Updated July 25th 2005

The Sustainable Development of the Motorhome and Self Contained Vehicle (MSV) Niche Market

by

The Campervan and Motorhome Club of Australia

ABN 16 095 568 157

Issues Paper No. 1

July 2005

PUBLISHING DETAILS

Report published:

July 2005

Prepared by:

Tony Charters and Associates
Level 1 The Mansions
40 George Street
Brisbane QLD 4000
Email tony@tonycharters.com
Phone: 07 3012 9575

On behalf of:

The Campervan and Motorhome Club of Australia
49 The Avenue
Wickham NSW 2293
Email: JohnO@cmca.net.au
Phone: 02 49 788 710

Author:

Dr Elizabeth Saxon – Tony Charters and Associates

Acknowledgements:

Darren Goddard – Department of Industry, Tourism and Resources
Lee Heaney – Tourism Research Australia

FOREWORD

This issues paper was developed in response to ongoing concerns from members of the Campervan and Motorhome Club of Australia (CMCA) that current tourism infrastructure and products were not adequately meeting the demands of the growing numbers of domestic and international motorhome and self contained vehicle (MSV) travellers.

The CMCA, with 43 000 members, is the peak representative body for the MSV niche market and the largest consumer voice for the caravan and camping sector as a whole. While the MSV market is a growing niche in its own right, many of the issues impeding its growth are equally relevant to the growth of the broader caravan and camping market (CCM).

The CMCA has been proactively conducting research, auditing infrastructure and engaging with a range of CCM stakeholders including industry and community groups, local, state and federal governments, and manufacturers and suppliers to increase awareness within the industry of the value and needs of the MSV market.

In 2005, the CMCA contracted Tony Charters and Associates to assimilate existing research and information on the state of the CCM sector as a whole and the issues inhibiting the growth of the MSV niche. The key findings of this report are presented in this issues paper and make it clear that the sustainable development of the CCM sector and the continued growth of the MSV niche require product and market development improvements in 5 key areas:

1. Camping infrastructure
2. Stakeholder relationships
3. Performance and quality standards
4. Research and information
5. Marketing and communication

The CMCA is calling on all stakeholders – industry, local, state and federal government and community to actively seek and contribute to collaborative solutions to the issues highlighted in this paper. We believe this to be the best way to foster the growth of the industry and quality of the domestic and international visitor experience – goals which we believe are shared by all CCM stakeholders.

We see this issues paper as a first step in bridging gaps in awareness, information and communication and for facilitating the building of better stakeholder relationships aimed at fostering a sustainable industry sector that provides environmental, social and economic benefits.

John Osborne
General Manager
The Campervan and Motorhome Club of Australia

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The importance of the caravan and camping market (CCM) is recognised at the national level within the Drive Tourism Strategy and the Tourism White Paper.

The value of this market to Australia is significant. There were 8.8 million domestic visitors using caravan and camping accommodation in 2004 who collectively spent 50 million nights and $4.8 billion. In addition, there were 320 000 international visitors who collectively spent 21 million nights and $1.5 billion[1].

The touring segment of this market (which excludes point to point and short break trips) in Australia has been estimated to be worth almost $1 billion with total spending having increased by 6.7% since 2002[2]. Travellers in this segment take long trips averaging 29 days and have a high average spend of around $2300 per trip.

Travellers carrying the most self contained forms of accommodation such as campervans and motorhomes are a rapidly growing niche segment of the caravan and camping market and are referred to in this document as the MSV niche (that is, the motorhome and self contained vehicle market). They are represented nationally by the Campervan and Motorhome Club of Australia (CMCA).

The MSV niche has been falsely assumed to have the same experiential needs as all other segments of the CCM in much of the related research, planning and marketing. However, the caravan and camping industry and infrastructure providers need to recognise that the needs of this niche, while overlapping with those of other campers in the broader CCM, are not identical.

Currently, the experience demanded by MSV travellers is not being matched by the existing network of infrastructure, services and information provided. In particular:

- the trend in caravan parks towards servicing higher yield markets, and providing a greater number of services in a higher density accommodation environment is not in line with CMCA member demand for quiet and natural surrounds, with minimal facilities and crowding;

- alternative site options in government managed areas are attractive but currently delivered to the market on short term and ad hoc arrangements which lack consistency and coordination within and across the states;

- a whole of government perspective is lacking in developing the infrastructure and communication network to service the MSV niche segment;

- environmental performance and quality standards are variable across site providers and availability and access to appropriate waste dump sites is inadequate;

[1] Tourism Research Australia June 2005 Caravanning and Camping in Australia - Snapshot
[2] Tourism Queensland 2005 Unpublished Report

- some depth in research and information focused on the MSV segment is required to fully understand the needs and demands in common with the rest of the CCM and those that are different; and

- communication between stakeholders in the broader CCM needs to be enhanced to enable more coordinated development of a product network that services the differing demands of different niche segments within the CCM – particularly those of MSV travellers.

An integrated development, planning and regulatory framework is essential for the sustainable development of the growing MSV market. There are a range of stakeholders that need to be involved and coordinated – including MSV travellers, regional communities, local governments, state governments, commonwealth agencies, MSV manufacturers and equipment suppliers and camping site providers.

The CMCA urges the federal government to engage on these issues and to take a coordination and facilitation role in supporting sustainable development of a MSV market that:

- improves traveller experiences;
- demonstrates best practice performance and quality standards across stakeholder activities; and
- develops an integrated network of Australia's caravanning and camping opportunities.

Specifically, this could be achieved by bringing the issues that require coordinated approaches onto the agenda in relevant forums such as the Tourism Ministerial Council, Australian Standing Committee on Tourism, the Australian Transport Council and the Local Government and Planning Ministerial Council. Key issues requiring coordinated approaches include: rest area policies; dump point signage; touring routes; certification standards and mapping information systems.

The assistance the Federal Government can provide to achieve sustainable growth of the MSV market is seen as critical. Through taking a proactive facilitation and coordination role at this early stage of the MSV market's development there is an opportunity to build this segment into a highly valuable tourism niche. A proactive facilitation and coordination role also mitigates against ad hoc issue management as was experienced across the States with the issue of rest area camping.

The CMCA also presents a call to action for industry representative bodies to engage with consumer representatives and other stakeholders to collaboratively work towards mutually beneficial solutions for sector development. Other caravan and camping representative bodies are also called on to participate in building a holistic perspective and approach to the identification and servicing of the needs of caravan and camping travellers.

The MSV market represents a great domestic and inbound tourism product, It epitomises authentic Australian culture, landscapes and products. The emergence of this market presents significant opportunities that can only be fully harnessed through innovative thinking and cooperation between the key stakeholders.

1.0 INTRODUCTION

Australia's expansive network of regional highways; outstanding natural and cultural heritage; and the prosperity of its 'baby boomers' provide the vital components of an industry sector based on camping, caravanning and campervanning and the growth of the caravan and camping market (CCM) over the past 8 years has been remarkable.

The Tourism White Paper recognises the value of this market and further indicates the importance of expanding Australia's niche tourism markets as a way to direct and encourage growth in international and domestic visitation, while simultaneously supporting regional development. The motorhome and self contained vehicle (MSV) niche segment of the caravan and camping market is particularly suited to achieving these ends as it encourages domestic visitation and spending in regional areas, particularly in off peak periods.

Currently, the growth of this segment is inhibited by a lack of stakeholder coordination and the lack of a national approach to developing an integrated product with appropriate infrastructure and consistent standards, marketing and information. To this end it is important to:

- establish ongoing dialogue and networks between key stakeholders;
- identify existing and emerging issues for market development;
- identify industry, government and market based incentives for addressing these issues;
- develop coordinated and integrated approaches to sustainable management solutions; and
- facilitate a nationally integrated product and consistent product quality across the country.

Currently, the key planks required for growth in MSV market include the development of:

- appropriate and adequate public, private and commercial camping facilities incorporating current infrastructure like racecourses and showgrounds;
- good working relationships and communication channels with industry stakeholders, suppliers, the community, and all 3 levels of government;
- appropriate and agreed upon environmental and performance standards across the industry, market and infrastructure and service providers;
- positive media and successful marketing; and
- consistent access to ongoing market and industry research.

While the focus here is on removing restrictions to the growth of the MSV niche it should be noted that these issues also inhibit the sustainable development of the CCM as a whole. This discussion presents an overview of the major stakeholders and relationships of relevance to growing the MSV niche; the major issues impeding growth; key stakeholder initiatives and challenges; and potential strategic solutions.

The aim is to improve awareness of the value of the MSV niche market and to stimulate the creation of a national coordinated approach to the sustainable development of the caravan and camping sector as a whole.

2.0 VISION

The CMCA has developed the following vision statement as an overriding goal for the stakeholders in the MSV niche segment:

> Campervanners shall be provided with opportunities to gain high quality experiences of regional Australia through access to convenient sources of information, services and sites. Their safety and security shall be paramount in decision making. In return for quality experiences campervanners shall care for and respect the environments they visit and the values of the communities they visit.
>
> Regional communities shall view the campervan and motorhome fraternity as an important and sustainable contributor to local business and services. They shall experience direct and indirect benefits from the sector and see it as an important contributor to the vitality of the region.
>
> Local governments shall investigate the community and regional economic benefits of facilitating the growth of the MSV niche in their locality. They shall invest in the growth and better facilitation of MSV activities and shall see returns on that investment. They shall coordinate with neighbouring councils and facilitate, (through their planning, health and recreation roles) greater use of existing infrastructure (e.g. showgrounds, racecourses and recreation reserves).
>
> State governments will have a coordinated approach with other states and the Commonwealth regarding use of main roads, rest areas, public lands, as well as use of signage, senior's cards benefits, and development of tourism promotion and research. They will encourage and participate in relevant national certification schemes and assist new operators entering the sector.
>
> Commonwealth government shall support national approaches and forums for stakeholder cooperation and coordination. Relevant market research and statistics will regularly be collected. National approaches to relevant market development issues will be supported, including across state touring routes, certification, rest area use, public liability and senior's cards benefits.
>
> MSV manufacturers and equipment suppliers will meet the needs of consumers through best practice initiatives and will maintain high environmental performance standards. They shall liaise with government transport certifying agencies and maintain close links with sector associations.
>
> Camping site providers shall recognise the MSV segment as an important client group and maintain links with the CMCA for industry intelligence and consumer inputs. Servicing this market shall provide them with a diversified income stream. Providers shall adhere to best practice standards or adopt national standards of infrastructure development and information services.

Australia will be recognised as the world leader in providing CCM tourism products. Australia's MSV segment will be held up as a model example of a tourism sector delivering diversely spread regional economic benefits; a coordinated national approach; support of host communities; and a high quality tourism pursuit.

3.0 THE STAKEHOLDERS IN THE CARAVAN AND CAMPING MARKET

The key stakeholders in the CCM are depicted in Figure 1.

Caravan and camping visitors comprise that segment of the drive market that takes their accommodation with them, in the form of a caravan, motorhome, camper trailer or tent. The largest representative of these consumers at the national level (that is the organisation with the largest membership) is the Campervan and Motorhome Club of Australia (CMCA). Other smaller national consumer representative groups include:

- the Australasian Touring, Caravan, Motorhome and Camping Club; and
- the A-Van Club of Australia

Industry stakeholders include the manufacturers and operators who supply commercial products (such as camp grounds, vehicles, technology and equipment) to service demand. The main representatives at the national level are:

- the Caravan, RV and Accommodation Industry of Australia;
- the Caravan Parks Association of Australia; and
- AAA Tourism - the national tourism body of the Australian Auto Clubs, who manages the STARS Accommodation Classification Schemes, publishes the Accommodation Guide, Tourist Park Guide and Experience State Guides, and manages the National Special Rates program.

Local governments are focused on planning, health and safety as well as economic returns from accommodating this market. They also own and manage important community infrastructure that can play a vital role in the development of the CCM sector – potentially important infrastructure includes showgrounds, racecourses and recreation or other reserves in regional towns. Representative groups include:

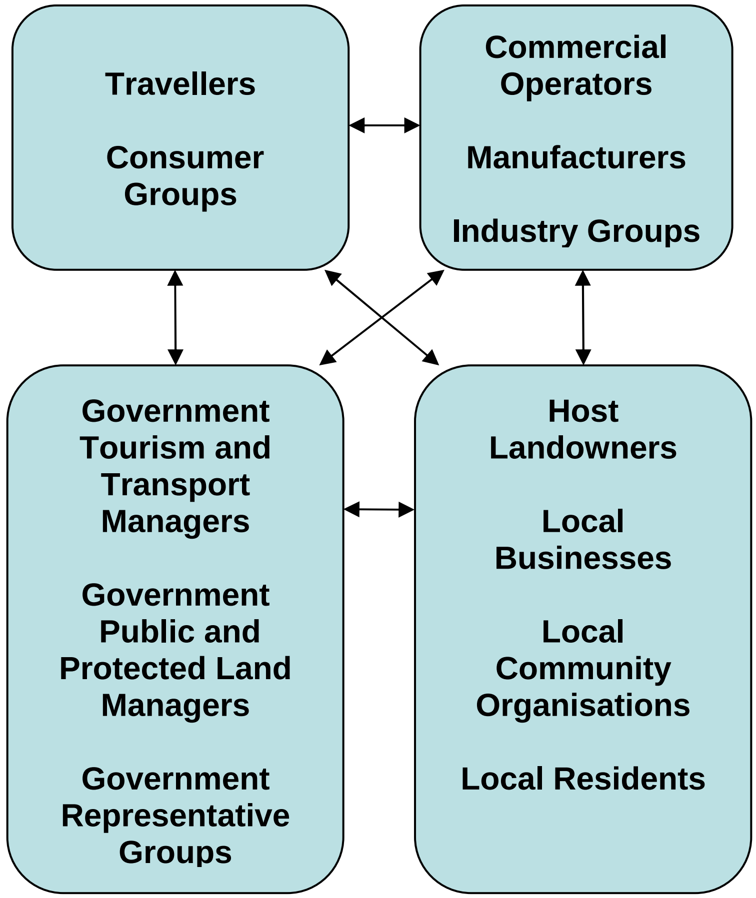
- Regional organisations of councils and
- The Australian Local Government Association.

At a state and national government level, tourism portfolios are interested in maintaining an integrated, sustainable, quality product for visitors and increasing yield and regional benefits from tourism. Transport and Main Roads portfolios are focused on the management of driver fatigue and road safety, themed routes and vehicle certification and licensing. Environment portfolios are primarily concerned with appropriate waste management and disposal in areas with few facilities. Protected Area agencies are concerned with the use of camping (both bush camping and formal site) and picnic facilities by this market. Other key agencies include:

- Tourism Australia and
- the State Tourism Organisations.

Community stakeholders include landowners that may provide private investment and provision of infrastructure and services and host residents and businesses who seek environmental, economic and community benefits from the CCM sector. Community perceptions of and attitudes to the caravan and camping market are important in that public area facilities are often shared. Community interaction is an important part of what makes a quality visitor experience. A positive relationship is also likely to attract a greater proportion of the economic benefits generated by these visitors

Figure 1:
Stakeholder Map of the Caravan and Camping Market

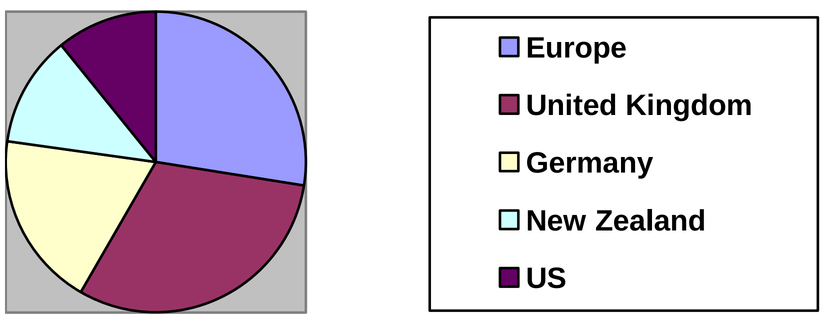


3.1 CARAVAN, CAMPING AND MOTORHOME TRAVELLERS

The 'drive market' is defined in the National Visitor Survey as covering trips for the purpose of holidays or visiting friends or relatives, that use a motor vehicle as the main mode of transport, stay away from home for at least 4 nights, and spend a night in more than two different locations on the journey. The 'caravan, camping and motorhome market (CCM)' is that segment of the drive market that takes their accommodation with them, in the form of a caravan, motorhome, camper trailer or tent. The value of this market in Australia in 2004 was worth $919 million with total spending having increased by 6.7% since 2002[3].

In 2003, there were 320 000 international visitors who stayed in a caravan park and/or commercial camping ground in Australia, spending a total of 4.4 million visitor nights[4]. Figure 2 indicates the top 5 source markets for these visitors[5].

Figure 2
Top 5 Source Markets for international CCM Visitors

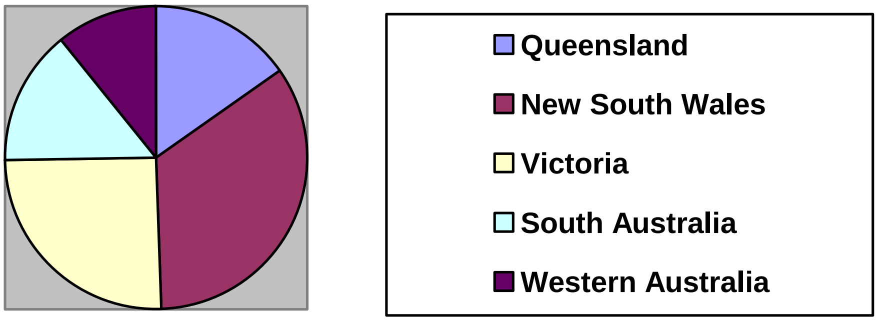


In the year ended March 2004 the CCM market comprised around 9 million domestic visitors spending 43.6 million visitor nights[6]. In the year ended September 2004, 33.8 million nights were spent in caravan parks or commercial camping grounds by tourists, and 14.5 million nights was spent in a caravan or camping near the road[7]. The average length of trip in 2003 was 4.9 nights and the average spend was $546[8]. The total expenditure by domestic travellers was estimated at around $4.9 billion which represented about 12% of total expenditure by overnight domestic travellers in that year[9].

[3] Tourism Queensland 2005 Unpublished Report
[4] Tourism Australia Fact Sheet
[5] Tourism QLD 2003 Fact sheet
[6] Tourism Research Australia, National Visitor Survey 2004
[7] Bailey Media Release 2005
[8] Tourism Australia Fact Sheet
[9] Tourism Australia Fact Sheet

Figure 3 highlights the top 5 hosts of domestic CCM visitors[10]. The most popular Australian destinations are North Coast NSW; Central West NSW, Far North Coast NSW; Outback QLD and Central QLD[11].

Figure 3
Top 5 Hosts of Domestic CCM Visitors



Research suggests that around 60% of CCM travellers are over 50 years of age[12]. The population of over 50's in Australia is forecast by the ABS to grow from 5.8 million in 2003 to 8.9 million by 2021[13]. Fifty to sixty year olds are also Australia's wealthiest demographic[14] with the Bureau of Tourism Research indicating that seniors in Australia spend $7.9 billion a year on domestic overnight trips[15] . While this indicates the growing potential of this market, it should be noted that current research shows that the majority of the actual CCM market consists of middle to lower income empty nesters and retirees over 65 years of age [16].

The CCM sector are likely to want to interact with nature, holiday without the pressures associated with crowds and are generally more active on weekends[17]. Resting and socialising is a significant activity and most information is shared by word of mouth, Motoring Clubs, Brochures and guide books. In 2003, approximately 34% of visitors had been to the destination before[18].

3.1.1 Campervan and Motorhome Travellers

It needs to be recognised that the CCM contains a spectrum of mobile accommodation types. While there are shared interests and needs across the market there are also differences in needs related to the level of self containment of the mobile accommodation used. For example, the needs of those carrying a tent or towing a caravan may differ to those in a motorhome as the latter is more self sufficient and often needs less facilities.

---
[10] Tourism QLD 2003 Fact sheet
[11] Tourism Queensland 2005 Unpublished Report
[12] Tourism Queensland 2005 Unpublished Report
[13] Federal Government 2005 Discussion paper on Roadside Camping
[14] Safe 2005 The Weekend Australian
[15] Federal Government 2005 Discussion paper on Roadside Camping
[16] Tourism Queensland 2005 Unpublished Report
[17] Federal Government 2005 Discussion paper on Roadside Camping
[18] EMDA 2003 Touring Market Review

In general, the **motorhome and self contained vehicle (MSV)** segment of the CCM market lies at that end of the spectrum where travellers are carrying the most self contained forms of accommodation. These range from converted light trucks to luxury purpose built vehicles. Improvements in technology mean the MSV segment of the CCM is becoming increasingly apparent as a niche market in its own right. The CCM industry and infrastructure providers need to recognise that the needs of this segment, while overlapping with those of other campers in the broader CCM sector, are not identical.

MSV travellers tend to be retired pensioners, travelling in twos and spending an average time of 157 days on the road[19]. This group tends to stay in both caravan parks and rest areas at an average of 1 night at a caravan park to 2.7 nights elsewhere. Over the journey approximately 42 nights are likely to be spent at a caravan park[20].

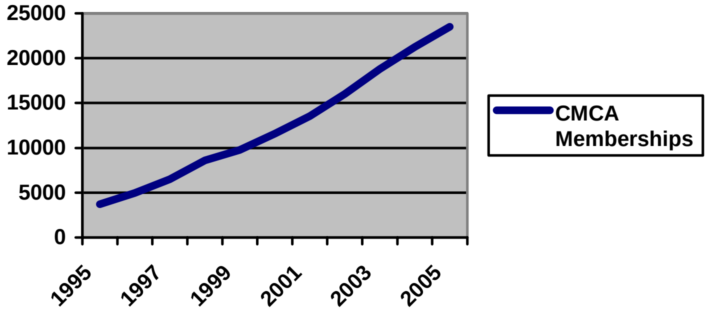
In the year ending December 2004, domestic MSV visitors numbered 122 000 and spent 1.643 million visitor nights in Australia[21]. The self sufficiency of this group together with modern communications and technology have vastly increased the ability of this sector to travel to remote areas (eg GPS, internet and solar energy).This group spends considerably more time on holiday than other CCM visitors and hence their overall spend is high ($4-5000 per person) [22]. Rest area stopovers are likely to generate at least $75 per person spending at nearby shopping facilities during a stay and in major towns around $360 per person on goods and services[23].

MSV visitors are very responsive to friendly local attitudes and tailored products and are likely to make a conscious decision to support businesses and regions which make them feel welcome.

This segment of the CCM is represented nationally by the **Campervan and Motorhome Club of Australia*.*** It was formed in April 1986 and is based in Newcastle NSW. This is Australia's largest recreational vehicle club with around 42 000 members. Figure 3 shows the growth in memberships over the last 10 years (note there are usually more than one member per membership) and the club expects member numbers to double in the next 5 years.

[19] Balfour Consulting 2003 CMCA sponsored survey
[20] Balfour Consulting 2003 CMCA sponsored survey
[21] Tourism Research Australia 2004 National Visitor Survey
[22] Balfour Consulting 2003 CMCA sponsored survey
[23] Balfour Consulting 2003 CMCA sponsored survey

Figure 4
CMCA Memberships – Growth from 1995 – 2005



There are 74 chapters across the country and every state and territory is represented. These chapters share information on activities and events through the club website and through the club's monthly publication *The Wanderer.* This publication also includes:

- member's travels and recommendations;
- tips on roads, rest areas, bush campsites and places to visit;
- technical, trade and new product information; and
- information on key industry and political issues and club advocacy programs.

Information is also channelled through two national rallies which are held each year in different locations around the country. The rallies provide a forum for stakeholders to share travel information, discuss market issues, new products and ideas. It is often difficult to identify appropriate locations for these rallies as sites often lack the required infrastructure or are outside the CMCA budget. Rallies are significant regional events in terms of attracting visitors to the area. For example:

- The Townsville Rally in 1999 attracted 842 motorhomes with the average stay in Townsville being 10.5 days. Club survey sheets show that members joined almost 1,400 pre-booked tours to such destinations as Magnetic Island and the Outer Great Barrier Reef, spent more than $1.5 million in Townsville ($170,000 in Castletown Shopping Centre alone, according to collected dockets) and in excess of $3 million in the North Queensland region bounded by Mission Beach, Charters Towers and Ayr. Total direct expenditure throughout Queensland exceeded $5 million. This Rally was a North Queensland Tourism Award finalist.
- The Forbes Rally in 1999 was also a major NSW Tourism Award winner and injected more than $1.7 million into Forbes and surrounding areas.
- The 2002 Barcaldine Rally (Queensland) attracted almost 1,200 vehicles and well over 2,000 members who injected more than $7.5 million into the Queensland economy during their travels throughout Queensland. A major side benefit was that much of this expenditure was made in regional areas which were suffering from drought and depressed commodity prices.

Over the last few years there has been an increasing need for the club to proactively establish stakeholder partnerships and engage in public debates to pursue members' interests in planning and regulatory processes governing the use of public campgrounds and rest areas. The growth within the sector demands that the CMCA takes a proactive stance to facilitate access to new or expanded camping sites. The club's National Rest Area and Environmental Committee has taken on this role and has been active in seeking to improve services and benefits through negotiations with local government, the private sector and commercial interests as well as through participation in consultative forums.

3.1.2 Caravan and Camping Travellers

There are also some smaller regional and national associations representing segments of the CCM market. These include:

- the Australasian Touring, Caravan, Motorhome and Camping Club (which has around 380 members); and
- the A-Van Club of Australia.

Current research does not clearly indicate if the market profile of this segment is significantly different to that of the MSV segment.

3.2 THE CARAVAN, CAMPERVAN AND MOTORHOME INDUSTRY

The industry comprises manufacturers of recreational vehicles, suppliers of goods and services, dealers and retailers of product, service providers and Caravan Parks. The industry is currently represented at a national level by Caravan, RV and Accommodation Industry of Australia.

3.2.1 Caravan, RV and Accommodation Industry of Australia

Caravan, RV and Accommodation Industry of Australia (CRVA) was formed in 1992 and its main objectives are to raise awareness of the industry, more clearly define the industry's image, and provide leadership and coordination. The CRVA National Board is comprised of a representative from each States respective Trade Association (with the exception of the Northern Territory) and Caravan Park Association. These representatives, together with a representative from the Recreational Vehicles Manufacturers Association of Australia (RVMAA) form the core leadership body[24].

Research suggests that currently there are approximately 360,000 campervans, caravans and motorhomes registered in Australia[25]. This figure is expected to grow by approximately 6-10% a year over the next decade[26]. Current growth is higher than at any point in the past 30 years, with registrations of new caravans rising by an average of 14% a year over the past five years[27]. CRVA suggests that 70% of current growth is being driven by the 55+ age market[28]. The Australian Bureau of Statistics Motor Vehicle Census shows a 1.4% p.a. increase in caravan sales and a similar level of growth in campervans[29].

3.2.2 Caravan Parks

In the year ended March 2004 the commercial caravan accommodation sector accommodated 7% of domestic visitors in Australia and 11% of visitor nights[30]. NSW and Victoria attract the bulk of these visitors (39% and 29% respectively) while NSW and Queensland attract the highest proportion of visitor nights (33% and 24% respectively). Visitors tend to have the longest stay in QLD (average of 8.6 nights), WA and the NT (both averaging 5.9 nights).[31]

It has been estimated that around 100,000 international visitors stay in caravan parks each year[32]. In 2004 the commercial caravan/camping sector accommodated approximately 4% of international visitors to Australia and 3% of nights with Queensland and NSW attracting the highest proportion of travellers[33].

[24] CRVA March 2005 website
[25] Federal Government 2005 Discussion paper on Roadside Camping
[26] Federal Government 2005 Discussion paper on Roadside Camping
[27] Federal Government 2005 Discussion paper on Roadside Camping
[28] Safe 2005 The Weekend Australian
[29] Sustainable Tourism Services 2003
[30] Tourism Queensland
[31] Tourism Queensland
[32] Tourism Queensland
[33] Tourism Queensland

Statistics from the ABS highlight difficulties in the park industry noting that from 1997-2000 there were 93 caravan parks that closed their doors. Most of these closures happened in coastal areas and capital cities. Victoria lost 28 parks, New South Wales and Queensland lost 20 parks each. South Australia lost 13, Western Australia 14 and the Northern Territory gained 2 [34]

Challenges for the industry include:

- caravan parks were designed and built for a different class of vehicle to campervans and for travellers seeking a different travel experience;
- rising land values – parks in good locations may find it more profitable to sell or develop their land;
- rising land taxes – high taxes on high potential sites do not reflect the low revenue generated by providing budget accommodation;
- the difficulty in attracting campervan and motorhome travellers - according to BTR statistics for the first 2 quarters of 2003 there were 78,000 overnight trips taken in Australia that indicated that the main mode of transport was a campervan or motorhome. Of these some 57,000 camped near a road or on private property, 23,000 used caravan parks and 12,000 used a friend or relatives property for their overnight stays. This means only about 27% of those that took a holiday that involved the use of a campervan or motorhome in the first half of 2003 made use of a caravan park [35]; and
- increasing scrutiny for workplace health and safety, environmental management, and community service obligations[36].

In response to these challenges, caravan parks have been evolving to accommodate higher yield markets by converting more sites to cabins, providing more services and facilities and allocating more long term resident sites[37]. (There are approximately 151 000 permanent residents in caravan parks across Australia[38]).

At the same time CCM travellers are increasing and recreational vehicle (RV) manufacturers through improvements in technology are producing a wider range of more self contained vehicles. The result is that the campervan community and travellers seeking experiential drive tours are finding that caravan parks do not fulfil their demands. Specifically:

- caravan parks don't suit the budget conscious traveller as they are progressively evolving to capture higher yield visitors;
- for the well appointed campervan the caravan park is not needed or desired – they have their own travelling 'motel room'; and
- the campervan and motorhome segment are looking for experiences of natural, uncrowded and quiet environments with like minded and outfitted neighbours.

The increased pressure on the caravan park industry has created a greater scrutiny on the use of public areas and roadside rest areas for free camping as well as of special arrangements developed with local governments to provide low cost camping sites to CCM visitors. Recent public debate has highlighted that:

---

[34] Federal Government 2005 Discussion paper on Roadside Camping
[35] Federal Government 2005 Discussion paper on Roadside Camping
[36] STS Services 2003
[37] Federal Government 2005 Discussion paper on Roadside Camping
[38] Federal Government 2005 Discussion paper on Roadside Camping

- current policies on rest areas are inconsistent within and across States;
- the use of public areas has been negotiated on an ad hoc basis and is also inconsistent across regions; and
- management of the supply of camping accommodation lacks a coordinated approach involving all stakeholders.

In summary, the needs and preferred experiences of campervan and motorhome segment are evolving in a different direction to the evolving character and services offered by caravan parks. Consequently they are looking for alternatives. It is also possible that other segments of the CCM market will be following suit – for example campers and caravanners who would also prefer more natural, less serviced and crowded experiences. This may further be supported by caravan technology making caravans more self contained and less in need of the full range of caravan park services.

4.0 SUSTAINABLE DEVELOPMENT OF THE CARAVAN AND CAMPING MARKET

The further development of the CCM market requires:

- appropriate and adequate public, private and commercial accommodation facilities;
- good working relationships and communication channels with industry stakeholders, suppliers, the community, and all 3 levels of government;
- appropriate and agreed upon environmental and performance standards across the industry, market and infrastructure and service providers;
- availability and access to ongoing market and industry research; and
- positive media and successful marketing.

These aspects are discussed below. Current issues are outlined, existing initiatives and challenges discussed and potential solutions proposed.

4.1 CAMPING INFRASTRUCTURE

An appropriate and adequate mix of camping infrastructure and facilities is critical to maintaining and developing the CCM. For the MSV segment, which are particularly self sufficient, the key camping requirements include:

- level and accessible sites;
- natural surroundings;
- a degree of open space;
- pet friendly;
- flexible booking arrangements;
- safe and secure locations;
- water points;
- waste dump points;
- laundry facilities; and
- costs reflecting the level of services and infrastructure required

Caravanners and campers are also attracted to these features but are likely to need more frequent access to a higher level of services (eg power, shower and toilet services) such as those found in caravan parks.

The needs of the CCM are currently met through the use of a network of:

- public areas such as rest areas, showgrounds, national parks and other dedicated park areas;
- commercial caravan parks; and
- private property arrangements.

These areas are managed by a mix of local governments, state level main roads agencies, national parks agencies, private businesses and individuals.

Currently this network is lacking in 3 respects:

- there are ***not enough areas*** to accommodate increasing numbers of CCM travellers (for example, CMCA member surveys suggest around 62% of members have been turned away from a caravan park because there was no room, either physically for the rig to manoeuvre or due to the park being full);

- ***does not offer a consistent diversity*** in camping products within and across regions (that is a mix of low service provision locations, as well as medium to high service provision locations); and

- at a ***state and national level the product network is not coordinated or managed*** within a consistent framework.

This situation is inhibiting both the growth of the market and the quality of the visitor experience. Negative outcomes include:
- competition and overcrowding of existing sites;
- likely environmental and community impacts and increased costs to local government;
- no visitor management framework;
- animosity between market segments and between the market and suppliers;
- visitors unsatisfied with product quality and the visitor experience;
- ad hoc exclusive arrangements which lack consistency, resilience and the support of a legal framework, are subject to abuse, have the potential to unfairly disadvantage commercial accommodation providers, and sometimes lack a market based user pays focus; and
- an inconsistent product framework precludes an effective and coordinated marketing and information program.

4.1.1 Initiatives and Challenges

The CMCA has focused on negotiating and registering sites with Local Governments (e.g. showgrounds) and private property owners. Challenges with this approach have included:
- public liability issues;
- the need to keep information to members only to avoid ‘flooding’ of areas with caravanners and other campers which often results in overuse and the consequent closure of areas or breakdown in agreements;
- the difficulty in controlling both member abuse of management controls and the activities of other segments of the market (for example, overstays in public rest areas; dumping of waste; use of isolated power boxes; keeping untidy and/or noisy camp areas);
- safety and quality assurance issues; and
- resistance from the CRVA concerned with impacts on caravan park use and equitable cost structures between accommodation providers.

The CMCA has also been a persistent advocate for the right for members to use rest areas for overnight stays. Challenges have included:
- the lack of a consistent state or national policy on roadside camping or free camping;
- the lack of a single rest area management body;
- concerns by caravan parks associations of loss of revenue to caravan parks and equitable cost structures;
- health and safety issues and a lack of infrastructure; and
- the hazy line between providing fatigue management facilities and camping facilities.

Currently:
- the Australian Government suggests that stays of no more than 24 hours in rest areas on the National Highway are appropriate;
- Northern Territory have a 24 hour policy;
- Western Australian governments have both short break rest areas with a maximum 4hour stay and 17 long break rest areas around the state with a maximum 24hr stay;
- Queensland Government policy for roads it administers (including the National Highway) allows a 20 hr time limit on the use of rest areas for fatigue management. Queensland has a total of 766 roadside rest areas of which 415 might be used for overnight stays to manage fatigue. Of the 415 sites in Queensland that do allow overnight stays, 75% are operated by local governments, 11% by Parks Agencies, 10% by the Queensland Department of Main Roads and 4% by various service clubs and other entities[39]; and
- Victoria has a maximum 12 hour stay policy.

4.1.2 Strategies to Optimise the Growth of the CCM sector

Strategies to improve the ***quantity and diversity of available camping sites*** may include:
- increase the number of rest areas and public areas and parks available for overnight stays (eg showgrounds and racecourses), develop a consistent and coordinated national policy framework and an appropriate visitor management system;
- increase the awareness of existing caravan park owners to the spectrum of needs across the CCM ;
- provide incentives and support these operators to diversify their product to match market needs;
- provide incentives for new 'specialised' commercial businesses to invest in the industry. for example:
  - assistance with business feasibility planning
  - industry intelligence to improve investment decisions
  - lower development fees and land taxes for developments aimed at budget markets
  - release of public lands under lease for new sites;
- provide business development support and clarify the supporting administrative and legislative and regulatory framework for private landholders to provide sites for CCM visitors;
- consider the use of standby rates and loyalty schemes[40]; and
- review the infrastructure and service network in each state and linkages between them, as well as hot spots and high demand areas.

Strategies to improve the ***coordination and management of the product network*** may include:

[39] Federal Government 2005 Discussion paper on Roadside Camping
[40] Federal Government 2005 Discussion paper on Roadside Camping

- encourage state and local governments to incorporate the needs of this market into regional planning, development assessment and infrastructure processes;
- support a consistent state and/or national approach to creating a network of mixed facilities that are strategically distributed throughout each tourism region and which link them;
- develop consistent use, access and visitor management processes and policies for public area use across regions and states;
- develop communication packages of the state/national network incorporating the relevant visitor management tools and policies applicable to rest area use, public area use and private facilities available;
- establish uniform regulations and a minimum code of conduct for CCM travellers[41] and site providers;
- tourism and industry partnership to develop and market infrastructure and facilities and potentially develop new facilities/services and dovetail with existing attractions and information distribution networks; and
- Parks managers, schools and local governments to work together to provide overflow sites for peak periods[42].

[41] Federal Government 2005 Discussion paper on Roadside Camping
[42] Federal Government 2005 Discussion paper on Roadside Camping

4.2 STAKEHOLDER RELATIONSHIPS

The CCM has multiple destinations and travels across local, regional and state boundaries. To meet the needs of these travellers, the product and policy framework needs to be integrated and coordinated. To facilitate this, good working relationships and communication channels between the stakeholders is important.

Key relationships include:

1. Government and industry working together to:
   - develop and manage an infrastructure network that contains enough diversity to meet the needs of the CCM market;
   - develop a regulatory and policy framework that supports continued industry viability in meeting these needs; and
   - develop consistent performance standards and potentially certification schemes for both users and suppliers.

2. Government and the CCM industry working with traveller associations and tourism bodies to:
   - develop this integrated product based on accurate market information;
   - maintain appropriate market research activities;
   - monitor the quality of visitor experiences; and
   - holistically promote the market and its benefits to local communities and potential visitors.

3. CCM travellers enhancing internal relationships to:
   - ensure accurate, consistent and holistic information about CCM travellers is being supplied to the industry and to policy makers and infrastructure providers; and
   - maintain a centralised representative to:
     - voice their needs and interests in policy, tourism and industry forums;
     - act as a central source of information on key issues; and
     - act as a central source of information on relevant products and services.

4. Government coordinating across State and Territory boundaries and across Local, State and Commonwealth levels in order to:
   - develop consistent policies and regulations regarding the use of public areas for camping within and across states; and
   - develop consistent government performance and quality standards for the provision of infrastructure and services (eg waste, building, marketing, research).

5. Industry, traveller associations and suppliers and manufacturers working together to:
   - improve quality and performance standards of equipment and vehicles; and
   - utilise existing communication and information technologies and/or develop specialised services and products where required.

Currently, ***the situation falls short*** of this ideal because:

- there is no established central infrastructure and industry planning network linking industry, tourism and government stakeholders at federal and state levels;
- policies and regulations regarding the use of public areas vary across the states;
- there is a lack of uniform industry and infrastructure standards;
- there is little research on economic impacts of this tourism niche at regional levels;
- there is no holistic information package for travellers regarding infrastructure, commercial services and information and policies on public area use nationwide;
- there are no recognised industry and infrastructure performance standards or accreditation/certification schemes;
- only a segment of CCM travellers are collectively represented at a national level;
- the relationship between the CMCA and the CRVA requires attention in order to achieve greater cooperation and coordination;
- cooperative efforts between government and travellers associations have focused on ad hoc small scale solutions rather than broad scale planning and development initiatives; and
- market segments within the CCM have tended to be competitive and sometimes antagonistic rather than cooperative due to a lack of communication channels between them.

This situation is inhibiting both the growth of the market and the quality of the visitor experience. Negative outcomes include:

- visitors experiencing a lack of consistent information and policy and a lack of infrastructure and services meeting their needs;
- likely loss of visitor expenditure in poorly serviced regions or regions perceived to be unfriendly hosts;
- a limited ability for CCM traveller associations to identifying common ground and shared interests and present a united front in the policy arena;
- local governments and communities that are sceptical about the regional economic benefits generated from travelling visitors;
- an industry lacking comprehensive information on market needs and a supportive investment environment; and
- unsustainable practices continuing due to lack of priority, coordination and knowledge (e.g. dump points).

4.2.1 Initiatives and Challenges

The CMCA is currently considering a proposal to welcome caravanners into the CMCA as Associate Members. There is an estimated target membership of around 80 000 caravan owners in Australia – ruling out those that are permanent or are for single destination use. This initiative would help to:

- create a broader voice for the CCM sector through the CMCA;
- more comprehensively represent the spectrum of visitor needs and interests in the caravan and camping market;
- secure contributions from caravanners currently benefiting from CMCA activities;
- give more of an opportunity to spread a positive environmental ethos; and
- increase information sharing and the social network for members.

CMCA has also sponsored research and disseminated results to local governments to help improve awareness of the benefits that these travellers bring to regional economies. It has also encouraged members to support businesses in those regions that offer alternative camping options, often in scenic open space public areas, as well as commercial caravan parks or private landholders that offer accommodation sites that meet the needs of campervan and motorhome travellers. The CMCA encourages members through articles in *The Wanderer* and on its website to respect conditions placed on the use of public areas as well as to be environmentally and socially responsible. Recently, it has encouraged a self regulation process within the membership whereby complaints of bad behaviour by members are followed up by the CMCA and where appropriate offenders may have their membership suspended.

Caravan and camping visitor behaviour is very visible. Inappropriate conduct or rule breaking by a minority can easily create negative perceptions of the market as a whole and strain existing agreements and partnerships under current conditions. It is difficult to enforce appropriate behaviour within the membership and almost impossible to enforce it outside the membership. This is a challenge as a large number of the caravan and camping travellers are not MSV travellers and communication channels to this segment are undeveloped.

The CMCA has devoted significant resources over the last few years towards building professional and business relationships with local, state and federal levels of government. The CMCA has presented at local government and tourism conferences and prepared submissions on key policy issues relevant to the development of the niche camping and caravan market. Association representatives have also had meetings with ministers and councillors to share the needs and interests of this growing market.

Tourism Queensland, in partnership with the Local Government Association of Queensland and the Queensland Department of Main Roads has set up a taskforce to address the issue of overnight stays at Queensland rest areas. Tourism Tasmania has recently facilitated a reference group meeting to discuss the issues. This group included representatives from local government, caravan and camping ground operators, state government agencies and consumer representative groups. Western Australia is currently conducting a statutory review of its Caravan Parks and Camping Grounds Act 1995. As part of this process Western Australia has established a working party to look at camping in traditional areas, including roadside rest areas[43]. The Federal Government has also developed a draft discussion paper that has been used to inform the sector and stimulate debate[44].

4.2.2 Potential Strategies to Optimise Growth of the CCM Sector

Strategies to improve stakeholder relationships may include:

- develop a national steering group that takes a 'whole of government' perspective on the sector: For example, this may include: Transport/Main Roads, Tourism, local government and Protected Area management agencies to coordinate the development of the market and infrastructure at a national level;

[43] Federal Government 2005 Discussion paper on Roadside Camping
[44] Federal Government 2005 Discussion paper on Roadside Camping

- gathering and disseminating information on the regional economic impact of the CCM;
- a media program to increase awareness of the environmental ethos of the industry and travellers including CMCA activities with the Keep Australia Beautiful Council; and
- the development of communication channels and networks with caravan associations and the possible development of a sister national body to the CMCA.

4.3 PERFORMANCE AND QUALITY STANDARDS

Developing quality visitor experiences in the caravan and camping sector requires consistently ***high standards*** in health, safety, environmental performance and attractions. This needs to occur ***across***:

- the manufacture of recreational vehicles and caravan and camping equipment;
- commercial suppliers of camping sites;
- public camping areas;
- privately provided camping areas;
- natural and cultural heritage sites; and
- public roads and signage (both directional/information and interpretive).

The MSV traveller has a very direct influence on environmental impacts, being in effect a mobile hotel room and requiring many of the same environment/health services as a fixed hotel room (eg black water disposal, grey water disposal, energy usage, laundry etc.)

Additionally, as the CCM user is normally located in regional, natural or ‘un-hardened’ sites there are additional sustainability issues to consider such as physical site impacts. These characteristics point to the need for a cooperative approach between the users of caravans and campervans and the suppliers and managers of camping sites. This may mean that codes of conduct or certification schemes need to be developed for both users and providers of the CCM sector.

In order to provide quality experiences it is essential that CCM travellers are aware of local natural and cultural heritage values and the linkages that thematically connect touring routes. The development of themed touring routes that acknowledge the visitor flow patterns of CCM users will greatly assist in contributing to quality.

Currently, there is a ***lack of:***

- black and grey water dump points;
- knowledge by some CCM segments of where existing dump points are;
- consistent signage and centralised information on dump point locations;
- consistent regulations covering use of public and roadside rest areas across Australia;
- policing in public and roadside rest areas;
- infrastructure and information on appropriate waste disposal procedures in some public use areas;
- themed routes; and
- connectivity between CCM destinations.

Negative outcomes include:

- public and roadside rest areas are prone to illegal dumping of human and other waste, overuse and tension over rights and access between user groups;
- difficulty delineating management responsibilities for different bodies because it is difficult to distinguish between the use of areas to prevent driver fatigue and the use of areas for free camping;
- environmental and health and amenity values may be damaged in these areas affecting both community and visitor experiences; and

- lost opportunities to improve the quality of the touring experience through the expansion of themed routes suitable for the MSV segment.

4.3.1 Initiatives and Challenges

CMCA is currently developing a specific certification program (for pilots across Australia) that will assess the level of self containment of vehicles - based on the number of days they are able to store fresh, black and grey water and solid waste. Once attained, this certification will be used to gain access to particular camping areas as negotiated with local authorities.

CMCA policies encourage members to:

- leave rest areas and overnight stopping spots cleaner than when they arrive;
- use bio-degradable toilet chemicals and avoid using those with toxic-based additives;
- use designated dump points to dispose of wastes;
- use caravan parks and tourist parks wherever possible; and
- upgrade vehicles to be totally self-contained for power and black and grey water.

The CMCA has also established a partnership with the Keep Australia Beautiful Council in South Australia where CMCA members have been involved in outback clean up and monitoring of rest areas.

Motorhome and caravan manufacturers are increasingly improving waste holding tanks[45]. A wide range of portable and contained toilet options are available. These vary in size and volume, being as small as a "Jimmy's Thunder box", which is an environmentally friendly portable toilet that folds down to a small pack, to fully self-contained cassette type toilets that have holding tanks capable of storing upwards of 115 litres of waste. Some of these toilets may include an automatic chemical metering system that measures the correct amount of chemical to release with each flush [46]. There are also a range of environmentally friendly chemicals being produced for use in these systems.

The NSW branch of the CRVA has a code of ethics for members that includes the following principles:

- strive to achieve the best practice standards that apply to the industry; and
- practice and foster sustainable economic, environmental and socially responsible management

They are also implementing an environmental awards scheme called "The Gumnut Awards" which was launched in 2002. It is a progressive rating scheme for holiday, tourist and residential parks that recognise a commitment to environmental sustainability and social responsibility[47].

Assessment covers the following areas: regulatory compliance, risk management, environmental management, human resource management; marketing and customer service management. There are three status levels, bronze, silver and gold and to date

[45] Federal Government 2005 Discussion paper on Roadside Camping
[46] Federal Government 2005 Discussion paper on Roadside Camping
[47] http://www.gumnutawards.com.au

there are around 131 bronze certified parks and 3 silver certified parks in NSW. Other states including Queensland and Victoria are also considering implementing the program

4.3.2 Potential Strategies to Optimise the Growth of the CCM Sector

Strategies to improve quality standards may include the following:

- supporting and broadening supplier and user certification programs and integrating where appropriate with initiatives such as the accreditation portal currently being developed by Decipher Pty Ltd and funded by the Federal Government.;
- requiring/funding service stations to have black water dump points[48];
- the shared use of black water dump points for marine and river craft[49];
- local governments might look at opening up sewerage treatment plants to RV operators for the dumping of black and grey water [50];
- managers of camping grounds at national and state parks installing dump points and incorporate the fees into the camping ground or park access fees [51];
- trialling a community ‘adopt a rest area’ program[52];
- better signage and information at rest areas (in accordance with any existing Australian Standards)[53];
- partnership funding between CMCA, local and state government to supply dump points and provide infrastructure upgrades;
- partnership funding between CMCA and government for a campaign to produce an information booklet and website identifying dump point sites around Australia
- developing self help guides to assist council and other landowners wishing to set up/modify infrastructure for the market;
- developing codes of conduct and self help guides for the users of caravans and campervans;
- developing guides on best practice for the manufacturers of CCM vehicles/equipment;
- the use of GPS and satellite navigation to provide touring route information, interpretive content and real time safety information and potentially the adoption of tracking and safety beacon technology by the MSV market;
- expanding themed routes suitable for CCM use that link sites of high environmental, infrastructure, interpretive and popular destinations; and
- undertaking pilot projects to test an integrated approach to high quality themed routes.

[48] Federal Government 2005 Discussion paper on Roadside Camping
[49] Federal Government 2005 Discussion paper on Roadside Camping
[50] Federal Government 2005 Discussion paper on Roadside Camping
[51] Federal Government 2005 Discussion paper on Roadside Camping
[52] Federal Government 2005 Discussion paper on Roadside Camping
[53] Federal Government 2005 Discussion paper on Roadside Camping

4.4 RESEARCH AND INFORMATION

In order to strategically develop the caravan and camping market it needs to be understood. Availability and access to ongoing market and industry research and monitoring of trends is important. If the park owner cannot put a value on the contribution that the CCM market or campervan and motorhome segment make to the parks' financial viability then the operator is less likely to actively target that market.

Additionally, if those responsible for the infrastructure that supports the CCM market do not know the size of the campervan and motorhome segment then that segment will, in all likelihood, not be adequately provided for. If an operator does not have current research available on the market segment then the chances are that the services provided for that segment will not be optimised

Currently, information on the broader CCM market is collected through:

- the Tourism Research Australia managed National Visitor Survey (NVS) and the International Visitor Survey (IVS):
    - IVS collects the number of international visitor nights:
        - in caravan parks or commercial camping grounds (from 2002 onwards)
        - in a caravan, camping by the side of the road, on private property, on crown land or in a national park (from 2002 onwards);
    - The NVS collects the number of domestic visitor nights:
        - In a caravan or camping near road or on private property
        - In a caravan park or commercial camping ground.

  The recent Caravanning and Camping Niche Snapshot (2005) provides an overall view of the profile of visitors using "accommodation in a caravan park or commercial camping ground or caravan or camping by side of road, on private property, on crown land or in a national park".

- The ABS collects statistics from Caravan Parks (with more than 40 powered sites) within the Survey of Tourist Accommodation (STA) once every three years. This will be expanded to every quarter in 2005. This provides information on supply, capacity, demand and seasonality for caravan parks and is available at state, as well as tourism region level [54].
- Tourism Queensland manages the Regional Tourism Activity Monitor (R-TAM) which is a voluntary business survey that collects data from a number of industry sectors including caravan parks.

Gaps in the ***research*** and ***data collection*** process include:

- ABS collection of manufacturer statistics was ceased at the end of 2000[55];
- at the end of 2001 the ABS ceased collecting New Caravan Registrations[56];
- TRA does not collect information on international visitor nights spent in a campervan post 2002

[54] CRVA March 2005 website
[55] CRVA March 2005 website
[56] CRVA March 2005 website

- no real research has been conducted on the Caravan industry by the governments many research arms[57]; and
- strategic market research focused on the travel motivations, needs, expectations and travel patterns of the **different segments** of the caravan and camping market.
- Research to date has focused on the market profile of CCM travellers as a whole, as well as potential differences between those travellers staying inside and outside caravan parks. Research on potential differences related to the type of self contained accommodation (eg tents versus caravans versus mobile homes) is difficult to find.

4.4.1 Initiatives and Potential Strategies to Optimise Growth of the CCM Sector

The CMCA has sponsored Balfour Consulting (2003) to conduct research into Rest Area Users with a focus on Campervan and Motorhome travellers. However, more focused research on the market profile and needs of the MSV segment of the CCM market needs to be conducted – in particular to compare different regions, different seasons and get a more holistic view of the MSV segment.

[57] CRVA March 2005 website

4.5 MARKETING AND COMMUNICATION

Currently, Tourism Australia:

- works in partnership with the State and Territory Tourism Organisations (STOs) and CRVA to provide marketing assistance to Caravan and Camping Operators;
- works with CRVA to progress the Caravan Safari Trail;
- Australia.com contains specific content, promoting Caravanning and Camping activities in Australian to key identified markets; and
- the International Media Unit runs the Visiting Journalists Program - which targets leading travel and lifestyle media to visit Australia, and the International Media Relations program - which researches and provides information on tourism experiences for the international consumer and trade media.

4.5.1 Initiatives and Challenges

CMCA have been building their profile through magazine articles, newspapers, talk back shows, stands at Caravan, RV and Accommodation Industry of Australia meets and exposure at tourism, regional development and local government conferences. They have been using their web page, monthly magazine and half yearly rally to distribute information to members on key policy and development issues; key infrastructure issues; new technology and products and available infrastructure and accommodation options in various regions.

Resources are becoming particularly stretched across the country and advocacy is time consuming. Distributing and collecting information from this segment is also costly and time consuming as members prefer word of mouth sources to the internet. Information is primarily shared through motoring clubs, brochures and travel shows.

The federal government has dedicated $250 000 towards the development of a caravan safari trail which will offer both a detailed guided tour program and a 'no frills' self guided tour option. The National Road Tourism Strategy will also promote growth of this sector and investigate further options for the development of themed routes.

4.5.2 Potential Strategies to Optimise Growth of the CCM Sector

Strategies to improve marketing and communication in the sector may include:

- developing and marketing integrated routes and accommodation options connecting regions and the states;
- investigating a one day workshop for stakeholders as part of the half yearly rally on key issues and trends emerging in the sector;
- incorporating infrastructure and service information into current Mapping systems;
- developing a coordinated education campaign regarding the use of public areas and appropriate free or low cost camping sites; and
- the use of GPS and satellite navigation to provide touring route information, interpretive content and real time safety information.

5.0 CONCLUSIONS AND RECOMMENDATIONS

Continuing growth in the camping and caravan market, increasing numbers of larger and more self contained recreational vehicles, and increasing numbers of budget conscious travellers will increase demand for alternative accommodation options to those currently being provided by caravan parks. This will continue to put management pressure on the road and rest area network and puts some priority on focusing on integrated strategic planning for infrastructure and services now.

At the state level, roads and infrastructure, consistent policies on national park and rest area use, and planning processes to integrate and promote caravan and camping products and services are necessary. At the national level, integrated and coordinated camping locations and services around the country are needed as well as a set of consistent product and quality standards. Sustainable solutions will require a coordinated approach from sector stakeholders.

In summary, the recommended actions discussed in this paper to support the sustainable development of the CCM are as follows.

To improve the quantity and diversity of available camping sites:

- increase the number of rest areas and public areas and parks available for overnight stays (eg showgrounds and racecourses), develop a consistent and coordinated national policy framework and an appropriate visitor management system;
- increase the awareness of existing caravan park owners to the spectrum of needs across the CCM ;
- provide incentives and support these operators to diversify their product to match market needs;
- provide incentives for new ‘specialised’ commercial businesses to invest in the industry. for example:
    - assistance with business feasibility planning
    - industry intelligence to improve investment decisions
    - lower development fees and land taxes for developments aimed at budget markets
    - release of public lands under lease for new sites;
- provide business development support and clarify the supporting administrative and legislative and regulatory framework for private landholders to provide sites for CCM visitors;
- consider the use of standby rates and loyalty schemes[58]; and
- review the infrastructure and service network in each state and linkages between them, as well as hot spots and high demand areas.

To improve the coordination and management of the product network:

- encourage state and local governments to incorporate the needs of this market into regional planning, development assessment and infrastructure processes;

[58] Federal Government 2005 Discussion paper on Roadside Camping

- support a consistent state and/or national approach to creating a network of facilities that are strategically distributed throughout each tourism region and which link them;
- develop consistent use, access and visitor management processes and policies for public area use across regions and states;
- develop communication packages of the state/national network incorporating the relevant visitor management tools and policies applicable to rest area use, public area use and private facilities available;
- establish uniform regulations and a minimum code of conduct for CCM travellers[59] and site providers;
- tourism and industry partnership to develop and market infrastructure and facilities and potentially develop new facilities/services and dovetail with existing attractions and information distribution networks; and
- Parks managers, schools and local governments to work together to provide overflow sites for peak periods[60].

To improve stakeholder relationships:

- develop a national steering group that takes a 'whole of government' perspective on the sector: For example, this may include: Transport/Main Roads, Tourism, local government and Protected Area management agencies to coordinate the development of the market and infrastructure at a national level;
- gathering and disseminating information on the regional economic impact of the CCM;
- a media program to increase awareness of the environmental ethos of the industry and travellers including CMCA activities with the Keep Australia Beautiful Council; and
- the development of communication channels and networks with caravan associations and the possible development of a sister national body to the CMCA.

To improve performance and quality standards:

- supporting and broadening supplier and user certification programs;
- requiring/funding service stations to have black water dump points[61];
- the shared use of black water dump points for marine and river craft[62];
- local governments might look at opening up sewerage treatment plants to RV operators for the dumping of black and grey water [63];
- managers of camping grounds at national and state parks installing dump points and incorporate the fees into the camping ground or park access fees [64];
- trialling a community 'adopt a rest area' program[65];
- better signage and information at rest areas (in accordance with any existing Australian Standards)[66];

---

59 Federal Government 2005 Discussion paper on Roadside Camping
60 Federal Government 2005 Discussion paper on Roadside Camping
61 Federal Government 2005 Discussion paper on Roadside Camping
62 Federal Government 2005 Discussion paper on Roadside Camping
63 Federal Government 2005 Discussion paper on Roadside Camping
64 Federal Government 2005 Discussion paper on Roadside Camping
65 Federal Government 2005 Discussion paper on Roadside Camping
66 Federal Government 2005 Discussion paper on Roadside Camping

- partnership funding between CMCA, local and state government to supply dump points and provide infrastructure upgrades;
- partnership funding between CMCA and state governments for a campaign to produce an information booklet and website identifying dump point sites around Australia
- developing self help guides to assist council and other landowners wishing to set up/modify infrastructure for the market;
- developing codes of conduct and self help guides for the users of caravans and campervans;
- the use of GPS and satellite navigation to provide touring route information, interpretive content and real time safety information and potentially the adoption of tracking and safety beacon technology by the MSV market
- developing guides on best practice for the manufacturers of CCM vehicles/equipment;
- expanding themed routes suitable for CCM use that link sites of high environmental, infrastructure, interpretive and popular destinations; and
- undertaking pilot projects to test an integrated approach to high quality themed routes.

To improve research and information

- conduct focused research on the market profile and needs of the MSV segment of the CCM market– in particular to compare different regions, different seasons and get a more holistic view of the MSV segment.

To improve marketing and communication:

- developing and marketing integrated routes and accommodation options connecting regions and the states;
- investigating a one day workshop for stakeholders as part of the half yearly rally on key issues and trends emerging in the sector;
- the use of GPS and satellite navigation to provide touring route information, interpretive content and real time safety information
- incorporating infrastructure and service information into current Mapping systems; and
- developing a coordinated education campaign regarding the use of public areas and appropriate free or low cost camping sites

In conclusion, the CMCA urges the Federal Government to assist in developing momentum for the proactive management of these issues by bringing the issues that require coordinated approaches onto the agenda in relevant forums such as the Tourism Ministerial Council, Australian Standing Committee on Tourism, the Australian Transport Council and the Local Government and Planning Ministerial Council.

The CMCA also presents a call to action by industry representative bodies to engage with consumer representatives and other stakeholders to collaboratively work towards mutually beneficial solutions for sector development. Other caravan and camping representative bodies are also called on to participate in building a holistic perspective and approach to the identification and servicing of the needs of caravan and camping travellers

BIBLIOGRAPHY

Balfour Consulting 2003 *Rest Areas Research*

Federal Government 2004 *Tourism White Paper Plus*

Campervan and Motorhome Club of Australia *The Wanderer* Issues Nov 2002 V17 N11 to Feb 2005 V20 N2

Campervan and Motorhome Club of Australia Feb 2005 *Self Containment Scheme*

Safe M 2005 Home on the Roam *The Weekend Australian Magazine* Jan pp17-20

Caravan, RV and Accommodation Industry of Australia http://www.caravanaustralia.com.au/aboutcia.asp

Bailey F Feb 2005 *Media Release – Caravan Safari Trail*

Sustainable Tourism Services 2003 Position *Paper: QLD Roadside Rest Area Policy*

EMDA (Economic and Market Development Advisors) 2003 *Drive Tourism and Touring Market Review*

Tourism Australia 2003 *Fact Sheet – Caravanning and Camping in Australia.*

Tourism Australia 2005 *Snapshot Caravanning and Camping in Australia*

Tourism Queensland 2005 Unpublished Report (personal Communication Manager Market Development)

Federal Government 2005 *Discussion paper on Roadside Camping*