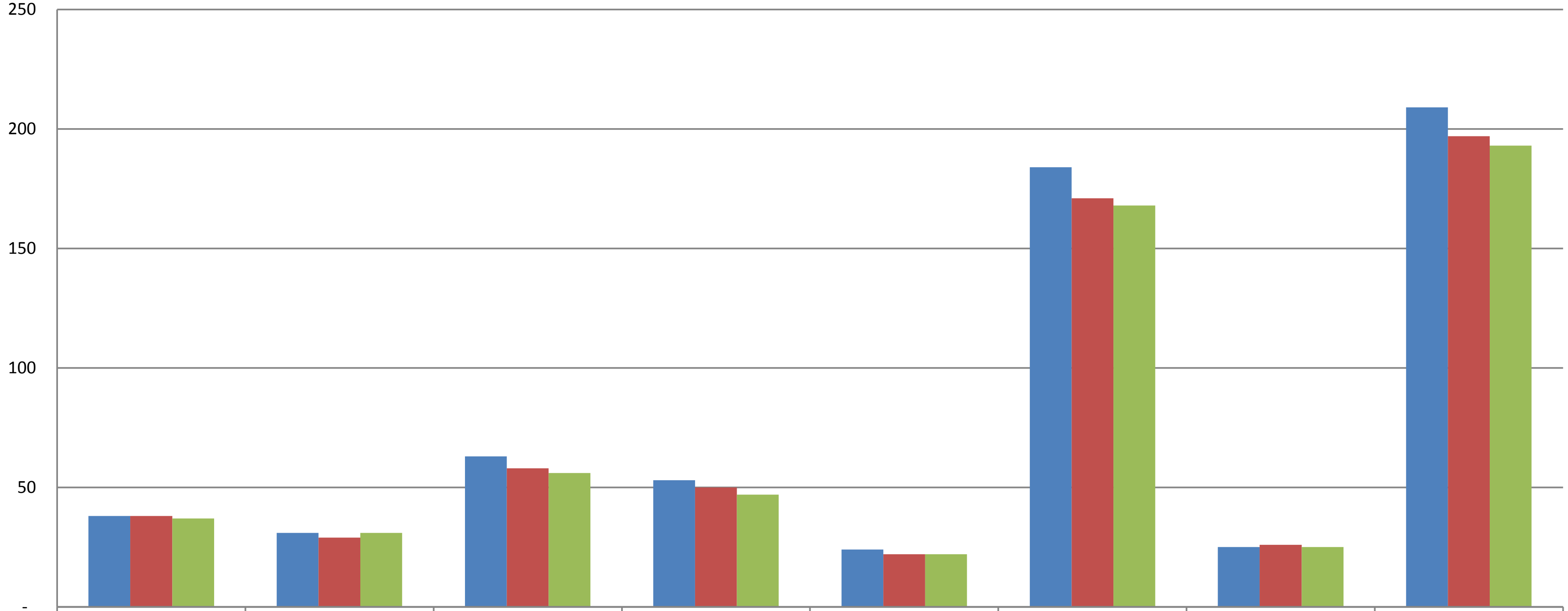
	Caravan park or commercial Campground International visitor nights					Caravan or camping by side of road, on private property, on crown land, or in a national park International visitor nights				
Year ending June	**2007**	**2008**	**2009**	**2010**	**2011**	**2007**	**2008**	**2009**	**2010**	**2011**
Augusta Margaret River (S)	38,993	33,844	62,327	52,842	46,254	10,507	3,419	3,918	18,144	7,091
Carnarvon (S)	42,323	42,431	52,454	47,909	45,343	11,729	9,094	11,238	6,916	3,851
Perth (C) Remainder	86,893	52,116	22,229	34,570	36,245	28,443	7,056	9,214	8,380	8,661
Broome (S)	67,432	55,618	58,350	70,753	32,712	17,327	3,778	42,017	7,678	11,852
Port Hedland (T)	7,196	8,471	15,956	10,259	31,960	3,386	2,343	3,217	5,221	1,728
Wyndham East Kimberley (S)	26,029	37,834	28,331	28,305	27,983	13,592	9,271	7,657	12,330	18,767
Exmouth (S)	33,373	29,602	25,723	52,346	22,161	10,818	8,364	12,680	11,343	15,499
Shark Bay (S)	30,238	23,199	38,185	30,745	20,064	5,527	4,522	5,501	4,575	3,092
Northampton (S)	19,191	22,068	30,404	17,780	19,427	4,011	2,182	4,772	2,723	2,143
Geraldton			8,894	24,190	15,989			1421	3434	4648
Esperance (S)	11,202	25,202	13,522	9,637	15,001	3,748	2,432	6,223	9,541	9,360
Fremantle (C) Remainder	42,233	13,980	11,510	8,915	14,951	212	146	911	1,285	1,304
Ashburton (S)	15,779	18,307	17,016	11,121	13,631	15,271	27,687	14,166	19,182	13,037
Albany (C) Central	23,742	20,195	30,079	15,591	13,473	2,438	1,460	3,869	2,503	5,671
Busselton (S)	11,657	15,908	17,352	9,964	9,724	2,584	3,579	504	2,655	1,080
Dandaragan (S)	11,626	10,051	9,512	11,278	8,445	1,231	1,687	1,748	602	1,601
Halls Creek (S)	22,007	8,185	10,520	3,933	6,956	9,082	2,908	12,616	6,467	4,530
Derby West Kimberley (S)	15,181	13,916	13,600	9,351	6,805	8,497	5,139	4,649	6,156	3,542
Manjimup (S)	8,295	11,612	12,256	21,549	5,578	4,044	2,344	1,843	1,544	1,923
Bunbury (C)	8,485	7,540	56,001	9,537	4,554	243	312	776	689	6,761

Legend:
* Blue Text: Data with a sample size less than 40 is deemed unreliable and should be used with caution
* Blue Text with Blue Shading: Data with a sample size less than 20 is deemed unreliable and should be used with caution

[32]Tourism Research Australia 2011 (unpublished data).

Caravan Parks and Campgrounds with 40 or More Sites[33]

Establishments - caravan parks with 40 or more powered sites
As at June (Source: ABS)



	Australia's Coral Coast	Australia's North West	Australia's South West	Experience Perth	Australia's Golden Outback	WA Caravan parks - short term	WA Caravan parks - long term	Total WA Caravan parks
2005	38	31	63	53	24	184	25	209
2007	38	29	58	50	22	171	26	197
2010	37	31	56	47	22	168	25	193

[33] Australia Bureau of Statistics - Tourist Accommodation, Small Area Data, Western Australia

Key Statistics for Identified Priority Areas

The following table identifies the key demand statistics relating to priority areas. Cells highlighted in pink are those that rate highly in their column category for the various measures shown (priority areas are sorted by Tourism Region not ranked within each category).

Priority	LGA	Tourism Region	Average annual occupancy over 60% (ABS)[34]	Reaches a peak month occupancy over 80% (ABS)[14]	(t) Av takings per site night over $40.00 (ABS)[14]	Over 0.8% of LGA population employed in caravan park (ABS)[35]	International visitor nights in caravan park or commercial Campground (TRA)[16]	Domestic visitor nights in caravan park or Campground (TRA)[16]	% International visitor nights in caravan park or commercial Campground	% Domestic visitor nights in caravan park or Campground	Total caravan and camping visitors	Total caravan and camping visitor nights	Caravan and camping visitors as a % of total visitors	Caravan and camping visitor nights as % total visitor nights
Extreme	Exmouth	ACC	52.4	89.3	$28.30	1.93%	42,000	395,000	40.00%	60.96%	49,000	437,000	47.12%	58.03%
Extreme	Shark Bay	ACC	39.3	63.2	$33.80	2.45%	36,000	215,000	39.13%	58.11%	45,000	251,000	40.91%	54.33%
Extreme	Carnarvon	ACC	55.1	93.2	$40.05	1.09%	46,000	291,000	39.66%	43.18%	55,000	337,000	40.15%	42.66%
Extreme	Esperance	AGO	70.1	87.5	$26.38	0.28%	15,000	100,000	17.44%	18.76%	40,000	144,000	25.81%	23.26%
Extreme	Broome	ANW	42.9	79.4	$35.54	0.30%	79,000	218,000	29.04%	16.05%	38,000	297,000	15.26%	18.22%
Extreme	Derby West Kimberley	ANW	(TR) 46.8	(TR) 76.7	(TR) $52.58		21,000	98,000	67.74%	32.89%	34,000	119,000	40.96%	36.17%
Extreme	Wyndham East Kimberley	ANW	39.6	76.5	$30.41	0.82%	53,000	166,000	43.44%	37.90%	38,000	219,000	40.00%	39.11%
Extreme	Ashburton	ANW	48.8	67.3	$53.43	0.45%	29,000	153,000	27.36%	38.44%	37,000	182,000	45.12%	36.11%
Extreme	Port Hedland	ANW	74.0	95.4	$75.15	0.27%	14,000	90,000	25.00%	23.02%	30,000	104,000	30.61%	23.27%
Extreme	Roebourne	ANW	78.3	90.0	$80.73	0.27%	19,000	77,000	9.22%	7.79%	26,000	149,000	18.71%	12.48%
Extreme	Augusta-Margaret River	ASW	43.0	78.9	$35.23	0.48%	48,000	228,000	20.78%	17.29%	75,000	276,000	15.27%	17.81%
Extreme	Busselton	ASW	49.9	75.1	$40.66	0.31%	11,000	293,000	8.27%	14.99%	72,000	304,000	11.67%	14.56%
Extreme	Mandurah	EP	85.8	88.7	$15.24	0.06%	4,000	40,000	2.61%	4.57%	15,000	44,000	4.57%	4.28%
Extreme	Murray	EP	72.0	86.8	$20.03	0.09%	*n.p*	61,000	*n.p*	38.13%	28,000	61,000	40.58%	38.13%
Extreme	Rockingham	EP	92.2	97.2	$18.73	0.01%	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Extreme	Gingin	EP	(TR) 70.7	(TR) 75.9	(TR) $25.63		4,000	64,000	10.53%	21.77%	28,000	68,000	25.45%	20.48%

[34] ABS Tourist Accommodation, Small Area Data, Western Australia (12 months to June 2010)
[35] Australian Bureau Of Statistics - Table 5. Estimated Resident Population, Local Government Areas, Western Australia

Priority	LGA	Tourism Region	Average annual occupancy over 60% (ABS)	Reaches a peak month occupancy over 80% (ABS) [14]	(t) Av takings per site night over $40.00 (ABS)[14]	Over 0.8% of LGA population employed in caravan park (ABS)	International visitor nights in caravan park or commercial Campground (TRA) [16]	Domestic visitor nights in caravan park or Campground (TRA) [16]	% International visitor nights in caravan park or commercial Campground	% Domestic visitor nights in caravan park or Campground	Total caravan and camping visitors	Total caravan and camping visitor nights	Caravan and camping visitors as a % of total visitors	Caravan and camping visitor nights as % total visitor nights
High	Northampton	ACC	55.7	79.7	$29.84	0.87%	24,000	160,000	33.33%	30.42%	49,000	184,000	32.24%	30.77%
High	Dandaragan	ACC	(TR) 55.3	(TR) 76.0	(TR) $30.66		10,000	91,000	38.46%	31.71%	40,000	101,000	36.04%	32.27%
High	Greater Geraldton	ACC	73.9	88.5	$21.61	0.14%	21,000	89,000	21.88%	13.48%	50,000	163,000	21.28%	21.56%
High	Dundas/Norseman	AGO	20.5	31.4	$27.05	1.98%	6,000	38,000	60.00%	28.57%	25,000	44,000	36.76%	30.77%
High	Kalgoorlie	AGO	70.0	95.2	$22.18	0.07%	16,000	77,000	12.31%	14.13%	16,000	93,000	8.56%	13.78%
High	Upper Gascoyne	AGO	(TR) 55.3	(TR) 76.0	(TR) $30.66		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
High	Halls Creek	ANW	(TR) 46.8	(TR) 76.7	(TR) $52.58		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
High	Bunbury	ASW	64.9	81.0	$30.67	0.10%	8,000	54,000	4.65%	8.41%	23,000	62,000	7.67%	7.62%
High	Harvey	ASW	73.4	80.8	$16.94	0.11%	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
High	Manjimup	ASW	30.6	61.1	$42.07	0.22%	10,000	104,000	12.99%	18.44%	49,000	157,000	21.59%	24.49%
High	Armadale	EP	89.5	92.4	$20.31	0.02%	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
High	Mundaring	EP	(TR) 70.7	(TR) 75.9	(TR) $25.63		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
High	Swan	EP	71.0	82.5	$29.87	0.03%	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Irwin	ACC	(TR) 55.3	(TR) 76.0	(TR) $30.66		*n.p*	49,000	*n.p*	31.01%	17,000	49,000	34.00%	31.01%
Medium	Mingenew	ACC	(TR) 55.3	(TR) 76.0	(TR) $30.66		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Coolgardie	AGO	(TR) 47.2	(TR) 55.4	(TR) $25.11		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Menzies	AGO	(TR) 47.2	(TR) 55.4	(TR) $25.11		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Ravensthorpe	AGO	(TR) 47.2	(TR) 55.4	(TR) $25.11		*n.p*	37,000	*n.p*	26.06%	12,000	37,000	32.43%	26.06%
Medium	Cuballing	AGO	(TR) 47.2	(TR) 55.4	(TR) $25.11		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Ngaanyatjarraku	AGO	(TR) 47.2	(TR) 55.4	(TR) $25.11		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Albany	ASW	47.7	66.0	$33.05	0.20%	31,000	210,000	21.99%	22.01%	48,000	241,000	14.24%	22.01%
Medium	East Pilbara	ANW	54.4	71.6	$35.56	0.92%	4,000	129,000	12.50%	25.15%	22,000	133,000	25.58%	24.40%
Medium	Collie	ASW	(TR) 47.7	(TR) 67.5	(TR) $31.81		*n.p*	29,000	*n.p*	26.36%	12,000	29,000	30.77%	26.36%
Medium	Dardanup	ASW	(TR) 47.7	(TR) 67.5	(TR) $31.81		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Nannup	ASW	(TR) 47.7	(TR) 67.5	(TR) $31.81		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Boddington	EP	(TR) 70.7	(TR) 75.9	(TR) $25.63		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Cockburn	EP	(TR) 70.7	(TR) 75.9	(TR) $25.63		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*
Medium	Joondalup	EP	(TR) 70.7	(TR) 75.9	(TR) $25.63		*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*	*n.p*

EXISTING CARAVANNING AND CAMPING INFRASTRUCTURE

Overview for Western Australia

Data collected for this study and estimates (as per below notes) would suggest there are approximately 37,369 campsites at 769 locations across Western Australia as per the following tables:

Number of Facilities by Tourism Region

Tourism Region	Aboriginal Owned / Operated	Accomm-odation	Caravan Park and/or Campground	DEC	Main Roads Rest area Night	Nature Based Park	Other (Shire/ Unofficial/ Unauthorised)	Overflow	Roadhouse	Station	Transit Camp	Total locations	Number of public toilets[36]	Number of public toilets with showers[37]	Dump Points	Main Roads Rest Area Day
ACC		1	51	8	3	2	25		3	6	1	100	194	23	9	8
AGO		3	82	20	5	1	100		8	5	1	225	271	10	18	35
ANW	18	1	44	9	14	11	35	4	7	13	2	158	162	3	5	11
ASW		2	101	28		1	54		1		1	188	421	22	5	12
EP			67	6			22		2	1		98	961	75	5	10
Total	18	7	345	71	22	15	236	4	21	25	5	769	2009	133	42	76

Number of Facilities by Regional Development Commission (RDC) Area

The following table shows the dispersal of facilities and facility type by Regional Development Commission area:

RDC	Aboriginal Owned / Operated	Accomm-odation	Caravan Park and/ or Campground	DEC	Main Roads Rest area Night	Nature Based Park	Other (Shire/ Unofficial/ Unauthorised)	Overflow	Roadhouse	Station	Transit Camp	Total	Number of public toilets[38]	Number of public toilets with showers[39]	Dump Point	Main Roads Rest Area Day
Gascoyne			21	5	2	1	10		2	8		49	55	5	3	4
Goldfields Esperance		2	34	18	4	1	55		5	1		120	98		9	19
Great Southern		2	36	5		1	39		1			84	142	7	4	10
Kimberley	18		26	5	7	11	19	4	3	11		104	71	2	3	7
Mid West		1	34	4	1	1	17		3	2		63	160	18	6	6
Peel			18	2			4			1		25	108	27	2	1
Perth			32	3			5			1		41	833	43		2
Pilbara		1	18	4	7		16		4	1	2	53	91	1	2	4
South West			65	23			15				1	104	275	15	1	2
Wheatbelt		1	61	2	1		56		3		2	126	176	15	12	21
Total	18	7	345	71	22	15	236	4	21	25	5	769	2,009	133	42	76

[36] National Public Toilet Map www.toiletmap.gov.au
[37] National Public Toilet Map www.toiletmap.gov.au
[38] National Public Toilet Map www.toiletmap.gov.au
[39] National Public Toilet Map www.toiletmap.gov.au

Estimated Number of Sites by Tourism Region

Tourism Region	Powered Sites	Ensuite Sites	Unpowered Sites	Overflow Sites	Total Short Stay Caravan and Camp Sites	Onsite Tourist Vans, Cabins, Chalets, Park Homes	Other	Total Short Stay Capacity	Permanent Park Homes / Onsite Vans	Semi Permanent Park Homes & On Site Vans / Storage	Total Long Term/ Long Stay Capacity	Total Capacity
ACC	3,119	132	1,694	165	5,110	405	8	5,523	288	102	390	5,913
AGO	2,698	31	2,649	58	5,436	330	31	5,797	169	25	194	5,991
ANW	3,407	199	3,695	290	7,591	460	30	8,081	1,688	439	2,127	10,208
ASW	5,224	66	2,579	150	8,019	790	15	8,824	594	86	680	9,504
EP	3,226	25	1,148	50	4,449	316	72	4,837	638	278	916	5,753
Total	17,674	453	11,765	713	30,605	2,301	156	33,062	3,377	930	4,307	37,369

Please note:

Campsites listed as 'other' including unauthorised, unofficial and Shire designated spots have been sourced from a number of user organisations and websites. These include places where people have suggested to others camping is available. As the list relies on user generated content, it is possible there is some duplication and inaccuracies, though reflects the published information users are sharing.

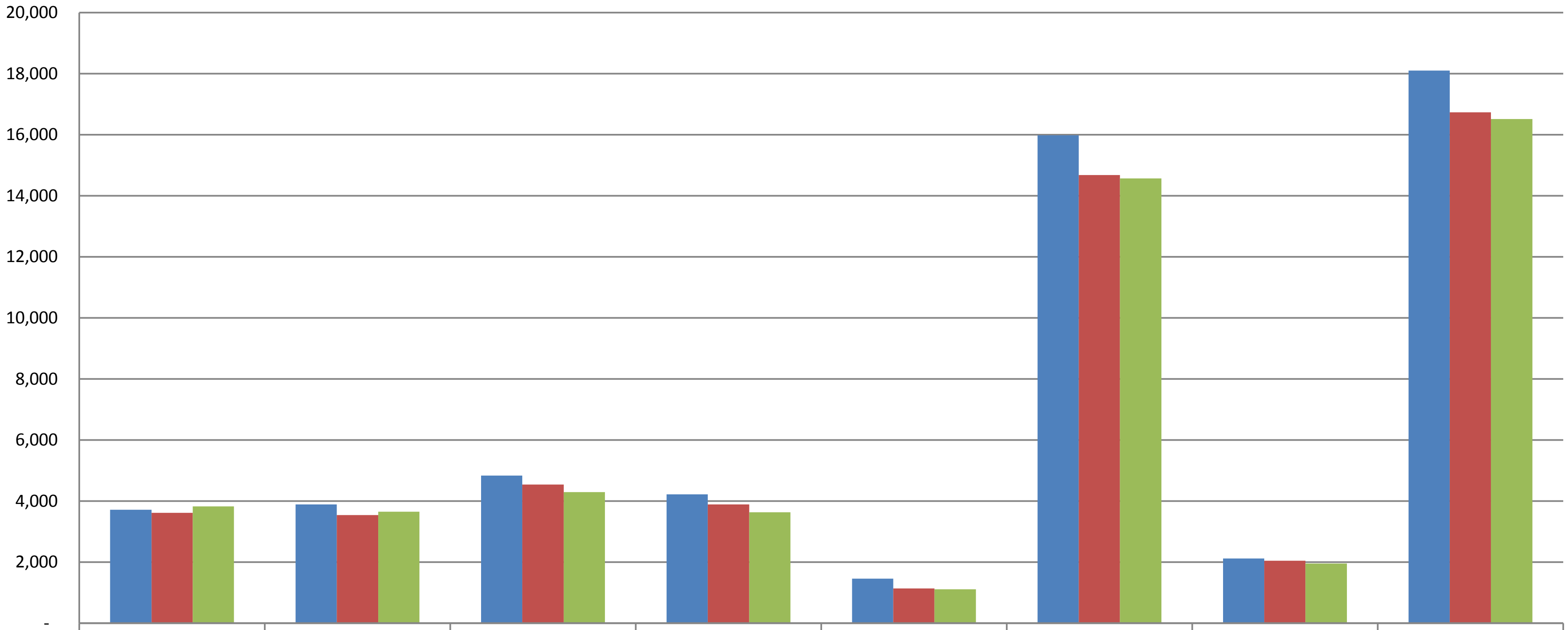
Approximately 60 percent of caravan parks and/or Local Governments responded to provide and/or verify information with regards to number of facilities and sites/site types. The remainder have been estimated based on information in the public domain, information supplied to the Department of Local Government Survey in 2009 and estimates based on other like facilities or locations. As such, the findings should be read as approximate - not as a complete audit of sites.

Approximate Number of Sites by Regional Development Commission (RDC) Area

RDC	Powered Sites	Ensuite Sites	Unpowered Sites	Overflow Sites	Total Short Stay Caravan and Camp Sites	Onsite Tourist Vans, Cabins, Chalets, Park Homes	Other	Total Short Stay Capacity	Permanent Park Homes / Onsite Vans	Semi Permanent Park Homes & On Site Vans / Storage	Total Long Term/ Long Stay Capacity	Total Capacity
Gascoyne	1,912	38	1,056	120	3,126	273	2	275	69	4	73	3,474
Goldfields Esperance	1,357	3	1,617	38	3,015	208	21	229	161	11	172	3,416
Great Southern	1,911	4	943	20	2,878	223	6	229	69	15	84	3,191
Kimberley	2,594	20	2,616	276	5,506	206	30	236	244	171	415	6,157
Mid West	1,298	84	666	41	2,089	177	6	183	127	101	228	2,500
Peel	904	9	504	10	1,427	66	-	66	18	200	218	1,711
Perth	1,622	12	265	40	1,939	215	72	287	587	78	665	2,891
Pilbara	813	179	1,079	14	2,085	254	-	254	1,444	268	1,712	4,051
South West	3,313	62	1,636	130	5,141	567	9	576	525	71	596	6,313
Wheatbelt	1,910	42	1,383	24	3,359	112	10	122	133	11	144	3,625
Total	17,634	453	11,765	713	30,565	2,301	156	33,022	3,377	930	4,307	37,329

Number of Powered Sites in Caravan Parks and Campgrounds with 40 or More Sites[40]

Other powered sites- caravan parks with 40 or more powered sites
As at June (Source: ABS)



	Australia's Coral Coast	Australia's North West	Australia's South West	Experience Perth	Australia's Golden Outback	WA Caravan parks - short term	WA Caravan parks - long term	Total WA Caravan parks
2005	3,712	3,885	4,830	4,216	1,456	15,981	2,118	18,099
2007	3,613	3,544	4,543	3,892	1,136	14,681	2,047	16,728
2010	3,824	3,650	4,296	3,633	1,111	14,564	1,950	16,514

[40] Australia Bureau of Statistics - Tourist Accommodation, Small Area Data, Western Australia

Department of Environment and Conservation Managed Sites

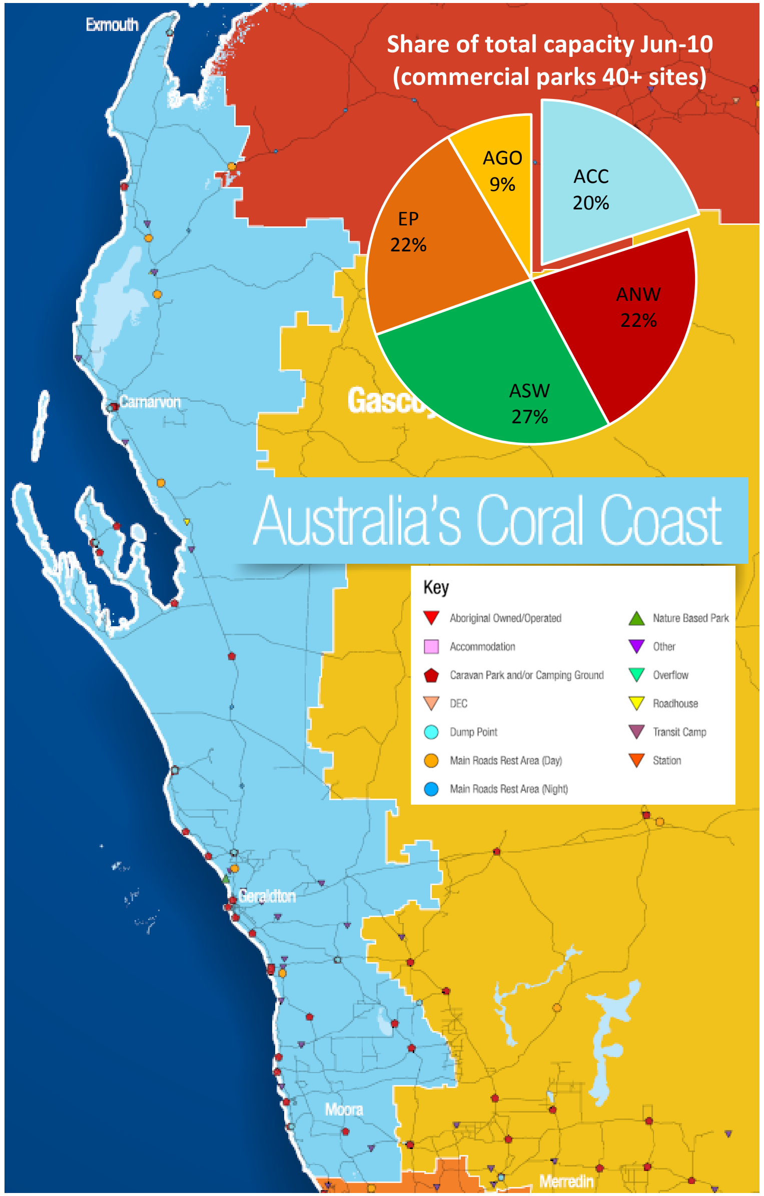
Park[41]	Dec District	Caravan sites	Vehicle sites	Walk in campsites	Group Sites
Fitzgerald River	Albany		14		
Stirling Range	Albany	1	11		
Waychinicup	Albany		4	5	
West Cape Howe	Albany		5	8	
Adelaide	Blackwood		2		
Beaton	Blackwood		2		
Bramley	Blackwood		2		
Chapman	Blackwood	4	14		
Leeuwin-Naturaliste	Blackwood	44	78		8
Powlalup	Blackwood	2	5		
Rapids	Blackwood	2	5		
Schroeder	Blackwood	5	20	10	
St John Brook	Blackwood	4	5		
Big Brook	Donnelly	5	12		
Cleave	Donnelly		18		1
Collins	Donnelly		4		
D`Entrecasteaux - Donnelly	Donnelly		52		6
Lindsay	Donnelly		3		
Reserve 37237	Donnelly		10		4
Shannon	Donnelly	22	20		5
Warren	Donnelly		18	4	
Mitchell River	East Kimberley	40	95		
Purnululu	East Kimberley		10		23
Wolf Creek	East Kimberley	20	5		
Cape Arid	Esperance	34	49		
Cape Le Grand	Esperance	35	9		2
Lake Shaster	Esperance		5		
Nuytsland	Esperance	20	20		
Peak Charles	Esperance	3	4		2
Stokes	Esperance	6	29		6
Warrenup	Esperance		5		
Cape Range	Exmouth	86	21		
Ningaloo	Exmouth		5		
D’entrecasteaux - Frankland	Frankland		56	8	
Mt Frankland	Frankland		9		1
Coalseam Conservation Park	Geraldton	14	14		
Cobra	Geraldton	20	5		
Doolgunna	Geraldton	20	20		
Karara	Geraldton	6	11		
Kennedy Range	Geraldton	12	10		
51 Dryandra Woodland	Great Southern	7	11	3	3
Burra Rock	Kalgoorlie	20	4		
Cave Hill	Kalgoorlie	20	7		
Credo	Kalgoorlie	20	3		
Goldfields	Kalgoorlie	4	8		
Goongarrie	Kalgoorlie	20	20		
Lake Mason UCL	Kalgoorlie	20	20		
Lorna Glen UCL	Kalgoorlie	20	2		
Northern Yilgarn Conservation Reserves	Kalgoorlie	40	40		
Rowles Lagoon	Kalgoorlie	2	5		
Victoria Rock	Kalgoorlie	20	7		
Wallaroo Rock	Kalgoorlie		7		
Dampier Archipelago	Karratha		60		
Karijini	Karratha	110	146		3
Millstream Chichester	Karratha	25	40		1
Montebello Islands	Karratha		10		
Avon Valley	Perth Hills	100	35		9
Beelu	Perth Hills		12		
Lane Poole Reserve	Perth Hills	82	223	2	20
Marrinup	Perth Hills	20	15		1
Sawyers	Perth Hills		1	1	1
Walyunga	Perth Hills	20	4		1
Dirk Hartog Island	Shark Bay		50		
Edel Land	Shark Bay		25		
Francois Peron	Shark Bay		30		20
Yalgorup	Swan Coastal		13		4
Hoffman	Wellington	20	15	5	4
Leschenault Peninsula	Wellington	4	7	11	2
Stockton Lake	Wellington	15	11		1
Wellington	Wellington	10	72	10	1
Broome Bird Observatory	West Kimberley	5	10		
King Leopold Ranges	West Kimberley	35	70		9
Windjana Gorge	West Kimberley	20	75		
Grand Total	73 locations	1064	1744	67	138

Please note: Red text denotes an assumed figure of 20 sites per campground has been assumed where sites not designated by respondents.

[41]Collated from information supplied Department of Environment and Conservation unpublished, November 2011.

Regional Profiles

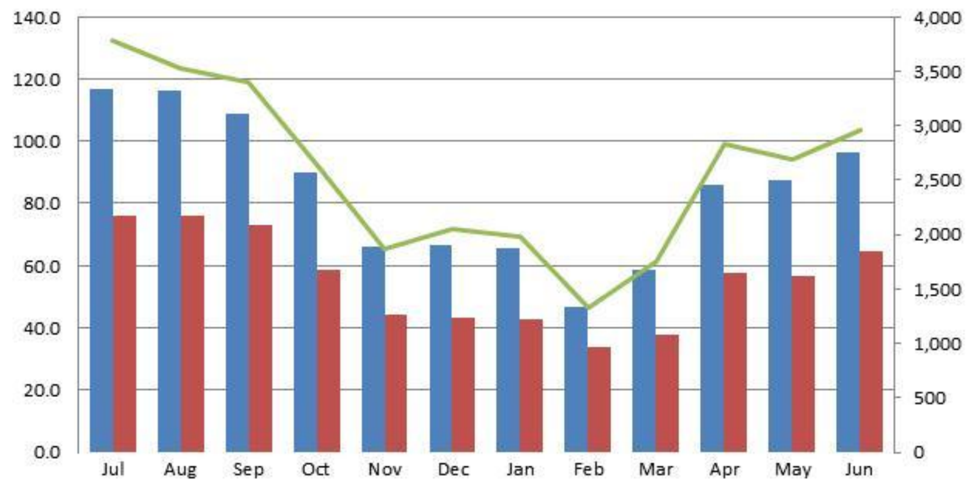
Regional Profile: Australia's Coral Coast Tourism Region



Caravan and/or camping locations	Count
Aboriginal Owned / Operated	
Accommodation	1
Caravan Park and/or Campground	51
DEC	8
Main Roads Rest area Night	3
Nature Based Park	2
Other (Shire/ Unofficial/ Unauthorised)	25
Overflow	
Roadhouse	3
Station	3
Transit Camp	1
Total	**97**
Dump Point	9
Main Roads Rest Area Day	8

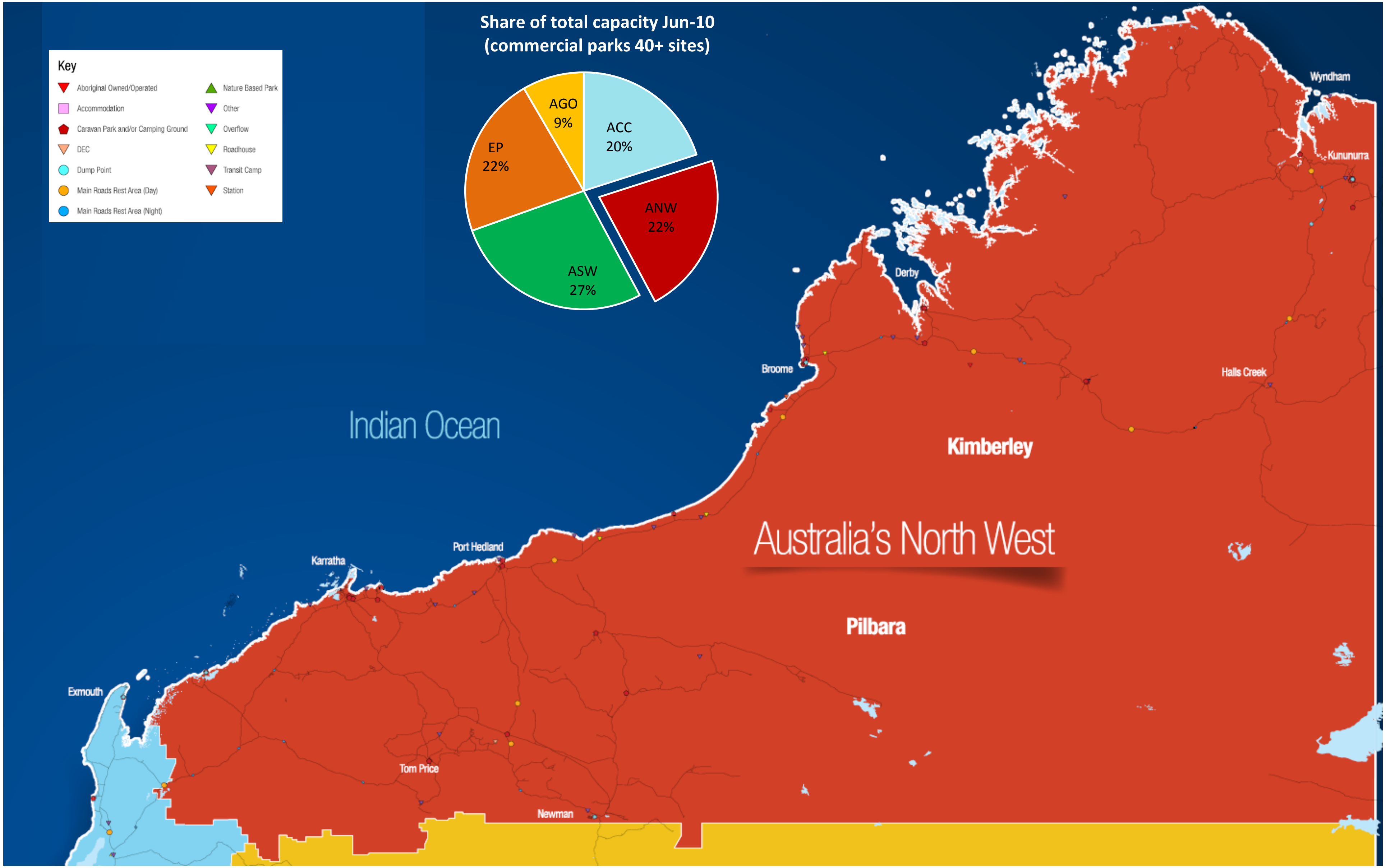
Site Type	Sites
Powered sites	3,119
Ensuite sites	132
Unpowered sites	1,694
Overflow sites	165
Total Short Stay caravan and camp sites	**5,110**
Onsite tourist vans, cabins, chalets, park homes	405
Other	8
Total Short Stay Capacity	**5,523**
Permanent Park Homes / onsite vans	288
Semi Permanent Park Homes / On Site Vans / Storage	102
Total Long Term/ Long Stay Capacity	**390**
Total Capacity	**5,913**

Australia's Coral Coast - Caravan parks with 40 or more powered sites 2009/10 (Source: ABS)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Site nights occupied '000	116.8	116.4	108.8	90.1	65.9	66.7	65.4	46.7	58.5	86.0	87.4	96.6
Site occupancy rate %	76.0	75.8	73.2	58.5	44.2	43.3	42.5	33.6	38.0	57.6	56.6	64.7
Takings $'000 (Right axis)	3,777	3,533	3,399	2,644	1,860	2,056	1,985	1,324	1,760	2,836	2,683	2,963

Regional Profile: Australia's North West Tourism Region

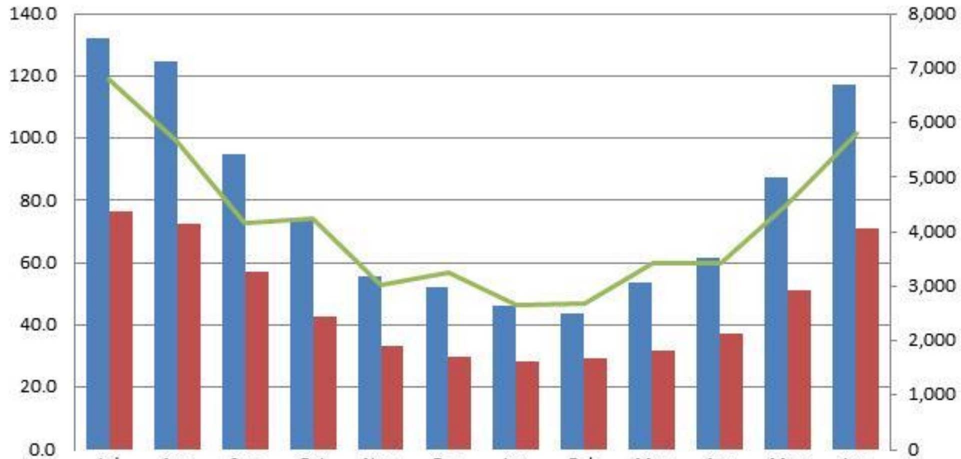


Regional Profile: Australia's North West Tourism Region (continued)

Caravan and/or camping locations	Count
Aboriginal Owned / Operated	18
Accommodation	1
Caravan Park and/or Campground	44
DEC	9
Main Roads Rest area Night	14
Nature Based Park	11
Other (Shire/ Unofficial/ Unauthorised)	35
Overflow	4
Roadhouse	7
Station	12
Transit Camp	2
Total	**157**
Dump Point	5
Main Roads Rest Area Day	11

Site Type	Sites
Powered sites	3,407
Ensuite sites	199
Unpowered sites	3,695
Overflow sites	290
Total Short Stay caravan and camp sites	**7,591**
Onsite tourist vans, cabins, chalets, park homes	460
Other	30
Total Short Stay Capacity	**8,081**
Permanent Park Homes / onsite vans	1,688
Semi Permanent Park Homes / On Site Vans / Storage	439
Total Long Term/ Long Stay Capacity	**2,127**
Total Capacity	**10,208**

Australia's North West - Caravan parks with 40 or more powered sites 2009/10 (Source: ABS)



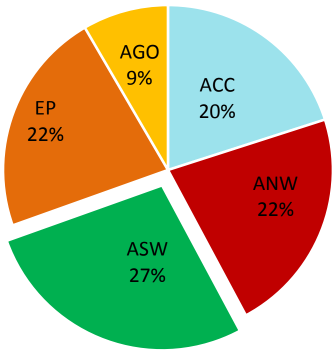
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Site nights occupied '000	132.2	124.8	95.1	74.3	55.7	52.0	46.1	43.6	53.9	61.5	87.4	117.2
Site occupancy rate %	76.7	72.4	57.0	42.9	33.3	30.0	28.1	29.2	31.7	37.3	51.3	71.2
Takings $'000 (Right axis)	6,804	5,659	4,148	4,254	3,010	3,254	2,660	2,688	3,414	3,416	4,517	5,804

Regional Profile: Australia's South West Tourism Region

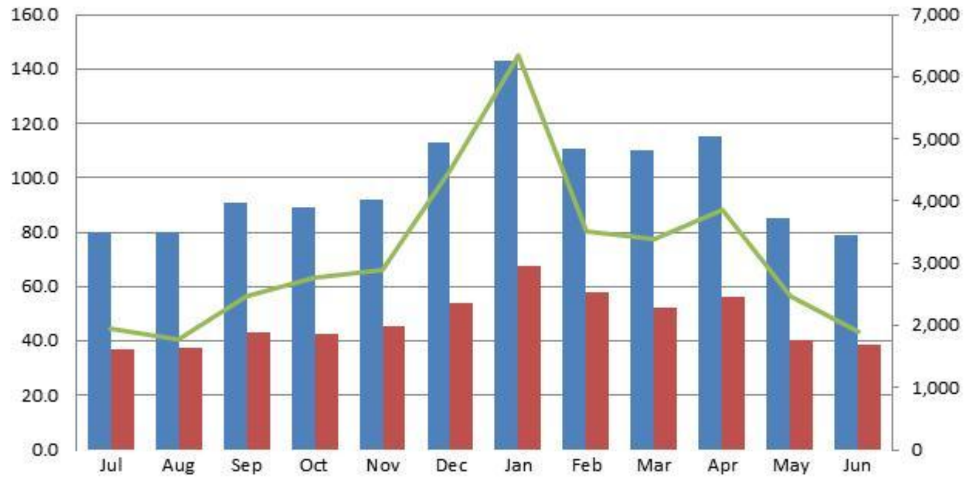
Caravan and/or camping locations	Count
Aboriginal Owned / Operated	
Accommodation	2
Caravan Park and/or Campground	101
DEC	28
Main Roads Rest area Night	
Nature Based Park	1
Other (Shire/ Unofficial/ Unauthorised)	54
Overflow	
Roadhouse	1
Station	
Transit Camp	1
Total	**188**
Dump Point	5
Main Roads Rest Area Day	12

Site Type	Sites
Powered sites	5,224
Ensuite sites	66
Unpowered sites	2,579
Overflow sites	150
Total Short Stay caravan and camp sites	**8,019**
Onsite tourist vans, cabins, chalets, park homes	790
Other	15
Total Short Stay Capacity	**8,824**
Permanent Park Homes / onsite vans	594
Semi Permanent Park Homes / On Site Vans / Storage	86
Total Long Term/ Long Stay Capacity	**680**
Total Capacity	**9,504**

Share of total capacity Jun-10 (commercial parks 40+ sites)



Australia's South West - Caravan parks with 40 or more powered sites 2009/10 (Source: ABS)



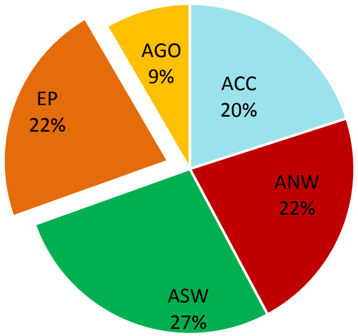
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Site nights occupied '000	79.8	80.3	91.0	89.2	92.0	112.9	143.1	110.8	110.3	115.0	85.2	79.1
Site occupancy rate %	37.1	37.3	43.2	42.4	45.2	53.7	67.5	57.9	52.0	56.4	40.4	38.8
Takings $'000 (Right axis)	1,938	1,766	2,465	2,769	2,892	4,503	6,335	3,503	3,392	3,871	2,480	1,903

Regional Profile: Experience Perth Tourism Region

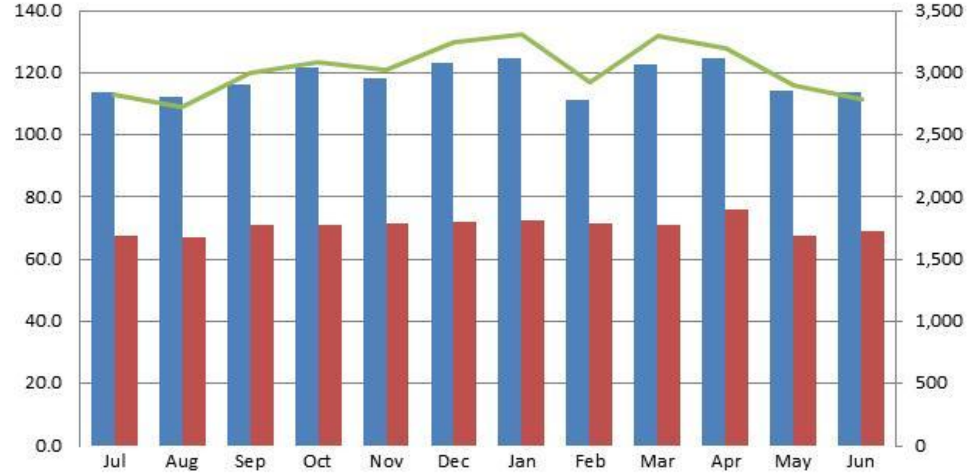
Caravan and/or camping locations	Count
Aboriginal Owned / Operated	
Accommodation	
Caravan Park and/or Campground	67
DEC	6
Main Roads Rest area Night	
Nature Based Park	
Other (Shire/ Unofficial/ Unauthorised)	22
Overflow	
Roadhouse	2
Station	
Transit Camp	
Total	**97**
Dump Point	5
Main Roads Rest Area Day	10

Site Type	Sites
Powered sites	3,226
Ensuite sites	25
Unpowered sites	1,148
Overflow sites	50
Total Short Stay caravan and camp sites	**4,449**
Onsite tourist vans, cabins, chalets, park homes	316
Other	72
Total Short Stay Capacity	**4,837**
Permanent Park Homes / onsite vans	638
Semi Permanent Park Homes / On Site Vans / Storage	278
Total Long Term/ Long Stay Capacity	**916**
Total Capacity	**5,753**

Share of total capacity Jun-10 (commercial parks 40+ sites)

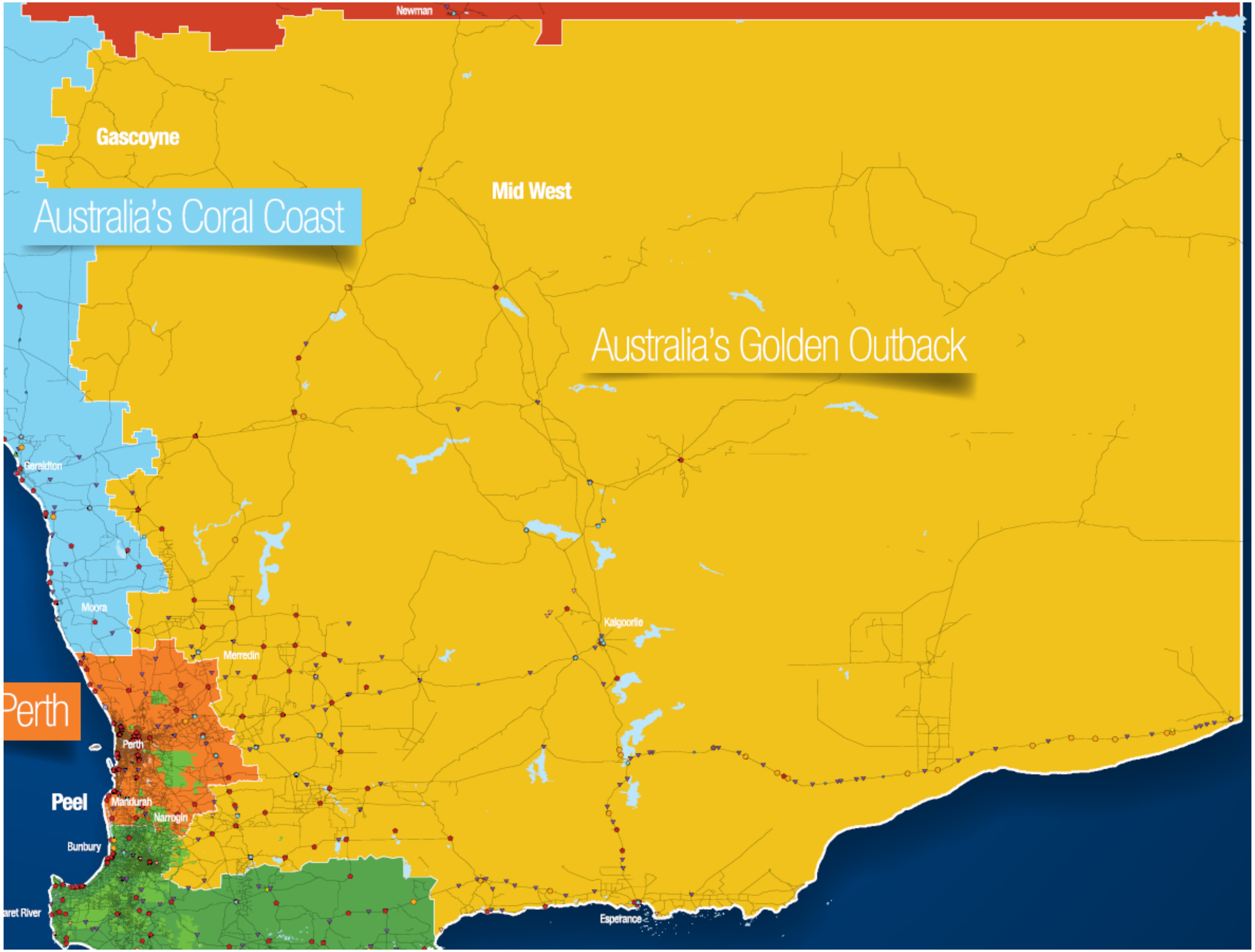


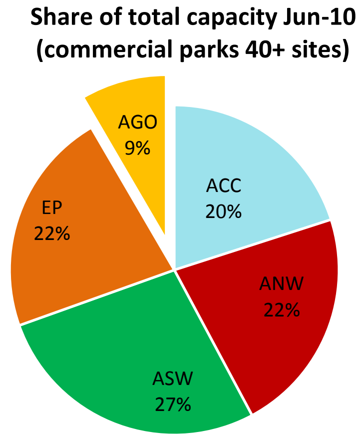
Experience Perth - Caravan parks with 40 or more powered sites 2009/10 (Source: ABS)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Site nights occupied '000	113.8	112.3	116.3	121.5	118.0	123.0	124.9	111.1	122.5	124.5	114.4	113.7
Site occupancy rate %	67.4	67.3	71.0	71.2	71.5	72.1	72.6	71.5	71.2	75.9	67.4	69.3
Takings $'000 (Right axis)	2,821	2,726	2,999	3,088	3,018	3,245	3,305	2,928	3,293	3,192	2,895	2,785

Regional Profile: Australia's Golden Outback Tourism Region





Regional Profile: Australia's Golden Outback Tourism Region (continued)

Caravan and/or camping locations	Count
Aboriginal Owned / Operated	
Accommodation	3
Caravan Park and/or Campground	82
DEC	20
Main Roads Rest area Night	5
Nature Based Park	1
Other (Shire/ Unofficial/ Unauthorised)	100
Overflow	
Roadhouse	8
Station	3
Transit Camp	1
Total	**223**
Dump Point	18
Main Roads Rest Area Day	35

Site Type	Sites
Powered sites	2,698
Ensuite sites	31
Unpowered sites	2,649
Overflow sites	58
Total Short Stay Caravan and Camp Sites	**5,436**
Onsite tourist vans, cabins, chalets, park homes	330
Other	31
Total Short Stay Capacity	**5,797**
Permanent Park Homes / onsite vans	169
Semi Permanent Park Homes / On Site Vans / Storage	25
Total Long Term/ Long Stay Capacity	**194**
Total Capacity	**5,991**

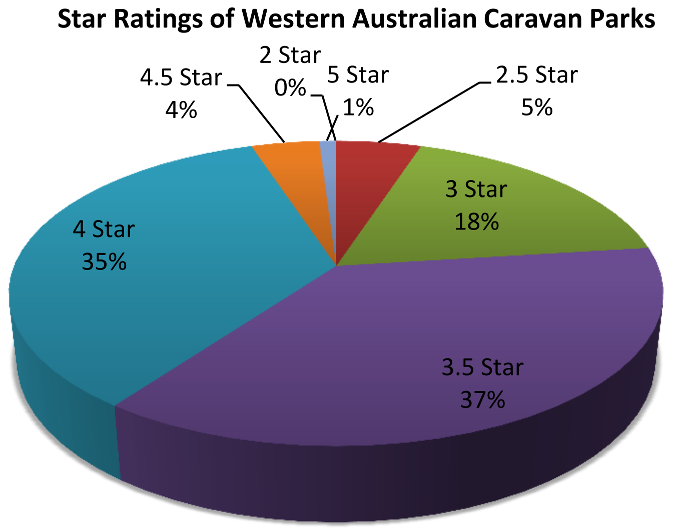
Australia's Golden Outback- Caravan parks with 40 or more powered sites 2009/10 (Source: ABS)

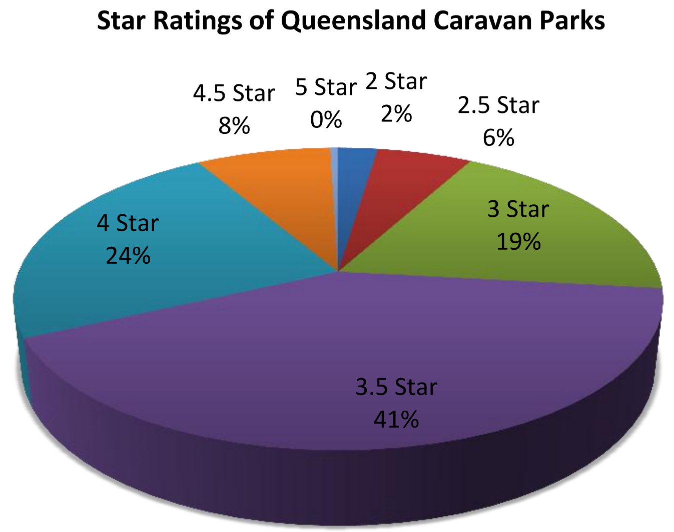
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Site nights occupied '000	29.3	31.6	33.7	32.5	28.9	28.9	29.7	25.9	30.9	29.9	27.1	26.2
Site occupancy rate %	46.3	50.0	55.4	50.8	46.7	45.3	46.8	45.2	48.7	47.7	41.9	41.8
Takings $'000 (Right axis)	644	714	876	787	668	702	827	656	846	832	702	651

Star Ratings and Quality of Existing Supply

Star Rating By Tourism Region[42]	2 Star	2.5 Star	3 Star	3.5 Star	4 Star	4.5 Star	5 Star	Rating Under Review	Total
ACC		1	7	8	5				21
AGO		1	4	6	4				15
ANW		2	1	4	7			1	15
ASW	1		5	12	12	2	1	1	34
EP		1	3	6	7	1			18
Total	1	5	20	36	35	3	1	2	103

ABS figures show there were 193 Caravan Parks and Campgrounds with 40 or more sites as at June 2010. AAA Tourism advised that in Western Australia 103 parks are actively participating in their star rating program. The distribution of star ratings is not dissimilar to Queensland who have proportionally more 4.5 star rated and less 4 star rated than Western Australia, as per the following graphs:[43]





In Tourism WA's 'Understanding the Caravan Park Industry in Western Australia' report, it was found that "around three quarters of visitors rated caravan parks in Western Australia about the same as other States. Caravan parks in Western Australia recorded a 'positive differential' compared to those in Tasmania and the Northern Territory (i.e. a higher proportion rated them better than rated them worse). The positive differential was +11% in relation to Tasmania, and +7% for the Northern Territory. Conversely, and of some concern, caravan parks in Western Australia recorded a negative differential compared to caravan parks in Queensland (-17%), Victoria (-12%), New South Wales (-11%) and ACT (-8%), amongst those who had stayed in caravan parks in both States."[44]

[42]Collated results from information supplied by AAA Tourism (unpublished)
[43]AAA Tourism email communication, November 2011 (unpublished)
[44] Understanding the Caravan Park Industry in Western Australia, May 2007 Tourism WA

Issues Raised in Consumer Feedback

A review of online user forums was completed in November and common comments were grouped to identify issues with regards to overall quality in key tourism regions. The findings are reported below.

Acceptable standard	Common issue to be monitored	Issue requires attention

Issue	Northwest (Broome, Kununurra)	Coral Coast (Exmouth, Coral Bay)	South West (Busselton, Margaret River)	Perth (Mandurah)	Golden Outback (Esperance)	Typical Consumer Feedback
General site availability						• *"Was in this part of the woods in July...having travelled from down south and was seriously disappointed in Broome...lack of facilities, crowded. No vacancy signs everywhere...and a general attitude that took everyone as being a cash cow." Source www.exploroz.com* • *"That's the very busiest time of year down here so it gets packed out. Always have people saying they have no where to go as they have not booked and the campsites (paying ones) are full. "Source www.tripadvisor.com.au*
Peak demand availability						• *"My only gripe with them was we couldn't book ahead and had to queue for a spot. I was about number 20 in the queue by 7am but by 9am enough people had left that we got in. Tip if you go peak time is to queue very early." Source www.exploroz.com* • *"We have been forced to drive all the way back to Perth when we have failed to pre book site accommodation." Source www.caravannersforum.com*
Quality of caravan park facilities						• *"We understand that it is the end of the peak season and the caravan park had probably seen a lot of visitors, but seriously come on, the back end of the park is nothing but a dust bowl, and to charge $45 per night for a site." Source: www.tripadvisor.com.au*
Quality of caravan park service						• *"It is a shame this great location is ruined by horrible staff and a totally opaque, non-booking system that applies to some guests but not others." Source www.tripadvisor.com.au*
Availability of low cost/free camp facilities						• *"I actually think the local station offering stations stays has put an end to the free camping area. When we travelled down earlier this year it was signed as closed to camping" Source www.exploroz.com* • *"Unfortunately this is happening everywhere there is free or cheap camping and it will only get worse if a fee is not imposed. No use blaming other camp spots that charge a fee for the influx of campers into free sites..... Charge a fee and it keeps the not so friendly campers out. As said above and I agree I would sooner pay a fee and have a good regulated camp spot then camp somewhere for free in an unregulated camp spot." Source www.exploroz.com* • *"Many of the long-stay, traditional campers are elderly pensioners who travel north for the winter. They cannot afford to stay at caravan parks charging anything from $25 a night, so they would not be able to go away and everyone loses. The present Act and the new review are designed to aid the owners of existing caravan parks." Source www.exploroz.com*
Road side stop/rest area facility availability						• *"Have to agree to the majority of the rest stops I have stopped at bins overflowing or the crows have had a party. At one location someone has just discarded a number of damaged tyres and tossed them in the grass area." Source www.exploroz.com* • *"One of the major problems we have though are the grubs in our society who litter where ever they are coz their too lazy or are of low intelligence and do not understand that facilities will not be provided for them to abuse, if everybody made sure to take their rubbish with them, then local councils would not have that extra burden of providing labour to clean up the sites." Source www.exploroz.com*
Dump point access						• *"As water disposal laws continue to tighten, dump points – and their correct use – are becoming an increasingly necessary part of life on the road." Source: caravanworld.com.au*
Site tariffs						• *"One thing I've also noticed is that some of the accommodation books, even though they're current editions, aren't up to date with costs, ie book stipulates $26 per night for a powered site, but by the time we check in it's $29 per night (and off season)." www.exploroz.com* • *"Caravan parks are expensive, charging 20 or more dollars a night, on a long trip thats expensive, especially if you just want somewhere legal to stop park and sleep." Source www.tripadvisor.com.au*

Issue	Northwest (Broome, Kununurra)	Coral Coast (Exmouth, Coral Bay)	South West (Busselton, Margaret River)	Perth (Mandurah)	Golden Outback (Esperance)	Typical Consumer Feedback
Site sizes						• *"The site sizes in many of the parks these days are never big enough to place your van, put you awning/annexe out plus you then have to try and put your 4x4 on the site as well. Packed in like sardines takes on a whole new meaning. How many parks have made two sites from what used to be one site?" Source www.caravanworld.com.au* • *"Some of the parks we inspected, we had absolutely no chance of setting up our camper (Cape York Deluxe hard floor) as the camper drawbar would of been encroaching on the road and blocked vehicles getting past. Actually it would've been hard to park a 15" van in some and not have their drawbar over the road." www.exploroz.com*
Fee paying systems for camp sites						• *"The fee structure was such that coins were required but after we put the payment into the envelope it wouldn't fit through the slot into the security box. Also we had to pay in advance although we may have wished to stay for more than one night depending on what we found when we arrived out at the campsites 40km away. I'm not too fussed if through poor systems NPs (and other camping area managers for that matter) miss a payment that I am otherwise happy to make. However NPs are always complaining that they are short of funds so I do think it would be good if "they" could find a system for collecting fees that actually works."* • *"I support the fees but only if used in the right areas and if it goes in the right pockets, i have seen large amounts go where they should not be and it only hurts them in the long run."* • *"One ranger said they stopped using money boxes cause people would smash them and take the money so they were loosing funds. I explained they are still loosing them cause it is nearly impossible now to actually pay the fee. "Good for you" was his reply. He basically said if you try to do the right thing and can't, don't worry." Source www.exploroz.com*
Overflow availability						• *Going west its first in best dressed. Tried booking ahead and got told get here early and you will be OK we don't book. Was very lucky to get a week in Broome. Had it been o/nite they wouldn't take it. Friends of ours were in Broome two years ago and had to line up outside a park at 7 am waiting for people to move out to get a site.*
Enforcement of caravan park rules						• *"We also experienced this during our trip round Oz - won't mention the park, however up Nth we stayed at a CP (well known one) and one night there was a LOT of noise, partying, drunk idiot on a quad bike with a couple of half naked female backpackers on the back no helmets etc. - on investigating it turned out to be the park manager partying on with all the backpackers!" Source www.exploroz.com*
Fuel cost						• *"Just a tad worried about rising fuel costs ? Putting off that long distance outback trip until you can save more money to cover the fuel cost? I wondered what effect rising fuel costs were having on the tourist industry...and now I know." Source www.exploroz.com* • *"Anyone who says the high fuel prices have any impact in any way on their travel plans is still in denial." Source www.exploroz.com*
Management control of facilities						• *"Very frustrating when you pay top dollar for a grass powered site for your caravan and then you have to put up with a large group of campers right beside you pinching power and water from behind the vans etc. (when they are paying for an unpowered site) to run rice cookers etc. for* cooking. I *find this extremely frustrating and disrespectful given the prices we are forced to pay on long weekends especially to be subject to this.....why don't these people use camp kitchens etc. like everyone else???? Even after warnings from the management they move all the cooking equipment etc. to the laundries... plain lazy and rude....do they not think!* • *Do you have a 4x4? is your van off-road ? if yes to both , why are you going to a caravan park." Source www.exploroz.com* • *"On long weekend its normally full of ferrel and drunks -- did you think a caravan park was going to be quiet peaceful at all times and no one close by? this is the exact reason why I have off-road van and 4x4... have the occasional run in , but they are few and very far between." www.exploroz.com*

Marketing Groups

Of all Western Australia's caravan parks listed on ATDW, 48 of participate in a group marketing arrangement. The most common is Top Tourist Parks, closely followed by Big 4.

Marketing Groups[45]	Big 4	Family Parks	Oz Parks	Top Tourist Parks	Total
ACC	4	1		6	11
AGO		5		2	7
ANW	3	1			4
ASW	7	2	2	7	18
EP	3	2		3	8
Total	17	11	2	18	48

Ownership Groups

Of Western Australia's caravan parks listed on ATDW, 19 caravan parks were identified as being part of one of the major ownership groups, half of these were owned by Aspen Parks.

Ownership Group[46]	Acclaim Parks	Aspen Parks	Discovery Holiday Parks	Total
ACC		2		2
AGO	4		1	5
ANW		3	1	4
ASW			2	2
EP	2	3	1	6
Total	6	8	5	19

Consolidation and Ownership Groups

According to the report *Understanding the Caravan Park Industry in Western Australia*, membership of a caravan park group such as Big 4, Top Tourist or Family Parks is a factor in the consumer's selection of caravan parks. This finding is supported by the Benchmarking Caravan and Tourist Park Operations Report, Sustainable Tourism CRC 2007, which found location and membership of a major park group was an important factor in caravan park choice.

Western Australia is well served by the three main park marketing groups mentioned earlier. However, minimum size and quality of caravan parks are determining factors which work against acceptance of many Western Australian parks, to these groups.

Aspen Parks is a fund managed by the Aspen Group, a publicly-listed operator of caravan parks throughout Australia. It is represented in Western Australia by several industry benchmark parks, including Monkey Mia Resort, Woodman Point and Exmouth Cape Holiday Park. Discovery Parks and Acclaim Parks also operate in Western Australia.

The NRMA does not own caravan parks in Western Australia, though has five caravan parks in Queensland and New South Wales. Mirvac Group is another caravan park owner that is not in Western Australia.

Western Australia has failed to attract the management groups, including ATPM and Free Spirit Management due to the low occupancy and yield of most of its caravan parks. These management organisations bring best practice operating procedures and marketing to the caravan park industry and compete with the park membership groups.

The recommendation that the State facilitates the development of caravan parks at strategic locations will present opportunities for the best practice management groups to spread their operations to Western Australia. Parks operating under a management group have all the benefits associated with economies of scale, as well as the increased reach of their marketing programs.

[45] Collated results from information on ATDW and online sources
[46] Collated results from information on ATDW and online sources

Co-Location of Facilities

There are many existing examples and potential opportunities where co-locating caravan and camping facilities in with other tourism and associated facilities can enhance the visitor experience as well as increasing capacity where a standalone caravan or camping facility may not be commercially viable in its own right. Some examples of this are:

- Co-locating rest areas and dump points with existing caravan parks and/or roadhouses
- Allowing limited duration caravan stays and camping at farms, stations, chalet establishments, bed and breakfasts or guesthouses
- Roadhouses being permitted to offer an increased number of caravan or camping sites
- Aboriginal communities encouraged to offer caravan or camping sites along with cultural tours and other tourism services
- Allowing caravan stays or camping at vineyards, micro-breweries, attractions, golf clubs, airports, showgrounds, sportsgrounds, racetracks and clubs (either for special events or for limited stays)

Many stakeholders and strategies have commented on the potential benefits of co-locating facilities, though there are a number of regulatory impediments which must be considered along with the impacts the on the future viability of the existing caravan parks and Campgrounds.

Some stakeholder comments from submissions to The Economics and Industry Standing Committee Inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia are represented below.

> *"We see the development of farm stays as a very suitable alternative, particularly up around Broome and that area."*[47]

> *"The Shire of Busselton was addressing some of these issues by including in its draft tourism strategy the opportunity for a farmer, who was zoned rural, to have up to 10 sites. At the moment, they can have 10 chalets in that particular shire. I think everyone thinks it is a good idea, but there are legislative barriers that need addressing, more than anything".*[48]

> *"There are a number of showgrounds throughout the State that are mainly used for only a small number of days each year for local shows and events. These make ideal locations for rest areas for self-contained mobile travellers.*[49]

Some examples of existing co-located facilities are:

Australia's Coral Coast Tourism Region

Facility Type	LGA	Facility
Roadhouse	Minilya Bridge	Minilya Bridge Roadhouse
Roadhouse	Wooramel	Wooramel Road House
Overflow	Exmouth	Council Football Ground
Station Stay	Carnarvon	Gnaraloo Homestead
Station Stay	Carnarvon	Quobba Station
Station Stay	Exmouth	Giralia Station
Station Stay	Hamelin Pool	Hamelin Station Stay
Station Stay	Kalbarri	Riverside Sanctuary
Station Stay	Warroora	Warroora Station

Experience Perth Tourism Region

Facility Type	LGA	Facility
Roadhouse	Bakers Hill	Bakers Hill Roadhouse
Roadhouse	Victoria Plains	New Norcia Roadhouse
Station Stay	Toodyay	Boshack Farm

[47] Submission to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: Campervan and Motorhome Club of Australia.

[48] Evidence given to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: CIAWA

[49] Evidence given to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: Campervan and Motorhome Club of Australia Limited

Australia's North West Tourism Region

Facility Type	LGA	Facility
Overflow	Broome	Broome PCYC
Overflow	Broome	Broome Pistol Club
Overflow	Broome	Broome Speedway Club
Overflow	Broome	Seventh Day Adventist Church
Overflow	Dampier	Dampier Transit Park
Overflow	Karratha	Karratha Overflow Site
Overflow	Kununurra	Kununurra Showgrounds
Overflow	Port Hedland	Port Hedland Golf Club
Roadhouse	Broome	Roebuck Plains Roadhouse
Roadhouse	Durack	Doon Doon Roadhouse
Roadhouse	Fortescue River	Fortescue River Roadhouse
Roadhouse	Halls Creek	Warmun Roadhouse
Roadhouse	Nanuturra	Nanuturra Roadhouse
Roadhouse	Newman	Capricorn Roadhouse
Roadhouse	Pardoo	Pardoo Roadhouse
Roadhouse	Port Hedland	Sandfire Roadhouse
Roadhouse	Tom Price	Auski Roadhouse
Station Stay	Broome	Barn Hill station
Station Stay	Broome	Anna Plains
Station Stay	Derby West Kimberley	Birdwood Downs
Station Stay	Derby West Kimberley	Charnley River Station
Station Stay	Derby West Kimberley	Barrage at Camballin
Station Stay	Halls Creek	Larrawa
Station Stay	Halls Creek	Mabel Downs
Station Stay	Karijini	Mt Florance Station
Station Stay	Port Hedland	Pardoo Station Stay
Station Stay	Wyndham	Diggers Rest
Station Stay	Wyndham East Kimberley	Drysdale River Station
Station Stay	Wyndham East Kimberley	El Questro Wilderness Park
Station Stay	Wyndham East Kimberley	Ellenbrae Station
Station Stay	Wyndham East Kimberley	Home Valley Station
Station Stay	Wyndham East Kimberley	Mount Elizabeth Station

Australia's Southwest Tourism Region

Facility Type	LGA	Facility
Overflow	Nannup	Nannup Recreation Ground

Australia's Golden Outback Tourism Region

Facility Type	LGA	Facility
Overflow	Esperance	Greater Sports Ground
Roadhouse	Balledonia	Balledonia Roadhouse
Roadhouse	Coorow	Halfway Mill Roadhouse
Roadhouse	Dowerin	Dowerin Roadhouse
Roadhouse	Eucla	Border Village
Roadhouse	Giles	Warakurna Roadhouse
Roadhouse	Gingin	Gingin Roadhouse
Roadhouse	Laverton	Tjukayirla Roadhouse
Roadhouse	Meekatharra	Kumarina Roadhouse
Roadhouse	Mundrabilla	Mundrabilla Roadhouse
Roadhouse	Warburton	Warburton Roadhouse
Roadhouse	Widgiemooltha	Widgiemooltha Roadhouse
Roadhouse	Yalgoo	Paynes Find Roadhouse
Station Stay	Jerramungup	Qualup Homestead
Station Stay	Kookynie	Morapoi
Station Stay	Mt Augustus	Mt Augustus Outback Resort
Station Stay	Mt Magnet	Wondinong Station
Station Stay	Mt Magnet	Wogarno Station
Station Stay	Mt Magnet	Kirkalocka Station
Station Stay	Mullewa	Wandina Station
Station Stay	Norseman	Fraser Range Sheep Station
Station Stay	Upper Gascoyne	Bidgemia Station Stay

ADEQUACY AND AVAILABILITY OF DATA SOURCES

There are significant gaps in the adequacy and availability of data for the caravan and camping sector. These are outlined below. Strategies to address these gaps are presented in the recommendations. The below summarises some of the more significant areas of concern.

Changes to the ABS Survey of Tourist Accommodation

The Survey of Tourist Accommodation (STA) is a quarterly survey undertaken by the ABS to measure the demand and supply of tourist accommodation. Funding for the expanded scope component of the STA ceased at the end of the June quarter 2010. Whilst this data is still valuable for this study, future studies and development proposals will be significantly impacted on by the unavailability of up to date data. Reliable data is of utmost importance in proving up investment opportunities and may inhibit future development and access to borrowings.

Small sample sizes for regional visitation in the National Visitor Survey (NVS) and International Visitor Survey (IVS) - Tourism Research Australia

The small sample sizes for data for regional visitation in the NVS and IVS results in limited usable data available for visitors outside the metro area. This is the only source of data for evaluating trends and investigating visitation outside of licenced parks, and with the cessation of the ABS STA for caravan parks and campgrounds, there will be no reliable data available in the future.

Department of Environment and Conservation (DEC) data

DEC does not collect nor report data on the number of people camping inside National Parks other than periodic snapshots which do not allow any meaningful analysis or show any trends. As a significant provider of camping capacity, this lack of information leaves a significant gap in data.

Department of Local Government Data incomplete

The survey data collected by the Department of Local Government showed a total of 303 caravan parks (the survey investigations indicated the presence of 345 caravan parks) with limited data breakdowns for site types usable within the data collected. The data does not include the significant number of caravan and camping sites available outside of licenced facilities.

Low level of response from most Local Government Authorities

An email was sent out to 139 local government agencies 16 October, 2011 with four short questions and a table to confirm caravan and camping facilities within their jurisdiction. They were asked to return this information within 3 weeks in order to meet the audit (stage 1 deadline). Only 37 Local Governments responded within the required time frame and many of these did not complete the information requested. Numerous follow up emails were required to be sent (and in many cases phone calls were made).

Caravan Parks low level of response

Seven days after sending out the request for confirmation of number of sites, only 60 out of 345 caravan parks responded. Some caravan parks do not publish (and refused to supply) email contacts, and many phones are not answered or messages not returned even during standard business hours. Some caravan parks do not have websites, and were not listed in online directories, Google maps or the Australian Tourism Data Warehouse (ATDW). Data included in this audit is based on a wide variety of sources including direct from operators, Local Government, users, online forums, the Consultants' knowledge of the industry and estimates.

List of ablution facilities and dump points not complete on the National Public Toilet Map

The National Public Toilet Map www.toiletmap.gov.au provides a comprehensive list of facilities across Australia. Discussions with the agency responsible for publishing the data identified concerns with the lack of completeness of the data published.

No definitive list of authorised overnight rest areas

CMCA lists 196 overnight rest areas. Main Roads lists 22 throughout Western Australia. Many published by CMCA are designated by Main Roads as day rest areas, and the remainder are private land, Shire land and unmanaged or illegal sites. There is no published list of legal overnight locations (including Main Roads, Shire Authorised and other authorised sites). The 'Camps 6 ' directory has become the definitive guide for unauthorised camping in Australia, it provides information on free camping locations that people rely on, though these are not in line with what is actually authorised or permitted.

SWOT ANALYSIS

The following strengths, weaknesses, opportunities and threats have been identified for the caravan and camping industry sector.

Strengths

- Passionate consumers and user groups with strong representation and networks
- Caravan and camping facilities encourages and supports recreational pursuits
- Provides a low cost holiday alternative to compete with cheaper international destinations
- Allows access to stay amidst some of Western Australia's best natural assets and/or remote locations without negatively impacting on the environment
- Drive tourism encourages multi-trip visitation rather than single destination holidays
- Caravan and camping is a strong contributor to regional economies
- Robust industry sector which continues to grow in spite of economic conditions
- Wide ranging options to potentially increase capacity without significant cost
- Self sufficiency of many caravans and recreational vehicles means they can be potentially accommodated with relative few facilities required and minimal development cost
- Presence of ownership and management groups who have significant industry expertise
- Caravan parks are a significant employer of mature aged staff
- Aligns with Tourism WA's Experience Extraordinary brand positioning - providing the opportunity to experience the extraordinary… "like all richly rewarding things in life, it's worth going the extra mile to experience it."
- Funding such as Royalties for Regions supportive of initiatives that benefit regional communities

Weaknesses

- Industry and users have divergent needs and expectations
- Highly seasonal particularly outside of the Experience Perth Tourism Region
- Low levels of innovation in delivery
- Lack of skill training
- Low yield and highly price sensitive
- Variance in skills and customer orientation of staff within industry sector
- Limited investment in repairs and maintenance
- Vocal spokespeople may result in overrepresentation of some user groups
- Slow to adapt to emerging technologies
- Limited availability of quality data to guide business planning and decision making (since June 2010).
- Highly regulated and prescriptive environment
- Geographic dispersal of tourism assets increases costs of service delivery
- Limited marketing expenditure as compared to other 'brand focused' and higher yielding tourism industry sectors such as resorts
- Limited overall responsiveness from caravan park operators and Local Government when asked to input into caravan and camping strategic report
- Regulatory impediments hold back new investment

Opportunities

- Innovate in supply to distinguish Western Australia as a desirable and unique caravan and camping destination
- Government-Industry partnerships to promote journeys rather than just destinations
- Online marketing equalises situation in regard to bigger budget tourism sectors
- Institute a skill training program with incentives for participation
- Potential for Indigenous economic development and participation
- Leverage new technologies (online marketing, directories, mobile applications, user generated content, online bookings, email)
- Co-locating facilities could improve viability and sustainability of other businesses and industries (small farms etc.).
- Set up state-wide online database showing availability and facilities of all caravan and camping facilities (including DEC, Main Roads, caravan parks, nature based parks etc.) similar to Child Care Places database.
- Better management of roadside rest areas and unofficial camping areas to ensure facilities are better maintained and users contribute to the costs of this
- Resume collection and publication of caravan and camping supply and demand statistics via ABS
- Release Crown land for development of caravan and camping facilities
- Grant longer term Crown leases for caravan and camping facility developments where appropriate
- Determine concessional lease payments for Crown land on the Valuer General's advice that specifically promote caravan and camping facilities
- Discount Crown land values for caravan and camping facility developments on a 'case by case' basis in consultation with the Department of Regional Development and Lands, and other relevant agencies
- Designate the use of land under Government control, Crown land, properties and/or buildings for future caravan and camping facilities
- Allocate funds for the provision of infrastructure upgrades to facilitate caravan and camping facilities development on a 'case by case' basis

Threats

- Inaction by Government and Industry may allow other states to consolidate their leadership position in the market
- Current high demand locations may be left with oversupply in the longer term, particularly in regions where workers for resource projects are putting extreme demand on facilities
- Local Government allowing owners of holiday homes to let accommodation to tourists without appropriate standards or regulation being applied.
- Government lease negotiation process in regard to lease renewals for caravan parks often harms the operator's business and prevents investment in the property.
- High value of the Australian dollar and increasing fuel costs will continue to impact on price based competitiveness of caravan and camping holidays when compared to overseas holidays
- If reputation for insufficient/ inadequate supply continues, it may start to impact on demand as people reconsider their travel plans
- Staff shortages increasing as resource projects come on line will continue to negatively impact on quality and cost of staff available
- Regulatory impacts may continue to drive away investors and professional ownership groups
- Complex issues surrounding supply and demand requires individual custom solutions and a multifaceted approach

KEY ISSUES, TRENDS AND IMPACTS

Consumer Issues

The caravan and camping tourism market is segmented by:

- Family groups
- Grey Nomads
- Backpackers and budget travellers
- Experiential travellers
- Short break and weekend holiday makers; and
- Owners of holiday sited caravans on caravan parks

One market segment will often have entirely different needs from another, within the market sector. For example, Family groups generally seek full facility caravan parks with swimming pools and recreation activities. Many short break travellers use cabins, although some may bring their own caravans, motorised units or tents. Experiential travellers may utilise cabins or hire campervans and motorhomes and camp at low cost and no cost locations. There are a great number of ways that tourists interact with caravan and camping accommodation facilities.

The consideration of consumer feedback and usage of caravan and camping product in Western Australia was important to enable assessment of the overall standard of delivery in key tourism locations for different types of users.

In order to establish priorities for improvement, and to provide balance to the extensive consultation with industry, government and other key stakeholders, the Study embarked on extensive consumer consultation, which included meetings and discussions with the CMCA representing over 60,000 members, as well as the WA Association of Caravan Clubs with its 5,000 members. Input was also sought from regular users of caravan and camping product and reviews of online forums.

Consumers were provided an opportunity to have their views recorded through a survey, posted on various caravan and camping forums and social media sites. The Study also captured caravan park reviews and other topical caravan and camping issues from websites such as Trip Advisor, Explore OZ and Badgers Australian Caravan Park Reports.

Travellers were invited to provide submissions by email and online blogs on issues relating to caravan and camping in Western Australia. All submissions topics were categorised and the feedback has contributed to the prioritisation in development of the strategic report.

There is a perception amongst interstate and international caravan and camping tourists is that Western Australia is not “user friendly” towards the particular tourism sector - a view that is widely communicated by the recreational vehicle organisation, CMCA.

A high proportion of recreational vehicle owners, who spend considerable periods travelling in the state for holidays and recreation, seek opportunities to camp outside licenced caravan parks and are very vocal in their requests for the provision of low-cost or free camping. They point to the lack of availability of caravan park sites during peak seasons at key holiday locations to support their position.

This group of caravan and camping travellers spend extended periods on the road utilising both approved and unauthorised camping areas outside of licensed caravan parks as a matter of preference. They also use rest areas for overnight and longer camping stays. There are a growing number of consumers who feel that they have a right to plan to camp in rest areas to overcome driver fatigue. Many believe they should be able to free camp at pubic locations on the basis that their recreation vehicle’s self-containment ensures that they “Leave No Trace”.

Generally, CMCA members and other users of self-contained recreational vehicles are responsible in their use of public land. Unfortunately, opening up such areas for uncontrolled camping often leads to violation of the environment by other less responsible campers.[50]

The seasonal peak demand for sites at prime tourist locations has been exacerbated by the closure of several caravan parks or their conversion to residential lifestyle parks or alternative uses such as resorts.

Other impacts on consumers include significant issues with bookings and availability of sites within key DEC managed camping grounds. A trial of online bookings has been set up for a limited number of sites within the following locations: Cape Range National Park (Kurrajong, Pilgramunna, Tulki, Yardie Creek); Lane Poole Reserve

[50]Submission to: *The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia* Submission by DEC

(Charlie's Flat, Chuditch, Stringers, Tony's Bend, Yarragil); Beelu National Park (Perth Hills Centre); and Purnululu National Park (Kurrajong, Walardi). This will alleviate some of the current issues, giving people certainty in their travel plans, and a review of the length of time people are able to book for, could ensure more visitors can access popular spots (albeit for a shorter duration of stay).

There is a cost associated with the maintenance, cleaning and waste disposal at roadside stops, rest areas, authorised and unauthorised camping areas. This cost is normally borne by the ratepayer of the local government area or State Government agencies, including Main Roads. Most caravan park operators consider these costs should be monitored and recovered from overnight campers to avoid unfair competition issues.

Excerpts from the submission by the CMCA to the Economics and Industry Standing Committee Inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia noted:

> *Three or four hours is an optimum travel distance and at a very leisurely pace and with regular breaks.*[51]
>
> *We believe that 50 % or more of the currently Western Australia registered (DPI 2008)41,000 caravans and 95% of the 7,000 motorhomes are fully self-contained.*
>
> *Inter-state visitors approach the upper limit of self-containment.*
>
> *Hire vehicles owned by hirers such as KEA, Apollo etc., at that particular end of the hire market are 100% self-contained.*[52]

While the caravan manufacturing industry statistics do not support the estimated market penetration (above) of self-contained caravans, the number of self-contained recreational vehicles is significant and increasing.

The CMCA's initiative to part-fund local government and Main Roads installation of dump points has been well received. However, sometimes there is a perception that the supply is tied to authorisation of free camping at the locality.

[51]Submission to: *The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia* Submission by: Campervan and Motorhome Club of Australia Limited

[52] Submission to: *The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia* Submission by: Campervan and Motorhome Club of Australia Limited

Some non-self-contained travellers challenge, on the basis of equity, the special treatment of travellers who can afford high-cost, self-contained recreation vehicles and use public open space in place of user paid facilities.

While some users rightfully point out that a large proportion of caravan parks do not cater for large motorhomes and 5th Wheeler trailers, some of the users of these vehicles are not prepared to pay the site tariffs that would encourage parks to allocate land for larger sites.

The users of large self-contained recreational vehicles have also indicated a desire to be allowed to use camping areas in national parks and other undeveloped public areas to experience and enjoy the natural attractions of Western Australia. Regular users of such facilities have questioned the appropriateness of allowing large recreational vehicles (some of similar size to a semi-trailer) into those areas due to potential damage to the environment.

The 4.5 metre height of many 5th-wheelers and large motorhomes may damage overhanging trees and road verges. The turning circle of up to 35 metres for some of these vehicles is unlikely to be accommodated in bush and waterside locations leading to significant damage to vegetation.

There are potential public liability issues for government agencies and local government which knowingly "turn a blind eye" to illegal camping activities that can place the public in dangerous situations. Fire risk, accidents between large transport vehicles and recreational vehicles competing for space in the same rest areas, health and security issues are all potential for litigation in the event that travellers suffer damage or loss.

The explosion of mining and resource development activity in Western Australia has impacted on tourist accommodation, particularly caravan parks. According to the recent snapshot released by Tourism Research Australia "In 2010, 23 per cent of domestic business nights in Australia were by visitors who took an overnight trip to their usual place of work (proxy for FIFO/DIDO workers). This proportion was driven by travel to regional Australia, with 30 per cent of domestic visitor nights in regional Australia by FIFO/DIDO workers – a proportion twice that when compared with nights spent in capital cities(14 per cent)."[53]

Strategically located caravan parks (near mining and resource development projects) are highly desirable for project workers. For many fly in - fly out workers, caravan

[53]Snapshots 2011: The impact of the mining boom on tourism, Tourism Research Australia, Canberra.

parks are the preferred permanent place of residence when off-site. This accommodation arrangement is often much more cost effective than owning or renting a property, which remains vacant for much of the year.

There are a number of “hot spots” or tourist destinations where there are insufficient caravan and camping facilities to meet high seasonal demand. This leads to calls by consumers and tourism organisations in those regions for new caravan parks to be developed.

Many of the concerns raised by users centre over the quality of sites and facilities, as well as the perceived lack of value for money on offer at prime coastal locations. The demand peaks are most pronounced during July and August for tourism regions above the 40^{th} parallel and in December and January in the southern coastal tourism localities.

There is great evidence to suggest that there is in fact insufficient supply of caravan and camping sites in key tourism locations. The high cost of land and competition from higher yielding development options for coastal land has resulted in a reduction in coastal caravan parks. This trend runs counter to consumer demand patterns.

Other caravan and camping tourism jurisdictions Australia are addressing the issue with proposed legislation and policies. Some reports suggest that government establish caravan parks at key locations as a matter of urgency and some contemplate the purchase of existing private caravan parks when they are offer for sale to prevent higher use redevelopment and loss of the caravan park. Another suggestion is the purchase of caravan parks at such high demand locations to allow expansion through the aggregation of adjoining land titles.

CMCA and other consumer groups are united with the caravan park industry on seeking opportunities to spread demand in key locations over a longer season. This is a marketing opportunity for local, regional and state tourism organisations.

The range of opportunities for travellers to enjoy caravan and camping based tourism has expanded with the introduction of new products facilities and services offering considerable choice. In addition to the traditional caravans and tents, new products including off road caravans and camper trailers, purpose built self-contained caravans, campervans, motorhomes, budget and luxury self-contained cabins and safari tents have expanded the market.

Despite the intent of the caravan and camping legislation to create uniformity across the State in terms of minimum facilities and licencing of caravan and camping locations, consumers have established travel accommodation patterns that fall outside current regulations. The use of roadside stops and rest areas, national parks and other public and private property for camping is prevalent and the Caravan Parks and Camping Grounds Regulations are not applied.

Main Roads has been proactive in developing roadside stops and rest areas in regional areas. Its policy precludes the placement of roadside stops and rest areas near to towns to avoid conflict with licenced caravan parks and unnecessary duplication of facilities.

However, the trend for recreational vehicle owners to utilise rest areas for planned camping in preference to using licenced facilities, impacts the availability of space in rest areas for emergencies and fatigued drivers of heavy transport. Main Roads is embarking on a pilot for the development of new and upgraded rest areas in the Pilbara. It is proposed that these rest areas will have ablution facilities, which are likely to attract more free-camping. Faced with a similar issue, the New Zealand government recently introduced regulations to manage ‘freedom camping’ to minimise foreseeable negative impacts.

In contrast to the Eastern States, most Western Australian caravan parks are not managed by professional management groups. There are a small number of caravan park ownership groups including Acclaim Parks and the publicly listed Aspen Group. There are also membership caravan park marketing groups such as Big 4, Top Tourist and Family Parks.

Professional management groups generate revenue from managing caravan parks on behalf of local government and the private sector. They have well developed policies and procedures and professionally focussed operations, which provide a high level of customer service.

The parks operating under ownership groups and caravan park marketing franchises, have established customer service standards as well as operating policies and procedures. However, in the case of the caravan parks operating under the marketing franchise, there is some variation due to the differences in skill levels and attitudes of the private owners.

Many caravan parks in Western Australia are owner-operated by people that operate the business for lifestyle reason or as a retirement “nest egg”. Some, according to the submissions of consumers have limited hospitality experience and training and lack customer service orientation.

Accreditation has helped improve facility standards. It has made a difference and both the Caravan Industry Accreditation (CRVA) and the Australian Tourism Accreditation Program (ATAP) have enlisted a number of caravan parks. However, the accreditation process is more targeted towards the facility rather than establishing skills and qualifications for the individuals that make up the business. The ATAP and CRVA programs do however include customer service standards for caravan parks.

Documentation for accreditation is often written by consultants external to the business or do not involve all staff at the facility. According to the consultation feedback, park owners, managers and staff often do not meet acceptable customer service delivery standards with reservations processes, front desk attitude and cleanliness at some caravan parks being particularly criticised by consumers.

The promotional campaigns by the peak national caravan industry organisation Caravan and Recreational Vehicle Association (CRVA) and the Caravan Industry Association Western Australia (CIAWA) have been effective in stimulating high demand for caravan and camping holidays. Consultation with caravan parks and consumers indicate a perception that the tourism sector is not afforded sufficient priority in state and federal promotional campaigns.

There is common agreement between park operators and consumers that creating increased tourism demand for regional destinations generally helps support the caravan park industry. Some operators cited a recent initiative from Tourism Australia (i.e. the launch of the Australia Safari Trails) that promotes travel through regional areas of Australia and stops in overnight in caravan parks.

Caravan Park Industry Issues at a State and Regional Level

Policy and Regulatory Framework - Issues and Impediments (Tourism Perspective)

Caravan park operators bemoan the lack of action by local government to administer the provisions of the Caravan Parks and Camping Grounds Regulations 1997 by preventing unauthorised camping. However, park operators are not meeting the requirements of the growth market segment for larger self-contained units.

Many caravan park operators (and some consumer groups) consider that the current legislation is overly prescriptive, preventing caravan park operators from meeting market requirements. They point out that the number of ablution facilities required in a licenced caravan park is much greater than that required for nature-based parks and transit parks, which are allowed to accommodate stays of up to three months.

If the provision of ablution facilities is determined on public health criteria, the argument that nature-based parks and transit parks can provide a lesser number of facilities is not consistent with that criteria.

Other requirements in the Caravan Parks and Camping Grounds Regulations 1997 are regarded to be inconsistent with providing flexible service delivery to caravan and camping tourists.

Caravan park operators refer to local government's obligations under the competitive neutrality principles that are set out in the Competition Principles Agreement entered into by the governments of the Commonwealth and each state and territory on 11th April 1995. The objective of the competitive neutrality principle is to ensure that all government bodies involved in significant business activities compete on fair and equal terms with the private sector, where it is in the public benefit to do so.

Early in 2011, the Economic Regulator of Tasmania received complaints from caravan parks in regard to the provision of free or subsidised sites by local government and after investigation, the Regulator determined that the subject Councils were in breach of the National Competition Policy.

Local government policy concerning the use of public areas as overflow camping facilities is inconsistent and a source of much concern for caravan park operators. There is an opportunity for a consistent state-wide overflow policy to be developed that recognises the needs of all stakeholders.

The CIAWA prepared a draft policy for the use of overflow facilities and guidelines, which it distributed to local government for consideration. A similar policy needs to be developed for the use of roadside stops and rest areas for caravan and camping tourists to take into account the needs of tourists, licenced caravan parks and heavy transport operators. There are potential negative issues arising from the acceptance of unauthorised camping by government agencies.

The emergence of farm and station stays and the growth of nature-based camping facilities impacts on licenced caravan parks. The addition of such facilities is highly desirable to improve the visitor experience but there is much debate over their placement in relation to licenced caravan parks. The current regulations have a fifty kilometre exclusion zone from a licenced caravan park for farm and station stay and nature based camping facilities.

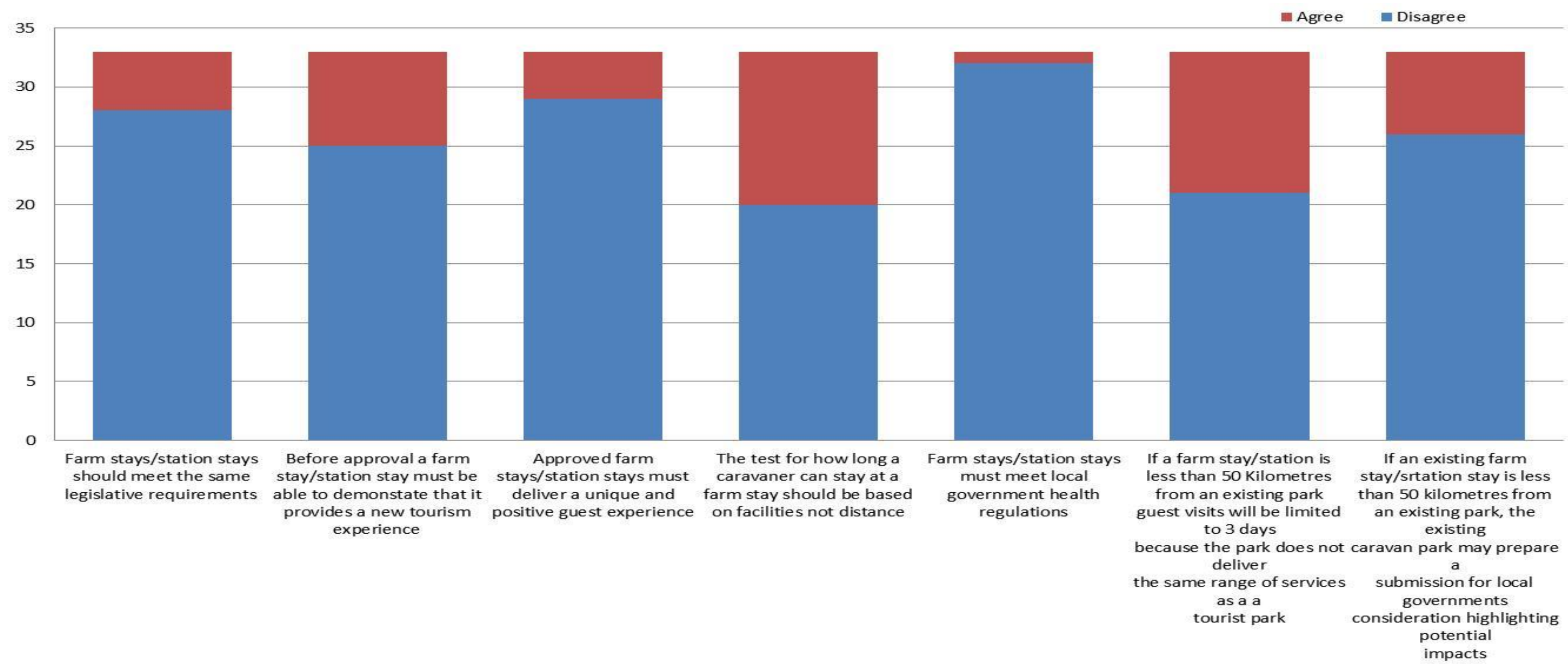
"The recommendation of the Economics and Industry Standing Committee Inquiry into the Provision, Use and Regulation of Caravan Parks that the fifty kilometre exclusion zone from licensed caravan parks for the development of nature-based and transit parks be removed will have major impacts. There are also unfair competition implications".[54]

To date the removal of the exclusion zone has not been implemented.

Surprisingly, there is support from licensed caravan park operators for the introduction of farm and station camping facilities and nature-based parks. In a recent survey of members of the CIAWA more than 80 percent of members agreed with the concept of developing more farm and station and nature-based Campgrounds, provided that the same facility requirements as for caravan parks (for ablutions etc.) were applied to such developments.

Caravan park operators also acknowledged in the survey that the spread of more farm and station and nature-based Campgrounds would provide growth for the industry and add to sustainability of the tourism sector. The chart below indicates responses from the survey.

A number of recommendations in the Economics and Industry Standing Committee Second Report - Provision, Use and Regulation of Caravan Parks (and Campgrounds)in Western Australia relate to the introduction of caravan and camping experiences as part of them of farm stays/station stays. Do you Agree or Disagree with the following statements?



[54] Ca

Many caravan parks have transitioned long-stay and tourist sites into park home sites in order to maintain consistent cash flows. Highly seasonal caravan park locations seek to have higher proportions of permanent residents to tourists to provide year round income.

Operating costs for caravan parks have increased significantly though higher utility charges, local government rates, transport costs and wages. Caravan parks are unable to increase tariffs to maintain profitability due to market resistance and the free camping alternative. Many park operators believe that unless camping outside of licenced caravan parks is restricted, the sustainability of many caravan parks may come into question.

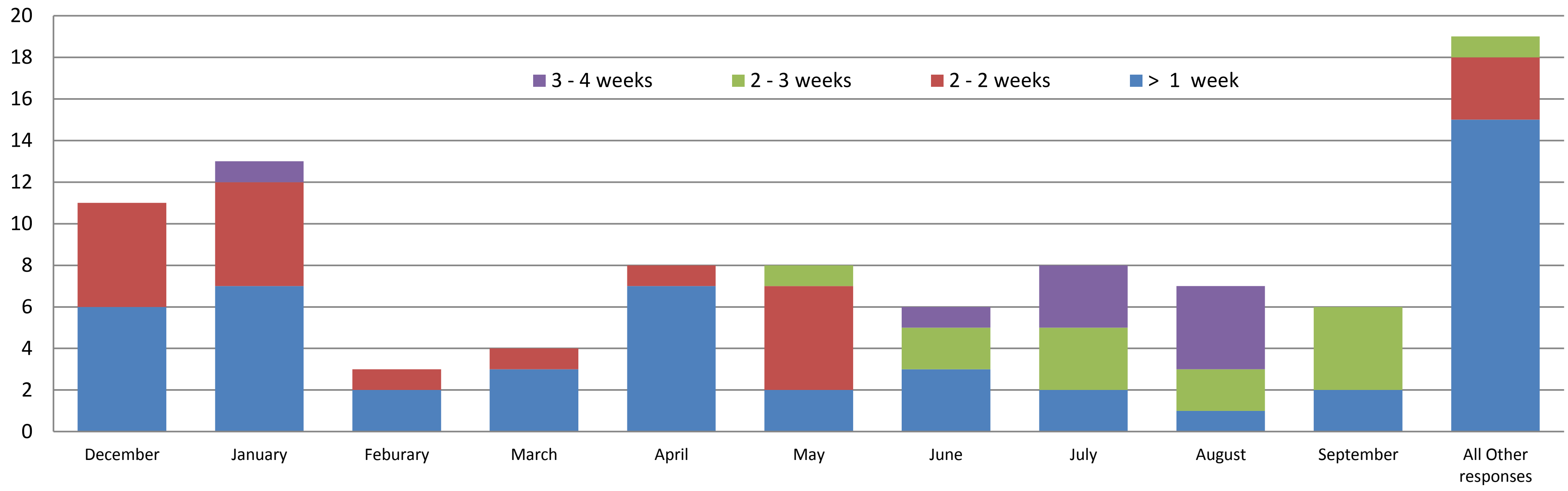
One of the major issues for caravan park operators in recent years has been land tax. The removal of the tax in from 1 July 2010 has improved the viability of many caravan parks.

In welcoming the announcement, in July 2010, that land tax was to be abolished for caravan parks, CIAWA's then Chief Executive Officer, Pat Strahan stated that there had been 22 caravan park closures in the preceding fifteen years.

The following chart is from a survey of members of CIAWA and describes the undersupply of caravan sites during seasonal peak demand.

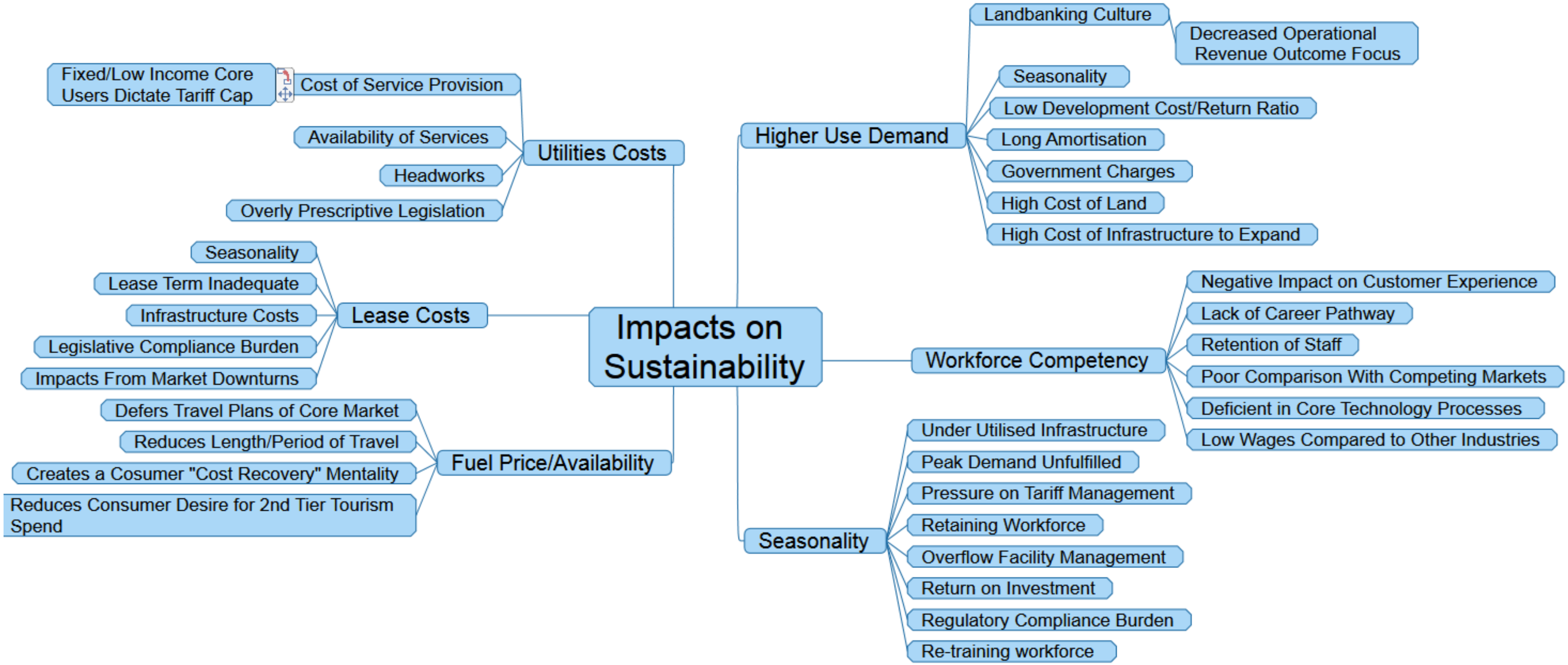
Analysis of monthly occupancy in many locations indicates that for significant parts of the year, site occupancy is below sustainable levels. Adding new facilities in that situation may be counter-productive and lead to caravan parks increasing the number of permanent occupants or even closure of parks in the longer term.

What times of the year do you have under supply of sites and for how many weeks? i.e 100% occupancy and you are turning guests away



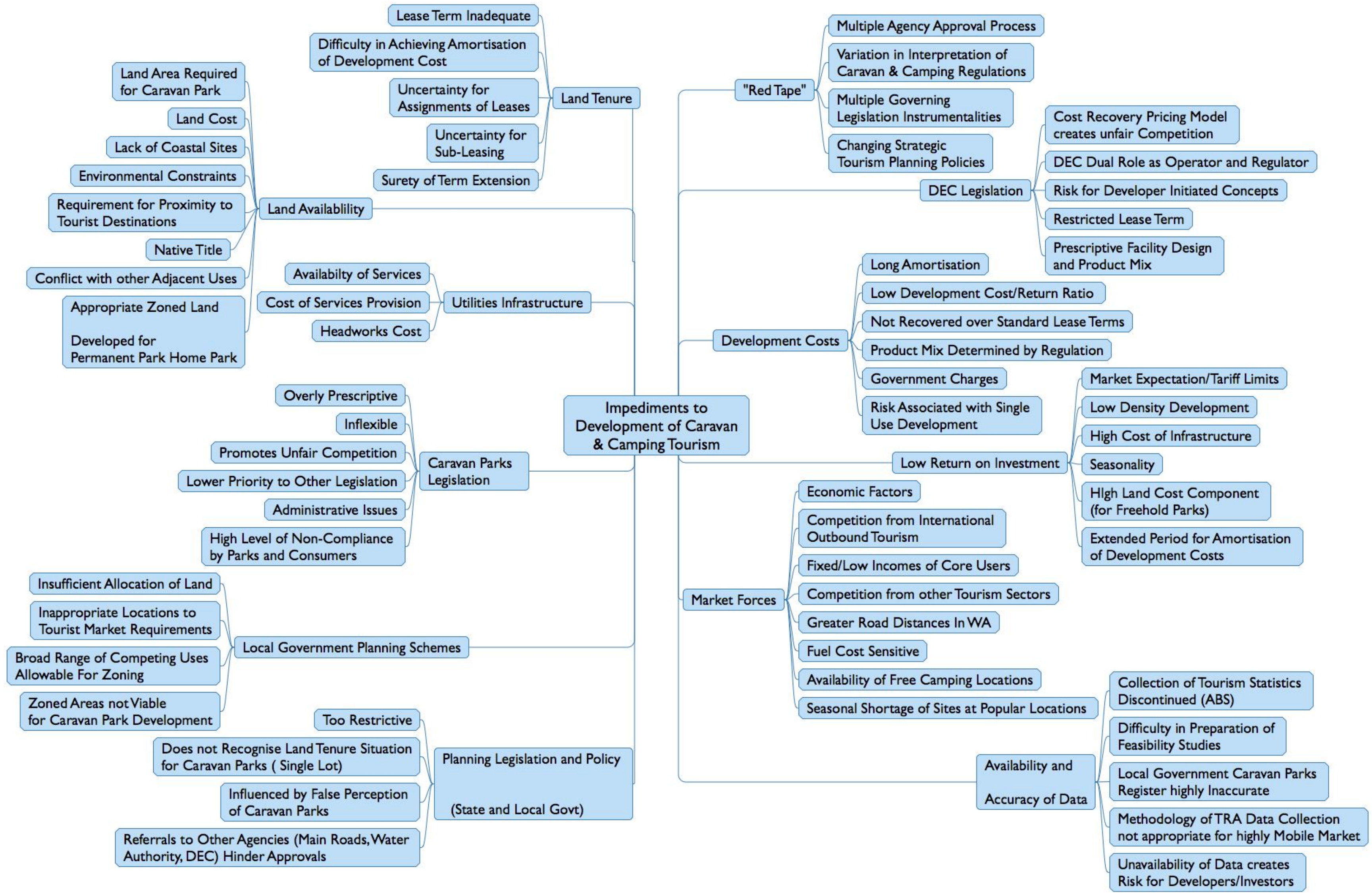
Impacts on Sustainability

The sustainability of caravan parks is influenced by a range of factors including overhead costs, demand, seasonality and staffing. The top level factors impacting on sustainability are identified in the following diagram.



Planning Controls and Restrictions Which Hinder Development and/or Retention of Caravan Parks

There are a range of issues, which impede on the development of caravan and camping infrastructure, these are identified in the following diagram.



Regulatory and Other Issues

A number of complex regulatory issues concern the development (or lack of development) of tourist caravan and camping facilities. They include restrictive planning policy, which prevents development of facilities at locations where developers are prepared to build caravan and camping facilities, and the approvals process (“red tape”) where multiple agencies are referred, causing untenable delays and adding to cost.

The Government of Western Australia has overarching state planning legislation, which is administered by local government. The Productivity Commission’s recent study into Planning, Zoning and Development Assessment highlighted a number of differences in state based legislation along with the variances in local government processes for dealing with planning and zoning. It also looked at the possibility of benchmarking performances across all local governments.

The Productivity Commission identified that “the regulations and agencies involved in planning, zoning and development assessments constitute one of the most complex regulatory regimes operating in Australia.”[55]

The State Planning Act generally dictates planning requirements as well as the planning policies and processes to be followed by local government to process applications.

So while State government legislation sets the broad framework for planning and decision-making, local governments carry out the day to day decision making in planning.

Local Government has some ability to tailor local planning schemes to meet specific local conditions through the implementation of local zoning controls. State planning policy guides planning schemes and must be taken into consideration by planning officers when making decisions.

The priority afforded to various pieces of legislation and policy stands in the way of investors and developers being able to rely on the specific caravan and camping legislation. There are conflicts between the Caravan Parks and Camping Grounds Act 1995 and planning, conservation and building legislation.

Many local government local planning schemes provide barriers to the development of caravan parks and are a disincentive to the development of caravan and camping facilities through zoning and other provisions.

A strong message from the consultation is that the approvals process needs to be simplified, preferably under specific caravan and camping development panels, which would have sufficient powers to call state government agencies to account and overcome the delay and cost of the current approvals system.

Approvals processes are also stifling further development of existing facilities. According to Aspen Group, which is stated to be the largest caravan park owner/operator in Australia, the barriers to new park development and redevelopment of their properties in Western Australia over as long as fifteen years has caused them to shift their development focus to the eastern states.

Aspen cites major issues concerning planning approvals, legislation and policy and also inaction by government agencies as the reason that they have resolved to defer development of caravan parks in Western Australia and concentrate on developments in the eastern states.

The lack of available and suitable, low cost land for caravan parks results in land speculation. Developers now often consider the prospect of land banking in the feasibility analysis of caravan park developments on approved land. The issues associated with investors developing caravan parks based on potential future conversion to higher use are:

- The operational priority is not focussed on service delivery and;
- The caravan park will be eventually lost to alternative use.

Availability of low cost, well located land is the key issue for caravan park development. The return on investment for caravan parks is diminished if suitable land is quarantined from caravan park development through planning policy.

Often caravan parks are a permitted use only in tourist zones, which means that caravan park developers compete with higher use developers for the same scarce land. Rural, residential and industrial or commercial land is often not available to caravan park developers despite its acceptability and suitability to the market.

[55] CIAWA - Caravan Parks Proprietors Survey, 2011 - Unpublished

Farm and Stations present an opportunity for development of small scale caravan and camping facilities. However, The Land Administration Act 1997 (LAA) stipulates that a pastoral lessee may not use a pastoral lease for other purposes, unless, in accordance with a permit that has been granted for the particular purpose.

The Pastoral Lands Board may issue Diversification Permits for pastoralists to carry out other activities, provided those activities are supplementary to the pastoral activities on the lease. The terms of the Diversification Permits restrict the pastoral lessee to charging a fee only to cover costs of providing the service.

Section 79 of the LAA provides for the excision of an area of land from the pastoral lease and the issue of a lease on that land to a tourist operator. Normally, this would occur through a competitive tender process, which is a disincentive to a tourism developer who has provided the concept.

Farms and pastoral leases present an excellent opportunity to improve the caravan and camping infrastructure diversity and user experience and consideration should be given to removing regulatory impediments.

Another area of high potential to increase the caravan and camping site inventory in the State is through the co-location of facilities. Potential co-locations are racetracks, farms and stations, wineries, worker's accommodation camps, roadhouses, Indigenous communities and community facilities (see section on Co-Location of Facilities on page 35).

There appears to be little political will to quarantine in perpetuity, the private land on which existing and future caravan park developments are (will be) situated for use as caravan parks and campgrounds exclusively. Therefore, only caravan parks located on Crown Land may have the use protected. Even then there are examples of such land being converted to freehold and eventually sold for alternative use.

Trends - Market, Industry and External

Major changes to the market have occurred over the last decade as caravan parks seek to expand their markets toward high yield tourists. High quality cabin accommodation in caravan parks competes favourably with other bedded accommodation.

New products such as luxury self-contained safari tents have spawned the term "glamping" (luxury camping) and improved facilities, including en-suites on caravan sites, resort-style swimming pools, camp kitchens, Wi-Fi connection and leisure amenities add to visitor experiences.

Increasing numbers of caravan parks are embracing the digital online revolution and have websites, social media presence and online booking systems. There are even mobile apps that allow consumers to find caravan park locations.

Due to the significant gap between the stated needs of traditional recreational caravan and camping consumers and the product that industry has on offer, consumers are willing to illegally camp at unauthorised camping areas. This impacts on the viability of tourist site sections of licensed caravan parks.

Caravan and camping consumer organisations argue strongly for the presence of more low cost or no cost camping options, as well as increased provision and maintenance of supporting facilities and amenities such as dump points. This has nurtured a plethora of print directories and online listings and forums promoting freedom camping. In their submission to The Economics and Industry Standing Committee Inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia, the CMCA noted that:

> *"The needs and preferred experiences of the RV self-contained segment are evolving in a different direction to the character and services offered by caravan parks. The number of mobile travellers is increasing, and recreational vehicle manufacturers, through improvements in technology, are producing a wider range of more self-contained vehicles.*
>
> *Travellers are looking for some or all of the following attributes:*
>
> - *A range of camping options - including budget options.*
> - *Access to shopping and dining with easy access for their new technology vehicles.*
> - *Minimal on-site services - maximum access opportunities.*
> - *Australiana experiences, especially overseas visitors in RVs.*
> - *Eco locations and informal environs for bush camping.*
> - *The company of like minded and similarly outfitted neighbours.*
> - *Access to potable water supplies, and waste disposal points*

- *Pet friendly locations.*[56]

Many caravan parks cannot accommodate large RV 'rigs'. Overhanging trees, restricted turning circles and narrow roadways, make it impossible to manoeuvre large vehicles 'on site'. Many of these vehicles can be the same length as a flat bed semi trailer, and are up to 19.5 meters in length.

They require a turning circle up to 35 meters, and a height clearance of 4.5 meters. During peak holiday periods, caravan parks are often fully booked, and under the current legislation, this leaves mobile travellers with no alternative but to travel at least a further 50 kms to a rest area, if there is one, and in many cases there isn't. Fatigue therefore becomes a very important road safety issue in such instances".[57]

Industry and operators communicate concern with the unfair competition from Government operated parks capping their rates at unsustainable levels, creating a situation where they are not able to invest adequately in improvements and maintenance. Without investment in new and upgraded facilities, caravan parks become less attractive over time to consumers.

Main Roads rest areas, which are provided primarily for road safety are being used as substitute caravan parks, with planned overnight stops commonplace at these 'free' camping areas. Heavy transport drivers may be unable to access rest areas due to high number of caravans and RVs using rest areas as a planned overnight stop.

There has been a rapid increase in the proportion of self-contained recreation vehicles manufactured in the last three years (see graph), albeit from a low base. This trend will ensure that there is a strong call for appropriate caravan and camping sites and access to alternatives to caravan parks.

RV travellers are seeking experiential drive tours with a mix of low and medium service camp sites where costs reflect the level of services required. Consequently this market is best serviced through a network of commercial caravan parks, private property arrangements, and sites in public areas including rest areas, showgrounds and National Parks.[58]

The 'Understanding the Caravan Park Industry in Western Australia' report (2007) found that "*location was a key factor in the selection of the caravan park, in particular the caravan park's proximity to attractions such as beaches, the town and local attractions.*"[59]

It also noted that: "*Caravanners are known to choose one park over another with considerable extra distance to travel for the sake of saving one dollar in site fees. Cost is of particular importance to users such as pensioners who are on fixed incomes and often frequent caravan parks".*

The report found that the main reasons for off-road camping included:

- ***Necessity*** *– the sheer distances means that driver fatigue necessitates a rest stop. Also driving after dusk is often dangerous so users would also stop overnight for safety reasons. It was also noted that once one caravan had stopped, others were also encouraged to stop due to belief that there was "safety in numbers"*

- ***Preference*** *– some users prefer stopping off-road compared to staying in caravan parks and rarely use a caravan park even if one is available. These users are primarily motivated by a combination of several factors including a desire to 'get away from it all', fishing, picturesque scenery and the common self interest of the group. These users typically possess fully self-contained caravans and only stay at caravan parks to 'catch up with the washing'.*

- ***No choice*** *– although these users would ideally prefer to utilise caravan parks, many simply cannot afford to do so on a regular basis, and off-road camping is the most cost effective means. Also within this group are those who are unable to find supervised accommodation because none is available (Tourism WA, 1982).*

[56] Submission to: *The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia* Submission by: Campervan and Motorhome Club of Australia Limited

[57] Submission to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: Campervan and Motorhome Club of Australia Limited

[58] Submission to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Submission by: Campervan and Motorhome Club of Australia Limited

[59] Tourism WA and Tourism Research Australia (2007). Understanding The Caravan Park Industry In Western Australia, Tourism WA, Perth.

They noted that *"Industry groups argue that free-camping is undesirable as it creates difficulties for local governments who are obliged to enforce the provisions of the Caravan Parks and Camping Grounds Regulations 1997and issue a $100 infringement. Also free-camping has environmental consequences that are often left to the local community and local government to manage (CIA, 2005).*

There are a number of factors detailed below, which will impact on the trends in terms of usage of caravan and camper facilities.

- **Oil and Gas** as well as the proliferation of other mining interests will have a significant impact on the region. At the Economics and Industry Standing Committee Inquiry Into The Provision, Use and Regulation of Caravan Parks (and Campgrounds) in Western Australia Mr Peter Sharp Director, Parks and Visitor Services, Department of Environment and Conservation said in his evidence (July 2009):

> *"There is no doubt that the Kimberley will be a hot spot for the next 50 years. The growth of the oil and gas industry will put some interesting pressures on Broome and areas around there. But I think it will deliver a substantial increase in short-term recreational visits in the immediate vicinity of wherever people are residing. That is our experience in Karijini, I might say, with Rio Tinto's operations there: people go into the park when they have a couple of days off during their time there and cause us some angst and problems. But we are putting in place some arrangements. That will certainly be a pressure we face in the West Kimberley. The Ord final agreement and expansion is happening around Kununurra and we have arrangements in there. Six new conservation parks have been created there and we are working very well with the Kimberley Development Commission and the Miriuwung Gajerrong people, who have the native title agreement there. We see that a strategic approach in hot spots such as Ningaloo and the Kimberley will put us in a good position to make decisions about where we invest in terms of caravan parks".* [60]

  The key impacts of the increased mining activity could include:

  - **Increased strain on existing capacity** with workers looking to stay in caravan parks near resource project locations. Tourism Research Australia noted that "while some segments of the industry are driving this benefit (such as those travelling for business and employment), other segments (such as leisure tourism), are being crowded out due to significant price increases."[61]
  - **Influx of 'workers'** negatively impacting on 'holiday' experience or feel of regional Western Australia.
  - **Heavy machinery and works** negatively impacting on the pristine nature regional Western Australia.
  - **Increased staffing shortages and 'mining economy'** where higher wages and rents are paid by mining companies, causing inflation across regional Western Australia.
  - **Increased pollution** detracting from the tourism appeal of locations where mining is increasing in prevalence.

- **Ageing population** will result in a larger representation of retirees in the traveller mix, and a larger number of travellers overall as the more affluent baby boomers set off on extended travels.

- **Reduction in supply** as other sites redevelop for higher yield, this will result in increased demand for caravan and camping sites where they are still available.

- **Increased environmental consciousness** and maturity of the visitor market - will continue the trend towards more nature based experiences.

- **Aboriginal economic development** and the phasing out of the Commonwealth Development Employment Program (CDEP) may result in increased interest in economic development tourism aspirations will open up access to new areas and provide improved access to and management of remote facilities and amenities. It may also result in increases in the prevalence of micro campgrounds and bush camping sites with opportunities to stay out in remote communities and outstations without an overly commercialised focus. This may add to the appeal of Western Australia as a destination and result in increased visitation.

- **Changing needs and consumer demands** as a result of new designs in mobile accommodation with self-sufficient caravans, motor homes, camper trailers and

[60] Submission to: The Economics and Industry Standing Committee inquiry into the Provision, Use and Regulation of Caravan Parks (and campgrounds) in Western Australia Submission by: Mr Peter Sharp, Director, Dept of Environment and Conservation.

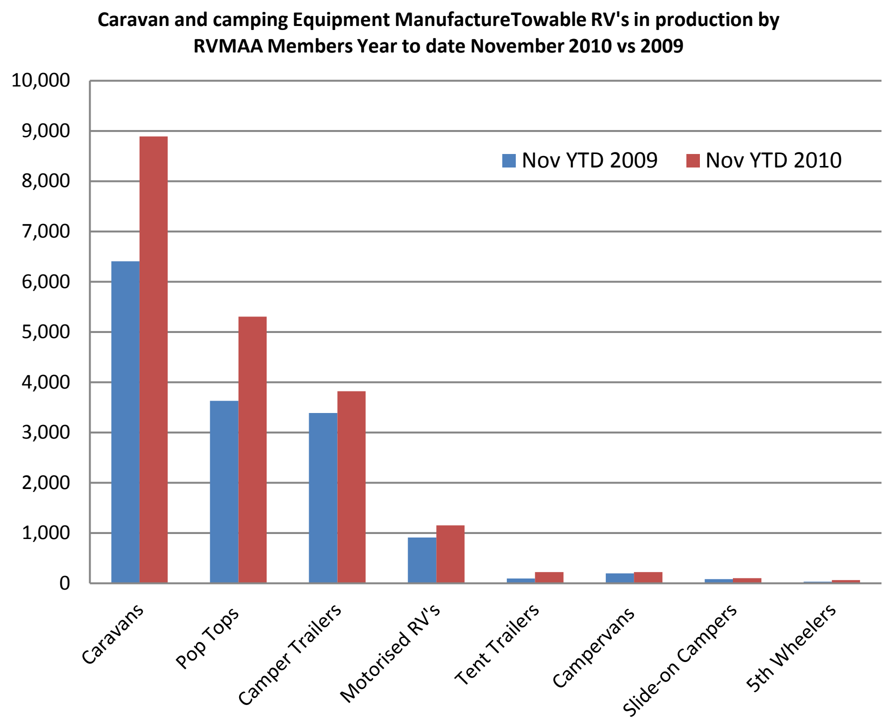
[61] Snapshots 2011: The impact of the mining boom on tourism, Tourism Research Australia, Canberra

RV's with their own power supply (solar), holding tanks for water, portable toilets, on board showers etc. resulting in less demand for conventional caravan parks and ablution facilities. This will increase demand for chemical dump points, larger sites and ability to restock perishables for longer duration stays in what were previously predominantly short stay destinations.

- **New opportunities resulting from changes in regulations** - changing regulations through opening up greater access to Nature Based Park Licences will increase the commercial opportunities in places previously not viable, thereby providing a greater range of appealing facilities. This may also increase visitation and preference for overland travel as it becomes more accessible and competition continues to improve services.

- **Growing rarity in wilderness spots elsewhere** will increase focus on the regional Western Australia as an untouched, pristine nature based destination.

- **Fluctuations in the cost of fuel, seasonality, economic cycles and global stability** will continue to see short to medium term ebbs and flows.

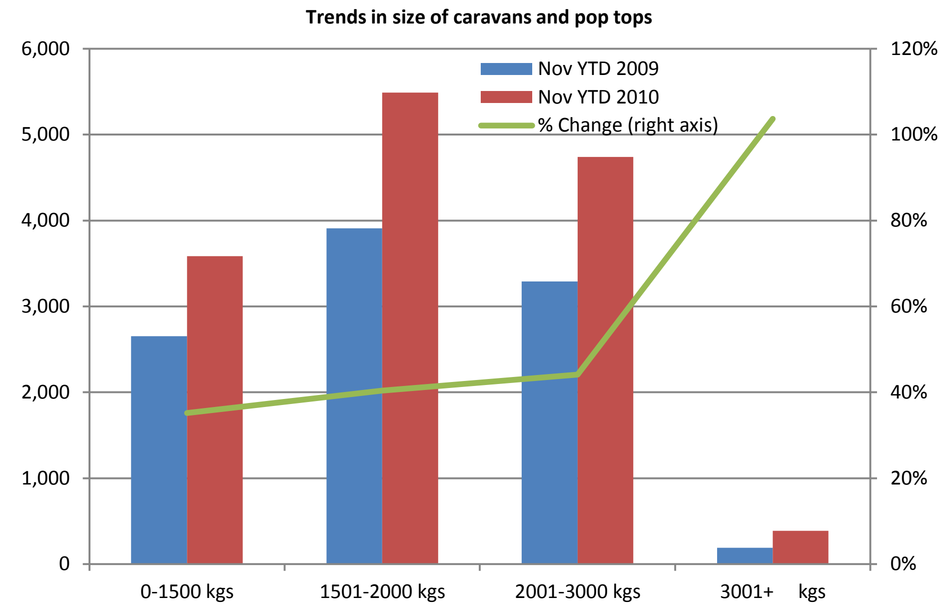


Trends in Caravan and Camping Equipment

According to the Recreational Vehicle Manufacturers Association of Australia, for the year to date to November 2010 there were 18,423 Towable RV's in production by RVMAA Members as compared to 13,637 in November 2009 year to date. Motorised RV's went from 1,111 to 1,380 in the same period.[62]

The majority of caravans and pop tops (making up 70 percent of production in the year to date), date),November 2010) are still in the 2,000 kilograms and less weight range, which for the most part do not include toilet and shower facilities.

However, the highest growth is in the heavier weight ranges, with growth of over 100 percent in the 3,001 plus kilogram weight range, and growth of 44 percent in the 2,001 - 3,000 kilogram range. This would indicate a trend towards larger self-contained units, negating the reliance on traditional style caravan parks for these larger recreational vehicles. This is demonstrated in the charts below.[63]



[62]Recreational Vehicle Manufacturers Association of Australia - Unpublished data
[63]Recreational Vehicle Manufacturers Association of Australia - Unpublished data

Traffic Movement Trends - Road Networks

Proposed or underway

Road Change[64]	Expected impact on caravan and camping sector
Constructing a 19 km fully sealed, all weather access road to the proposed LNG Precinct at James Price Point. This will involve sealing an additional 12.3 km of Broome-Cape Leveque Road to the proposed turnoff. This section is currently unsealed and subject to seasonal flooding. This will compliment Main Roads proposed future plans to upgrade and seal the remaining unsealed 90 km of the road to the Beagle Bay Turnoff.	This is expected to have significant impacts on caravan and camping demand on the Dampier Peninsula - allowing 2WD caravans and campers to travel to the extremely popular stunning remote beaches north of Broome.
Bunbury Port Access Stage 2	No significant impact on visitation expected
Bussell Highway - Vasse to Margaret River	Improvements and safety enhancements - minor increased visitation expected
Busselton Outer Bypass (BOB) Planning Study - Planning for a BOB will cater for the expected future traffic volumes, and the existing bypass will operate as a district distributor road for local traffic.	Improvements and safety enhancements - minor increased visitation expected
Coalfields Highway	No significant impact expected
Dampier Highway Duplication	No significant impact expected
Eelup Roundabout Bunbury	No significant impact expected
Esperance Port Access Corridor	No significant impact expected
Geraldton North South Highway - Alignment Study	No significant impact expected
Great Northern Highway - Fitzroy Crossing to Gogo Station	No significant impact expected
Great Northern Hwy Realignment - Port Hedland	No significant impact expected
Fitzgerald River National Park Improvement (previously Hamersley Drive - Hopetoun to Hamersley Inlet) - to enhance tourist access and facilities in the park. The State and Commonwealth Governments have both committed $20m to the project to deliver these outcomes: • Sealing 16 km -Culham Inlet to Hamersley Inlet; • Improving road access and facilities of existing roads and car parks • Redeveloping associated spur roads, car-parks, day use areas and camping facilities; • Enhancing signage and interpretive information; • Developing a coastal walk trail linking Hamersley Inlet to Point Ann	Significant improvement to access - additional capacity planned
Kununurra Heavy Vehicle Route Stage 1	Improvements and safety enhancements - improvements to visitor confidence in driving route may impact on visitation

Road Change[64]	Expected impact on caravan and camping sector
Perth Darwin National Highway - Undertaking a planning study to define the alignment for the future Perth-Darwin National Highway (PDNH) between Bullsbrook and Bindoon. The national highway currently follows the Great Northern Highway (GNH) alignment. The study addresses the long term needs for the highway with a 20 to 30 year planning horizon, and is divided into two sections: • the northern section between Brand Highway, Muchea and Calingiri Road, north of Bindoon • the southern section between Maralla Road Bullsbrook and Brand Highway, Muchea.	Improvements and safety enhancements - significant impact on visitation expected in the long term (20 - 30 years)
South Western Highway Upgrade	Improvements and safety enhancements - no significant impact on visitation expected

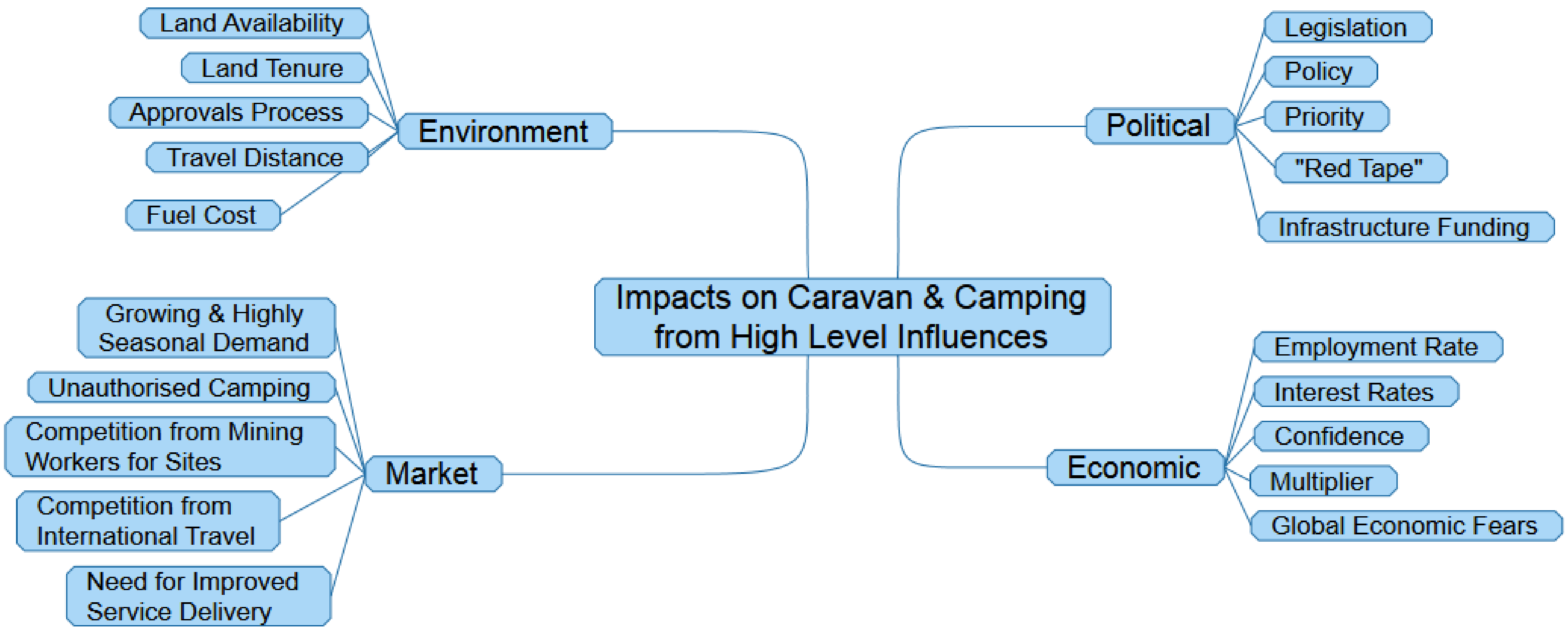
Completed

Road Change	Expected impact on caravan and camping sector
Indian Ocean Dr Stage 2. Just north of Lancelin to Cervantes opened 19 September 2010	Significant touring route - additional capacity likely required
Great Northern Hwy- Muchea to Wubin Completed July 2010	No significant impact expected
Great Eastern Hwy - Kellerberrin Townsite upgrade opened 25 June 2010	No significant impact expected
Collie River Bridge opened 15 April 2010	No significant impact expected
Bunbury Port Access Rd Stage 1 opened 5 February 2010	No significant impact expected
Great Northern Hwy Kimberley bridges upgrades (Bow River Section. Telegraph Creek Bridge. Mabel Creek Bridge. Fletchers Creek Bridge) opened 9 December 2009	Improved quality of road - though no significant impact on visitation expected
Geraldton Southern Transport Corridor Stage 2 opened 6 December 2009	Improved quality of road - though no significant impact on visitation expected
Forrest Hwy (Part of New Perth Bunbury Hwy Project) From Pinjarra Rd to Old Coast Rd Opened 20 September 2009	Significant touring route - additional capacity likely required

[64]Information summarised from Main Roads Western Australia Website and Traffic Digest (downloaded Nov 2011)

Impacts from High Level Influences

There are current and potential impacts on the caravan and camping sector from high-level influences. The influences are generally beyond the control of industry and consumers and have the potential to inhibit growth, impact negatively on the user experience and affect the sustainability of the tourism sector.



Political

Government across all levels sets the policies and regulatory environment that ultimately controls the destiny of caravan and camping in Western Australia. The overarching mechanism that controls what can be provided to tourists, at what locations and to some extent when is dictated by legislation and policies.

Industry and consumers are agreed that the current caravan and camping legislation does not allow sufficient market freedom. Industry points to over-prescriptive and anti-competitive regulatory standards. Licensed caravan parks are required to have high ratios for ablution and other amenities to occupiers, where nature based and transit facilities do not. Government appears to be turning a blind eye to breaches of regulations, thereby impacting on the viability of licensed caravan parks.

In the past the caravan and camping sector has been regarded as a low yield, low priority, tourism sector despite its high value in the provision of tourist accommodation facilitation and importance to regional tourism delivery.

The impacts of government policy and actions on the sustainability of caravan and camping tourism have not been fully recognised. Rising costs and market pressures on revenues due to an artificial ceiling on tariffs though consumer expectations and availability of free or low cost alternative camping areas have had a negative effect on the industry.

Many developers report that the approvals process for new caravan park developments and redevelopment of existing properties is too convoluted and leads to unacceptable cost and delay. Developers have indicated that the approvals process will cause them to deploy resources to development of parks in other states as an alternative to Western Australia.

The availability of infrastructure services to potential new sites for caravan park development is another issue that needs to be addressed. Government has a role in providing appropriately zoned land with services in order to attract investors and developers. The lack of suitable land and cost of utility services infrastructure is offered as the reason that very few new caravan park developments have occurred in Western Australia over the last two decades.

Economic

Market confidence is a major influence in the growth of caravan and camping tourism. While the industry offers many products that do not require any capital investment by the consumer (cabin accommodation, tents), a large proportion of the market makes a major commitment and capital decision to purchase a caravan, campervan, motorhome or 5th Wheeler. In the case of towed recreational vehicles there is an additional cost in upgrading transport to an appropriate tow vehicle.

The decision to purchase a recreation vehicle is often a lifetime commitment to the tourism segment. Global economic fears have created issues for many consumers, particularly those approaching retirement and self-funded retirees.

For the family market, unemployment is a potential issue. In Western Australia the mining and resources boom has provided a huge economic windfall of high employment. However, the economic benefit from mining has not flowed to other parts of the economy. Workers with young families are being made redundant and mining employment may not be an option due to family circumstances.

Interest rates have an effect on discretionary spending. The high cost of entry for the high level caravan and camping consumer means that the market is negatively affected by rising interest rates.

Were there to be any significant reduction in caravan and camping tourism the effect on regional economies would be devastating. The multiplier effect from this market is an important contributor to regional economies.

Market

The market is currently impacted by the growing demand for the product and availability issues in peak season. Unauthorised camping may affect the sustainability of licensed caravan parks if not well managed.

There is competition for market share from international travel due to the strength of the Australian currency. Competition for tourist sites has increased through mining and resource workers and permanent residents.

Consumers point to the need for improved service delivery for the caravan and camping tourism sector.

General Environment

Factors impacting on development are detailed above under the various headings. The main impediments are availability of appropriately zoned land at locations that are acceptable to the market and viable for developers and investors. “Red tape”, particularly in the approvals process is another barrier to increasing caravan site inventory.

Consumer issues are the long travel distances in Western Australia compared to Eastern States, availability of caravan and camping sites during peak seasons and rising fuel costs.

NATIONAL CONTEXT - BEST PRACTICE APPROACHES

Best practice approach to regulatory and legislative frameworks to support the retention and establishment of caravan parks

A review of the approaches to caravan and camping based tourism across all other Australian jurisdictions yields no stand-out best practice approaches in the regulatory framework for the retention of existing and establishment of new caravan parks and campgrounds.

There is a significant amount of variation nationally in the specific nature and relevance of regulations for the caravan and camping sector. These regulations have significant impacts on the retention and establishment of caravan parks due largely to the development cost burden resulting from the regulatory requirements.

Queensland and Victoria have implemented policies to support the retention and establishment of caravan parks. These are centred on restrictions on the use of State owned land for caravan parks and camping grounds. These policies are consistent with Recommendations of this strategic report:
2. Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable; and
6. The WA Planning Commission to Provide Better Guidelines for the Development of Caravan Parks to Development Assessment Panels and Local Government

Western Australia has the potential to lead the nation in the development of a regulatory framework that leads to the supply demand equation for caravan and camping infrastructure being better managed and a substantial improvement in road based travellers' perceptions of the state's tourism offering.

As in Western Australia, each State and Territory has a variety of regulations and policies that impact on caravan parks and campgrounds, though no single overarching management approach to the sector.

An overview of the current situation is presented below.

Queensland

Queensland's Department of Environment and Resource Management supports the government commitment to restrict the loss of caravan parks. Their Policy document Caravan Park Policy PUX/901/102 Version 3 provides "guidelines to ensure appropriate action is taken to restrict the loss of caravan parks and the subsequent reduction in economy accommodation stock. This will be achieved by preserving caravan parks and campgrounds sited on State-owned land and identifying unallocated State land suitable for development as caravan parks."[65]

The policy provides for the following:

- "Leases and reserves issued for caravan park or camping purposes should be retained for such purposes. If it is found that an even greater community benefit is potentially available from an alternative use, or if retention of the land for caravan park or camping purposes becomes contentious the matter is to be escalated to the Director General.
- As the State has little control over the use of land once it passes from State ownership, when assessing an application for conversion to freehold of a term or perpetual lease that is leased for caravan park purposes, the department will ensure that any offer of conversion will be conditioned requiring the lessee to enter into a covenant restricting the use of the land for caravan park purposes.
- A Reserve for Recreation may be used for camping with the provision of limited facilities. The length of stay is to be restricted to no more than three nights. Local governments wishing to utilise Reserves for Recreation for camping will need to adopt a local law to authorise the activity."[66]

Legislation
Queensland has no specific caravan park legislation. Each local government area in Queensland is responsible for its own legislation of caravan parks.

Victoria

Victoria has a well-defined policy which relates to operation of 84 caravan and camping parks on public land along the coast, and supports the retention of these facilities. The Victorian Government Department of Sustainability and Environment released the *Caravan and camping Parks on Coastal Crown Land Reference Group Report (2006),* which states "The Victorian Government is committed to planning for

[65]http://www.derm.qld.gov.au/about/policy/documents/3850/slm_2007_3127.pdf
[66]http://www.derm.qld.gov.au/about/policy/documents/3850/slm_2007_3127.pdf

the future of the coast and ensuring safe and affordable coastal holidays continue to be a part of the Victorian tourism experience."[67]

The State Government of Victoria has issued in the interim a policy document *Improving Equity of Access to Crown Land Caravan and Camping Parks.*[68] This policy applies to caravan and camping parks on Crown land in Victoria. It has been developed to improve equity of access to Crown land caravan and camping parks in Victoria, enabling affordable holidays for all Victorians.

The policy implemented midway through 2011 has the following objectives:

1. To enable parks to better respond to increasing demand for sites and facilities, particularly during peak holiday periods.
2. To ensure affordable and equitable access to Crown land caravan and camping parks

It is stipulated that their Crown land caravan parks must not be managed for:

- Exclusive long term occupancy
- Permanent residency
- Individual profiteering
- Poor environmental outcomes

Legislation

Victoria has specific caravan park legislation covered in:

- Residential Tenancies Act1997
- Residential Tenancies (Caravan Parks and Movable Dwellings Registration and Standards) Regulations 2010

Other state regulations that incorporate Caravan Park Regulations

- Building Act 1993 (Plumbing Regulations 2008) - Applies to plumbing works carried out in a caravan park, This includes but is not limited to drainage work, fire protection work, gas fitting work, roofing (stormwater) work, sanitary work and water supply work. Applies to adjacent structure standards.
- CFA Caravan Park Fire Safety Guideline (the CFA Guideline) - An obligation on a caravan park owner to provide and maintain fire fighting equipment for a caravan park. This places a significant cost burden on caravan park operators.
- BCA Volume 1 & 2 - For the technical standard for the construction of an unregistered moveable dwelling. Requirements for smoke alarms for all moveable dwellings

Best Practice Ownership and Maintenance Models For Caravan/Camping Infrastructure

In line with the policies to support the retention and development of caravan parks, Queensland and Victoria offer good models for ownership and maintenance of caravan and camping infrastructure.

These are in line with Recommendation 2 of this strategic report: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable.

Queensland

Sunshine Coast Council's "Sunshine Coast Holiday Parks" business unit market and operate nine holiday parks on State owned land. They have a professional business and marketing plan which covers all nine of the Sunshine Coast Holiday Parks. Management agreements are put out for tender with weightings on track record, experience, availability, past experience of campground manager(s), responses from referees contacted, Resume(s) of Manager(s) and response to questions raised in candidate selection criteria, as well as health, safety, environmental management and other criteria.

Victoria

The State Government of Victoria has reviewed their policy document "Best Practice Management Guidelines for Committees of Management Managing Caravan and Camping Parks on Crown Land". It has issued in the interim a policy document *Improving Equity of Access to Crown Land Caravan and Camping Parks* which includes provisions to ensure parks are managed as desired, and recommends making specifications in the lease agreement before a lease begins.

[67] caravan *and camping Parks on Coastal Crown Land Reference Group Report (2006)*, Victorian Government Department of Sustainability and Environment
[68] http://www.dse.vic.gov.au/__data/assets/pdf_file/0012/119100/Revised-Policy-13072011.pdf

It states that "the best way of doing this is to make sure a current and comprehensive park management plan and/or business plan is developed in consultation with [Department of Sustainability and Environment] DSE before a lease begins. The Best Practice Management Guidelines include a park management plan template to provide Committees of Management and park managers with a framework to address a wide range of issues. All park management plans should be prepared in consultation with stakeholders and must be endorsed by DSE before their implementation.[69]

Best practice initiatives to manage unauthorised camping and seasonal variations in demand;

There is currently a great deal of debate and discussion on the best way to provide for seasonal variations in demand, unauthorised and unlicensed camping across Australia. Both Queensland and Tasmania have investigated provision and pricing of Local Government authorised overflow or free camping and are proposing cost recovery models to better manage the supply and demand for these facilities.

Queensland

Queensland Government is looking to allow short term camping on Trust land for 3 to 7 night maximum (on the proviso that there is no adverse effect on local licenced caravan parks. It is developing tools for calculating cost recovery that local governments can use.

In May, 2011 the Queensland Government released its response to the Economic Development Committee's Report No. 5: Inquiry into developing Queensland's rural and regional communities through grey nomad tourism, stating that the Government supports the committee's recommendation "to develop land management plans which will allow for short term camping on trust land. This approach facilitates local management solutions which reflect the unique circumstances in each community."[70]

It further stated that it supports the "recommendation for supporting local government's adoption of cost recovery methodology in determining fees and charges. It is necessary to ensure there is an equitable commercial environment for commercial operators in the sector, especially where Councils currently provide free services; which can undermine the profitability of the commercial sector. As far as it relates to Trust land (reserves) administered by the Land Act 1994, DERM already gives guidance to local government in relation to Land Management Plans and Trust land. In relation to the use of reserves for recreation or showgrounds for short term camping, councils or other trustees of these reserves are required by the Land Act 1994 to spend any rental/fee received on the maintenance or enhancement of these reserves, this in effect provides a level of cost recovery. In conjunction with the existing work being undertaken in developing a model TLMP, DERM will look at incorporating a cost recovery tool that local government can use."[71]

"An additional policy titled 'Secondary Use of Trust Land Policy' states that trust land may be provided for the travelling public only and must be limited to no longer than three nights, which may be extended to no more than seven nights, with the proviso that there is no adverse effect on local licensed caravan and/or tourist park owners. It also requires the trustee to prepare land management plans in consultation with stakeholders for lodgement with the Department. In effect, Trust Land Management Plans (TLMPs) have a role in legitimising secondary use of trust land and appropriate detailing management arrangements"[72]

Tasmania

In 2010/11 four complaints were received from private caravan site owners about councils providing free or low priced overnight RV camping services. These complaints were upheld by the Office of the Tasmanian Economic Regulator. The Local Government Association of Tasmania (LGAT) and the State Government jointly prepared a response by way of the *Consultation Draft Statewide Directions Paper – Review of Council Recreational Vehicle Overnight camping Services* *(October, 2011)*.

This Directions Paper summarised that "The premise of the complaint in each case was that the pricing (or lack of pricing) for these council-provided services was in

[69] http://www.dse.vic.gov.au/__data/assets/pdf_file/0012/119100/Revised-Policy-13072011.pdf
[70] Queensland Government response to the Economic Development Committee's Report No. 5 (February 2011) downloaded from http://rti.cabinet.qld.gov.au/documents/2011/may/govt%20response%20report%20on%20grey%20nomad%20tourism/Attachments/gn-gr-rpt-005-12May2011.pdf
[71] Queensland Government response to the Economic Development Committee's Report No. 5 (February 2011) downloaded from http://rti.cabinet.qld.gov.au/documents/2011/may/govt%20response%20report%20on%20grey%20nomad%20tourism/Attachments/gn-gr-rpt-005-12May2011.pdf
[72] Queensland Government response to the Economic Development Committee's Report No. 5 (February 2011) downloaded from http://rti.cabinet.qld.gov.au/documents/2011/may/govt%20response%20report%20on%20grey%20nomad%20tourism/Attachments/gn-gr-rpt-005-12May2011.pdf

breach of competitive neutrality principles under National Competition Policy that government organisations are required to follow."[73]

Its key findings are as follows:

"The review of council overnight RV camping services found that councils must adhere to the principles of competitive neutrality and should apply a full cost attribution approach when operating these services. Each council-owned service in Tasmania is highly likely to be competing with a privately-owned caravan park, either within its own municipality or in surrounding municipalities, and needs to price its services to reflect costs.

Providing free or low-cost camping services by a council may be a useful short-term solution to some of the amenity issues facing councils, for instance to prevent RVs parking and camping on the side of the road and to attract visitors to the area. However, these measures discourage private caravan parks from investing and operating in the area and reduce the benefits from a competitive market. These benefits include efficient market prices (reflecting the costs to provide and operate such services), customer choice through a wide range of services and the development of services that customers want, leading to economic development. Setting cost recovery prices will, in the long term, enable councils to contribute to a more sustainable overnight camping industry and promote the tourism industry in the local, regional and State economy."[74]

In reviewing the current policy, titled Recreational Vehicles - Development and Management of Facilities 2008, LGAT and the Tasmanian State Government found it no longer appropriate and recommended a revised policy which includes cost recovery requirements and address competitive neutrality. The Directions paper includes a decision-making guide "to support open and transparent decision-making on the pricing of camping services"[75] and a Full Cost Attribution Checklist.

[73] Consultation Draft Statewide Directions Paper – Review of Council Recreational Vehicle Overnight camping Services (October, 2011)
[74] Consultation Draft Statewide Directions Paper – Review of Council Recreational Vehicle Overnight camping Services (October, 2011)
[75] Consultation Draft Statewide Directions Paper – Review of Council Recreational Vehicle Overnight camping Services (October, 2011)

Best practice methods to reduce development and operating costs

There are few references to concessions or subsidies offered specifically for caravan parks and campgrounds (outside of the general tourism grants programs and regional development funds). The main method used to manage the high development and operational costs is for Governments to develop caravan and camping facilities which are then leased to operators with attractive lease arrangements. Outside of this, land tax and/or stamp duty concessions appear to be the only other concession offered to reduce operating costs.

Victoria

A Land tax exemption for caravan parks exists in the State of Victoria

Queensland

A partial exempting from Land Tax applies for caravan parks in Queensland, but only where 50 percent or more of the sites are allocated to residential use, as is the case in New South Wales.

MARKET SEGMENTATION

In their Consumer Research Report 2011 Caravanning & Holiday Parks Industry report, CRVA found that:[76]

- Since 2008, people are less likely to free camp and are more likely to stay in a caravan holiday park
- The Internet is the core starting point for consumers when researching holidays - 69% expect online booking facilities
- 85% said they would be happy to visit a caravan holiday park outside of school holidays

Their report concluded the following[77]:

- Respondents recognise the benefits of caravanning and camping holidays, which offer an affordable, easy to organise, simple holiday at caravan holiday parks which are well run, secure and located in good tourist destinations. They work well for families and for mature travellers.
- Respondents show concern that these holidays, while still relatively good value compared to other holidays, are becoming more expensive, particularly during the main holiday periods. Caravan owners were most sensitive to the cost.
- The proportion of the Australian population who have recently had a caravanning or camping holiday remains unchanged since 2008. However, the population has grown in real terms, so the number of visitors has increased.
- There has been a slight shift in visitor demographics since 2008, with the 50+ group growing to have similar visitor numbers to the 35-49 age group.
- There has been a slight downturn in the proportion of people planning for any type of holiday in the near future, particularly in the 18-24 years age bracket.
- In 2011, fewer people aged 65+ are planning a holiday than were planning a holiday in 2008, but the percentage planning to use caravan holiday parks has increased.

In terms of changing demographics, their findings were reported as per the following table[78]:

Current users by demographic - People who have visited a camping ground, caravan holiday park or national park in the last 2 years

When was the last time, if ever, you stayed at a camping ground, caravan holiday park or national park in Australia for at least 2 consecutive nights?
Base: Visited in the last 2 years

Key Finding: Since 2008, there has been increased visitation within married couples and family groups.

		2011	2008
Have children aged under 18 years	Yes	↑ 54%	50%
	No	35%	38%
Marital status	Married	↑ 50%	45%
	Not married	32%	39%
Residence	City	40%	41%
	Not city	44%	45%
Socio-economic status	White collar	43%	43%
	Blue collar	40%	41%
Household income (Sub-group definitions changed between 2008 and 2011)	‹ $30,000 / ‹ $40,000	32%	25%
	$30,000 - $69,999 / $40,000 - $79,999	41%	43%
	› $70,000 / › $80,000	52%	51%

Source: 2011 Omnibus Survey n=1201, 2008 Omnibus Survey n=1202

[76] Consumer Research Report 2011 caravanning & Holiday Parks Industry, caravan, RV & Accommodation Industry of Australia
[77] Consumer Research Report 2011 caravanning & Holiday Parks Industry, caravan, RV & Accommodation Industry of Australia
[78] Consumer Research Report 2011 caravanning & Holiday Parks Industry, caravan, RV & Accommodation Industry of Australia

A great deal of investigation into segmentation has been undertaken by TNS™ Social Research for Tourism WA and Tourism Research Australia (2007) and published in their report *Understanding the Caravan Park Industry in Western Australia*. It concluded that there were two separate characteristics of visitors staying in caravan parks, driven by the primary reasons they were staying there, their findings are provided below:

Travellers: who were staying in the caravan park for accommodation on a road trip:

- Grey nomads – older age group (55+yrs) on an extended trip, often including travel to other states in Australia
- International travellers – overseas visitors typically staying in caravan park accommodation to afford a longer holiday
- Freedom seekers – typically younger interstate travellers, or older travellers staying for a shorter period of time

Holidaymakers: where the caravan park is the destination of their holiday:

- Families – family holidays with children
- Winter drifters – older age group (55+yrs) intrastate visitors taking an extended holiday within Western Australia
- Intrastate holidaymakers – intrastate visitors who are typically younger, travelling intrastate on their trip, or having a short getaway

Travel patterns

- Just over half (56%) of the total sample were Travellers and the remainder were Holidaymakers (44%).
- Two fifths (40%) of visitors staying in caravan parks were classified as Grey Nomads, one tenth (13%) were Freedom Seekers and a small proportion (3%) were International Travellers.
- The Holidaymaker segments consisted of one fifth Intrastate Holidaymakers (21%) and one tenth Families (13%) and Winter Drifters (10%).
- A quarter (26%) of visitors started their trip in Perth and a further 19% began elsewhere in Western Australia.
- Two fifths (43%) of visitors had only visited and/or intended to visit Western Australia. This suggests that caravan parks provide accommodation predominately to a mix of Intrastate and Interstate visitors (only 3% of visitors were International Travellers).
- Visitors were asked to sketch their travel patterns within Western Australia. For visitors visiting other states in Australia, the main entry and exit points were Kununurra / North West Australia (50% entry; 20% exit) and Eucla / South West Australia (42% entry / 58% exit). The primary direction of travel was anti-clockwise for the majority (68%) of visitors travelling interstate– i.e. entering in the North of Western Australia and exiting in the South West.
- Grey Nomads and Freedom Seekers were more likely to have travelled extensively within Western Australia, the majority having visited most tourism regions in Western Australia. Grey Nomads were more likely to have visited the North West region than were Freedom Seekers. Holidaymakers generally travelled to fewer regions in Western Australia than Travellers. Families predominantly visited Perth and the South West region, and Winter Drifters were most likely to visit the Coral Coast region.
- Grey Nomads stayed on average 104 nights in Western Australia on their trip, similar to Winter Drifters – the extended holiday is possible in their retirement compared to the other segments.
- Freedom Seekers were typically away for around two months (54 days), Families holidayed for 3 weeks (25 days) on average, and Intrastate Holidaymakers' getaway usually lasted 2 weeks (15 days). Despite the variations in trip length, on average 7 nights were spent at a caravan park in one location.[79]

[79]Tourism WA and Tourism Research Australia (2007). Understanding the Caravan Park Industry in Western Australia, Tourism WA, Perth

Combining the research findings of the two aforementioned reports, the following table seeks to present market trends by market segment.

Segment	Demographic	Prefer	Equipment (typical)	Long Stay/ Short Stay	Emerging Market Trends	Where they go (predominantly)
Grey Nomads and Winter Drifters	Retired (single or couple), 55+ on an extended trip	Caravan Parks and Low cost with basic facilities/ social opportunities	Caravans, Big Rigs and Self Contained	Medium to long stay	Split segment with slightly more than 50% of this demographic preferring to stay consistently at full facility caravan parks for social activity and passive recreational pursuits. The balance of this segment are more easily satisfied in terms of overnight location and are driven by minimising accommodation costs. The latter group often have the greater investment in recreational vehicles and are the most vocal in their desire to be able to free camp. Opportunity for Tourism WA/Industry to provide incentives for segment to travel to key destinations outside peak season.	ANW ACC AGO ASW
International Travellers	Single/Couple Family with children at home - Backpackers and low budget experience seekers	Caravan Parks and Free or low cost	Rented motorhomes and campervans	Short stay - peak season	Seek access to wilderness experiences and contact with like-minded travellers. Want full itineraries and interaction with locals.	ANW EP (Perth Rockingham Peel) ASW
Freedom Seekers (Travellers)	Younger interstate travellers, or older short stay travellers Semi retired (single or couple)	Stop off appeal as part of a multi destination trip, quality facilities	Caravan, Camper Trailer or Tent	Short stay - peak season	Growth market segment but even those committed through ownership of RVs compare costs of caravanning and camping to overseas holidays. Need value added incentives.	ANW ACC ASW EP
Family and Intra State Holiday makers	Family with children at home and younger couples	Caravan Parks and Nature Based camping. Looking for destination appeal and opportunities to visit attractions and interact with natural environment.	Cabins, Camper Trailer or Tent	Short stay - peak season	Seek new experiences and interaction with appealing attractions.	ANW ACC ASW EP
Domestic Caravan Park Residents	Workers (regional) Semi retired (single or couple) Retired (single or couple)	Low cost residential alternative	Caravan and solid annexe	Long Stay	Demand to increase due to population aging and rental housing costs (result of reduction in new housing starts)	ANW ACC AGO EP (Perth Rockingham Peel) ASW
All (Western Australia)	Working age Single/Couple Family with children at home Related group (family & friends) Semi retired (single or couple) Retired (single or couple)	Low cost residential alternative Low cost with basic facilities/ social opportunities Destination appeal, quality facilities Destination appeal and opportunities to interact with natural environment. Free or low cost	Caravan Motorhome Campervan Camper trailer Tent		Using their growing voice to demand attention from legislators, government agencies and industry. Will continue to push for more freedom of choice and access to public land for camping. Threats by caravan and camping consumer organisations to boycott “unfriendly” towns could affect local economies. Furthermore, they are likely to suspend holidays at home as a natural preference and take advantage of the strong currency exchange to travel to low cost overseas holiday destinations unless their needs, in terms of user experience and value, are met.	ANW ACC AGO EP (Perth Rockingham Peel) ASW

MARKETING INITIATIVES

Current approaches to promoting caravan and camping in Western Australia

Around the state, caravan park operators, ownership groups, marketing groups, industry associations, tourism organisations and others all contribute to the marketing of the caravan and camping sector. An overview of the current approach to promoting this sector by each of these main groups is provided to follow.

Tourism WA

Tourism WA is the State Government agency responsible for promoting Western Australia as an extraordinary holiday destination. Its focus is on marketing the State and developing significant tourism infrastructure and projects. Their caravan and camping promotions are targeted at the domestic market and include:

- Attendance at the caravan and camping Shows in Brisbane, Sydney, Melbourne and Adelaide each year. This participation is an umbrella representation for the State, and Tourism WA also coordinates tourism operators to attend the show to build a stronger presence for Western Australia as a whole.
- Digital content on westernaustralia.com includes self-drive itineraries, general destination content, and product listings for accredited tourism operators that service this sector (the WA content is drawn from the Australian Tourism Data Warehouse)*; the social media content platform focuses just on destination content.
- Domestic PR provides funding support for broadcast programs and visiting journalists that develop programs, and/or write stories on Western Australia for a range of relevant publications.
- Placement of print advertising in relevant publications such as; Go Camping Australia and the Australian Caravan and Camping Guide 2012
- Cooperative Marketing with distribution partners that have the ability to retail self-drive packages which encourage a caravan and camping experience
- Work with key stakeholders such as Department of Environment and Conservation (DEC) to embed links from westernaustralia.com to DEC's booking facility for National Parks with camping facilities.
- Tourism WA also funds the five Regional Tourism Organisations who promote and support the caravan and camping sector through their marketing activities on a domestic level, particularly intrastate .

*The Australian Tourism Data Warehouse (ATDW) was formed in 2001 as a joint initiative of Tourism Australia and Government Tourism Organisations across Australia including Tourism WA. The content complies with a nationally agreed format and is electronically accessible by a broadening network of over 60 travel websites including Tourism WA's consumer website www.westernaustralia.com and Tourism Australia's www.australia.com. To be listed on the ATDW, WA product must be accredited as WA has a compulsory accreditation policy. Accreditation can cost anywhere from $299 to $1,749 per year (depending on the number of employees).

A search on Tourism WA's consumer site returned 81 listings when searching for caravan in the accommodation category, which is less than 25 percent of commercial caravan parks and campgrounds in the state. A large majority of these accommodation facilities have AAA Tourism 'star rating' which has applied to be recognised under the National Tourism Accreditation Framework. However, the program had to be updated to be accepted, and each AAA rated product must now be inspected under the revised program to be fully accredited. This has contributed to the low number of caravan and camping accommodation facilities being on Western Australia.com due to the high level of the AAA assessment. There is currently no search sub category for caravan and/or camping on the Tourism WA website, with current search options being; Bed and Breakfast, Farm Stay, Hotel and Motel, Resort, Self-Contained or Wilderness Safari Retreat.

Regional Tourism Organisations (RTOs)

Western Australia's five RTOs were developed to promote their respective regions while retaining consistency with Tourism WA's strategic marketing direction.

Each RTO aims to be the peak tourism marketing body for their region delivering the best possible results for their members. They have the responsibility of raising the profile of and increasing visitation and yield for their respective regions by marketing the destination to the intrastate, interstate and international markets. An overview of their approach to marketing the caravan and camping sector follows:

Australia's Coral Coast (ACC)

ACC has a total of just 7 members from over 59 commercial operators in the caravan and camping sector in the region. Regardless of this relatively low membership, they actively promote the region as a whole to the self-drive market which includes the following promotions:

- Caravan and camping Shows as per the following:
    - Perth: ACC co-ordinates and part funds a stand in Perth attended by our Visitor Centres (Exmouth, Carnarvon, Shark Bay, Kalbarri, Geraldton, and Cervantes/Jurien Bay). ACC will again be at the Perth caravan and camping Show from 15 to 19 March, 2012.
    - Sydney/Melbourne: ACC attends these shows as part of the Western Australia stand and on behalf of the caravan industry in the region.
    - Adelaide/Brisbane: ACC takes out a representative package with Tourism WA which distributes the ACC Holiday Planner.
- ACC undertake marketing campaigns that promote the entire region and all market sectors. ACC's marketing has a strong digital focus with anew website which receives around 30,000 unique visitors per month and contains self-drive itineraries and information. The call to action for most of their marketing is the website where members can pay a small fee ($55) to offer deals. They offer all members the opportunity to participate in campaigns, though reportedly only a couple of the caravan parks take up these opportunities.
- ACC provide editorial and images to caravan& camping publications with a range of stories having been published, the also support educational visits from these publications.
- ACC are active in markets such as Germany and Switzerland which are a strong source market for motorhome and campervan holidays to Australia. ACC provides images and itineraries to key agents for their Coral Coast programs and host educational visits, often in partnership with Tourism WA or Tourism Australia. ACC meet with agency Product Managers from key source markets at trade events such as Australian Tourism Exchange and have been on sales mission's in-market four times in the past five years.
- ACC's Annual Holiday Planner is targeted at self-drive visitors who make up the largest proportion of all of their visitors.
- Caravanning Australia published a seven-page article written by ACC on the Coral Coast Region, with the feature commencing along the Indian Ocean Drive and ending at the Ningaloo Reef. A number of their new images also featured throughout the publication.

Australia's Golden Outback (AGO)

AGO is the only RTO that mainly concentrates on intrastate self-drive tourism, and therefore tends to attract a large number of caravanners, motorhomes and campers. They are reportedly seeing an increase of interstate with "grey nomads" travelling through and staying longer in AGO (where there are many *RV Friendly Towns* and free caravan parking spots offered), in preference to some of the busier and more expensive locations in the South West.

Anecdotal evidence and "door stats" from Visitor Centres in the AGO region is that this caravan motorhome segment of the market is rapidly expanding. Wongan Hills has gone from 300 vans per year, to 3000 vans per year over 4 years.

AGO's promotions and advertising is targeted mainly to the local intrastate market and includes the following:

- Website www.australiasgoldenoutback.com listing a range of drive route itineraries and a directory search option with 29 caravan parks and campground listed
- Social Media - FaceBook Page keeping people up to date with what is happening in the region
- Holiday Planner with suggested drive routes which is produced annually and distributed to consumers and holidaymakers in Perth and Western Australia. 80,000 copies of the planner are printed and distributed
- Major travel trade shows to be attended include:
    - Extraordinary Tourism Exchange (ETE)
    - Corroboree, UK & Europe agents
    - Australian Tourism Exchange (ATE)
    - East Coast Tourism WA Roadshow
    - New Zealand Tourism WA Roadshow
- Consumer shows - for 2011/12 AGO will have promotional stands at:
    - Perth 4WD Expo
    - Caravan and camping Shows in Perth, Sydney,
    - Melbourne, Adelaide and Brisbane
- Print advertisements in the Sunday Times, Saturday West

- Print advertisements in national caravan and self-drive magazines (eg CMCA Wanderer Magazine) with detailed self-drive itineraries.

Print advertisements usually contain detailed self-drive itineraries for specific sub regions based on seasonality and time of year:

- Mar/May - Autumn self-drives to all AGO sub regions
- Jul/Oct - Wildflower self-drives to all AGO sub regions
- Oct/Dec – Pre-summer self-drives to most sub regions, except Gascoyne – Murchison (which are considered by many as too hot)

Australia's North West (ANW)

ANW's promotions and advertising includes the following:

- Attendance at domestic caravan and camping shows in Sydney, Melbourne, Perth, Adelaide and Brisbane.
- Production and wide distribution of an annual holiday planner which provides information and suggested drive itineraries for the caravan and camping market and provides opportunities for members to advertise their product (eg caravan parks) in the holiday planner.
- A comprehensive website www.australiasnorthwest.com which provides suggested drive itineraries and provides an opportunity for members to appear in their directory or take up advertising opportunities on the website
- Opportunities for members to promote their product in ANW media campaigns
- Provision of assistance with editorial coverage in relevant publications aimed at the caravan and camping market eg Camper Trailer Australia
- Social Media - Facebook site which includes a trailer on the 'Camper Trailer Australia' story
- Regional promotion at a range of national and international trade events:
    - Australian Tourism Exchange
    - Western Australia (Extraordinary) Tourism Exchange
    - Corroboree UK and Europe
    - Corroboree USA
- Winter Escapes consumer publication - providing member advertising opportunities in the publication produced and distributed by the Sunday Times and The Australian.

Experience Perth (EP)

EP undertakes an annual program of strategic marketing activities designed to attract visitors to the greater Perth region and increase the region's international and domestic profile.

Although EP did not provide specific details with regards to their promotion of caravan and camping, their membership prospectus outlines that EP works in collaboration with members and Tourism WA to conduct the following marketing activities:

- Attendance at travel trade events and consumer holiday expos
- Domestic and international brand/ tactical advertising campaigns and features
- Production of destination collateral including an annual Holiday Planner
- Distribution of destination collateral and information to global consumers, trade and media
- Annual program of digital marketing activities including digital advertising, social media and e-newsletters to consumers and trade
- Ongoing update of features and destination information for www.experienceperth.com
- Educational famils and activities for visiting domestic and international media and trade

There are just eight caravan parks/ Campgrounds listed on the EP website and it would appear that many of their marketing activities are more targeted towards higher yielding visitors as would be expected for the metropolitan region.

Australia's South West

ASW has the responsibility of raising the profile of and increasing visitation to the Australia's South West region. Although this study was unable to get specific details regarding their promotion of caravan and camping, their membership prospectus outlines that a range promotional activities are undertaken in intrastate, interstate and international markets each year including:

- ASW's consumer website australiassouthwest.com, which is the call to action in all consumer promotions and a training tool for trade the website lists 16 caravan parks and campgrounds in the ASW tourism region.
- ASW Facebook profile and pages are attracting large numbers of fans from all over Australia and the globe. Together with online adverts, they are used regularly to promote the region, members and events. Directory listings and advertising opportunities are available to members.
- Over 370, 000 copies of the ASW Holiday Planner are printed and distributed state wide in the West Australian, around Perth, Eastern states, Singapore, Malaysia, NZ, Germany, UK and more.
- Winter Getaways 2011 is distributed state wide in the Weekend West Australian, with 15,000 extra copies distributed through intrastate and interstate channels.
- ASW distributes a Product Lines e-newsletter which is sent to over 1,800 trade contacts.
- ASW hold or represent at a number of trade and consumer shows in Perth, Singapore, Malaysia as well as at ATE and other road shows.

Caravan, RV & Accommodation Industry of Australia Ltd (CRVA)

The Caravan, RV & Accommodation Industry of Australia Ltd (CRVA) is the peak National Tourism Body representing over 4,000 industry businesses including caravan parks, manufacturers and retailers of industry products, suppliers of goods and services, and service providers.

The main responsibilities of the CRVA include lobbying, facilitating a national accreditation program, as well as marketing and promoting the industry and lifestyle to Australian consumers. The CRVA National Marketing and Promotional Campaigns aim to increase the awareness of the industry by highlighting the many lifestyle benefits on offer to consumers who have yet to holiday using the industry's products and services.

The CRVA National body is governed by a National Board that includes one representative from each State's Trade and Caravan Parks Association and one representative from the Recreational Vehicles Manufacturers Association of Australia (except Northern Territory and Tasmania who have just one representative). They gather to deliberate on national issues of interest to the overall wellbeing of the caravan, camping and Motorhome industry. CRVA works closely with the Western Australia State Association in the placement of marketing activity to support local endeavours such as the Perth caravan and camping Show.

Their national marketing and promotional campaign elements include national television advertising, national magazine advertising, national cooperative marketing initiatives with leading lifestyle television programs, public relations and the online marketing. All of these national market expansion campaigns are funded through individual industry businesses contributing to a national marketing fund that is investing in the future viability of the industry.

Their consumer website www.welovethiscountry.com.au includes a directory of member parks, though by no means is representative of the entire industry. The provide some excellent motivational content along with tips, listings of dealers, details on the different equipment options available together with a directory of services for caravan and camping consumer. The also run a VIP club and an online shop.

While many of their activities are nationally based there has been some specific activity which has promoted Western Australia product, or has been specifically placed within the Western Australian market over the past year. Obviously with the nomadic nature of the industry consumers, marketing activity and investment conducted in other states also has a positive spin off into the Western Australian marketplace.

Specific activities in Western Australia include:

- Television Advertising – Perth Metro (71 spots) - $41,085 ex GST
- Television Advertising – Western Australia Regional (40 spots) - $5,361 ex GST
- News Ltd Escape Publication – 32 page glossy insert - Insert in Sunday Times Western Australia (260,000 copies in extended metro)
- Featured product and places within We Love this Country VIP Club E-Newsletter (135,000+ subscribers)
- 2011 Perth caravan and camping Show (promo) – February 2011
- South West Coast of Western Australia – Bunbury to Augusta (sidetracks) – April 2011
- Dongara Tourist Park (profile) – April 2011
- Caravanland (profile) – April 2011
- Wintersun caravan& Tourist Park (profile) – June 2011
- George Day caravans (profile) – August 2011
- Mandalay Holiday Resort and Tourist Park (as part of larger story) – October 2011

- Peppermint Park Eco Village (profile) – October 2011
- Caravan Superstore & RV's (profile) – October 2011
- 2012 Perth caravan and camping Show (promo) – December 2011
- Jurien Bay Tourist Park (profile) – December 2011
- BIG4 Middleton Beach Holiday Park (profile within Award winners story) – December 2011
- BIG4 Beachlands Holiday Park (profile within Award winners story) – December 2011
- Peppermint Park Eco Village (profile within Award winners story) – December 2011

CRVA is committed to launching a new consumer marketing position "Experience caravanning & camping" in April and as part of this is undertaking a number of national and regional activities including a follow up to the Escape News Ltd print publication which will be distributed within extended metropolitan Perth.

A regional road show of Industry product in late 2011 featured a prominent display within a Perth landmark pedestrian precinct.

Caravan Industry Association

The Caravan Industry Association of Western Australia (CIAWA) is the peak industry organisation for caravan parks and caravan and camping-related manufacturing and distribution throughout the state. CIAWA is a significant contributor to the national CRVA marketing and promotions fund and receives the benefit of the Western Australian targeted marketing by the CRVA (see previous section for list of WA specific promotions).

In addition to the CRVA initiated promotions, CIAWA undertakes a number of high profile marketing initiatives in Western Australia. For the period 1 July 2010 to 31 December 2011 the Association's promotional activities - such as the Discover Down Under and What's Up Down Under TV series, Perth Caravan and Camping Show, http://www.caravanandcampingshow.com.au/index.htmlGoldfields Caravan and Camping Show, CIAWA "free" Caravan and Camping Guide - the CIAWA marketing and promotions spend was $620,500.

Due to recent changes in the Executive and Board composition of the CIAWA, the association was unable to provide a formal submission for this study. However, consultation with individual past and present board members and executive officers provided the required information on the CIAWA's activities and views.

http://www.caravanandcampingshow.com.au/index.html

Department of Environment and Conservation (DEC)

The objective of the Parks and Visitor Services (PVS) section of DEC is to provide world-class recreation and tourism opportunities, services and facilities for visitors to the public conservation estate while maintaining in perpetuity Western Australia's natural and cultural heritage.

DEC provides a website with a separate section on DEC's campgrounds. They provide details of campgrounds and their facilities across Western Australia. Selected campgrounds from across the state are now also bookable online for a trial period. If this trial is successful, they aim to make more campgrounds bookable in the near future.

DEC has instituted a Rediscover Parks Program and prints a number of brochures including a Visitor's guide to the State which identifies the recreational facilities and activities available in each park.

Marketing and Ownership Groups

Top Tourist Parks

Top Tourist Parks is a marketing group representing the interests of 200+ holiday parks in Australia. Top Tourist Parks is owned by the member parks and offers a loyalty program to its 100,000 guest members. Specific activities include:

- Inclusion on two episodes on the Discover Downunder television program. Each episode included three parks. For example, the 2011 episodes covered Jurien Bay, Dongara, Geraldton, Kalbarri, Denham and Carnarvon. Discover Downunder is televised nationally on the Nine Network and affiliated channels with a total viewing audience of more than 8 million.
- Print advertisement in the Western Australia Caravan Park guide.
- Print advertisement in the West Australia Newspaper to coincide with the caravan& camping show.
- Incorporating Western Australia stories in their club member e-newsletter and web site promotions.
- They are also planning another episode on Discover Downunder to include Perth, Kalgoorlie and the south coast.

- They have a well presented website where people can buy gift vouchers, download guidebooks, join their club to receive discounts, sign up to their e-newsletter, find out about special offers, enter in competitions, read park reviews and use their trip planner.

Family Parks

Family Parks is a marketing group representing the interests of 160+ holiday parks within Australia and New Zealand. The membership based organisation has 40,000 loyalty club members. Specific activities include:

- Advertising in the Western Australia Caravan Park guide.
- Print advertisement in the West Australia Newspaper to coincide with the caravan& camping show.
- Incorporating Western Australia stories in their club member e-newsletter and web site promotions.
- The group is planning a Western Australia focussed episode on the Great Australian Doorstep

Big4

Big4 is a marketing group representing the interests of 170+ holiday parks within Australia. The franchise based model has a strong loyalty program with 150,000 members. Specific activities include:

- Website - with online bookings, special offers, holiday park finder
- YouTube - short films profiling caravan parks
- Charity events/promotions such as 'Camp and Care'
- Price based promotions 'Come Camp with Big4 for Free'
- BIG4 Passport - memento of every short break, weekend escape or journey of a lifetime that is taken around Australia. Once participants have collected 25, 50 and 75 BIG4 stamps, they are acknowledged with a souvenir reward and listed on the BIG4 Passport Honour Board.
- Competitions e.g. September BIG News Competition - The Logo Board Game
- Free email newsletter
- Club membership - offering discounts off caravan parks

Discovery Holiday Parks

Discovery Holiday Parks is the largest owner and operator of lifestyle holiday parks in Australia, providing a broad range of accommodation to suit any need. Since December 2004, Discovery Holiday Parks has continued to build its portfolio in strategic locations across Australia. Alliances currently exist with BIG4; Top Tourist and Family Parks to ensure maximum exposure to the Discovery Holiday Parks name as it grows to secure the position as market leader in the accommodation park industry. Discovery currently own and operate 30 holiday parks, 6 of which are in Western Australia. Specific activities include:

- Website offering a directory of participating parks, online bookings, competitions and special offers
- A membership program and e-newsletter

Smaller Independent Operators

Smaller independent operators show varying commitment to marketing. Professionally run coastal parks generally have good representation online with a website and sometimes even an online booking system and a social media strategy. A few run print advertising in weekend newspapers and targeted online and offline publications (magazines and newsletters).

Smaller inland caravan parks and campgrounds generally speaking do not appear to have such a strong online presence with dated websites or none at all.

Representation on the Australian Tourism Data Warehouse is also limited with just 25 percent of caravan parks overall listed, which includes both smaller independent operators and the larger groups.

Smaller independent operator's participation in Visitor Centre activities (memberships and marketing programs) is higher than their participation in Regional Tourism Organisations activities (memberships and marketing programs), this is perhaps in part due to cost of participation and added benefits from visitor centres acting as a booking channel. Visitor centres are an important source of information on caravan and camping opportunities and most have a list or a directory of facilities in their local area.

Opportunities for Improvement

It is recommended that a full marketing strategy be compiled for the caravan and camping sector to analyse in detail:

- National and international competition to the Western Australian caravan and camping sector
- Current, emerging and potential target markets (and their needs)
- Marketing mix and channels (advertising, brochures, direct marketing, trade shows, consumer promotions, publicity, online strategy and social media)
- Prioritised actions in line with agreed marketing budget and agency priorities (depending on representation of agencies collaborating on strategy).

Immediate opportunities for improvement which have been identified in the process of analysing the current state-wide approach to promoting the sector are outlined below:

- Increase the number of caravan parks listed on ATDW. This could be achieved by State Tourism Organisations partly or fully subsidising listing fees for all low turnover tourism operators across all sectors of the tourism industry. A search for 'caravan' in the accommodation category of Tourism WA's consumer site (westernaustralia.com) returned 81 listings which is less than 25 percent of commercial caravan parks and campgrounds in the state.
- Encourage all providers of bookable caravan and camping infrastructure to provide online booking capability (also linked to their listing on westernaustralia.com) through an active communications campaign in conjunction with the Small Business Development Commission or similar.
- List all Department of Environment and Conservation Campgrounds (and provide integrated online booking functionality) on ATDW.
- Provide details of rest areas, dump points and other related facilities on ATDW to facilitate trip planning and highlight the facilities available to ensure visitors are confident to undertake trips in remote and rural Western Australia. This could be done by Tourism WA the same way attractions are listed.
- Promote routes to supplement the destination marketing undertaken by the states' RTOs. The issue of distance to desired locations can be partially mitigated by making the journey to the destination a tourism experience in itself. This will have a multiplier effect for regional towns and businesses which have a great deal to offer tourists.
- Provide a search sub category on westernaustralia.com for caravan and campgrounds. There is currently no search sub category for caravan and/or camping on the website, with current search options limited to; Bed and Breakfast, Farm Stay, Hotel and Motel, Resort, Self-Contained or Wilderness Safari Retreat.
- Promote the experience of camping whilst engaging caravan and camping consumers through social media and other online channels. For example produce a 'free to download' camping and caravanning Cookbook and/or Cooking Vignette/Podcast - with a selection of motivational images from around Western Australia, include write ups about the top 10 caravan and camping locations around Western Australia and features on outdoor cooking in inspirational locations using local produce (Prawns in Exmouth, Wine in Margaret River, Mud crab on the Dampier Peninsula etc.). Distribute through all partner websites (welovethiscountry.com, westernaustrlia.com, consumer groups websites and blog sites, mobile device Apps, You Tube Channels and national caravan and camping forum websites etc.).
- Mobile Applications to be expanded to include bookable caravan parks and full details of caravan and camping facilities (dump points, authorised camping areas, camping regulations etc.).
- RTOs provide invaluable marketing opportunities for members, though the cost of memberships can be prohibitive, particularly for smaller caravan parks in the North West where memberships range from $330 for base level membership up to $3,300 for premium membership. Many RTO's strongly market destinations and self-drive opportunities in spite of relatively low levels of membership from the caravan and camping sector, though their directory listings do not reflect the wide range of options for caravan and camping in the region. ANW for example lists just 20 caravan and campgrounds out of over 100 (including DEC, stations and roadhouses). A very low cost 'base membership' providing little more than a directory listing on the RTO websites could better demonstrate the quality and diversity of caravan and camping opportunities across the state.

RISK ANALYSIS

Individual risk assessments are provided for selected priority locations in the business case. These risk assessments investigate risks relating to viability, impacts on industry, consumer needs and regulatory implications.

PRIORITY AREAS FOR CARAVANNING AND CAMPING

Priority Areas Assessment Matrix

Based on the statistics assessed, stakeholder input and review of other studies completed, the following priorities have been identified. The extreme priorities are selected based on their impact on the sector state-wide, not just the importance their locality. The table is provided in order of Tourism Region (not in order of priority) within each of the priority groupings.

***(A) Sources referred to in column titled: 'New facilities proposed, investigated or needed'**

1.Tourism WA Tourism Development Priorities 2010 - 2015, Tourism WA 2010
2.DEC submission to the Economic Standing Committee
3. WALGA Kimberley Zone, Brighthouse 2010
4. Mount Augustus Tourism Accommodation Prefeasibility Study, Starfish 2009
5. Broome Shire Minutes, Shire of Broome, 2011
6. Shark Bay Accommodation Supply and Demand Study
7. Potential Caravan Park Developments in Regional WA: Pre-feasibility Study
8. Derby Accommodation Study
9. Kununurra Accommodation Study
10. Understanding the Caravan Industry in Western Australia Research Report
11. Industry intelligence (stakeholder consultation, CIA, and consultants knowledge)
12. Sustainability Report for Caravan Parks and Associated Trades, Caravan Industry Association 2009
13. Development Guide for Nature Based Caravan Parks and Campgrounds, Resolve Global 2011
14. Lancelin Caravan Park Feasibility Study, Brighthouse 2011
15. Aspen Parks letter to Brighthouse, November 2011
16. Mandurah Tourism Strategy 2011 – 2016, City of Mandurah 2010
17. Tourism WA Caravan Park Pre-feasibility Study Kununurra, Brighthouse 2009
18. Shire of Augusta-Margaret River Business Case Study, Turner Caravan Park, Brighthouse 2009
19. Planning Policy 3.3.3 Caravan Parks, City of Rockingham
20. Peel Caravan Parks Sector Support Group Framework Action Plan, November 2011
21. Letter from Gary Player - Main Roads Regional Manager - Pilbara Region
22. Letter from Shane Liddelow, District Manager, Goldfields Esperance Development Commission
23. Direct communications with DEC November/ December 2011

***(B) As per comments recorded in Department of Local Government Survey 2009**

***(C) Legend for column 'Preferred Options':**

To be delivered via proposed strategic initiatives as per recommendations	Potential to be delivered via Business Case/ Royalties for Regions Application	Current strategic planning/ development underway by others	Priority Need - wider/complex issues which require investigation: Tourism WA to encourage strategic development in conjunction with other agencies (eg IBA, DEEWR, DEC)

Extreme Priorities

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Exmouth RDC: Mid West - Gascoyne TR: ACC	1. Work is being done to alleviate some of the shortages in caravan park accommodation in the town through the investigation and possible release of a caravan specific development site in the Exmouth town site. 2. Royalties for Regions is providing $4.8 million over four years *(2010/11* to *2013/14)* to establish low cost in-park nature-based camping opportunities across Western Australia (in addition to $5.1 million allocated to the NatureBank program). In 2011-12 development of an expanded camping area in Cape Range National Park at the Kurrajong campground will result in around another 20 sites ($800,000). 13. Development proposals on land along the Ningaloo Coast from Carnarvon to Exmouth will need to conform to State Planning Policy 6.3 Ningaloo Coast. Two of its key objectives are to (1) Provide state agencies, local government, community and proponents with clear guidance regarding acceptable and sustainable development on the Ningaloo coast, and (2) Maintain the Ningaloo coast as an all-seasons recreation and nature-based tourism destination and limit growth with managed staged development, to ensure that the community continues to enjoy a remote and natural experience. 23. DEC: Demand exceeds capacity in peak times during April-August at Cape Range (Exmouth DEC Office) - their Management Plan recommends increase in camp sites to an upper limit.	Overflow capacity - has new overflow facility	Ningaloo - Iconic tourism destination	Yes	Ningaloo coast iconic	• DEC increase sites at Cape Range → Underway (require further funding beyond implementation of Kurrajong) • DEC online bookings - all sites → State support • DEC shorter maximum stay → State support • Caravan Park Exmouth → Business case • Overflow policy → State template • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy
LGA: Shark Bay RDC: Mid West - Gascoyne TR: ACC	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at Francois Peron National Park ($120,000) and Edel Land National Park ($162,000). 6. The Shire of Shark Bay requests that DEC provides a briefing on the proposed approach to free camping within the potentially expanded estate managed by them, and in particular an outline of how this will be managed (50km radius of Denham). 6. Monkey Mia Resort requires 29 additional sites, Nanga Bay 6 additional sites, Hamlin Station Stay 10 additional sites - pending approvals/ economic conditions. The study found when factoring in projected new supply over the next 20 years; notwithstanding seasonality, there is a projected excess of supply over demand in caravan park accommodation. 10. 14 Respondents to Tourism WA research indicated unable to stay in a Denham due to no availability. 13. Development proposals on land along the Ningaloo Coast from Carnarvon to Exmouth will need to conform to State Planning Policy 3.3 Ningaloo Coast. Two of its key objectives are to: (1) Provide state agencies, local government, community and proponents with clear guidance regarding acceptable and sustainable development on the Ningaloo coast, and (2) Maintain the Ningaloo coast as an all-seasons recreation and nature-based tourism destination and limit growth with managed staged development, to ensure that the community continues to enjoy a remote and natural experience. 15. Development and Environment Approval for the Monkey Mia Resort have been granted for the expansion from 600 beds to 1,200 and Aspen is trying to progress this development which will include a number of cabins, powered and camping sites. 23. DEC: Demand exceeds capacity in peak times during April-September at Francois Peron. Their Management Plan recommends larger campgrounds at Big Lagoon & Herald Bight. There is a NatureBank site in Francois Peron National Park ($1.4m allocated).There is an issue with illegal camping at South Peron (Unallocated Crown Land). Demand exceeds capacity in Winter at Edel Land - their Management Plan recommends a new campground. Demand exceeds capacity in Winter at Dirk Hartog, their Management Plan recommends consolidation of existing sites and no increase in capacity.	More tourist sites, dump points, rest areas	Iconic tourism destination	Yes	Industry sector is a significant employer/ World Heritage status	• DEC increase sites → Underway but require further funding beyond implementation of current projects • DEC online bookings → State support • DEC shorter maximum stay → State support • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Carnarvon RDC: Mid West - Gascoyne TR: ACC	1. In Carnarvon, there is a feeling amongst stakeholders that although the town has a range of lower end accommodation, such as caravan parks, backpackers and three star motels, most of this accommodation is relatively dated and in need of refurbishment. There is also strong consensus that the limited accommodation available in Coral Bay at present (there are only three land owners who operate a three star resort, two caravan parks and a backpacker hostel), is in need of upgrading. 10.&15respondents to Tourism WA research indicated unable to stay in a Coral Bay caravan park due to no availability. 13. Development proposals on land along the Ningaloo Coast from Carnarvon to Exmouth will need to conform to State Planning Policy 3.3 Ningaloo Coast. Two of its key objectives are to: • Provide state agencies, local government, community and proponents with clear guidance regarding acceptable and sustainable development on the Ningaloo coast. • Maintain the Ningaloo coast as an all-seasons recreation and nature-based tourism destination and limit growth with managed staged development, to ensure that the community continues to enjoy a remote and natural experience.	No response or none identified	High peak demand	No	Need more seasonal capacity (Coral Bay)	• Alternate accommodation for workers / permanents → Underway • Caravan Park (Coral Bay) expansion and improvement → Business case / funding (pending impact of workers accommodation on freeing up existing capacity)
LGA: Esperance RDC: Goldfields Esperance TR: AGO	2. In 2011-12 capital funds will be invested into site planning for additional camping and improved visitor facilities at Cape Le Grand National Park. 11 & 12. Closure of Bathers Paradise Caravan Park Esperance (post July 1, 2005). 22. Accommodation supply has been identified as a major issue for the town due to a large construction workforce due to arrive 2012 to 2014, and the expected decommissioning of an existing caravan park. Quality and capacity issues identified and facilities need upgrading. 23. DEC: Demand exceeds capacity at Stokes (Esperance DEC Office) - they may explore potential infrastructure upgrades at high demand sites Demand exceeds capacity at Cape Le Grand (Esperance DEC Office) - planning underway to look at expansion/improvement. NatureBank site proposed at Cape Le Grand National Park.	Shire did not respond. VC advised high demand for free camping and concerns with cost of caravan parks.	SuperTown, Cape Le Grand	No	Infrastructure projects/ port expansion, coastal redevelopment plan may reduce current capacity	• Business Case for alternate accommodation for workers / permanents (possibly to include short stay) → Underway • DEC increase sites → Underway • DEC improve facilities/ range of facilities or lease out → Investigate NatureBank Site • DEC online bookings → State support • DEC shorter maximum stay → State support • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Broome RDC: Kimberley TR: ANW	1. While most stakeholders believe that the level of accommodation in Broome is generally sufficient to meet current levels of demand, it is recognised that this situation may change with the proposed James Price Point LNG project, 60km north of the township. Investigate opportunities for the development of seasonal nature based caravan parks near Broome and Kununurra. Ensure the provision of additional black dump facilities in all major towns in the region. 10. 98respondents to Tourism WA research indicated unable to stay in a Broome caravan park due to no availability. 3. Current seasonal undersupply of short stay sites. New caravan park (Broome North) proposed. Possible future sealing of Cape Leveque Rd will open up access for two wheel drive caravans and likely increase demand. 5. In Broome, RAC are looking to lease land to set up a new caravan park. 7. Palm Grove caravan park and Tarangau Caravan Park – closing for redevelopment, Cable Beach Caravan Park – potential for sale and redevelopment. 11. Potential new caravan park development at Broome North (LandBank Site).	Dump Point	Broome and Dampier Peninsula - Iconic tourism region	Yes	More seasonal capacity - it is expected this will be addressed with the proposed new Caravan Park at Broome North. Sealing of Cape Leveque Road will likely require increased capacity on Dampier Peninsula.	• Caravan Park → Underway (Broome North) • Nature Based Park (Indigenous opportunity) - Dampier Peninsula → Business case • Overflow policy → State template • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform
LGA: Derby West Kimberley RDC: Kimberley TR: ANW	Demand exceeds capacity in peak times during July-August at Silent Grove (West Kimberley DEC Office) - this could potentially be met by the expansion of the existing campground on DEC managed lands. Demand exceeds capacity (dry) at Mt Hart (West Kimberley DEC Office) - this is a NatureBank site managed by a commercial operator and future demand could potentially met with the expansion of the existing campground on DEC managed lands. 1. Develop additional toilet and rubbish collection points along the Gibb River Road. Ensure the provision of additional black dump facilities in all major towns in the region. A better management of camping along the Gibb River Road is also seen as a priority for the region. 3. Need for expansion of DEC Silent Grove (Bells Gorge) camping sites. Under supply is seasonal and generally restricted to popular tourist destinations ie Windjana and Bells Gorge. 3. Mowanjum (entry to the Gibb River Road)- Aboriginal Community is investigating viability of a new Nature Based Park for economic development. 8. There is no forecast unmet demand in the township of Derby in the short term (2009-2014). In the medium (2015-2025) - long term (2025-2045) unmet demand could only expect to be created as a result of a sustained level of high growth across these periods. Existing caravan parks should be encouraged to expand to meet any future demand requirements for this market segment. This is a low-yielding market and attempts to develop new sites for this segment are anticipated to prove unviable. 23. DEC: Demand exceeds capacity in peak times during June-August at Windjana Gorge (West Kimberley DEC Office) and there is no intention to expand, though it is their intention is to upgrade and possibly relocate the current camping facilities. There is a NatureBank site at Windjana Gorge.	Facilities adequate.	Gibb River Road	No	Issues with unmanaged camping along Gibb River Road	• DEC increase sites at Silent Grove and Mt Hart (the latter is via a commercial lease) → State support • DEC online bookings → State support • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Caravan Park at Mowanjum→ Business case underway (Aboriginal Corporation)

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Wyndham East Kimberley RDC: Kimberley TR: ANW	1. Investigate opportunities for the development of seasonal nature based caravan parks near Broome and Kununurra. Ensure the provision of additional black dump facilities in all major towns in the region. 3. Future potential conversion of workers camp to caravan park. 9. Demand forecasts developed do not support the development of new caravan parks in the township of Kununurra. While it could well be argued that this does not address expected future shortages in this market, the economics of developing a greenfield site are almost certain to prove such a project as unviable. Instead, it is anticipated that the best means of meeting future shortages in the caravan market will be to add inventory to existing parks. Despite a proposed concept to develop one of the identified sites initially as worker's accommodation prior to transitioning the site to a caravan park the low yielding nature of this market is likely to result in the viability of a new park being marginal. 12. New land zoned for caravan park in Kununurra. 17. Tourism WA, in conjunction with local government has identified potential caravan park sites in locations that are perceived to require additional tourism infrastructure to meet future demand. 17. The caravan park Pre-feasibility Study, Kununurra, considers a site within the Shire of Wyndham East Kimberly described as Lot 2484 Victoria Highway, Kununurra. 23. DEC: Demand exceeds capacity in peak times during June-August at Mitchell Falls - future demand will potentially met by expansion of existing campground Punamii Unpuu (Mitchell Falls).	Shortage of sites in major towns during the peak tourist season. Potential for sporting grounds to be used as overflow or temporary camp sites in the future.	Entry Point - Kununurra	No	Issues with unmanaged camping along Gibb River Road	• DEC increase sites at Mitchell Falls → Underway • DEC online bookings → State support • Overflow policy *(Kununurra) → State template • Management of free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy
LGA: Ashburton RDC: Pilbara TR: ANW	1. Investigate the opportunity for the development of transient accommodation that caters for short term visits of three days or less in the Pilbara region. 11 & 12. Closure of Ashburton Travellers Park Onslow, Gorges Caravan Park Wittenoom (pre July 1, 2005). 21. Main Roads identified need for improvement of roadside facilities across the Pilbara citing issues with toilet cleanliness, disabled access, littering and drainage. 23. DEC: Demand is met for the majority of visitors to Karijini (Karratha DEC Office) - their Management Plan identified Hamersley Gorge in the west of the park has possible future camping potential. Demand exceeds capacity in peak times during June-August at Millstream Chichester (Karratha DEC Office) - their Management Plan recommends a new campground.	Shire advised rest areas & facilities required in all townships, particularly Onslow and Tom Price, and on Warlu Way Additional caravan parks viable in Onslow and Tom Price. VC advised need more capacity near Karijini (allowing dogs and big rigs)	Karijini - Iconic tourism destination	No	Workers taking up most of existing capacity. Require short stay capacity in Tom Price + additional capacity at Millstream Chichister National Park.	• DEC improve facilities/ range of facilities or lease out → Investigate NatureBank Site at Millstream (underway) • DEC online bookings → State support • Transit/ caravan park → Business case • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform • Overflow policy → State template • Alternate accommodation for project workers (Onslow, Newman etc) → Business case required

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Port Hedland RDC: Pilbara TR: ANW	1. Investigate the opportunity for the development of transient accommodation that caters for short term visits of three days or less in the Pilbara region 7. Transit park, nature based park or extension to existing parks required. Also seeks review of; land tax, land valuations, Government grants, rest stops, transit and nature based parks, amendments to existing crown leases, holiday van legislation, Caravan and Campgrounds Act 1995 and development of best practices management guide. 10. 10 respondents to Tourism WA research indicated unable to stay in a Port Hedland Caravan Park due to no availability 11 & 12. Closure of South Hedland Caravan Park Port Hedland (post July 1, 2005) 21. Main Roads identified need for improvement of roadside facilities across the Pilbara citing issues with toilet cleanliness, disabled access, littering and drainage.	More tourist sites, increased affordability. VC also commented on need for rubbish disposal, more (and better maintained) dump points and more affordable sites.	High peak demand	No	Permanents taking most available capacity. Require transit/ overflow capacity.	• Transit/ caravan park → Business case • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform • Overflow policy → State template • Caravan Park expansion and improvement → Business case / funding
LGA: Roebourne Karratha RDC: Pilbara TR: ANW	1. Investigate the opportunity for the development and formalisation of affordable accommodation at coastal and river mouth localities within the region such as Onslow, Cleaverville, Point Samson and river mouths 11 & 12. New development - The Cove Point Samson (post July 1, 2005) 21. Main Roads identified need for improvement of roadside facilities across the Pilbara citing issues with toilet cleanliness, disabled access, littering and drainage.	More tourist sites	High peak demand	No	Permanents taking most available capacity. Require transit/ overflow capacity.	• Transit/ caravan park → Business case • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform • Overflow policy → State template • Existing caravan park expansion and improvement → Business case / funding
LGA: Augusta-Margaret River RDC: South West TR: ASW	1. Investigate future sites for caravan parks in the region. Improve visitor amenities in national parks - Department of Environment and Conservation 11 & 12. Closure of Doonbanks Caravan Park Augusta (post July 1, 2005) 18. Potential redevelopment of Turner Caravan Park. 23. DEC: Demand exceeds capacity during peak times at Leeuwin-Naturaliste (Blackwood DEC Office) though this could potentially be met by the expansion of existing campground (Conto) on DEC managed lands. Potential NatureBank site at Wharnecliff Mill	Dump Point - have one in Augusta and one yet to be installed in Margaret River. Issues with illegal camping and day parking for vans.	Margaret River - Iconic tourism region, SuperTown	No	Occupancy/ demand in Margaret River distorted by lower demand for Augusta. Pressures on converting land to higher/better use.	• DEC increase sites → State support • DEC improve facilities/ range of facilities or lease out → NatureBank Site underway • DEC online bookings → State support • DEC shorter maximum stay → State support • Co-located facilities/ low cost - low facility sites → Regulatory reform • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Busselton RDC: South West TR: ASW	1. Investigate future sites for caravan parks in the region 11 & 12. Closure of Greenacres Beachfront Caravan Park Dunsborough (pre July 1, 2005) and Acacia Caravan Park Busselton (post July 1, 2005) and in neighbouring Shire of Capel closure of Peppermint Grove Caravan Park Capel (post July 1, 2005). 7. Recommends a review of Locke Estate leases - and provides recommendations for Legislative Changes	No response or none identified	Popular - Intrastate	Not answered	Pressures on converting land to higher/better use.	• Caravan Park → Business case • Co-located facilities/ low cost - low facility sites → Regulatory reform • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy
LGA: Mandurah RDC: Peel TR: EP	11 & 12.Closure of Peninsula Caravan Park Mandurah (pre July 1, 2005), Estuary Caravan Park, Yalgorup Eco Park and Lucky Caravan Park Mandurah (post July 1, 2005) 11. Potential future closures or redevelopment Timbertop Caravan Park Mandurah, Belvedere Caravan Park, Miami Caravan Park 16.Limited campgrounds and the recent closure of caravan parks has also affected at least two of the key target markets ie: family connectors and grey explorers. Discussions with City of Mandurah indicated that caravan and camping facilities are not a high priority in their Tourism Strategy. 20. Dept of Planning in consultation with other government agencies and Peel LGA's is identifying potential Federal, State and LGA land in the Peel region for additional, specifically-designated, caravan park use	Inadequate number of sites, Freeway service centre opportunity. Inland waterways demand. (Has completed tourism strategy 2009-2014, Edge Tourism)	Access to metro	No	Permanents taking most available capacity	• Co-located facilities/ low cost - low facility sites → Regulatory reform • Investigate alternative sites in Shire of Murray • Caravan Park → Business case (medium term - if identified as a priority by City of Mandurah)
LGA: Murray RDC: Peel TR: EP	2. Royalties for Regions is providing $4.8 million over four years *(2010/11* to *2013/14)* to establish low cost in-park nature-based camping opportunities across Western Australia (in addition to $5.1 million allocated to the NatureBank program). In 2010-11 this has resulted in development of a new camping area at Baden Powell in Lane Poole Reserve to replace the existing campground which has a capacity of 18 sites ($1m). The new campground, which is expected to be opened in December 2011 will have 40 individual sites plus two new group camping areas which will have capacity for 20 and 40 campers respectively. $1m Royalties for Regions funding is to be allocated to Nanga Mill for improvements and expansion to campground. $1m Royalties for Regions funding is allocated to Martins Tank Campground for major renovation and some expansion. 11. Potential new caravan park development at Thompsons Road. Closure of Aqua Caravan Park. 20. Department of Planning in consultation with other government agencies and Peel LGA's is identifying potential Federal, State and LGA land in the Peel region for additional, specifically-designated, caravan park use 23. DEC: Demand exceeds capacity during peak times at Yalgorup (Swan Coastal DEC Office) though this could potentially partially be met by expansion of existing campground Demand exceeds capacity during peak times September-December/Easter at Lane Poole (Perth Hills DEC Office) - their Management Plan recommends new campgrounds.	More tourist sites	Access to metro	Yes	Permanents taking most available capacity	• Development panel to overcome regulatory barriers/impediments → High level approval assessment process required for current proposal(s) • DEC increase sites → Underway • DEC improve facilities/ range of facilities → Underway • DEC online bookings → State support • Caravan Park → Business case • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform • Alternate accommodation for permanents → Business Case
LGA: Rockingham RDC: Perth TR: EP	11 & 12. There is high potential for a new development at Port Kennedy 13.The City of Rockingham has prepared a Planning Policy for caravan parks. 19. Caravan Parks have traditionally provided accommodation for tourists, however, there has been a trend for caravan parks to also provide permanent accommodation for residents. In this regard, it is important to provide short-term accommodation for tourists in locations that complement tourist and recreation facilities and to provide long-term accommodation for permanent residents in locations with access to services normally available to conventional residential development.	No response or none identified	Access to metro	No	Permanents taking most available capacity	• Development panel to overcome regulatory barriers/impediments → State support • Caravan Park expansion and improvement → Business case / funding • Alternate accommodation for permanents → Business Case

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating	Preferred options → Requirement (C)
LGA: Gingin RDC: Wheatbelt TR: EP	1. Once the Indian Ocean Drive has been completed between Lancelin and Cervantes... expected increase in caravan and camping traffic. Particular areas for focus include the shack settlements around Wedge Island and Grey, caravan park accommodation in major townships... 11 & 12. Closure of Ledge Point Caravan Park Ledge Point (pre July 1, 2005), Lancelin North End Caravan Park (post July 1, 2005), potential future closure or redevelopment Lancelin Caravan Park 11& 12. New development - Willowbrook Tea Rooms & Caravan Park Gingin and Ledge Point Caravan Park (post July 1, 2005) 14. Tourism WA (Tourism WA) and the Department of Regional Development and Land(DRL) are jointly investigating the provision of a new Tourist Park (Park) in Lancelin 14. Tourism WA brief required the study to recommend an accommodation mix for a new Tourist Park at Lancelin, considering but not limited to RVs, motor homes, caravans, camp sites and cabins (LandBank Site) 14. The Shire of Gingin has identified a significant and urgent need for a new Tourist/Caravan Park to be established within the town in order to counter for the loss of the affordable tourist accommodation previously supplied by North End Caravan Park 14. The lease of the existing Lancelin Caravan Park expires in 2016 23. DEC: There is an issue with undefined/illegal camping at Wilbinga (Swan Coastal DEC Office) - current planning identifies the potential development of accommodation/campground.	Inadequate sites future (Indian Ocean Drv)	Lancelin - Indian Ocean Drive	No	Lancelin: Indian Ocean Road, Attrition	• Caravan Park → Progress business case • Development panel to overcome regulatory barriers/impediments → State support • Management of/ investment in improved or increased rest areas, free / low cost camping and facilities (dump points)→ State Strategy • Co-located facilities/ low cost - low facility sites → Regulatory reform

High Priorities

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating
LGA: Greater Geraldton RDC: Mid West - Gascoyne TR: ACC	11. Closure of Separation Point Caravan Park Geraldton (pre July 1, 2005)	No response or none identified	Major Regional City	No	High occupancy (peak month and average annual)
LGA: Northampton RDC: Mid West - Gascoyne TR: ACC	1. Accommodation in Kalbarri is generally considered to cater for the needs of the current tourism market, with a range of hotels, caravan parks and holiday units. However, in continuing to serve the regions primary market (intrastate families), stakeholders suggest that there is the need to both upgrade the facilities in existing caravan parks and also develop an additional caravan park to compensate for the recent closure of one of the existing parks in the town 10. 10 respondents to Tourism WA research indicated unable to stay in a Kalbarri caravan park due to no availability	No response or none identified	Kalbarri - Iconic	No	Significant employer, significant visitation. Attrition.
LGA: Dandaragan RDC: Wheatbelt TR: ACC	1. Investigate the opportunity for additional caravan park accommodation in the region - In order to cater for the existing caravan and camping market, it is recommended that the Shire of Dandaragan continue to make significant numbers of short term visitor sites available in caravan parks in both Cervantes and Jurien Bay. In addition, with the expected increases in caravan/camping traffic, there is seen to be an opportunity for private investment in additional caravan parks in the region. 23. DEC: Demand for public access not being met at Wedge/Grey (Moora DEC Office) though this is subject to government direction.	Inadequate sites future (Indian Ocean Drv)	SuperTown, Indian Ocean Drive	Yes	Growth in traffic expected resulting from Indian Ocean Drive.
LGA: Dundas / Norseman RDC: Goldfields Esperance TR: ACC	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at Peak Charles National Park ($60,000) 23. DEC: There is an issue with undefined camping at Peak Charles (Esperance DEC Office) - plans recommend expansion and improvement and that work has commenced.	No response or none identified	Entry Point	Yes	Large number of unauthorised camping locations being utilised at roadside rest areas along the Eyre Highway.
LGA: Kalgoorlie RDC: Goldfields Esperance TR: AGO		No response or none identified	High peak demand	Yes	Extremely high peak month occupancy.
LGA: Upper Gascoyne RDC: Mid West - Gascoyne TR: AGO	1. Improving camping and other facilities on the eastern side of the National Park, including a relocation of the Temple Gorge campsite identified. Improvements planned for Cobra Station. 4. Mt Augustus Outback Resort- new/ redeveloped Nature Based Park - Planning currently underway to improve quality, facilities and capacity. Possible future transport link to Karijini. 23. DEC: Demand exceeds capacity in Winter at Kennedy Range (Geraldton DEC Office) - their Management Plan recommends new campgrounds. Demand for sites is met at My Augustus/Cobra (Geraldton DEC Office) though potential infrastructure upgrades are required.	Advised facilities adequate	Mt Augustus	Yes	Require improved facilities at Mount Augustus

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating
LGA: Halls Creek RDC: Kimberley TR: ANW	1. Investigate the opportunity for the development of accommodation that caters for short term visits of three days or less along the Great Northern Highway. Ensure the provision of additional black dump facilities in all major towns in the region 3. Halls Creek - New caravan park proposed to improve quality, capacity and noise issues at current location (underway). New caravan park proposed on Mabel Downs Station at gateway to Purnululu. 23. DEC: Demand exceeds capacity in peak times during June-August at Purnululu (East Kimberley DEC Office) though future demand is expected to be met by adjoining Mabel Downs Station.	No response or none identified	Entry Point	No	Improved range of facilities required at Purnululu and improved quality in Halls Creek.
LGA: Manjimup RDC: South West TR: ASW	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at D'Entrecasteaux National Park at Black Point ($150,000) 11. Potential expansion/redevelopment Manjimup 23. DEC: Demand exceeds capacity January/Easter at D'Entrecasteaux (Donnelly DEC Office) - their Management Plan recommends s new campground and the expansion of existing facilities. Demand exceeds capacity Summer/Easter at Shelley Beach (Albany DEC Office), though site does not allow for expansion.	Reduction in availability of short stay sites - detailed submission received regarding issues. Investigate viability of dump point.	SuperTown	No	High visitation, high cost of average site, popular natural assets D'Entrecasteaux National Park.
LGA: Bunbury RDC: South West TR: ASW		No response or none identified	Major regional town	No	Illegal camping a significant issue
LGA: Harvey RDC: South West TR: ASW	2. In 2011-12 capital funds will be invested into improved day use visitor facilities at Logue Brook 11. Closure of Binningup Caravan Park (post July 1, 2005)	Shire did not respond, VC advised they are looking to identify areas in the Shire (Australind, Brunswick, Harvey, Binningup& Yarloop) to accommodate Motor homes and caravanners	Inland and coastal waterways	No	Demand for intrastate access to camp at inland waterways such as Lake Brockman
LGA: Armadale RDC: Perth TR: EP		Shire advised adequate. VC advised need more Dump Points, unpowered and powered sites (pull thru bays), camping and rest areas.	Access to metro	Not answered	High occupancy (many long stay)
LGA: Mundaring RDC: Perth TR: EP	1. Investigate the opportunity for a caravan park development in the Mundaring area around the Great Eastern Highway 23. DEC: Demand exceeds capacity at Beelu (Perth Hills DEC Office) though they have no capability to expand site	Improved facilities	Perth Hills	No	Hub for the Golden Pipeline Heritage Trail, Bibbulmun Track, Munda Biddi Trail and Kep Track

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)	Main reason for rating
LGA: Swan RDC: Perth TR: EP		Dump Points	Access to metro	Yes	High occupancy (peak month and average annual)

Medium priorities

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)
LGA: Irwin RDC: Mid West - Gascoyne TR: ACC		Dump points (Indian Ocean Drv)	Indian Ocean Drive	No
LGA: Coolgardie RDC: Goldfields Esperance TR: AGO	23. DEC: Demand exceeds capacity at Credo (Goldfields DEC Office) - planning underway to look at options for expansion/improvement	No response or none identified	Outback	Not answered
LGA: Menzies RDC: Goldfields Esperance TR: AGO	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at the proposed Goongarrie Conservation Park ($50,000) 23. DEC: Demand exceeds capacity in peak times at Goongarrie (Goldfields DEC Office) - planning is underway to look for options for expansion/improvement	No response or none identified	Golden Quest Discovery Trail	No
LGA: Ravensthorpe RDC: Goldfields Esperance TR: AGO	2. Four Mile Beach camp is undergoing improvements as part of the Fitzgerald River National Park Improvement Project 11. New development - Wavecrest Ravensthorpe (post July 1, 2005) 23. DEC: Demand exceeds capacity in peak times during Summer at Fitzgerald River (Albany DEC Office) - they have no intention to expand though may explore infrastructure upgrades	Require grant funding to assist with set up cost of Nature Based Park at Starvation Beach, Mason Bay, Hamersley Inlet or Two Mile Beach	Fitzgerald River National Park	No
LGA: Cuballing RDC: Wheatbelt TR: AGO	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at Dryandra Woodland ($130,000) 23. DEC: Demand exceeds capacity in Spring at Dryandra (Great Southern DEC Office) - their Management Plan recommends a new campground	No response or none identified	Dryandra	Yes
LGA: East Pilbara RDC: Pilbara TR: ANW	23. DEC: Demand is met for the majority of visitors to Karijini (Karratha DEC Office) - their Management Plan identified Hamersley Gorge in the west of the park has possible future camping potential. Demand exceeds capacity June-August at Millstream Chichester (Karratha DEC Office) - their Management Plan recommends a new campground.	No response or none identified	Karijini - Iconic	No
LGA: Collie RDC: South West TR: ASW	23. DEC: Demand exceeds capacity in peak times at Stockton Lake (Wellington DEC Office)	Explore opportunity for nature based camping at Minninup Pool or Lake Kepwari. Issue with illegal camping. Require transit park.	SuperTown, Inland water/ nature	Yes
LGA: Dardanup RDC: South West TR: ASW	2. In 2011-12 capital funds will be invested into site planning for additional camping and improved visitor facilities at Wellington National Park. $1m Royalties for Regions funding is allocated for additional camping at Potters Gorge in Wellington. 23. DEC: Demand exceeds capacity in peak times during September-January at Wellington (Wellington DEC Office) - their Management Plan recommends new campgrounds	No response or none identified	Wellington National Park	No

Location	New facilities proposed, investigated or needed *(A):	Responded indicating a need:	Importance to tourism	LGA Facilities sufficient (B)
LGA: Boddington RDC: Peel TR: EP	Shire advised a caravan park has been approved for the former Crossman Roadhouse site - not yet being developed.	Facilities adequate.	SuperTown	No
LGA: Cockburn RDC: Perth TR: EP	15. Aspen Parks have identified a further vacant 4 hectares of land adjacent to the existing park that Aspen are trying to secure by lease from DEC to allow for the addition of an extra 80 tourism sites and to secure a long term lease for both land areas	No response or none identified	Proximity to Fremantle and Cockburn Sound	No
LGA: Joondalup RDC: Perth TR: EP		It is not considered a priority	Access to metro	No
LGA: Mingenew RDC: Mid West - Gascoyne TR: ACC	2. In 2011 -12, DEC is investing capital funds to provide additional camping and improved visitor facilities at Coalseam Conservation Park ($42,000) 23. DEC: Demand exceeds capacity in peak times during August-September at Coalseam (Geraldton DEC Office) - their current planning recommends expansion/improvement	No response or none identified	Wildflowers	Yes
LGA: Ngaanyatjarraku RDC: Goldfields Esperance TR: AGO		No response or none identified	Entry Point	No
LGA: Albany RDC: Great Southern TR: ASW	11. Closure of Frenchman's Bay and Oyster Harbour Albany (post July 1, 2005)	Adequate facilities	High domestic and international visitation	Yes
LGA: Nannup RDC: South West TR: ASW		Improvement/ expansion required	Blackwood River	No

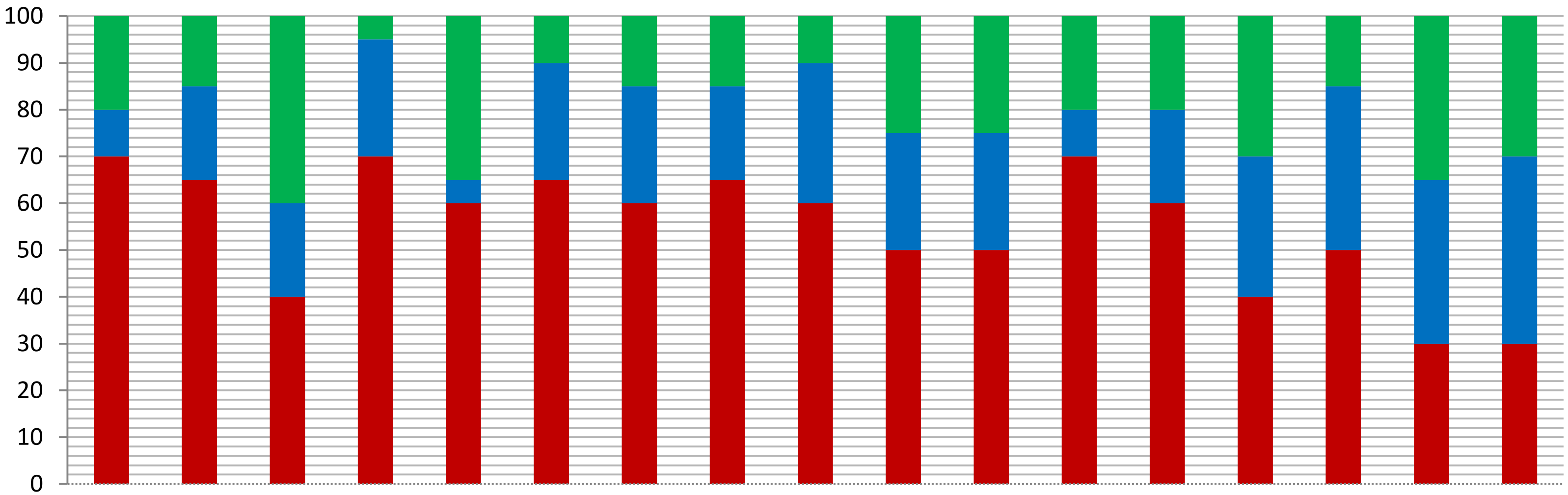
Other past or potential changes in supply identified (not included in table above):

LGA	Potential changes in supply[11]
Wanneroo	Closure of Capricorn Village Yanchep (pre July 1, 2005)
Wanneroo	Potential future closures or redevelopment Kingsway Tourist Park Kingsway
Gosnells	Closure of caravan Village Caravan Park Gosnells (pre July 1, 2005)
Gosnells	Closure of Travellers Caravan Park Gosnells (pre July 1, 2005)
Kalamunda	Closure of Springvale Caravan Park High Wycombe (post July 1, 2005)
Toodyay	Potential expansion/redevelopment Moondyne (Toodyay)
Donnybrook Balingup	Closure of Donnybrook Caravan Park Donnybrook (pre July 1, 2005)
Goomalling	Closure of Goomalling Caravan Park Goomalling (pre July 1, 2005)
Waroona	Closure of Preston Beach Caravan Park Preston Beach (post July 1, 2005)
Denmark	Closure of Wilson Inlet Caravan Park Denmark (pre July 1, 2005)
Yilgarn	Closure of Yellowdine Caravan Park Southern Cross (pre July 1, 2005)

GAP ANALYSIS

The Gap Analysis below shows the prioritisation of requirements for the ‘Extreme Priority’ locations. Those with a larger ‘gap’ between the current score and the short term target score (the blue shaded section) are the priority focus locations.

Excellent- Excellent Range of facilities - meets seasonal demand with minimal overflow.
Competent- Good facilities in this area (range of tourist product standards and types catering for up to 90% of peak demand before overflow)
Average- Average facilities in this area (Mixed tourist and - permanents at caravan parks, caters for 80% of peak demand)
Fair - Basic facilities in this area (Nature based, transit camps or similar)
Poor - No facilities in this area



Percentage Assessment	Exmouth	Shark Bay	Carnarvon / Coral Bay	Esperance	Upper Gascoyne	Broome	Derby - West Kimberley	Wyndham -East Kimberley	Ashburton	Port Hedland	Roebourne /Karratha	Augusta/ Margaret River	Bussel-ton	Mandurah	Murray	Rockingham	Gingin
Current Score	70	65	40	70	60	65	60	65	60	50	50	70	60	40	50	30	30
Target Score in year 1 - 2	10	20	20	25	5	25	25	20	30	25	25	10	20	30	35	35	40
Target Score in 3 - 5 years	20	15	40	5	35	10	15	15	10	25	25	20	20	30	15	35	30

See next page for details relating to the gap analysis.

Location	Comment
Exmouth	Current Inventory of caravan sites generally sufficient. Some seasonal peak shortages. New caravan park proposed, plus DEC proposes expansion of Cape Range National Park camping area. Overflow to cater for peaks.
Shark Bay	Current sites not adequate. Sites shortages at Denham and Monkey Mia in peak times- Aspen proposal for expansion of sites and accommodation at Monkey Mia held up in approvals for 15 years.
Carnarvon/ Coral Bay	Current sites at Coral Bay do not meet at peak times. Consumer feedback indicates a need for improvement in standard of facilities. Completion of Banksia Drive extension is a priority.
Esperance	Caravan parks currently adequate but there has been the recent loss of one caravan park. New pressures will emerge from infrastructure projects. DEC advises demand exceeds capacity at Cape Le Grand.
Broome	Industry stakeholders indicate sufficient supply apart from high season. However, consumers report necessity to bypass Broome due to lack of availability throughout major part of dry season. Potential closure of one existing park. New Broome North park under consideration. Need for dump points. Supply of sites likely impacted by LNG Hub project. Sealing of Cape Leveque Road presents opportunity for Indigenous camping developments on the Dampier Peninsula.
Derby -West Kimberley	Demand exceeds capacity at Windjana Gorge, Silent Grove and Mt Hart. High tourism potential for travel on Gibb River Road needs additional camping infrastructure. Potential for environmental impacts unless ablution facilities and dump points are provided. Potential for station stays and Indigenous owned and operated facilities. Existing Campgrounds should be capable of expansion to meet demand.
Wyndham-East Kimberley	Wyndham caravan parks are reported to be in need of improvement. Investigate opportunities for development of seasonal nature-based parks closer to Kununurra and Broome. Future opportunity for additional Indigenous owned caravan park at the site of the Ord Expansion Project worker's camp in Kununurra, which has designed on a future caravan park services infrastructure grid. Potential to add inventory to existing parks in the short term. Provision of additional dump points is required through the region. Additional facilities required on this section of the Gibb River Road.
Ashburton	Demand is currently met for majority of visitors to Karijini. Demand exceeds supply at Millstream Chichester. DEC management plan recommends new campground. Rest areas and dump point required through region. Opportunity for development of new caravan park and expansion of existing park in Tom Price. High proportion of tourist sites occupied by resource mining workers which is a trend that will continue to impact on tourism availability. There has been two caravan parks closed - at Onslow and Wittenoom. High demand in Onslow due to Wheatstone Gas development.
Port Hedland	Substantial proportion of caravan sites utilised for worker accommodation - likely to continue over the next 5 years at least. High tariffs due to demand. Transit Park(s) nature-based and expansion to existing facilities required to mitigate shortages. Closure of South Hedland Caravan Park and occupation of all sites on Black Rock Caravan Park by BHP workers has exacerbated shortfall of tourist sites. Need for more road traveller facilities including dump points.
Roebourne/Karratha	As for Port Hedland - Insufficient tourist sites due to resource project accommodation demand (unmet). Requirement for transit park(s) and overflow capacity to be added. Need Ministerial waiver on 50km exclusion zone. Investigate opportunity at coastal locations for new park development. New park has been developed at Point Samson.
Augusta/Margaret River	Demand exceeds capacity at Margaret River. DEC is to investigate future sites for caravan park the region and camping at Leeuwin- Naturalist National Park. Issues with illegal camping in region. Occupancy statistics distorted by lower demand at Augusta. Planned expansion of caravan park at Augusta may relieve pressure on Margaret River facilities. Dump Points required in region. Closure of caravan park in Augusta has reduced number of available sites. Evidence of potential for further closures of caravan parks for conversion to higher use in region.
Busselton	High seasonal demand and site shortages in peak holiday periods. Loss of a number of caravan parks to higher use in recent years. Potential for new caravan park developments at Siesta Park but existing leases have been extended. Popular interstate and intrastate destination. Pressure on existing site inventory from retiree market and fly in - fly out workers. Require additional tourist sites and overflow facilities.
Mandurah	The closure of three caravan parks in Mandurah has created a shortage of site during the holiday seasons. Potential closure of an additional three parks will exacerbate the shortages. A significant number of the remaining caravan sites are utilised for permanent occupation and by workers on mining and other projects. The City of Mandurah does not afford a high priority of the development of new caravan parks in its Tourism Strategy which may result in some equity issues. The Peel Development Commission has been active in promoting the provision of caravan and camping sites in the Peel Region and has formed a Sector Support Group Framework to investigate opportunities. There are potential coastal and near-coastal sites in Mandurah and in the Yalgorup National Park that would be highly desirable if the land was deemed suitable for development. DEC does not have camping as a priority in Yalgorup National Park.
Murray	The availability of tourist sites in the shire of Murray has been diminished by the recent closure of Aqua caravan park. The adjoining parks are at future risk of redevelopment for other uses due to commercial creep along Pinjarra Road. Permanent occupiers of sites take up a high proportion of sites. Development of new camping area at Baden Powell, potential new caravan park development at Thompsons Road and the potential for new caravan and campgrounds on the eastern side of the Peel Estuary have come into focus through the completion of the Forrest Highway, which provides better access to Perth and other major gateways. The Shire of Murray holds the key to the provision of caravan and camping facilities to meet anticipated demand in the region.
Rockingham	Rockingham caravan parks have the highest occupancy in the state. However, many of the sites are occupied by permanent residents. A potential new caravan park development at Port Kennedy was incorporated into the land development agreement with the State of Western Australia. City of Rockingham has prepared a planning policy for caravan parks to address the shortage of tourist sites. There is high potential for the development of sustainable tourist caravan parks in Rockingham due to its proximity to Perth, coastal location and access by road and public transport.
Gingin	Two coastal caravan parks at Ledge Point and Lancelin have reduced site availability at beachfront locations. The closures have been mitigated somewhat by the development of new parks at Ledge Point and Gingin, although neither are on the coast. There is a possibility that the other caravan park at Lancelin will be developed for alternative use in the near future. Tourism WA and the Department of Regional Development and Lands are considering a potential new coastal site at Lancelin for the development of a large tourist caravan and holiday accommodation park. The provision of new caravan and camping infrastructure at Lancelin and adjoining coastal areas is seen as critical due to its high demand as a holiday location and the increased visitation through the opening of the Indian Ocean Drive.

RECOMMENDATIONS

The concepts presented in this caravan and camping strategic report are aimed at positioning Western Australia at the forefront of self-drive tourism.

Of all the States of Australia competing for the growth caravan and camping based tourism market, Western Australia best presents the attributes that make tourists want to leave the cities and explore the widespread regional attractions. Yet, for all its geographic and cultural attractions, it does not deliver in line with expectations. The barriers to visitor satisfaction are defined throughout this document.

The solutions to the issues appear relatively simple - improve supply to introduce more competition and reduce cost, raise service levels through accreditation and training, and grow the market to increase revenue and occupancy through sound marketing strategies. However, there are a number of conditions that conspire to hold back the development of caravan and camping tourism in Western Australia, these include:

- Seasonality and extreme climatic conditions (particularly in the North)
- Land supply, land cost and pressure from higher order uses
- Development cost - especially in remote and regional Western Australia
- The tyranny of distance and geographic dispersal of attractions
- Staff and skills shortages and the resulting wage pressures due to the resources boom
- Quality of service provision and market expectations

The recommendations and strategies presented herein are the result of detailed consideration of each of the issues. They are crafted to mitigate the obstacles and risks. Many of the strategies are intertwined, which makes a staged approach less effective.

The recommendations proposed have sought balance between the often contrasting views and priorities of the caravan and camping stakeholders. Due consideration has been given to the often complex and competing range of needs including:

- User expectations and priorities
- Access and equity to affordable holidays for all sectors of the community
- The economic benefit of caravan and camping tourism and the propensity of drive tourists to visit regional Western Australia
- Environmental management and sensitivities
- Safety and security
- Accessibility to key natural assets such as beaches and inland waterways
- Impact of growth of visitation on the infrastructure and community amenities of small regional towns
- The effect on surrounding land users
- Sustainable supply and the need to encourage the retention of, and investment into, new and existing caravan parks

The successful implementation of most strategic decisions relies heavily on leadership. Because caravan and camping based tourism has such a diversity of stakeholders, the implementation of the proposed strategies will require the buy-in of the political leadership, their agencies, industry and the community.

Introduce Flexibility in Licencing to Meet the Modern Market

Recommendation 1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand

- **Review licence requirements to simplify, streamline and provide a consistent approach - aligned to duration of stay, health requirements and user expectations.**
- **Allow multiple zones within one licence to enable licence holders to meet different user segment needs.**
- **Encourage development of micro campgrounds in diverse environments such as bush camps, micro-breweries and farm stays.**

Issues and Risks

Despite the intent of the caravan and camping legislation to create uniformity across the state in terms of minimum facilities and licencing of caravan and camping locations, consumers have established illegal or unauthorised camping patterns that fall outside current regulations. The use of roadside stops and rest areas for camping is prevalent and the Caravan Parks and Camping Grounds Regulations are not applied to these, resulting in illegal or unauthorised camping.

Western Australia has the most prescriptive regulation of tourist caravan parks of any state or territory in Australia, and many caravan and camping visitors are deterred from visiting the state due to its reputation as the "can't do" state[80].

The current system for licencing allows for different facility ratios under each licence type, which results in a discord with the assumed minimum requirements. A guest staying in a tent in a Nature Based Park is likely to have similar requirements for ablution facilities to a guest staying in a small caravan in a caravan park and the minimum standards in the regulations do not currently reflect this consistency. Likewise a fully self-contained RV user does not require access to these facilities regardless of where they are staying, and resents paying for facilities they do not use.

The requirement for higher levels of facilities at licensed caravan parks results in higher costs and ultimately higher charges to users. The gap between caravan park occupancy costs and tariffs is dictated by the market and impacts on the viability of caravan parks. Where there are unlicensed alternatives to caravan parks (authorised or illegal) the viability of caravan parks is threatened, as the unlicensed facilities do not have to meet the same facility requirements in accordance with the regulations.

The current licence requirements are skewed against caravan parks forcing them into an overly prescribed framework and preventing them from providing facilities suited to user demands. Transit camps and nature based camps are permitted, under the regulations, to tailor facilities to user requirements, putting caravan parks at a commercial disadvantage. This negatively impacts on the willingness of investors and developers to develop new caravan parks or refurbish existing parks, due to the often inadequate return on investment.

Park operators consider that the regulations pertaining to the facilities provided at all caravan and camping locations should be dictated by minimum health and safety requirements, and should be common to all types of camping areas.

Unlicensed camping sites, both illegal and authorised (by state or local government), are growing in patronage, and provide minimal facilities (if any). Some local governments allow occupants to stay at these unlicensed sites for extended periods.

Some travellers occupy DEC managed sites for extended periods (permitted for up to three months in the Draft Nature Based Caravan and Camping Guidelines) thereby denying other visitors' access to those parks and their associated attractions. The pricing differential afforded by lesser facility ratios encourages long staying guests to substitute nature based camps for licenced caravan parks impacting on the viability of licenced parks, which must provide higher levels of facilities, and therefore charge higher tariffs.

The fifty kilometre exclusion zone from licenced caravan parks, for developing a nature-based campground has been deemed anti-competitive and the Parliamentary Inquiry recommended its removal from the regulations. However, the deletion of the regulation would provide another anti-competitive situation in regard to unfair competition to licensed caravan parks from nature-based campgrounds if they are allowed to operate with lesser facilities. There is little logic in having two different requirements for licenses, which are servicing a similar (if not the same) client base. A number of local governments in Western Australia offer land (often Crown Reserves and showgrounds) for regular overnight camping. Many of these are not required to

[80] CMCA and Online user forums

comply with the Caravan Parks and Camping Grounds Regulations 1997, and have not been subject to a Planning Application.

More often than not, these non-compliant sites are offered free of charge or with a token fee competing against licensed caravan parks which they inspect and are required to be compliant with the regulations. In these cases, the Councils may be breaching the competitive neutrality provisions of the National Competition Policy as well as conducting illegal and potentially unsafe operations.

A recent decision by the competition regulator in Tasmania, following a complaint of inaction by local government to administer local laws in relation to free camping, led the Economic Regulator deciding that Kentish, West Coast, Latrobe and Central Highlands councils had acted unfairly against the parks by providing free unpowered caravan and camping sites. There does not appear to any instances of similar action by caravan parks within this state, yet.

Strategy

The current caravan and camping legislation should be reviewed with a view to reducing the regulations to provide only necessary facilities to meet the health and safety needs of tourists and allow market forces to dictate other facility and amenity requirements. This would allow consumer demand and market segmentation to drive investment in additional optional amenities rather than forcing the provision of facilities not required by many of today's users.

The review should consider basing licences primarily on duration of stay, encouraging co-location of small scale facilities with other businesses e.g. wineries, sports clubs etc. providing short-term accommodation and alternative types of visitor experiences.

The proposed review of regulations could investigate the possibility of allowing multiple zones within one facility licence, so that amenities can be reflective of segmented user requirements (based on duration of stay and self-contained status) whilst minimising the development cost burden. This would allow caravan parks to offer zones for lower cost low facility camping (as unlicensed camping currently does), in line with consumer demand.

It would also make sense to bring all other providers of camping facilities under the common regulatory regime, including Local Government authorised camp areas, DEC managed campgrounds and Main Roads overnight rest areas.

Nature Based Camps could be merged into a broader licence type and expanded to include remote, historic or attraction based locations as well as encompassing small facility licences for bush camps, wineries, micro-breweries, farms etc. These could be licenced as a 'Limited Facility Camp' to reflect the expanded scope. The duration of stay at the 'Limited Facility Camps' could be restricted to a 10 night maximum (unless otherwise approved) in line with the reduced facilities required to be provided.

This would enable the tailoring of options to segmented groups of travellers, whilst managing negative environmental impacts and providing opportunities to develop more camps in closer proximity (within 50kms) to towns or other facilities, without having different requirements to existing licenced caravan parks. Locations, which suited lesser facilities due to remoteness, seasonality or environmental considerations, could opt to have shorter durations of stay. Such locations would include rest areas and sites with high environmental significance. They could operate with an overnight rest area or transit camp licences.

Any caravan parks or campgrounds on the DEC Managed Lands that are compliant with the licensed facility requirements for caravan parks under the revised requirements would not be restricted in terms of duration of stay, for short-term tourist sites beyond those restrictions stipulated by DEC. There would also be the option to have multiple zones within the one facility to provide for both short and longer stay durations. For example, a DEC campground could offer a Limited Facility Camp Zone and a Fully Self-Contained Zone, to cater for short stay visitors and longer staying fully self-contained visitors.

DEC has developed *A Guide for Nature based Caravan Parks and Camping Grounds, Western Australia*[81], and the facility requirements identified in this could form the basis of the minimum requirements for all caravan and camping grounds, regardless of location. Many of the environmental considerations are appropriate only for nature based facilities, though the general facilities required to suit consumer needs could be universally adopted (as appropriate).

Fully Self-Contained Zones in caravan parks and rest areas could provide the option for users of certified (NZS 5465:2001 equivalent) self-contained motorhomes and caravans to use camping areas with no facilities. Fees would be minimised, commensurate with the level of amenities provided.

The following table provides a sample outline of how the licence requirements could be streamlined in line with user equipment and duration of stay.

[81] A Guide for Nature based Caravan Parks and Camping Grounds, Western Australia, Department of Environment and Conservation 2010.

Proposed facility zone options within a licence type

Zone Types and Requirements (one facility may operate with multiple zones)	1 night	2-3 nights	4-10 nights	11 - 90 nights	91 + nights
Overnight Rest Area	Yes	No	No	No	No
Transit Camp	Yes	Yes	No	No	No
Limited Facility Camp [82] or Overflow	Yes	Yes	Yes	No	No
Caravan Park - Short Stay	Yes	Yes	Yes	Yes	No
Caravan Park - Long Stay	Yes	Yes	Yes	Yes	Yes
Fully Self-Contained Zone[83]	Yes	Yes	Yes	Yes	No

The ablution requirements could be loosely in line with existing requirements for Transit Camps, though further investigation could look to expand the range of site numbers within each category to better reflect actual minimum facility requirements and further reduce complexity.

Positive Impacts

Allowing for separate zones within a licence type will allow managed and unmanaged facilities to meet a consistent standard of facilities based on the minimum acceptable standards to adequately meet the needs of users. Additional facilities could give operators a competitive edge with tariffs set accordingly. This would allow consumers to pick the level of facilities they require to meet their particular needs and priorities.

Streamlining licence requirements would reduce the development cost and complexity and allow caravan parks to be more competitive with unmanaged locations, and differentiate themselves on service provision and optional facilities. It would present more of a market driven approach to development, improving our relative competitiveness with overseas and interstate destinations.

Additional licence types and zones could improve the profitability for professional operators as well as providing a small but significant alternate income stream for farmers, Indigenous communities, wineries and other properties through the option to develop small scale campgrounds.

It would support and encourage the development and expansion of commercial facilities as well as removing some of the existing barriers to entering the market. This would reduce the supply side deficit in many high appeal locations and would also facilitate the emergence of more diversity in the product style and offerings to better suit a range of consumer needs.

[82] Limited Facility Camp -Nature or Attraction Based Camp (includes proposed small facility licences e.g. wineries, farms etc)
[83]Fully Self-Contained - certified to the Australian Standard equivalent of NZS 5465:2001

Station Camping Provides a Low Cost Camping Option

Amending the Pastoral Act to allow caravan and camping facilities to be developed on Pastoral Leases without onerous restrictions, such as the requirement for tourism activities to be "purely supplementary" to pastoral activities would enable the licence options mentioned herein to be applied to the significant parcels of pastoral land in the State. (The requirements are not being applied to certain pastoral properties in the Kimberley region, which are highly tourism focussed). This would contribute significantly to providing much needed capacity particularly in the north.

The Department of Regional Development and Lands should utilise the Land Administration Act to excise land for caravan and camping facilities from pastoral leases under Sect.79 of the Act, and work with State Lands to remove restrictions on the delivery of caravan and camping on pastoral leased land.

The requirement for all camping areas (roadside rest areas, Shire authorised camping spots etc) to meet minimum requirements would improve the visitor experience and provide greater consistency in health and safety requirements and outcomes with a good range of low cost options for users.

The simplified requirements could be more clearly interpreted by planners, developers, regulators and operators to facilitate a speedier approvals process.

Impacts on the Recommendations from the Parliamentary Inquiry

Provision, Use and Regulation of Caravan Parks (and Campgrounds) In Western Australia: 5, 6, 7, 9, 10, 18, 19, 20, 21 22, 23, 24, 26, 29, 30, 31, 32, 38, 39, 41, 44 & 56

Rally the Reserves

Recommendation 2: Increase Support for Release of Land for more Caravan Park Developments where Viable

- **Provide development-ready land for caravan parks and campgrounds in Western Australia through the LandBank Program.**
- **Tourism WA to consider the extreme priority locations identified in the gap analysis and elsewhere in this report and work with other agencies to apply for appropriate funding to develop caravan parks at those locations.**

Issues and Risks

Since 2005, ten caravan parks have closed at prime coastal holiday locations. Without State Government intervention it is unlikely that enough new caravan parks will be developed at coastal sites to replace them due to the high cost of land. Unallocated Crown Land and Reserves at strategic locations may be deemed to have higher use potential. However, unless sites are provided at priority locations, access and equity issues will arise, as there will be no affordable holiday accommodation options at such locations over time. The lack of caravan parks and campgrounds at prime locations will encourage illegal camping, which is extremely difficult to regulate.

The LandBank initiative, introduced in 2005, aims to attract suitable domestic and overseas investors to tourism development projects by identifying strategic tourism sites and making them investor ready through the facilitation of the required approvals. LandBank also contributed to research that resulted in a report: Understanding the Caravan Park Industry in Western Australia that provided extensive insights into the type of tourists who use caravan parks, their decision making processes and the key operational issues that caravan park operators need to focus on to attract this market.

Although investigations have been undertaken, the LandBank program has not yet resulted in attracting investors to develop new caravan parks or in providing a supply of development-ready sites for caravan parks in Western Australia. It is considered that the critical land supply needs of this important tourism sector can only be addressed by a new high-level whole of government focus.

Many of the extreme priority locations identified have developments proposed or alternative delivery methods (as per the other recommendations), which would better fill the gaps in supply. Of the extreme priority areas identified, there are two key locations that meet the requirements for urgent intervention by state government to re-establish tourist caravan park sites lost through closures and redevelopment - Peel and Lancelin. Both of which are considered to have the supporting year round occupancy (to achieve viability) and a lack of other more cost effective alternatives to deliver additional year round capacity.

Closures of caravan parks at Lancelin and Mandurah/Murray in the Peel region have diminished the tourism opportunity at these key coastal locations, which are highly strategic in terms of their proximity to Perth.

The lack of caravan parks near to the capital city is an issue for people domiciled in Perth as it reduces their capacity to take short breaks without travelling long distances. For tourists to Western Australia, having caravan parks located within one hour of the major city on major transport routes is critically important to their enjoyment of the tourism experiences that Perth offers.

The availability of land suitable for caravan parks at these two strategic locations is severely inhibited and it is unlikely that new caravan parks will be developed at Lancelin and Mandurah/Murray without government intervention due to the cost of land. A working group has been established to address these issues in the Peel Region.

Local government has identified shortages at both locations and support the establishment of new caravan parks to improve the tourism opportunity. The Shires of Gingin and Murray have been quite proactive in determining suitable locations. However, Mandurah City does not rate caravan parks a high priority in their Tourism Strategy. Mandurah and Murray have average annual occupancies of 86% and 72% respectively and occupancies at the location peak at more than 85%.

Strategy

It is proposed that increased focus is put on the identification of Unallocated Crown Land, Reserves, Conservation Estate, Indigenous land and local government land through the LandBank and NatureBank frameworks to facilitate development of tourist caravan parks and campgrounds.

Furthermore, planning policy should be reviewed to ensure that land for caravan parks is considered a high priority and provided for whenever new land releases are proposed. The broader inclusion of 'tourism zones' in major land releases is not a satisfactory outcome for the caravan and camping tourism sector, as the value of such strategically located land precludes development of lower return developments such as caravan parks in favour of higher and better use, including hotels and holiday apartments.

For caravan parks and campgrounds to be viable in Western Australia, appropriate areas of well-located land must be reserved for their development and maintained in an ownership structure that ensures caravan and camping holidays are accessible for future generations. It is proposed that it be mandatory for local government to provide a list of potential caravan and camping sites in their localities.

Land assessed under the proposed LandBank program would take into account demand/supply issues for all localities in the State and aim to restore facilities lost through redevelopment of priority coastal and other strategic locations. Ownership of the sites, approved for caravan park and campground development, would be retained by the state government or vested in local government. The land should be quarantined in perpetuity for the specific use to protect from future redevelopment for higher use.

It is essential that land managed by the Department of Environment and Conservation is also considered for potential NatureBank caravan and camping development sites as it covers a very large area of the State of Western Australia, which includes some of the most desirable caravanning and camping sites anywhere.

Caravan park and campground sites provided under this initiative would be available for development by local government or tendered to the private sector. Long-term leases should be offered under terms that recognise the capital cost/return on investment equation of the tourism segment. In the event that freehold for any of the LandBank sites were made available, there should be a restrictive covenant on the Land Title that ensures the land is not developed for any other purpose.

It is important to consider seasonality and viability in identifying locations for potential for development of new caravan parks, and it is considered that in some instances short falls in supply are better provided for through other models, such as proposed low facility camps, and co-located facilities. Potential sites for priority investigation under the LandBank initiative have been identified in the following locations:

Location	LGA	Justification	Recommendation
Herron Point	Murray	Mandurah and Murray are both well positioned to provide much needed capacity with good accessibility to the metro area. Mandurah is suffering particularly high pressures for land to be redeveloped for higher order uses (or permanent accommodation) and is a popular coastal destination offering a range of recreational pursuits, though the City of Mandurah do not rate development of additional caravan parks as a high priority. Murray also has distinct appeal with inland waterways and ease of accessibility for travellers on the new Forrest Highway. Local government has indicated very strong support for additional caravan and camping capacity in their LGA. Mandurah and Murray have average annual occupancies of 86% and 72% respectively and peak month occupancies over 85%.	Business case to investigate a LandBank site in Melros or Herron Point.
Melros	Mandurah		
Lancelin	Gingin	With recent and expected caravan park closures, together with its good proximity to Perth and a raft of popular ocean based recreational opportunities on offer, Lancelin is well positioned to provide additional outer metro capacity and an ideal short trip destination. The new Indian Ocean Drive has significantly increased traffic through Lancelin, and there is a parcel of Unallocated Crown Land which is well positioned on the coast presenting a significant opportunity for delivering a new caravan park with few foreseeable complications. A prefeasibility study has already been undertaken demonstrating viability. The Experience Perth tourism region (which Lancelin falls into) has the highest annual average occupancy of all of the tourism regions of 70.7%. The second highest is Australia's Coral Coast with 55.3%.	Business case to investigate a LandBank site in Lancelin.
40 mile	Roebourne	Pilbara - With an average annual occupancy of 78.3%, peak month occupancy of 90% and average takings per site night occupied over $80/pn, Roebourne has perhaps the most extreme current supply side pressures of the entire State. The shire indicated a need for more short stay sites in the region. The proposed solution would be a short stay transit park, which could potentially be located in place of the current Cleaverville or 40 Mile camping areas alleviating current issues with lengthy stays and inappropriate use of these unmanaged/ unofficial (yet integral) locations.	Recommend compilation of business case for the designation of a LandBank site at 40 Mile or Cleaverville. This may suit year round or peak only (overflow).
Cleaverville	Roebourne		

Location	LGA	Justification	Recommendation
Broome North	Broome	Caravan parks being redeveloped for higher order uses has been an issue in Broome and will likely continue to be an issue due to shortages of available land in the town site. While the Shire of Broome advises that the level of accommodation in Broome is generally sufficient to meet current levels of demand, user forums and surveys indicate a high level of dissatisfaction with the availability of caravan sites in the peak season. Further, it is recognised that supply shortages may be exacerbated with the proposed James Price Point LNG project, 60km north of the township. There are also opportunities for development of additional facilities on Aboriginal land, particularly on the Dampier Peninsula where they are unable to service existing demand, and there will likely be increases in demand following the proposed sealing of the remainder of the Cape Leveque Road.	Broome North has a LandBank site identified for the development of a caravan park. It is recommended that Tourism WA work with the Shire of Broome to ensure that sufficient lead-time is allowed for the development of the caravan park to ensure it can meet market demand. Alternatively investigations should focus on overflow or peak only capacity.

Other priority locations including suitable sites for developing capacity on the DEC Managed Lands and for additional facilities such as dump points etc are identified in the table on page70.

Sites which may impact on the ongoing viability of existing supply could be designated as 'Overflow Only' facilities until the demand grows to a point where it necessitates the conversion to a fully operational licenced caravan park. New regulations for the provision and management of overflow sites as per '*Recommendation 7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry*' would protect the viability of existing caravan parks without compromising public health and safety. With facility requirements for licenced parks and overflow facilities being in line with the same minimum standards, the process of converting to a fully licenced facility would not be cumbersome.

Where in a regional context, the establishment of a caravan park was deemed to provide an important community and economic multiplier benefit, but through seasonality or other reasons was considered economically unviable to develop by private investors, the State could develop the facility and vest the land to the local government area to operate or lease to private caravan park operators.

Tourism WA to work with local government to prepare a business case for caravan parks to be developed at Lancelin and Shire of Murray Shire or City of Mandurah in the Peel. Each of the sites should be "made ready" with preliminary concept design, approvals and site works. Utilities should be connected to the sites and provision made for headworks. Essentially the sites are to be development-ready.

Expression of interest should be called for the development of the caravan parks under a model that provides a long lease with renewal options in order that the developer can amortise its development costs and obtain a reasonable return on investment. The lease rental should be set according to the land use, not its potential for higher and better use. Failure to attract appropriate responses from the private sector could be mitigated by development of the caravan park infrastructure by government prior to leasing and/or development of the parks by local government with Royalty for Regions funding.

Positive Impacts

Increasing the availability of caravan and camping sites at popular locations can overcome the supply-demand issues that are the cause of much negative consumer feedback.

The average duration of stay of caravan and camping based tourists exceeds that of any other tourism segment. The economic multiplier effect of caravan and camping tourism is significant for small regional communities, adding to their capacity.

The control of land use for caravan parks at popular tourist locations under the proposed strategy, is an important factor in the ongoing attraction of more tourists to Western Australia, as caravan and camping based tourism continues to expand, against the general trend.

The vesting of the caravan park sites in local government will provide local government with commercial enterprises that improve community sustainability.

The proposed caravan park will mitigate identified supply gaps and establish a benchmark for future caravan park developments.

One or both of the new sites could be established as a training centre in a public-private partnership (refer recommendation 8).

Increase Nature Based Camping Opportunities

Recommendation 3: Identify Opportunities to Access Western Australia's Conservation Estate

- **Tourism WA and DEC to work together to define and implement strategies to balance the priorities of tourism and conservation to ensure that development of increased capacity is planned in line with key tourism priorities.**
- **Facilitate increased access to DEC managed land through increased funding for identification of additional NatureBank sites specifically for caravan parks and/or campgrounds.**
- **Improve awareness of opportunities to camp on DEC managed land and improve user's ability to book and plan accordingly**

Issues and Risks

The Department of Environment and Conservation (DEC) managed land covers more than 27 million hectares and includes some of the most beautiful and appealing natural landscapes in the State. DEC is proactive in providing tourist access to its managed lands through the Rediscover Parks and NatureBank initiatives.

DEC provides basic camp facilities at many locations and has identified a number of locations where they need to expand, or open up new areas for camping, to meet demand. There remain a number of factors which constrain their ability to satisfy identified needs, some of which are outlined to follow:

- DEC's nightly campground tariffs for campsites are restricted to being based on a contribution towards cost recovery pricing model which benefits the public with access to low cost camping sites. Some commercial park operators consider that it creates unfair competition with the commercial facilities who cannot match their low prices. This pricing policy also makes DEC reliant on other funding sources to allow them to expand, improve or develop new camping facilities.
- DEC has previously had a limited annual capital budget of just $14.5 million for the State (the cost of one large caravan park), which includes roads. This has been reduced down to $10.5million for 2012/13. This does not allow a significant amount to invest into development or improvement of camping capacity and facilities leaving it reliant on grant funding. Increased funding is required to meet demand.
- DEC has received $4.8 million funding through Royalties for Regions for campgrounds in Lane Poole, Cape Range, Wellington, Yalgorup and Serpentine, though even with the grant funding and provision from the DEC capital budget, there are not sufficient funds available to develop facilities or capacity to meet current or future demand. This also impacts on potential commercial operators, as DEC needs capital for basic infrastructure and site readiness to be able to release commercial sites to other operators.
- $5.1 million funding from Royalties for Regions has been received for NatureBank sites, though these are typically geared towards higher end developments such as safari tents etc. Commercial caravan parks and campgrounds are considered economically marginal and therefore higher risk, this maybe in part why NatureBank tends to focus on safari camps and other high-end type accommodation facilities. As a result no caravan park sites have been identified under the program to date.
- Due to the complexity of issues, and broad ranging stakeholder views which must be taken into account, management plans often take 2-3 years or longer to produce, and many parks do not yet have management plans in place. Development cannot generally proceed without a management plan in place or a compatible operations/ necessary operations process being undertaken, and due to the wide ranging issues DEC must consider, DEC's management planning priorities are not always the same as tourism planning priorities.
- Industry has suggested that due to DEC's tight operating budget and limited human resources; some tasks that the industry and community would see as important, are not able to be completed within the timeframes industry would like. This includes progressing decisions or approvals for development on DEC lease areas in what is considered a commercially acceptable timeframe.
- . The requirement to meet KPIs on DEC leases and licences is a recommendation from the Review of Nature-Based Tourism, now adopted by the Government. It is consistent with the management objectives of parks to balance protection and use. DEC policy is that it rewards good practice and these costs can be reduced by meeting the KPIs and reducing the frequency of the audits. There is a high cost of audit compliance for commercial operators in national parks on top of high increased costs to meet required environmental, heritage and social standards in National Parks which can influence the type of developments which are feasible within National Parks.
- Consumers (including nature based campers) have wide ranging needs, and look for differing types, designs and layouts of caravan and camping areas. Different market

segments require different levels of facilities and privacy, some require powered sites or travel with pets or prefer to camp a significant distance from other visitors. This is currently not catered for within many camping areas on DEC managed land. Road access and remoteness restricts the provision of a higher level of infrastructure (power, waste treatment, water) in some areas.

- The process for gaining approval for commercial developments on DEC land involves the developer initiating and investigating the feasibility of a concept and presenting this to DEC to ascertain if it is a suitable fit with their management planning. If DEC is satisfied, they would then put the opportunity out for Expressions of Interest under a competitive process, which is a significant disincentive for developers who stand to invest in developing a concept for which the right to develop a site which be potentially awarded to a competitor. One of the most practical ways to mitigate this risk is for DEC to initiate the identification of caravan park and camping ground development opportunities, and provide guidelines for what would be permitted on a site by site basis for all parks, through the NatureBank program.

- DEC historically has offered very limited lease terms to commercial operators which do not provide sufficient time to ensure a reasonable return on investment. This impacts on the ability and willingness for developers to invest in providing significant infrastructure, where these constraints are in place. Government is introducing amendments to the Conservation and Land Management Act 1984 to allow for lease periods to be granted up to a maximum of 99 years' where significant bona fide private sector investment is required'[84].

- A significant focus for DEC is the management of the conservation estate and biodiversity protection. DEC has a broader focus than just the commercial tourism developments or promotion of existing tourism opportunities.

Strategy

It is proposed that Tourism WA together with DEC and other agencies to define and implement strategies to achieve the following:

- Review competitive neutrality guidelines and pricing policy to investigate the possibility of factoring in to the user pays pricing model, a small allocation of funds to be quarantined for investment into the development or expansion of caravan and camping facilities on DEC managed land, This would be contingent on ensuring that this did not make access to these sites too expensive to be in the public benefit, and would only be appropriate where the benefit of opening up access to additional sites outweighs the additional cost of providing these sites.

- Seek funding for the development of prefeasibility studies for identified high priority locations on DEC managed land to attract private investment in the development of caravan parks or campgrounds as part of the NatureBank initiative.

- Allocate increased funding to investigate and if possible implement a call for Expressions of Interest for caravan park developments in National Parks at identified high priority sites through the NatureBank program, providing a framework for evaluation of these. Development conditions could be discussed with Tourism WA to ensure they are not overly prescriptive, providing a disincentive for tourism development. This would need to be consistent with the CALM Act and could be integrated into the Development Guide for Nature Based Caravanning and Camping. Seed funding for putting some infrastructure in place should also be allocated where required to ensure feasibility of caravan park or camping ground development.

- Support and progress timely implementation of the approved amendments to CALM Act to allow for leases up to 99 years and actively encourage longer lease terms in return for increased development commitments with KPIs and lease periods determined on a case by case basis.

- Continue to work to improve collaboration between DEC and Tourism WA on decisions relating to development priorities and capital works to increase or improve facilities and capacity for caravan and camping stays on DEC managed land.

- DEC to investigate where National Parks could provide camping opportunities in 'extreme' or 'high' priority tourism locations and prioritise the preparation of Compatible Operations Notices and/or Necessary Operations Notices, for Parks without Management Plans.

- DEC to continue to work closely with Tourism WA and tourism operators to review DEC's sustainability criteria and work internally to investigate and implement initiatives to streamline DEC's auditing systems offering online submissions and eliminating any unnecessary burdens on operators (subject to its retaining an appropriate level of robustness and also meeting the reporting requirements). Continue to communicate with tourism operators to ensure they are confident in their ability to work with DEC to meet criteria and reporting requirements.

- DEC and other industry partners to make more sites bookable online and facilitate trip planning through providing information on sites and facilities on ATDW and other distribution networks.

[84] Review Of Nature-Based Tourism, Tourism Western Australia and Department of Environment and Conservation, 2011. Perth, WA.

Positive Impacts
The proposed strategies would support the development of new and expanded facilities to improve access to caravan and camping opportunities on DEC managed land.

Tourism opportunities on DEC managed land provide excellent recreational opportunities for Western Australians, economic outcomes for regional communities and a competitive edge for Western Australian tourism, through offering world class nature based caravan and camping experiences to visitors.

DEC managed land is significant in both size and appeal. By implementing strategies to continually improve accessibility and marketing of opportunities for camping in National Parks, there is the potential to better leverage off the nature based tourism drawcard for both domestic and international visitors - so long as the needs of conservation and tourism can be effectively balanced.

Sustainable Serviceability

Recommendation 4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities

- **Increase the supply and improve distribution, maintenance and cleanliness of publically accessible facilities such as dump points, toilets and rest areas through co-locating (where practical) with existing businesses and entering into cooperative arrangements for their management.**

- **Tender out Management Contracts for existing popular overnight camping locations including Main Roads Rest Areas and Shire Authorised Campgrounds to provide daily cleaning, maintenance, and monitoring of permitted duration of stay.**

- **Implement a user pays (cost recovery) system to better distribute the cost burden of maintenance and cleaning.**

- **Enable Main Roads to focus their resources on the management of roads and safety by transitioning facilities that are predominantly used for tourism over to a more appropriate management structure.**

Issues and Risks
Many rest areas, which are provided primarily for road safety, are being used as substitute caravan parks, with planned overnight stops and extended duration stays commonplace at these 'free' camping areas.

Heavy transport drivers can find it difficult to access some rest areas due to the high number of caravans and RVs taking up the space provided. Main Roads is embarking on the development of new and upgraded rest areas as a pilot in the Pilbara. It is proposed that these rest areas will have ablution facilities, which may attract more 'free' camping.

Faced with a similar issue, the New Zealand government recently introduced regulations to manage 'freedom camping' to minimise any negative impacts. However, a number of issues have arisen since the introduction of the new legislation including anti-social behaviour, fire risk, pollution of the environment, and unauthorised and illegal use of caravan park facilities. The lack of regulation of the 'free camping' sites has had a negative impact on the peaceful enjoyment of those locations, by the consumers that lobbied for them.

Many self-contained travellers cherish the opportunity to camp free of charge, and individuals and user groups are vocal in their criticism of Western Australia as being unfriendly where adequate 'free camping' and associated facilities are not provided.

There is a cost associated with the provision, maintenance, cleaning and waste disposal at roadside stops, rest areas, authorised and unauthorised camping areas. This cost is normally borne by the ratepayer of the local government area, or state government agencies, including Main Roads.

Due to these costs, which are extremely high in some remote and regional locations, facilities are not maintained or cleaned as frequently as they need to be. This results in significant complaints about the state of facilities, with some rendered unusable, particularly during peak times. There is also insufficient supply in some areas.

There are currently issues with some people staying for extended durations at some of the states more appealing rest areas (particularly those alongside waterways), taking away opportunities for other visitors with genuine needs to be able to utilise the provided facilities.

There are potential public liability issues for government agencies and local governments which knowingly "turn a blind eye" to unmanaged camping activities that can place the public in dangerous situations. Fire risk, accidents between large transport vehicles and recreational vehicles competing for the same rest areas, health and security issues are all potential for litigation in the event that travellers suffer damage or loss.

Strategy
Main Roads could tender out supply opportunities for existing businesses to provide new rest areas and publically accessible ablution and dump point facilities on its land. These could complement or replace existing facilities, depending on distribution of the locations proposed by those who tender to supply the required services.

Roadhouses, Stations, Indigenous Communities, Caravan Parks or other business types may tender to provide and maintain rest areas and facilities on a fee for service arrangement. Infrastructure could be provided by Government or supplied by the tenderer by negotiation. A user pays system could be implemented to contribute to the costs of providing these services where appropriate.

Some of the more popular existing day or overnight rest areas in high appeal locations could provide opportunities for contracted on site (or daily visiting) caretakers to maintain the facilities and ensure they are kept clean and safe during the peak of the season.

A minimal fee (cost recovery) would ensure proper management of sites and the security for users, knowing there are caretakers on site. It is anticipated that these sites would need to have capacity for at least 25 sites and be in areas with average peak month occupancy of 80 percent or above to make it viable as per the below example:

Rest area management	
Camp sites	25
Av guest per site	2
$/person/night	$8
Months/ peak season	4
Days/ season	120
Average peak month occupancy	80%
Revenue / season	$38,400
Licence Fee (20% of revenue) - paid to LGA or Main Roads (for the provision/ replacement of infrastructure provided)	$7,680
Management Contract Revenue / season	**$30,720**
Revenue / week	$1,792
Estimated hrs / week	21
Rate / hr	$85

The management contracts would likely appeal to a range of individuals such as retirees seeking a small income to supplement superannuation; or businesses looking to diversify income streams such as Indigenous communities, local caravan parks, stations, roadhouses, clubs etc.

On site or visiting caretakers (located nearby) could enforce the stipulated duration of stay to ensure equity of access for all visitors and minimise abuse by over-stayers. Sites that have the capacity and facilities for more than a single night stay could operate as transit camps rather than overnight rest areas. A designated number of bays could be reserved for genuine emergencies and Heavy Transport Operators by segregation and controlling numbers for each vehicle type.

A variety of payment options could be considered for locations which do not meet the above criteria, and where unmanaged camping is an issue, including an online pre-paid permit system or permit payment through visitor centres. At locations near towns, a ticket machine option could be placed outside Shire offices to sell single or multi-day camping permits.

A communications strategy targeting online forums, clubs and guidebooks, together with clear signage should be implemented to clearly indicate permitted duration of stay. All sites could also be listed on the Australian Tourism Data Warehouse to facilitate ease of planning for visitors.

Locations where existing rest areas could be relocated or co-located with other commercially managed business locations would also need to be investigated with roadhouse or caravan park operators able to tender for contracts to manage publically accessible rest areas either nearby, or co-located with their existing facilities.

Some rest areas for preliminary consideration for improved management arrangements and peak season on-site caretakers could include:

- Spring Creek - Just outside Purnululu National Park
- Leycesters Rest Area on the Ord River - between Halls Creek and Warmun
- Ellendale Rest Area between Derby turnoff and Fitzroy Crossing
- Cliff Head North Rest Area just south of Dongara
- Galena Bridge Rest Area 13 km north of the turnoff to Kalbarri on the banks of the Murchison River

Positive Impacts

Co-locating facilities has the potential to improve the distribution and increase the number of rest areas, ablutions and dump points provided.

Management of rest areas and related facilities would improve the maintenance, security and cleanliness of facilities provided and ensure enforcement of permitted durations of stay. This would ensure sites can always be accessed by fatigued drivers and those with a genuine need.

Management of the facilities would offer the potential to recover the costs of providing and maintaining the facilities through a user pays arrangement. This would enable the development of additional facilities and capacity to better meet demand and user expectations.

Camp with the Custodians

Recommendation 5: Partner with Indigenous Australians to Develop Caravan and Camping Infrastructure on Indigenous Land

- **Tourism WA to collaborate with the Department of Indigenous Affairs (DIA), Aboriginal Lands Trust (ALT), Indigenous Land Corporation (ILC), Department of Education, Employment and Workplace Relations (DEEWR) and Indigenous Business Australia (IBA) to investigate a program which would facilitate the establishment of Indigenous and Private Enterprise Partnerships for expansion of caravan and camping opportunities on Indigenous Land.**

- **Engage best practice industry experts to develop infrastructure and deliver skills to their Indigenous business partners in return for a partnership on a lease to develop the assets. At the end of the lease, the Indigenous partner has the assets and the skills to move forward independently with a thriving business on their own land.**

Issues and Risks

A total of 364,445 km2 (14% of the state) is Indigenous-held[85]. "In terms of the size, Western Australia has by far the largest areas of native title land of any Australian jurisdiction. Ninety two percent of the area of native title determinations is in Western Australia (Western Australia)."[86] Much of this land is in regional and remote areas which are in high demand by 'nature based' and 'experience seeker' caravanners and campers. A significant proportion is also in the North of the state which appeals to the intrastate market looking for somewhere warm to stay through the winter months. At present much of this land is not effectively utilised or there are insufficient facilities to meet the demands of the majority of caravanners and campers.

Much of the caravan and camping supply side deficit is in locations where there is a significant Indigenous population and landholding. Many Indigenous communities and families have tried offering small scale camping on their land, particularly in the Kimberley with twenty or more small scale Indigenous operated campgrounds operating with varying degrees of success. Many of these business operators lack the capital and commercial experience to reach financial viability or sustain real wages for operators.

[85] Regional Indigenous Land Strategy 2007-2012 Western Australia, Indigenous Land Corporation
[86] Http://www.hreoc.gov.au/about/media/speeches/social_justice/2007/IQPC_2may_2007.html

Lack of clear succession planning and back up staff can often result in lack of consistency in service delivery, especially when cultural or family commitments divert attention away from the business. This results in negative impacts on reputation, as is indicated by many online user forums.

Past grant funded investment in tourism infrastructure and marketing has shown little long term returns in terms of sustained employment (with real wages) or commercial success (without reliance on ongoing support). Furthermore a great deal of this infrastructure is underutilised or unutilised. Cash flow issues inhibit sufficient investment in repairs and maintenance which significantly reduces the lifespan and effective long term use of assets with many being retired well before they should be.

The need to seek outside employment (due to insufficient income for wages) can often result in short or long term breaks in tourism operations and/or insufficient staff to maintain and grow the business resulting in a gradual decline or failure.

Strategy

Tourism WA could initially seek support through DEEWR's Indigenous Employment Program and/or IBA's Economic Development Initiative to engage a consultant to investigate the viability and progress the development of an Indigenous Private Partnership Program for caravan and camping Facilities on Indigenous Lands. A successful program could deliver the following outcomes:

- As a first stage, it may be advantageous to select one region, such as the Kimberley, to develop the strategy and identify suitable sites.

- Devise a model for delivering an Indigenous and Private Enterprise Partnerships for the delivery of caravan and camping facilities on Indigenous Land

- Assess the financial viability of the proposed partnership model

- Consult with stakeholders to establish the long-term sustainability of the model and identify any opportunities or foreseeable impediments to the implementation or viability (e.g. Aboriginal Lands Trust, caravan park Investor Groups etc.)

- Seek funding (if required) to support the development and delivery of the model

- Develop collateral for 'selling' the opportunity to interested parties to include running in-depth workshops to transfer skills and understanding about the opportunity and required commitment to Indigenous landowners/ lease holders
- Provide a framework for seeking interested parties to establish partnerships
  - Indigenous landowners or leaseholders; and
  - Caravan industry experts – e.g. management or ownership groups
- Structuring sample partnership agreements and lease agreements (land to be leased or sub leased to the new partnership entity)
- Investigating potential management models considering options such as:
  - Industry expert / management group could be responsible for financial management, administration, bookings, marketing, online payments etc.
  - The Indigenous proponent could be responsible for guest relations, cleaning; routine maintenance and provision of value added touring components such as cultural tours, fishing charters, hire equipment etc. (alternatively these could be delivered by separate micro enterprises or pooled labour resources arrangements).
- Secure ongoing support from DEEWR and/or IBA to provide mentoring to participating Indigenous proponents as required improving and developing their skills and commitment. Also to help troubleshoot any issues which may arise and have the potential to negatively impact on the partnership / relationship
- Cost out and seek grant funding if required for the development and installation of physical infrastructure (ablution facilities, laundry, camp kitchen etc.) - this may be able to be funded through Indigenous specific subsidised loan programs (e.g. through Indigenous Business Australia or the Indigenous Capital Assistance Scheme) or funded by one or both of the partners
- Provide a framework for agreements which could stipulate key performance indicators (KPI's) for both parties which if not met could require the placement of an employed staff member who would be made responsible for meeting KPI's as an interim or long term measure. KPI's could include receiving satisfactory guest ratings on service, cleanliness and maintenance of facilities
- Provide indicative development concepts which take into account best practice environmental sustainability and remote logistical constraints
- Identify support, training, employment and economic development opportunities for Indigenous participants and surrounding communities
- Through access the National Workforce Development Fund and DEEWR's Skills Connect program (which provides enterprises with access to a range of skills and workforce development programs and funding) ensure that the workers engaged on the program develop the necessary skills for sustainability of the enterprises.

Positive Impacts

Indigenous and Private Enterprise Partnerships for the delivery of caravan and camping facilities on Indigenous Land would deliver much needed capacity in areas of high demand. It would open up accessibility to remote and spectacular parts of the State and provide visitors with awesome nature based experiences, with the added cultural component providing a unique dimension to the camping experience. It would provide a sustainable opportunity for visitors to learn about and share Indigenous culture in exclusive locations, with a business structure that strikes a balance between cultural considerations and mainstream consumer demands.

The Jackson Report (2009) identified that Australia needs to focus more clearly on developing our tourism industry products based on our four key competitive advantages, one of which was Indigenous culture. It noted that Indigenous tourism "is a key point of differentiation for Australia in a highly competitive international tourism market." It further stated that "tourism offers enormous potential to Indigenous communities, both to create sustainable jobs and employment and as a means to protect and nurture cultural and environmental heritage."[87] This supports many of the strategies identified in the *Aboriginal Tourism Strategy for Western Australia 2011 - 2015*.[88]

The Federal Government's draft Indigenous Economic Development Strategy Draft identified 'cultural tourism, natural resource management and arts industries' as one of five areas of competitive advantage collectively Indigenous Australians have. It states that "...this strategy builds on these areas of competitive advantage where they exist, as well as those areas that maximise Indigenous Australians' opportunities

[87] The Jackson Report On behalf of the Steering Committee Informing the National Long-Term Tourism Strategy, Commonwealth of Australia, 2009.
[88] Aboriginal Tourism Strategy for Western Australia 2011 - 2015, TWA and WAITOC, 2011.

to participate in the broader economy."[89] The development of a robust framework for delivering caravan park and campground enterprises will help to build a sustainable Indigenous tourism sector which goes beyond economic outcomes.

Operating a caravan park or campground offers an employment structure more suited to Indigenous peoples' lifestyles with the ability to work varied hours, involve family members, and stay connected to 'their country'. It also offers longer term job satisfaction and greater appeal than many other regional industries (for example mining).

Much of the risks of current grant funding programs could be mitigated with the security of long term commercial partnerships and succession planning. Indigenous participation in operations would be encouraged, though not essential with the potential to place trained staff (from a management pool) in at relatively short notice where required to maintain operational consistency and quality standards. Indigenous owners would still retain an income source, regardless of employment, by way of lease fees and profit sharing.

The support of industry experts/ownership groups would ensure that the facilities are professionally marketed and effectively managed protecting investment and assets whilst providing opportunities for self-determination, entrepreneurship, training, best practice procedures and employment (with real wages).

Stimulating economic activity on Indigenous owned land would improve the well-being of Indigenous communities by providing self-sustaining income and real employment opportunities for current and future generations 'on country'. Flow on potential for the development of complimentary business opportunities such as roadhouses, cafés, tours, workshops, bakeries, hire equipment, firewood supply and cultural centres would also emerge.

[89] Indigenous Economic Development Strategy Draft Pg.7 Australian Government (FaHSCIA), 2010.

Consistent Planning Policy

Recommendation 6: Provide Better Guidelines for the Development of Caravan Parks to Local Government

- **The WA Planning Commission to undertake a review of Planning Bulletin 49 and other caravan park policy.**
- **Attract investment in caravan and camping infrastructure by removing barriers to industry development.**
- **Address impediments to the timely approval of applications for planning consent for new developments or expansion of existing facilities.**
- **Provide online resources and templates to facilitate preparation of proposals by caravan park developers and investors.**

Issues and Risks

Industry consultation during the investigation phase of the Caravan and Camping Strategy identified a common complaint amongst caravan park operators, potential industry investors and developers that Western Australia was the most difficult state in Australia in which to obtain approvals for new caravan park developments or redevelopments of existing caravan parks. It is considered that the current approvals process for caravan parks does not satisfactorily address the present issues and a different (and better) approach is necessary.

To demonstrate viability, caravan parks generally need to have a minimum of 150 sites. For caravan parks operated under professional management, a minimum of around 250 sites is required to amortise the professional management costs and processes.

Unless larger caravan park developments are approved in strategic tourism locations, Western Australian caravan parks will not attract high level professional management groups and investors. These developers will instead continue to be enticed to develop parks in other states of Australia.

At a consultation meeting with Aspen Group Limited, an ASX-listed company (said to be the largest caravan park developer and operator in Australia), Aspen provided examples of ongoing delays and restrictions of more than ten years to their Applications for Planning Consent for caravan park development proposals. This has resulted in the Company deferring all caravan park development in Western Australia. By comparison Aspen noted that the Company obtained planning consent for a new caravan park and marina on the Murray River on the NSW/Victoria border in just 13 months.

Strategy

Policy guidelines and a clearly defined escalated process for review of applications for planning consent for caravan and camping facility developments will result in more caravan parks in Western Australia. The aim is to remove the restrictive policies that lead to delay or refusal of caravan park development applications.

Tourism WA, the Caravan Industry and peak caravan and camping consumer organisations could provide advice to the WA Planning Commission on the policy guidelines.

The Department of Commerce and/or Tourism WA should provide Local Government Authorities with best practice templates and documentation, including lease templates and management contracts, to ensure consistency and avoid issues where caravan park lease rentals are inappropriately priced or structured based on highest and best use of the site. Fact sheets could outline for local government the appropriate lease terms required to encourage investment in infrastructure and provide an adequate return on investment to the developer. WA Planning Commission and Department of Planning could provide guidance to facilitate a review of all local government local planning schemes and ensure that appropriate sites for caravan parks were identified in Local Government Tourism Strategies. A focus on increasing opportunities for caravan park development may result in caravan parks being identified as a compatible land use within all appropriate zonings including residential zones, tourist zones, rural zones, recreational reserves or any other zone where caravan parks may be compatibly located.

The proposed resources should be accessible online.

Positive Impacts

Reducing the complexity of the approvals processes would overcome many of the issues that impede development of caravan and camping tourism in Western Australia. Resolution of issues that have delayed development of much needed facilities at high priority tourism areas would be a positive outcome for developers and consumers and the State's tourism.

Impacts on the Recommendations from the Parliamentary Inquiry

Provision, Use and Regulation of Caravan Parks (and Campgrounds) In Western Australia: 5, 6, 7,9, 10, 18, 19, 20, 21 22,23, 24, 26, 29, 30, 31, 32, 38, 39, 41, 44 & 56

An Overflow Policy That Works

Recommendation 7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry

- **Develop a state-wide overflow policy which is consistently enforced for the benefit of visitors and the support of industry.**

- **Provide a well-developed framework to ensure the travelling public has an opportunity to stay at their location of choice, as opposed to having to bypass a town or region when tourist demand exceeds the capacity of local licensed caravan parks.**

Issues and Risks

In many remote and regional locations, there is often a level of demand during peak tourism periods when the capacity of existing commercial caravan and tourist parks is at saturation.

An overflow policy will respond to concerns raised by visitors with regard to the lack of caravan park capacity during peak tourist seasons, and avoid conflict with the Caravan Parks and Campgrounds legislation.

The absence of a clear overflow policy can promote illegal camping and the inappropriate use of community facilities, resulting in a potentially negative outcome (visual and noise pollution, environmental damage and maintenance and clean-up of the camp sites) for the local community.

There are currently potential conflicts of interest where local government regulates commercial caravan parks and also provides (potentially unfair) competition to them through overflow camping facilities.

The risk that the overflow facility replaces fully licensed caravan parks is significant where tariffs are much lower. Potentially a shift in occupancy from licenced caravan parks to overflow facilities could impact on the viability of the licensed facilities, leading to a reduction in supply.

The Caravan Industry Western Australia Inc. and the Caravan Parks Association of Queensland have both produced draft overflow policies which "provide a set of guidelines for Local Government that assist in the promotion of tourism"[90] and "aid Local Government to establish a protocol of referral between local licenced caravan parks, the Local Authority, the relevant Tourist Association, and newly arrived visitors to be directed to overflow facilities"[91]. While each of the State Caravan Parks Associations' draft policies have merit, they require complex administration, do not provide certainty for consumers in booking sites during peak periods and are regarded by the caravan and camping consumer groups as being biased towards caravan park operators.

Strategy

This strategy draws from both of the State Caravan Association policies and takes into account the comments and feedback from all sectors of the industry and consumers during the consultation.

There are generally two situations where this policy has application, namely, where communities are serviced by both the presence of local caravan parks and local showground, sportsground, and community facilities and where towns and communities are not serviced by the presence of a caravan park but have community facilities suitable for short-term camping.

In the first situation, the overflow area must be carefully managed to avoid unfair competition with licensed caravan parks, which are required to maintain high standards of facilities. The proposed Overflow Policy would require that local government establishes seasonal demand , the supply of overflow facilities required and appropriate sites. The sites may include the community facilities described above.

For the latter example, the proposed Overflow Policy would require that local government identify one or more community facilities suitable for a Transit Camp or Limited Facility Camp (overflow facility). It would provide a licence to the overflow facility operator to operate as a Transit Camp or Limited Facility Camp as appropriate, ensuring the town could accommodate caravan and camping based tourists.

Local government would approve the opening of an overflow facility for the period of peak seasonal tourism demand, subject to the licensed caravan park being ninety percent booked or occupied on any one day. Where the bookings for all the local caravan parks do not exceed ninety percent, the overflow facility must not accept new

[90] Use of Local Showgrounds & Community Facilities - Overflow Policy, Caravan Parks Assn Queensland

[91] Template for A Local Government Overflow camping Policy – CIAWA

guests on the particular day. The maximum duration of stay at an overflow facility shall be between 3 and 10 days, determined by local government.

Prior to the peak tourist season local government would send a selected panel request for tender to all operators of licensed caravan parks in the locality, seeking an operator for the overflow facility for the current peak season. The tender would provide the Key Performance Indicators for the overflow facility, operation terms and conditions.

The successful tenderer (Overflow Operator) would be selected on the basis of capability, prior record of caravan park and campground operational conformance and price. The Overflow Operator would lease the site from the landholder and pay the landholder the nominated rent. The minimum and maximum tariffs applicable to consumers would be nominated in the tender and approved by local government.

The Overflow Operator would be the primary contact for the facility during the peak tourist season and would be responsible for checking the availability of sites on any day during the season for all the licensed caravan parks in the locality. Until all parks achieved ninety percent occupancy, the Overflow Operator would refer travellers to the lesser occupied properties.

The operation of the overflow facility could be facilitated by local government providing the Overflow Operator with a supply of triplicate forms, which were used by the Overflow Operator to capture the following information:

- Name and address of overflow facility occupant
- Registration number of tow vehicle
- Name of issuing caravan park
- Arrival date
- Departure Date
- Number of nights paid
- Fee paid
- Client register number

One copy would be displayed on the dashboard of the primary vehicle (tow vehicle) at the overflow facility where the local government ranger could periodically check for compliance, one copy would be forward to the local government for inclusion on a daily overflow occupancy register and a copy retained by the Overflow Operator.

By maintaining the above process, local government would be able to check for compliance with the terms of its overflow policy and competitor caravan parks could cross check that the overflow facility was not being utilised when they had occupancy below ninety percent

It is considered that the above Overflow Policy framework would establish a protocol of referral between local licensed caravan parks, the Local Authority, the relevant Tourist Association, and newly arrived visitors to be directed to overflow facilities.

Existing overflow operators, e.g. sports clubs, may apply for a Limited Facility licence to allow them continue to operate during peak seasonal periods and avoid the tender process for operating overflow facilities.

Positive Impacts
It will provide visitors with sufficient certainty of accommodation and allow them to plan and book caravan and camping holidays within Western Australia.

Ensure viability of existing caravan parks and campgrounds is protected.

Provide a cost effective means of ensuring there is sufficient supply to meet peak season demand.

People Are Our Best Asset

Recommendation 8: Raise the Bar on Skills for the Caravan and Camping Sector

- **Require industry training for management at a minimum, and encourage training for all staff where practical.**
- **Provide online training materials, manuals and fact sheets to improve professionalism and effectiveness of caravan park operators.**
- **Establish caravan industry training facilities, co-located with privately or publicly managed caravan parks in conjunction with the peak caravan industry organisation and a major training provider.**

Issues and Risks
Customer service standards and the training of caravan park personnel are critical components of service delivery, but often relegated behind the National Tourism Accreditation, which applies to the facility and does not provide caravan park staff with a portable qualification or recognition. Therefore, staff turnover can to some extent negate the benefit of the customer service provisions of accreditation, unless the facility manages customer service training on an ongoing basis, especially for new inductions.

The cost to comply with operator customer service accreditation requirements for facility licence approvals would need to be carefully considered. The compliance costs associated with operating caravan parks are considered to be high by the industry and there may be resistance to an additional compliance burden. Offset or rebate arrangements could be established to provide incentive for accreditation completion. Alternatively an online training program may offer a low cost means of completing the theoretical component of the training requirement.

Consumer surveys, online forums and consultation with stakeholders, during the audit phase of this study, identified issues of poor service delivery for the Western Australian caravan park sector. There is also a concern regarding the lack of business acumen and managerial skills, which may inhibit growth and profitability.

Locating a training facility within an operating caravan park would maintain the relevance and standards of the training process. This could ideally be achieved through the development of a new caravan park facility incorporating an on- site training facility. Locating a suitable site to establish a practical training facility, which is accessible for operators across the state could be a significant issue.

Alternatively, with the support of Tourism WA and the industry, an existing caravan park owner/operator wishing to diversify their business may consider partnering with a Registered Training Organisation to offer on-site training services.

Strategy
Establish an accredited pathway for caravan park management through Tourism Council WA, the CIAWA and training providers linking training qualifications with facility accreditation. The Holiday Parks and Resorts qualifications (Certificate II, II, IV and Diploma) developed under the national SIT 07 Tourism, Hospitality and Events Training Package is endorsed by the Australian Quality Framework (AQF) and could provide a suitable qualification.

The program could be linked to the provision of caravan park facility licences to ensure benchmark standards in service delivery and broader business and tourism knowledge are achieved in caravan parks across Western Australia.

By implementing a strategy to improve the standard of service delivery, the Western Australia caravan park sector can better align with other States and Territories in service standards and also improve their competitive advantage over other accommodation sectors, thereby improving business sustainability.

The lack of attention to formal qualifications within the caravan and camping industry has historically been a barrier to attracting people to focus on a career in this tourism sector. A flow-on benefit of the training would be the improvement of the profitability of caravan park businesses through the injection of additional knowledge and skills.

The focus initially would need to be on addressing the skills gaps in the existing workforce and ensuring new entrants to the caravan park industry are provided with the pathways to gain the necessary skills.

FutureNow, the Creative and Leisure Industries Training Council in Western Australia has been working with the CIAWA to establish a level five traineeship to professionally develop industry managers (Diploma of Holiday Parks and Resorts) and to implement a targeted workforce development strategy for the sector. Unfortunately, CIAWA has suspended the implementation of this essential training program. Additional support from Tourism WA may be required to ensure this pathway is established and create a sound platform from which the training can evolve.

General customer service training for caravan park managers and staff can be delivered through public and private registered training organisations, and through Tourism WA with support from Tourism WA.

New South Wales has a training facility, which is co-located with a fully operational caravan park. A suitably qualified caravan park operator in conjunction with an appropriate Registered Training Organisation[92] could seek to secure Royalties for Regions funding to offer caravan park specific accredited training qualifications at an existing or new caravan park in Western Australia in a similar format.

The linkage between caravan park facility licences and the requirement for ATAP of CRVA accreditation with qualified onsite management to attain the licence may create a culture of appropriate service delivery within the industry and ensure that owners/managers are provided with the necessary skills to operate a sustainable and viable business.

Governance of the accreditation process and subsequent issue of park licences would need to be managed at local government level, similar to securing a licensed restaurant approval, operators would need to provide documentation demonstrating the approved manager's qualifications.

Positive Impacts
The implementation of this strategy would help create a benchmark standard of service delivery and business practices to better align the caravan park industry in Western Australia with those of other State and Territories.

Increasing service standards in the caravan park industry will help raise the profile of the tourism sector. There is great potential through a concerted effort to improve service and operational standards to increase the 2010 national caravan parks revenue of $1.3 billion.[93]

Locating a training facility within a fully functional caravan park will provide the combined practical and theoretical requirements. Specific industry-based training is considered essential for this growth tourism sector to continue to develop. A benefit of raising the caravan park industry profile is the attraction of people seeking career pathways in tourism accommodation.

A flow on effect of training and the higher service delivery standards is the potential benefits to regional communities where extending duration of stay stimulates economic activity.

[92] Partnerships in assessment Auspicing in action -National Centre for Vocational Education Research (NCVER) 2002
[93] Ibis World Caravan Parks and Campgrounds In Australia July 2011.

Stop Flying Blind

Recommendation 9: Improve Data to Support Decision Making

- **Collect and analyse data to better understand market needs and visitation.**
- **Resume collection and publication of ABS data on caravan parks and campgrounds.**
- **Produce and publish annual visitor profiles at a state level for the caravan and camping sector.**
- **Conduct research into the needs of new and emerging visitor segments and the value of these visitors to Western Australia.**
- **Maintain an up to date and accurate database of all caravan and camping facilities (including licenced and unlicensed sites, dump points, DEC camps, rest areas etc).**

Issues and Risks

The Australian Bureau of Statistics ABS) Survey of Tourist Accommodation (STA) provided results of a quarterly survey undertaken by the ABS to measure the demand and supply of tourist accommodation. Funding for the inclusion of caravan parks and campgrounds (part of the expanded scope component of the STA) ceased at the end of the June quarter 2010 and the collection and publication of this data ceased.

Whilst the 2010 data will still be relevant for the next year or two, future studies and development proposals will be significantly impacted on by the lack of availability of up to date data. Reliable data is of utmost importance in financial modelling that proves up investment opportunities and for the production of bankable feasibility and business case studies. The lack of accurate statistical data will almost certainly inhibit future development or improvements and limit access to borrowings.

It is noted that the extended scope is due to be reinstated going forward, however this will be based on a sample rather than a census. This may result in unreliable data, particularly at a Local Government Area level.

The only alternate source of caravan and camping visitation data is Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS), though the small sample sizes for regional visitation makes this data largely unusable at a regional or local area level.

Though data is collected by Tourism Research Australia, this is not reported on at a state level for the caravan and camping sector in any real detail. At present to get a good understanding of visitation in this sector, special reports must be requested (and paid for) from Tourism Research Australia, data requested from Main Roads, old data collated from ABS reports (no longer available) and pulled from Tourism Research Australia's regional profiles (where available).

There a lack of data at the State level regarding the nature and value of caravan and camping visitors, especially emerging market segments such as the fully self-contained visitor. There is little by the way of impartial research about the needs of fully self-contained travellers who predominantly utilise free and low cost camping options. There is much conjecture over the value of these visitors to regional communities, though a lack of quantifiable data on the return on investment in providing facilities to attract these visitors. Planners and policy makers need to better understand this market to assess what facilities should be provided, how we can best meet their needs, and what is the most appropriate way to recover costs for the provision of these facilities.

An example of the type of anecdotal evidence for and against "free camping" that exists in the market space due to a lack of reliable data:

CMCA asserts that when visiting towns, 97% of Self-Contained RV Tourists make purchases when stopping in a town and that major purchases include $235 on motoring needs including fuel and vehicle maintenance, $160 on living expenses such as groceries and medical expenses, and $51 on accommodation costs (calculated per week). [1] They state that: *"The RV Friendly Town™ scheme has proven to be very successful, especially in regional and rural areas, where the dollars spent by these Self-Contained RV Tourists can make a huge difference to the local economy."*[1]

Others suggest that attempts by Government to subsidise facilities to attract this visitor segment do not result in quantifiable benefits to regional communities: *"It's always seemed to me to be a desperate ploy to think you are going to make money out of people who don't want to spend it! Certainly what we've observed in Kalgoorlie both pre & post the CMHA rally a month or so back is that the preponderance of miserly people amongst them is much higher… but having made Kalgoorlie "CV/MH-friendly" we're not actually sure what the benefit is…those of us who thought it would bring us some more business are scratching our heads…. if you are a struggling country town, don't think you're going to make much money out of nomads by providing them with free camping…Paul, Kalgoorlie"*[1]

Research for the Caravan and Camping Strategy study also uncovered a significant lack of reliable data on caravan and camping facilities across the state such as dump points, rest areas, permitted lengths of stay at authorised free and low cost camp sites, ablution facilities, litter disposal points, caravan parks etc. A number of sources were consulted and on cross checking much of the data conflicted. This results in visitors inadvertently breeching regulations, and relying often on incorrect information published in guidebooks and user forums. It also makes it very difficult to plan caravan and camping holidays, potentially resulting in a loss of market share for the state.

Strategy

The collection of ABS statistics for caravan parks and campgrounds must be resumed as a matter of highest priority and at a minimum, collect and publish data on occupancy, visitor nights and revenue (by small area and by tourism region).

Funding permitting, it would be beneficial to expand the scope to include all caravan and camping facilities with five or more caravan or camp sites, including DEC operated campsites and Transit Parks.

Tourism WA could collect, collate and publish fact sheets for Western Australia on caravan and camping statistics similar to those produced by Tourism Victoria at http://www.tourism.vic.gov.au/images/stories/marketsegments/caravan-and-camping-tourism-market-profile-2009.pdf.

Funding should also be sought to conduct a combination of primary and secondary research into the needs, 'real costs' and benefits of provision of facilities for self-contained campers visiting regional communities. This would helpful for local governments to better plan and provide facilities to suit the needs of this group of users and evaluate cost recovery options that would best suit the needs of the providers and the users. The leading recreational vehicle consumer group CMCA confirmed in its monthly member's magazine, Wanderer, that member users of 'free camping' are prepared to pay an appropriate fee for "free camping", if it resulted in better facilities, safety and security.

It is important that a complete list of caravan and camping facilities across the state is compiled, maintained and published. It should include dump points, rest areas, permitted lengths of stay at authorised free and low cost camp sites, ablution facilities, litter disposal points, caravan parks etc. ATDW would present an advantageous means of publishing this information online, though a more detailed internal database should also be maintained which includes licencing details, number of sites, site types, condition of facilities, licence provisions etc. This information could then be used by developers, planners, government and others to plan and develop appropriate facilities to fill gaps and improve the quality of caravan and camping infrastructure provided.

Positive Impacts

Improving collection and publication of this data would enable developers and operators to continue to grow and develop caravan and camping infrastructure. It would facilitate accurate planning and forecasting and provide sufficient justification on which to base investment decisions. It also allows operators to bench mark their performance against their local area, tourism region and state to measure their own marketing and operational effectiveness.

Publication of information with different levels of information accessible by different user groups would provide a cost effective repository of information which could be maintained for use by a range of stakeholders.

Inspire, Inform and Close the Sale

Recommendation *10*: *Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector*

- **Tourism WA to collaborate with industry bodies and stakeholders to develop a marketing strategy that raises the profile of caravan and camping – exploring improvements to online booking functionality and social media presence for the sector.**

- **The marketing strategy should primarily focus on building up or redistributing occupancy to the off peak and shoulder seasons by stimulating new demand from different user groups and shifting user perceptions to encourage them to shift their patronage out from the peak periods.**

- **The key messages to convey is that WA is a *'caravan and camping friendly'* place to visit and that there are great benefits and experiences to be enjoyed by those who chose to travel outside of peak times.**

Issues and Risks

In 2010 Tourism WA refocussed their priorities, closing down regional offices and centralising operations in Perth. Its new focus is primarily on major events, aviation access and marketing. Regional Tourism Organisations (RTO's) are charged with the responsibility for regional marketing and they recognise caravan and camping visitation as a significant priority for regional tourism - particularly for those furthest away from Perth (Australia's North West, Australia's Coral Coast and Australia's Golden Outback).

Although there is some collaboration amongst the Regional Tourism Organisations, there is no significant focus on providing detailed regional information in the form of a single 'one stop shop' tailored to caravan and camping and/or drive tourism across the whole State. The only way for a caravan or camping traveller to get to Australia's North West is by travelling via the Golden Outback or Coral Coast. Visitors do not recognise RTO boundaries and want information to be able to make decisions on the best routes to take, and to inspire them to undertake what can often be a significant journey.

There is a popular rule of thumb in destination marketing that suggests people will travel somewhere if there are a sufficient number of appealing activities for them to participate in, that would maintain their interest for at least four times as long as it takes them to get there. With the vast distances and huge travel times to get to, or move between, many of Western Australia's regional destinations and attractions, there is a great need to demonstrate the abundance of activities and experiences on offer at each of the stops along their potential route.

By offering a range of drive trails linking a critical mass of appealing attractions, there is increased incentive to undertake overland travel across Western Australia. Conjunctional marketing efforts to provide fuel discounts or incentive programs for long distance travellers may go some way to offsetting the negative perceptions surrounding the cost of overland travel in Western Australia.

The travel distribution system does not actively engage with the caravan and camping sector, in part due to low yields (as compared to hotels and flights), partly due to operator's unwillingness to pay inbound and wholesale commissions, and also, due to the fact that the majority of caravan and camping visitors book direct rather than through travel agents. The travel trade are an important partner in proactively selling Australian tourism experiences and destinations both domestically and internationally and thus many of the primarily drive destinations (such as the Coral Coast and Pilbara Coast) are not well represented through trade channels.

A recent CRVA consumer survey found that 69 percent of users want to book caravan parks online. At present many caravan parks and campgrounds are not well profiled online. Many are not listed on Google Maps or the Australian Tourism Data Warehouse. Only a sample of DEC camping areas are bookable online, and outside of the major ownership and marketing groups, few caravan park operators offer online booking. Trip planning across Western Australia becomes very complicated with the need to research, plan and book through a number of different websites and channels. This can make it too difficult to uncover some of the great experience on offer, leaving potential visitors with insufficient justification to commit to travelling within the state.

There is a great deal of misinformation on line with regards to authorised camping areas. The CMCA lists 196 overnight rest areas, where Main Roads lists just 22 throughout Western Australia. Many of those published by CMCA are designated by Main Roads as day rest areas only, and the remainder are private land, Shire land and unmanaged or illegal sites. There is no published list of legal overnight locations (including Main Roads, Shire Authorised and other authorised sites). As a result, user generated content such as that provided on the CMCA website and the 'Camps 6' directory has become the definitive guides to where people camp, compounding issues of unauthorised camping.

Pre-trip planning inevitably leads to greater satisfaction by matching consumers to experiences most in line with their particular inclinations. There are significant opportunities to improve the delivery of visitor information via new and emerging technologies more suited to the mobile nature of many of the caravan and camping visitors. 'On the road' information sources often differ to those used for pre-trip planning and this needs to be considered in the way information is disseminated.

Google, Facebook Twitter and mobile Apps are increasing utilised by consumers using smartphones and mobile tablets. These technologies are perhaps more able to penetrate at the 'point of purchase' than traditional advertising. The freedom to research and book en-route and change plans to suit the weather, local conditions and satisfaction with locations visited is important to overland travellers who often change plans, timings and routes frequently after leaving home.

Strategy

A caravan and camping Marketing Strategy will investigate the unique needs of the caravan and camping visitor and consider this, whilst assessing the current marketing expertise and techniques being utilised by suppliers, DEC, industry groups and tourism organisations. The strategy will ascertain the gaps, which need to be addressed by Tourism WA, offering a state-wide approach to better meet consumer expectations.

DEC is working with RAC on a program that will share online tourism data access each organisations' booking systems and link other tourism initiative. This partnership could be an opportunity to take a collaborative approach to building a comprehensive online directory of all caravan and camping facilities across the state including;

- Dump points and public toilets
- Road network information (closures, upgrades, road conditions)
- Main Roads Rest Areas (noting which are day use and which permit overnight stays)
- Shire Authorised camping areas
- Commercial caravan parks and campgrounds
- Transit parks
- Safety information
- Destination information
- Activities and attractions
- Fuel availability
- Online booking capabilities via Open Booking Exchange
- Links to user forums (such as Trip Advisor)
- Integration with social media to provide Facebook updates and Twitter feeds on changes in road conditions, weather conditions, wildlife sightings (e.g. passing whales), blooming of wildflowers, special events, downloadable podcasts, special offers, maps, guides, and even perhaps moderated forums for travellers to communicate with one another.

Marketing initiatives that may complement the promotion of this sector in Western Australia

There are a range of other initiatives which could be explored as part of the marketing strategy, or given their fit with existing initiatives could be implemented simultaneously or in advance of the strategy and these are detailed in the marketing section of this document. Broadly speaking, these include:

- Increasing the number of caravan parks listed on ATDW by partly or fully subsidising listing fees (this could be done across the sector for low turnover tourism operations).

- Support the proposed development of an interface between ATAP and CRVA to allow accredited caravan parks to be directly listed on ATDW without an additional application process.

- Facilitating caravan parks to utilise social media through industry training and one on one digital coaching programs as provided by Tourism Council WA.

- Encouraging all providers of bookable caravan and camping infrastructure to provide online booking capability (also linked to their listing on westernaustralia.com) through an active communications campaign in conjunction with the Small Business Development Commission or similar.

- Listing all DEC Campgrounds (and provide integrated online booking functionality) on ATDW.

- Providing details of rest areas, dump points and other related caravan and camping facilities on ATDW (as is currently done for attractions).

- Providing a search sub category on westernaustralia.com for caravan and campgrounds.

- Promoting the experience of camping whilst engaging caravan and camping consumers through social media and other online channels

- Developing caravan and camping Mobile Applications

- Encouraging RTO's to offer a very low cost 'base membership' providing little more than a directory listing on the RTO website.

Positive Impacts

The strategy could investigate what initiatives the state needs to drive in terms of access, availability, visibility, product development, customer service, amenities, appeal and marketability as well as also investigating opportunities to better target mobile visitors and inspire them to visit or stay longer.

By making the trip planning process easier and more consumer focussed, Western Australia would attract increased visitation, whilst at the same time better targeting visitors leading to improved visitor satisfaction.

Reward programs that offer incentives to mitigate cost of fuel and added accommodation costs due to greater distances will have a significant effect on overcoming these major issues.

Fresh end motivating video content distributed via Facebook and YouTube such as RV Cooking Shows and other campaigns* (see *Australia hits two million Facebook fans* excerpt for an example) have proven immensely successful in engaging target markets and building long term relationships.

***Australia hits two million Facebook fans**

"Tourism Australia's Facebook page has surpassed two million worldwide fans, making it both Australia's largest Facebook page and the most popular tourism destination page on the planet. The milestone was reached after Project:12 - a short Tourism Australia film showcasing Sydney's New Year's Eve celebrations - attracted 85,000 new fans over three days. The Australia page has been growing rapidly since its launch in May 2008, winning 855,000 fans last year alone. Tourism Australia Managing Director Andrew McEvoy believes the two million milestone demonstrates both Australia's enduring international appeal and its successful social media strategy. "We engage very closely with our followers, listening and acting upon their feedback to deliver simple and effective content which inspires many fans to share with their own Facebook networks. It's a massive multiplier effect and this is what social media and advocacy is all about," he said. "

Source: Tourism Australia's E-Newsletter - Essentials, Jan 11, 2012

Longer Term Rewards from the Mining Boom

Recommendation 11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom

- **In locations where there is potential tourism gain through conversion of workers camps into caravan parks, enforce as a condition of planning approval, to prepare for conversion as a residual use.**

- **Consider future use as a caravan park at the design stage of workers camps to facilitate the cost effective conversion at the end of the project use. Project operators to consider this factor in the application for planning approval for a temporary worker's camp.**

Issues and Risks
The current resource, mining and infrastructure boom in Western Australia presents some unique challenges to the tourism sector, particularly where dedicated workers accommodation is not provided and results in extreme pressures on tourism accommodation in the region.

There has been too little forward planning and regulation by government concerning the provision of workers accommodation for major projects, resulting in detrimental effects on tourism, residential rents and availability of community facilities.

Often workforce accommodation planning is left to the latter stages of project scheduling. Planning and environmental approvals for proposed workers accommodation facilities can take a great deal of time. Provision of workers accommodation should be a condition of planning approval for the main project to ensure that delays in the provisioning of this accommodation does not result in workers taking up all of the available capacity in caravan parks and similar.

It is common for the placement of worker accommodation camps to be constructed without regard to residual use. While mining camps are invariably reliant on the mining lease, many resource projects and construction camps are remote from their associated projects and have potential for future use as tourism accommodation, and particularly as a caravan park.

Caravan parks on Greenfields sites can often be too expensive to set up due to the costs of below the ground infrastructure. This is even more so the case in highly seasonal locations in the north, where many mining and infrastructure projects are underway.

Strategy
With forethought and planning, mining and infrastructure projects can provide distinct benefits to regional communities in the longer term, through facilitating the development of new enterprises once the project workers move on. For many major projects there is a requirement for temporary worker's accommodation to be constructed to house the project workers, so as not to affect the availability of tourist and rental accommodation in the region.

Project developers could be required to liaise with local government on the location of camps and consideration given to residual or redundant use of the facility. Even the smallest worker's camp will require several million dollars to be expended on below ground services for power, potable water and sewage reticulation with a condition of many camp approvals is that the services infrastructure is removed at the end of the project life.

With caravan parks one of the encouraged residual uses in locations where there is sufficient long term (projected) demand, plans can be drawn up which will suit both the current use as workers accommodation and residual use as a caravan park, thus providing benefits for the community in the longer term.

Positive Impacts
There is potential for better practices to be instigated to provide a community benefit upon demobilisation of workers camps. In Kununurra and Esperance, concepts for workers camps to be constructed over a caravan park site set-out have been developed. To gain further economic benefit, administration, recreation room, laundry and ablution buildings can be positioned to be suitable for both a temporary worker's camp and future use as a caravan park. The cost saving on the services infrastructure for the future caravan park facility from the utilisation of the camp's in-situ services can often sure up the viability of the sites longer term use as a caravan park.

This not only provides benefits for caravan and campground users and developers, it also provides a long term employment solution and economic development solution to keep regional communities alive once the resource projects move out.

REGIONAL PROFILE OF TRENDS, ISSUES AND IMPACTS FACING THE INDUSTRY

Issues, impediments, impacts and trends by region	Australia' North West	Australia's Coral Coast	Australia's Golden Outback	Experience Perth	Australia's South West	1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand	2: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable	3: Identify Opportunities to Access Western Australia's Conservation Estate	4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities	5: Partner with Indigenous Australia's to Develop Caravan and Camping Infrastructure on Indigenous Land	6: The WA Planning Commission to Provide Better Guidelines for the Development of Caravan Parks to Development Assessment Panels and Local Government	7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry	8: Raise the Bar on Skills for the Caravan and Camping Sector	9: Improve Data to Support Decision Making	10: Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector	11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom
Issues and impediments:	**Regional impact**					**Expected influence of recommendation on issue or impediment**										
"Red tape" Multiple agency approval process and multiple governing legislation instrumentalities Variation in interpretation of Caravan & Camping regulations Changing strategic tourism planning policies	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓				
Planning legislation and policy (state and local govt.) too restrictive - Does not recognise land tenure situation for caravan parks (single lot) Influenced by false perception of caravan parks Referrals to other agencies hinder approvals	✓	✓	✓	✓	✓	✓		✓			✓					
Local government town schemes - Insufficient allocation of land/ inappropriate locations to tourist market requirements Broad range of competing uses allowable for zoning Zoned areas not viable for caravan park development	✓	✓		✓	✓						✓					
DEC legislation - Below cost recovery pricing creates unfair competition Risk for developer initiated concepts Restricted lease term, prescriptive facility design and product mix	✓	✓	✓	✓	✓			✓			✓					
Availability of Land and Land tenure - Lease term inadequate - difficulty in achieving amortisation of development cost Uncertainty for assignments of leases or sub-leasing	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓					✓
Workforce availability and competency - Negative impact on customer experience and poor comparison with competing markets Lack of career pathway Retention of staff - low wages compared to other industries Deficient in core technology processes	✓	✓	✓	✓	✓				✓	✓			✓			
Availability and accuracy of data - Collection of caravan park statistics discontinuation (ABS STA) will cause difficulty in preparation of feasibility studies. Local government caravan parks register inaccurate and incomplete Methodology of TRA survey data collection not appropriate for highly mobile market and small samples make data unusable for regional WA Unavailability of data creates risk for developers/investors No recognised official guide to free and low cost sites where camping is authorised	✓	✓	✓		✓									✓	✓	

Issues, impediments, impacts and trends by region	Australia' North West	Australia's Coral Coast	Australia's Golden Outback	Experience Perth	Australia's South West	1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand	2: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable	3: Identify Opportunities to Access Western Australia's Conservation Estate	4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities	5: Partner with Indigenous Australia's to Develop Caravan and Camping Infrastructure on Indigenous Land	6: The WA Planning Commission to Provide Better Guidelines for the Development of Caravan Parks to Development Assessment Panels and Local Government	7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry	8: Raise the Bar on Skills for the Caravan and Camping Sector	9: Improve Data to Support Decision Making	10: Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector	11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom
Impacts	**Regional impact**					**Expected influence of recommendation on impact**										
Lease costs Seasonality Inadequate lease terms	✓	✓	✓	✓	✓	✓		✓			✓					
Development costs Long amortisation Low development cost/return ratio not recovered over lease terms Product mix determined by regulation Risk associated with single use development	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓			✓		
Low return on investment Market expectation/tariff limits Low density development Seasonality High land cost component (for freehold parks) & high cost of infrastructure	✓	✓	✓	✓	✓	✓	✓		✓	✓				✓	✓	
Utilities infrastructure and costs Availability and cost of services provision and headworks Caravan parks legislation overly prescriptive / inflexible	✓	✓	✓			✓					✓			✓		
Land availability Land area required for caravan park and cost of land Lack of coastal sites and those with proximity to attractions Environmental and native title complexities Conflict with other adjacent land uses	✓	✓		✓	✓	✓	✓	✓	✓	✓						
Higher use demand Landbanking culture - decreased operational revenue outcome focus Low development cost/return ratio Government charges High cost of land and infrastructure (to expand) - Long amortisation	✓	✓		✓	✓			✓	✓							
Competing demand for sites for workforce accommodation Resource Sector and Project Accommodation Substitute for residential accommodation	✓	✓	✓	✓	✓								✓			✓
Seasonality Underutilised infrastructure - limits return on investment Retaining workforce and Re-training workforce Overflow facility management Workers willing to pay year round take up capacity	✓	✓	✓	✓	✓	✓			✓			✓	✓		✓	

Issues, impediments, impacts and trends by region	Australia' North West	Australia's Coral Coast	Australia's Golden Outback	Experience Perth	Australia's South West	1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand	2: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable	3: Identify Opportunities to Access Western Australia's Conservation Estate	4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities	5: Partner with Indigenous Australia's to Develop Caravan and Camping Infrastructure on Indigenous Land	6: The WA Planning Commission to Provide Better Guidelines for the Development of Caravan Parks to Development Assessment Panels and Local Government	7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry	8: Raise the Bar on Skills for the Caravan and Camping Sector	9: Improve Data to Support Decision Making	10: Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector	11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom
Trends:	**Regional impact**					**Expected influence of recommendation on trends**										
Changing nature of caravan parks Higher yields Higher costs Higher level of facilities	✓	✓		✓	✓	✓	✓			✓	✓			✓	✓	
Demand for Provision of a range of accommodation types Deluxe Cabins Standard Cabins Powered Sites Unpowered Sites Ensuite Sites Drive Through Sites Extra Large Sites for RV's	✓	✓	✓	✓	✓	✓		✓			✓			✓	✓	
Growing number of self-contained campers Expect low rate/low facility options Strong advocacy voice Internet forums identifying authorised and unauthorised free camping spots	✓	✓	✓	✓	✓	✓		✓						✓	✓	
Ageing population and resource projects may increase demand - over medium term to unsuitable levels.	✓	✓	✓	✓	✓	✓		✓	✓	✓		✓	✓		✓	✓
Increasing Fuel Price/scarcity Defers travel plans of core market Reduces length/period of travel Creates a consumer "cost recovery" mentality Reduces consumer desire for 2nd tier tourism spend	✓	✓	✓	✓	✓				✓						✓	
Market forces Economic factors Competition from international outbound tourism and other tourism sectors Greater road distances in WA - Fuel cost sensitive Availability of free camping locations Seasonal shortage of sites at popular locations	✓	✓	✓	✓	✓		✓	✓	✓					✓	✓	

Expected Impact of Recommendations on Stakeholder Groups

Recommendation:	1: Streamline Caravan Park and Campgrounds Regulations to Improve Supply and Meet Market Demand	2: Increase Support for LandBank to Release Land for more Caravan Park Developments where Viable	3: Identify Opportunities to Access Western Australia's Conservation Estate	4: Create Public-Private Partnerships to Improve Delivery and Maintenance of Caravan and Camping Facilities	5: Partner with Indigenous Australia's to Develop Caravan and Camping Infrastructure on Indigenous Land	6: The WA Planning Commission to Provide Better Guidelines for the Development of Caravan Parks to Development Assessment Panels and Local Government	7: Develop a State-wide Overflow Policy That Works for Visitors and Supports Industry	8: Raise the Bar on Skills for the Caravan and Camping Sector	9: Improve Data to Support Decision Making	10: Develop a Marketing Strategy to Improve Perceptions and Online Presence of the Caravan and Camping Sector	11: Secure Sustainable Regional Tourism Benefits from the Resource Mining Boom
Industry impact:	Improved ability to plan, operate and develop new facilities	Improved opportunity to invest, increased competition	Improved opportunity to invest in developing on DEC managed lands, increased competition	Competitive neutrality	Economic development opportunities for Indigenous Australians and their caravan industry business partners	Improved ability to plan, operate and develop new facilities	Opportunity to deliver overflow capacity, benefit from improved reputation of availability. Perceived competitive threat	Improved professionalism, competitiveness and profits	Improved information to use as a basis from which to make investment decisions	Growth in demand and spreading visitation over the shoulder and off peaks season	Provide opportunities for reduced cost start up
User impact:	More capacity/ availability / amenities	More choice/ value and capacity	More choice/ value and capacity in well sought after locations	Better managed facilities provided low cost and in convenient locations	Increased capacity, accessibility and improved infrastructure on Indigenous land Cultural learning experience	More capacity/ availability / amenities	Ability to plan and book with confidence in supply	Improved service	Better distributed facilities	Understanding the wealth and diversity of opportunities available and the benefits of travelling in the off season	More choice/ value and capacity
Government impact:	Streamlined process	Sustainable supply	Increased visitation/ satisfaction	Less cost burden and better facilities	Unique sales proposition, Indigenous economic development	Streamlined process	Increased visitation	Sustainable supply	Sustainable supply	Increased visitation/ satisfaction	Sustainable long term supply Benefit from ownership of resources

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The methodology employed is highly consultative with input sought from a large number of stakeholders across a wide range of interests in the caravanning and camping sector. The majority of the consultation was done via email requesting input into the study and asking questions relevant to stakeholder interests.

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Email and telephone consultation
Caravan Park Operators, State and Local Government agencies, Caravan Industry Australia, User groups, Department of Environment and Conservation, Department of Sport and Recreation, Regional Tourism Organisations, Regional Development Commissions, Indigenous Business Australia, Small Business Centre, Land and Sea Councils, Local Visitor Centres, Local Government Associations, Main Roads Western Australia, CIAWA, specialist consultants, Western Australian Indigenous Tourism Operators Committee (WAITOC), and Department of Planning.

Consumer Survey
Review of caravan and camping blog websites undertaken to canvass user opinion.

Inquiry Review
Review of the Western Australian Government Economics and Industry Parliamentary Standing Committee Inquiry into the Provision, Use and Regulation of Caravan Parks and Campgrounds in Western Australia and subsequent reports and submissions.

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- Top Tourist Parks – Donna Cocking (Top Tourist Park Board Member)
- Big 4 Parks – Craig Robins
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- Patricia Strahan – Former CEO, CIAWA
- Goldfields Esperance Development Commission – Shane Liddelow (District Manager)
- Western Australian Association of caravan Clubs - Ted Walker (President)
- Shire of Murray – Brett Flugge (Executive Manager Strategic Development)
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- Numerous unnamed (in respect of their privacy) consumer and industry contributors

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- Aboriginal Tourism Strategy for Western Australia 2011 - 2015, TWA and WAITOC, 2011.
- Various other letters and emails from Local Government agencies
- Documents and studies of a general tourism nature

ATTACHMENTS

Attachment 1: Methodology and scope

Attachment 2: Database of all facilities