University of South Australia

Business School

EFMD EQUIS ACCREDITED

CERM PI

Measuring impact and benchmarking efficiencies and service delivery in local government owned caravan parks.

20/09/2019

Project Background

Various local government authorities own and/or operate caravan parks particularly those in regional areas. With a changing nature and culture and an increase in the variety of accommodation options now available, there exists some uncertainty as to the future of these facilities and indeed the role they play in their local environments. Anecdotally, facilities such as these bring tourist dollars into a local region and shops, restaurants and other business benefit from their existence. However, an objective measure of the contribution of these facilities to their localities in financial terms or otherwise has not previously been conducted. Further, there may be increased efficiencies to be gained through exploring best practice management across the network of caravan parks in South Australia that could lead to a more secure financial position for these facilities moving forward and illuminate where cost savings may be possible. Finally, the socio-demographic and psychographic segmentation analysis of caravan park guests and their contribution to the local communities will be able to identify profitable market segments and management/marketing practices for targeting and attracting to the regions and boosting economic multiplier effects

Background to the Local Government Association

The Local Government Association (LGA) of South Australia is the peak body representing local council and government in South Australia. The LGA's overarching mission is to provide "…leadership to Councils for the benefit of the South Australian community"1.
Again, drawing from the LGA website, the LGA states that to achieve this mission the Association has set itself three key initiatives areas:

- *Leadership and advocacy*: Achieving greater influence for local government in matters affecting councils and communities.
- *Capacity building and sustainability*: Working with member councils to build capacity and increase sustainability. An integrated and coordinated local government.
- *Best practice and continuous improvement*: Facilitating continuous improvement in councils and the LGA.

Accordingly, by investing in research to explore service delivery in council owned caravan parks, the LGA is reflecting its authentic commitment to each of the three initiative areas outlined above.

Research Design and Methodology

The project began with high level engagement with each of the participating councils to develop a survey instrument that was suitable to examine the spending habits and other factors associated with the visitation of individuals and groups to council owned caravan parks. This stage of the project coincided with a robust analysis of the latest research, both in Australia and overseas, related to the impact of similar facilities in local areas to further inform the instrument to be used in this part of the research.

Following this, CERM PI developed an online customised survey thorough our software partners that could be accessed by caravan park visitors via clicking on a link or scanning a QR code for smart phones. Hard copies of the survey were also made available on site at each of the participating caravan parks. The online link was sent to the email addresses of the caravan park visitors they used during check in/ registration. Data was collected over three months in order to have a representative sample of caravan users/visitors (i.e. weekends, weekdays, school holiday periods).

Once the data had been collected, the analysis began and was led by internationally recognised researchers in the tourism field. Again, this process was based on proven methodologies in the field and although customised to this specific project, the method of analysis followed recognised best practice protocols for interpreting and making sense of the nature of this type of data.

Following this stage of the project, a focussed interview was undertaken with each participating caravan park manager to understand the key operational management metrics that could be benchmarked to potentially be used as evidenced-based data that could illuminate relevant issues related to improving efficiencies and service delivery. Once this instrument was developed, a data input sheet was created and each participating caravan park was asked to complete it in order to generate data that is specifically relevant to the South Australian caravan park context.

Section A: User Experience Results

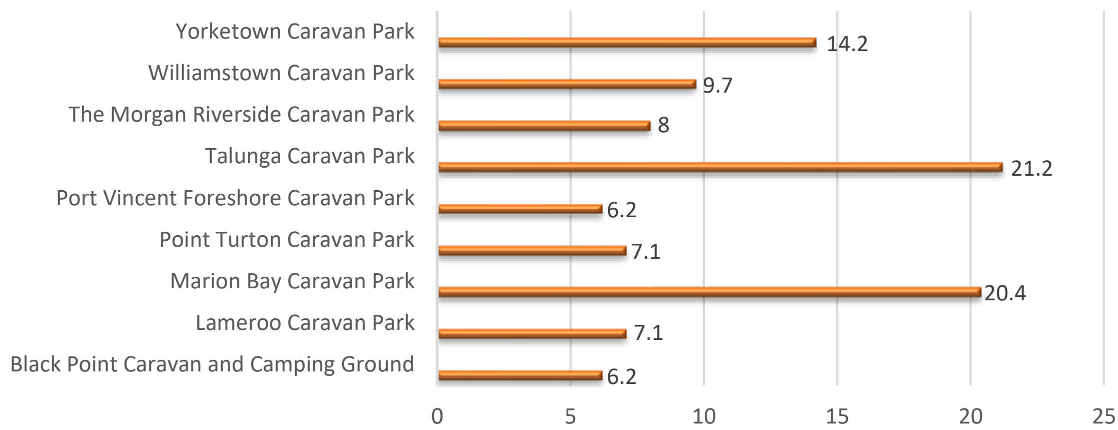
1 Caravan Park

This section of the report presents the number of visitors who selected varied caravan parks. These places were visited by them during their trip. The related results are shown in the below table.

Table 1: Caravan Park

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Black Point Caravan and Camping Ground	7	5.7	6.2	6.2
Lameroo Caravan Park	8	6.5	7.1	13.3
Marion Bay Caravan Park	23	18.7	20.4	33.6
Point Turton Caravan Park	8	6.5	7.1	40.7
Port Vincent Foreshore Caravan Park	7	5.7	6.2	46.9
Talunga Caravan Park	24	19.5	21.2	68.1
The Morgan Riverside Caravan Park	9	7.3	8.0	76.1
Williamstown Caravan Park	11	8.9	9.7	85.8
Yorketown Caravan Park	16	13.0	14.2	100.0
Total	113	91.9	100.0	
Missing System	10	8.1		
Total	123	100.0		

Figure 1: Visited Caravan Park



Overall, most of visitors (21.2 percent) selected the Talunga Caravan Park, and the Black Point Caravan and Camping Ground were chosen by fewer number of visitors (6.2 percent).

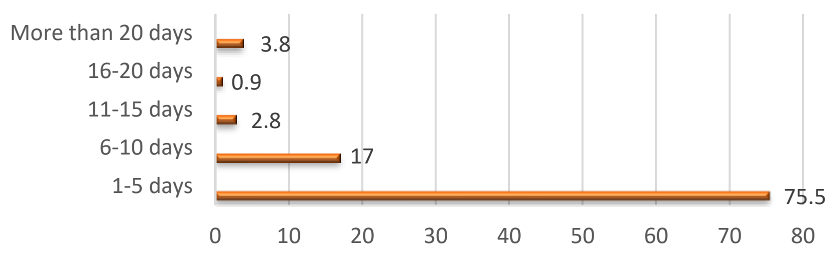
2 THE LENGTH OF STAY VISITORS IN CARAVAN PARK

This section of the report presents the Number of days that visitors stayed in Caravan Park. The related results are shown in the below table.

TABLE 2: THE LENGTH OF STAY VISITORS

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
1-5 days	80	65.0	75.5	75.5
6-10 days	18	14.6	17.0	92.5
11-15 days	3	2.4	2.8	95.3
16-20 days	1	0.8	0.9	96.2
More than 20 days	4	3.3	3.8	100.0
Total	106	86.2	100.0	
Missing system	17	13.8		
Total	123	100.0		

FIGURE 2: Length of Stay Visitors



Overall, most of visitors (75.5 percent) stayed in the Caravan Park between 1 and 5 days, while just 0.9 percent of them stayed in this park between 16 and 20 days.

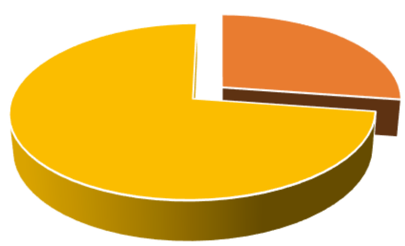
3 EXTENDING STAY VISITORS LONGER THAN ORIGINALLY PLANNED

This section of the report presents the Number of visitors who extended their stay longer than originally planned or not. The related results are shown in the below table and graph.

TABLE 3: EXTENDING STAY VISITORS

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	30	24.4	27.3	27.3
No	80	65.0	72.7	100.0
Total	110	89.4	100.0	
Missing system	13	10.6		
Total	123	100.0		

FIGURE 3: EXTENDING STAY VISITORS



Overall, as it can be seen, most of visitors (72.7 percent) did not extent their plan for staying in Caravan Park.

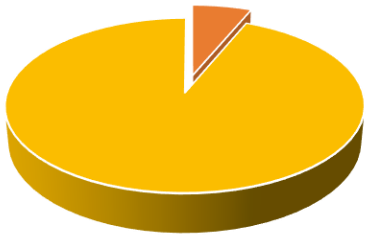
4 ONLINE BOOKING ACCOMMODATION

This section of the report presents the Number of visitors who make their accommodation booking online. The related results are shown in the below table and graph.

TABLE 4: ONLINE BOOKING ACCOMMODATION

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	7	5.7	6.3	6.3
No	105	85.4	93.8	100.0
Total	112	91.1	100.0	
Missing system	11	8.9		
Total	123	100.0		

FIGURE 4: ONLINE BOOKING



Overall, as it can be seen, most of the visitors (93.8 per cent) did not book their accommodation online.

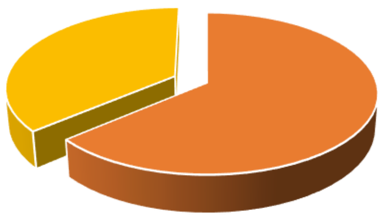
5 FIRST STAY IN CARAVAN PARK

This section of the report presents whether it was the first time for the visitors to stay in Caravan Park or not. The related results are shown in the below table and graph.

TABLE 5: FIRST STAY IN PARK

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	72	58.5	63.7	63.7
No	41	33.3	36.3	100.0
Total	113	91.9	100.0	
Missing system	10	8.1		
Total	123	100.0		

FIGURE 5: FIRST STAY IN PARK



Overall, as it can be seen, most of the visitors (63.7 per cent) stayed in Caravan Park for the first time and just 36.3 percent of them are return visitors.

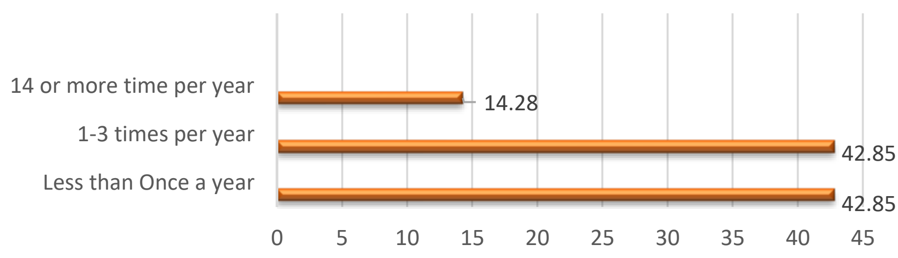
6 Visiting the Caravan Park in a Year

This section of the report presents the times of visiting the Caravan Park in a year by 33.3 percent of visitors, who did not visit the park for the first time. The related results are shown in the below table and graph.

Table 6: Visiting The Caravan Park Per Year

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less than Once a year	12	29.26	42.85	42.85
1-3 times per year	12	29.26	42.85	85.7
4 or more time per year	4	9.75	14.28	100.0
Total	28	68.29	100.0	
Missing system	13	31.70		
Total	41	100.0		

Figure 6: visiting Caravan Park per Year



Overall, as it can be seen, 42.85 percent of visitors visited the park less than once a year or 1-3 times per a year. Meanwhile, just 14.28 percent of them visit park 4 or more time in a year.

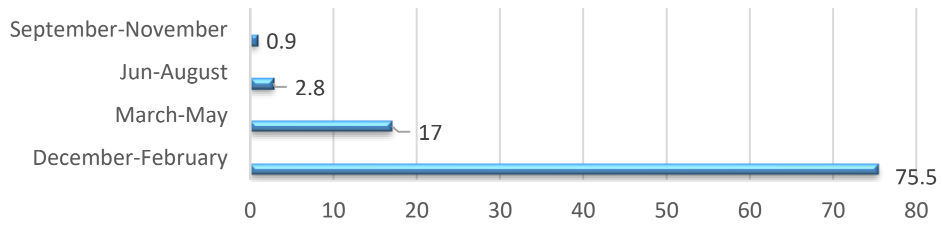
7 Month of Visiting the Caravan Park

This section of the report presents the month of visiting the Caravan Park in a year. The related results are shown in the below table and graph.

Table 7: Month of Visiting the Caravan Park

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
December-February	80	65.0	75.5	75.5
March-May	18	14.6	17.0	92.5
Jun-August	3	2.4	2.8	95.3
September-November	1	0.8	0.9	96.2
Total	106	86.2	100.0	
Missing system	17	13.8		
Total	123	100.0		

FIGURE 7: VISITING CARAVAN PARK MONTH



Overall, as it can be seen, the majority number of visitors (75.5 percent) visited the park during December and February, and just 0.9 percent of them preferred September and November to visit Caravan Park.

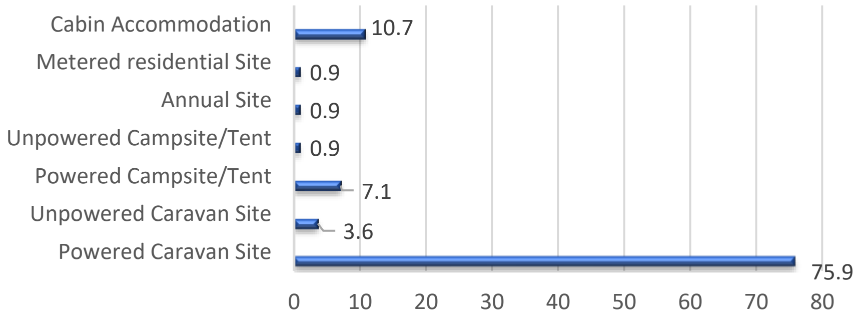
8 ACCOMMODATION TYPE

This section of the report presents the type of accommodations that were selected by visitors. The related results are shown in the below table and graph.

TABLE 8: ACCOMMODATION TYPE

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Powered Caravan Site	85	69.1	75.9	75.9
Unpowered Caravan Site	4	3.3	3.6	79.5
Powered Campsite/Tent	8	6.5	7.1	86.6
Unpowered Campsite/Tent	1	0.8	0.9	87.5
Annual Site	1	0.8	0.9	88.4
Metered residential Site	1	0.8	0.9	89.3
Cabin Accommodation	12	9.8	10.7	100.0
Total	112	91.1	100.0	
Missing System	11	8.9		
Total	123	100.0		

FIGURE 8: ACCOMMODATION TYPE



Overall, as it can be seen, the Powered Caravan Site was selected by the majority number of visitors (75.9 percent) And Unpowered Campsite/ Tent, Annual Site and Metered residential Site were selected by just 2.7 percent of them.

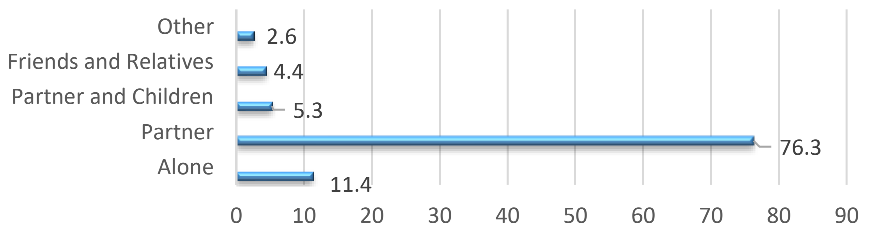
9 Who Accompanied

This section of the report presents the information regarding the companions who accompany respondents to the Caravan Park. The related results are shown in the below table and graph.

TABLE 9: WHO ACCOMPANIED

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Alone	13	10.6	11.4	11.4
Partner	87	70.7	76.3	87.7
Partner and Children	6	4.9	5.3	93.0
Friends and Relatives	5	4.1	4.4	97.4
Other	3	2.4	2.6	100.0
Total	114	92.7	100.0	
Missing System	9	7.3		
Total	123	100.0		

FIGURE 9: VISITING CARAVAN PARK MONTH



Overall, as it can be seen, the greatest number of visitors went to the Caravan Park with their partner (76.3 percent).

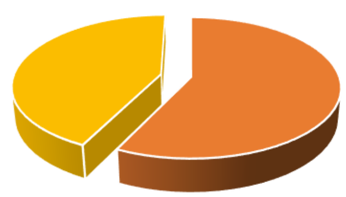
10 Same Accommodation

This section of the report presents that whether or not visitors stayed in the same accommodation if other people accompanied them during their visit. The related results are shown in the below table and graph.

TABLE 10: SAME ACCOMMODATION

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	28	22.8	57.1	57.1
No	21	17.1	42.9	100.0
Total	49	39.8	100.0	
Missing system	74	60.2		
Total	123	100.0		

FIGURE 10: SAME ACCOMMODATION



Overall, as it can be seen, the most number of visitors stayed in a same accommodation, when others accompanied them (57.1 percent).

11 Purpose of Staying in the Caravan Park

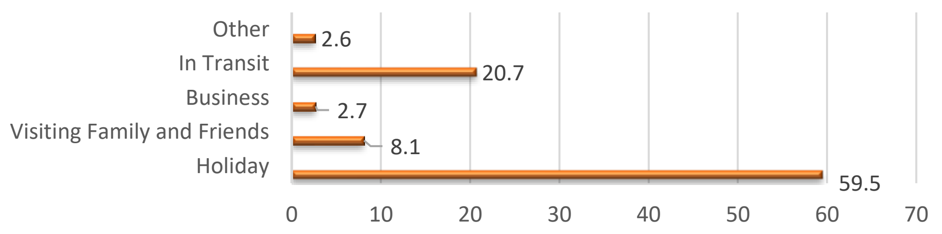
This section of the report presents the respondents' purpose of staying in the park. The related results are shown in the below table and graph.

TABLE 11: PURPOSE OF STAYING IN THE PARK

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Holiday	66	53.7	59.5	59.5
Visiting Family and Friends	9	7.3	8.1	67.6
Business	3	2.4	2.7	70.3
In Transit	23	18.7	20.7	91.0
Other	10	8.1	9.0	100.0
Total	111	90.2	100.0	
Missing System	12	9.8		
Total	123	100.0		

Overall, as it can be seen, the most number of visitors (59.5 percent) visited the Park for their holidays, and just 2.7 percent of them spend their time in the park for business purposes.

FIGURE 11: VISITING CARAVAN PARK MONTH



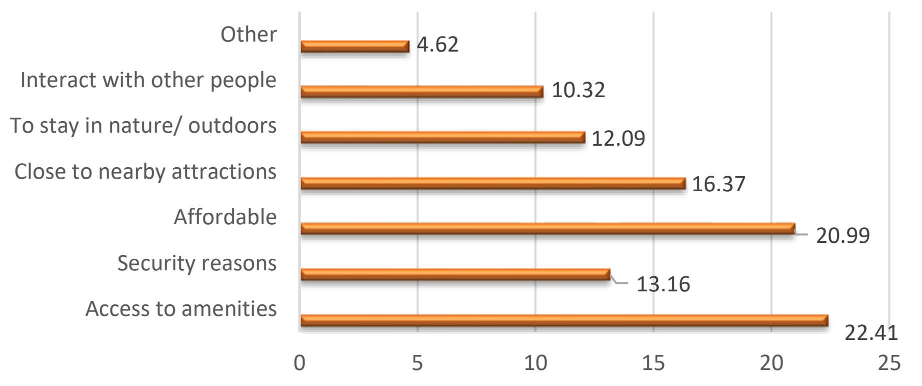
12 Reasons For Staying in the Caravan Park

This section of the report presents the visitors' reasons for staying in the Caravan Park. Visitors could choose several reasons. The related results are shown in the below table and graph.

TABLE 12: REASONS FOR STAYING IN THE PARK

Valid	Frequency	Percent
Access to amenities	63	22.41
Security reasons	37	13.16
Affordable	59	20.99
Close to nearby attractions	46	16.37
To stay in nature/ outdoors	34	12.09
Interact with other people	29	10.32
Other	13	4.62
Total	281	100.0

Figure 12: Reasons for Staying in The Park



Overall, as it can be seen, the most number of visitors (22.41 percent) choose the access to amenities as their reason for staying in the park. And, interacting with others was the reason of just 10.32 percent of visitors.

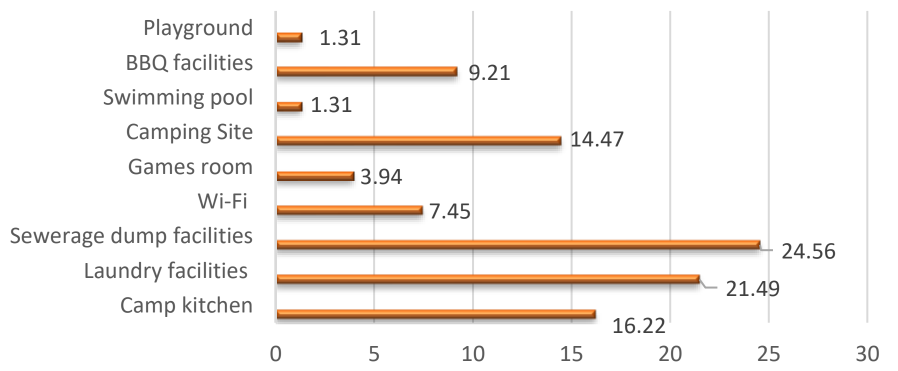
13 Services/ Amenities Use

This section of the report presents the services or amenities which were used by visitors during their stay. Visitors could choose several reasons. The related results are shown in the below table and graph.

Table 13: Services/ Amenities Use

Valid	Frequency	Percent
Camp kitchen	37	16.22
Laundry facilities	49	21.49
Sewerage dump facilities	56	24.56
Wi-Fi	17	7.45
Games room	9	3.94
Camping Site	33	14.47
Swimming pool	3	1.31
BBQ facilities	21	9.21
Playground	3	1.31
Total	228	100.0

Figure 13: Services/ Amenities Use



Overall, as it can be seen, the most number of visitors (24.56 percent) used the Sewerage dump facilities in the Park, and just 2.62 percent of them used playground and Swimming pool.

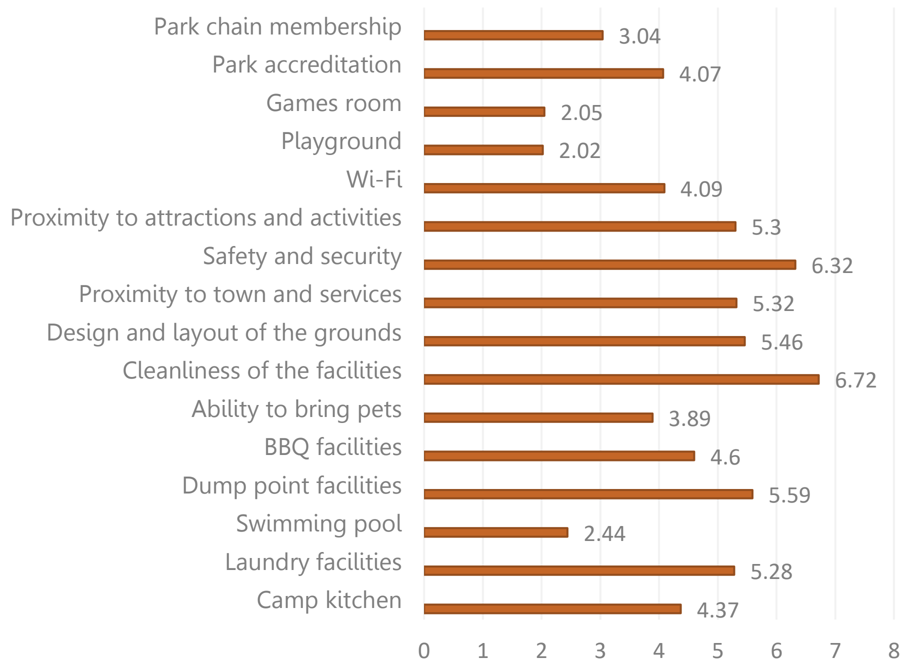
14 The Importance of Items in Visitors Stay

This section of the report presents each item in the Caravan Park and its importance for visitors who stayed in there. Visitors could rate the importance of each item on the scale of 0=Not Important at All to 7=Very Important. The related results for each item are shown in the below table and graph.

Table 14: The Importance of Items in for Visitors Stay in the Caravan Park

Valid	Mean	SD	Valid	Missing
Camp kitchen	4.37	0.250	86	37
Laundry facilities	5.28	0.187	96	27
Swimming pool	2.44	0.218	46	77
Dump point facilities	5.59	0.218	30	93
BBQ facilities	4.60	0.232	88	35
Ability to bring pets	3.89	0.282	93	30
Cleanliness of the facilities	6.72	0.078	105	18
Design and layout of the grounds	5.46	0.170	98	25
Proximity to town and services	5.32	0.169	94	29
Safety and security	6.32	0.109	96	27
Proximity to attractions and activities	5.30	0.179	91	32
Wi-Fi	4.09	0.247	88	35
Playground	2.02	0.194	86	37
Games room	2.05	0.189	83	40
Park accreditation	4.07	0.245	84	39
Park chain membership	3.04	0.225	85	38
Total	4.41	0.199		

Figure 14: Services/ Amenities Use



Overall, as it can be seen, Cleanliness of the facilities, Safety and Security were the most important items for visitors, with the mean at 6.72 and 6.32, respectively. While, the Playground (Mean=2.02), Game room (Mean=2.05) and Swimming pool (Mean=2.44) were the least important items, with a mean lower than 3.

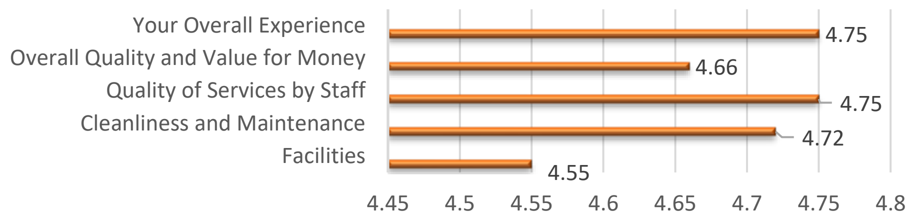
15 Visitors' Satisfaction

This section of the report presents the amount of visitors' satisfaction. Visitors could rate each item on the scale of 1=Poor to 5= Excellent. The related results are shown in the below table and graph.

Table 15: Visitors' Satisfaction

Valid	Mean	SD	Valid	Missing
Facilities	4.55	0.069	105	18
Cleanliness and Maintenance	4.72	0.054	107	16
Quality of Services by Staff	4.75	0.064	106	17
Overall Quality and Value for Money	4.66	0.065	109	19
Your Overall Experience	4.75	0.054	104	19
Total	4.68	0.061		

Figure 15: Visitors' Satisfaction



Overall, as it can be seen, visitors ranked their satisfaction for each item near the Excellent (5). And among them their overall experience and quality service had the highest level of mean at 4.75, while the lowest level belonged to their satisfaction about facilities (Mean=4.55).

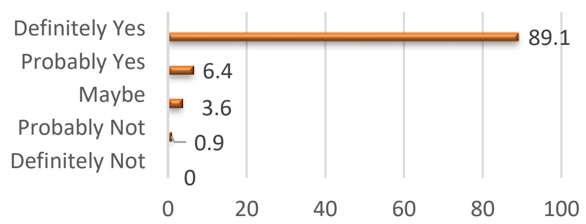
16 Visitors' Recommendation

This section of the report presents the level of visitors' recommendation about the Caravan Park to others. The related results are shown in the below table and graph.

Table 16: Visitors' Recommendation

Valid	Frequency	Percent	Valid Percent	Cumulative Percent	Mean	Std.
Definitely Not	0	0	0	0	4.84	0.049
Probably Not	1	0.8	0.9	0.9		
Maybe	4	3.3	3.6	5.4		
Probably Yes	7	5.7	6.4	10.9		
Definitely Yes	98	79.7	89.1	100.0		
Total	110	89.4	100.0			
Missing System	13	10.6				
Total	123	100.0				

FIGURE 16: VISITORS' RECOMMENDATION



Overall, as it can be seen, most number of visitors (89.1 percent) will recommend this park to others, definitely. By measuring mean, it is mentionable that visitors strongly recommend this park to others (Mean=4.84).

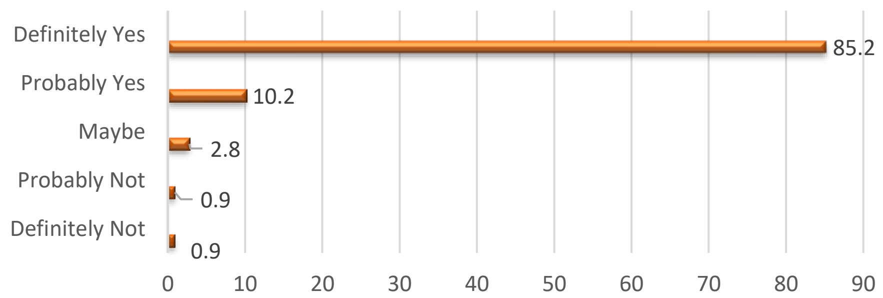
17 VISITORS' PREFERENCE TO STAY AGAIN

This section of the report presents the level of visitors' preference of staying in the Caravan Park again. The related results are shown in the below table and graph.

TABLE 17: VISITORS' PREFERENCE TO SATAY AGAIN

Valid	Frequency	Percent	Valid Percent	Cumulative Percent	Mean	Std.
Definitely Not	1	0.8	0.9	0.9	4.78	0.061
Probably Not	1	0.8	0.9	1.9		
Maybe	3	2.4	2.8	4.6		
Probably Yes	11	8.9	10.2	14.8		
Definitely Yes	92	74.8	85.2	100.0		
Total	108	87.8	100.0			
Missing System	15	12.2				
Total	123	100.0				

FIGURE 17: VISITORS' PREFERENCE



Overall, as it can be seen, most number of visitors (85.2 percent) prefer to stay again in this park. By measuring mean, it is mentionable that visitors strongly prefer to stay again in this park (Mean=4.78).

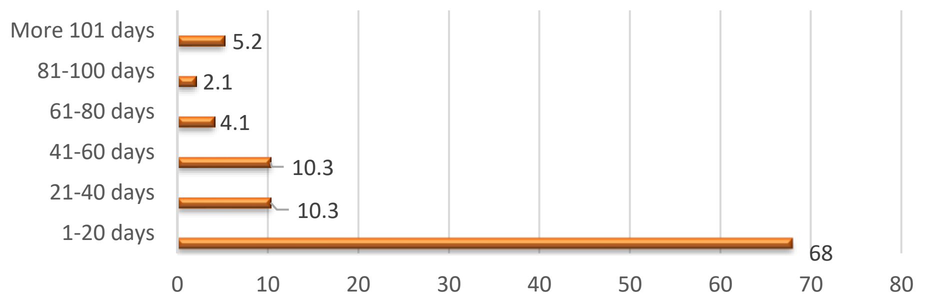
18 Visitors' Stay in Area/ Town

This section of the report presents the number of days of visitors' whole-trip. The related results are shown in the below table and graph.

Table 18: Visitors' Whole trip days

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
1-20 days	66	53.7	68.0	68.0
21-40 days	10	8.1	10.3	78.4
41-60 days	10	8.1	10.3	88.7
61-80 days	4	3.3	4.1	92.8
81-100 days	2	1.6	2.1	94.8
More 101 days	5	4.1	5.2	100.0
Total	97	78.9	100.0	
Missing System	26	21.1		
Total	123	100.0		

Figure 18: Visitors' Whole trip days



Overall, as it can be seen, the majority number of visitors (68 percent) had a 1 to 20 days' trip, while, just 2.1 percent of them had a trip between 81 and 100 days.

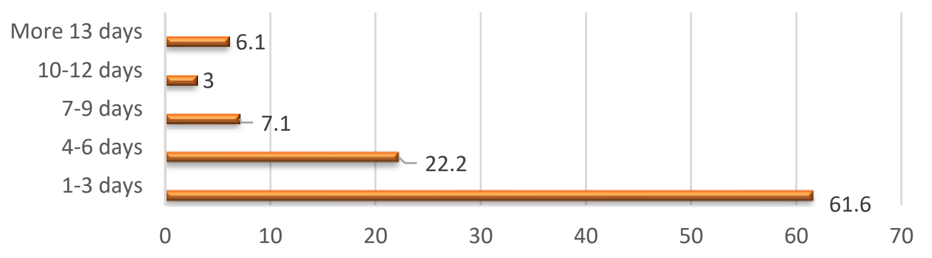
19 Period of Time of Staying in Town

This section of the report presents the period time of visitors stay in town. The related results are shown in the below table and graph.

Table 19: Visitors' Period of Stay in Town

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
1-3 days	61	49.6	61.6	61.6
4-6 days	22	17.9	22.2	83.8
7-9 days	7	5.7	7.1	90.0
10-12 days	3	2.4	3.0	93.9
More 13 days	6	4.9	6.1	100.0
Total	99	80.5	100.0	
Missing System	24	19.5		
Total	123	100.0		

FIGURE 19: VISITORS' PERIOD OF STAY IN TOWN



Overall, as it can be seen, the majority number of visitors (61.6 percent) stayed in town from 1 to 3 days. And just 3 percent of them stayed between 10 and 12 days in there.

20 PERIOD OF TIME OF STAYING IN TOWN

This section of the report presents the number of visitors who visit the town for the first time. Then, the number of times that visitors visited the park previously is represented. The related results are shown in the below table and graph.

TABLE 20: VISITORS' FIRST VISIT

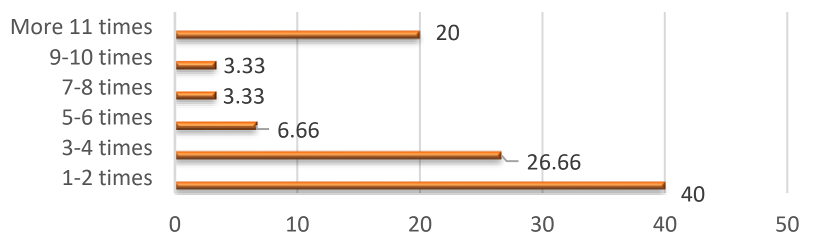
Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	59	48.0	54.6	54.6
No	49	39.8	45.4	100.0
Total	108	87.8	100.0	
Missing system	15	12.2		
Total	123	100.0		

FIGURE 20: VISITORS' FIRST VISIT

TABLE 21: VISITORS' PREVIOUS VISIT

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
1-2 times	12	24.48	40	40
3-4 times	8	16.32	26.66	66.66
5-6 times	2	4.08	6.66	73.32
7-8 times	1	2.04	3.33	76.65
9-10 times	1	2.04	3.33	79.98
More 11 times	6	12.24	20	100.0
Total	30	61.22	100.0	
Missing System	19	38.77		
Total	49	100.0		

FIGURE 21: VISITORS' PREVIOUS VISIT



Overall, as it can be seen, the majority number of visitors (54.6 percent) visited the town for the first time. Among 45.4 percent of those who visited the town previously, 40 percent of them visited the park 1 or 2 times before.

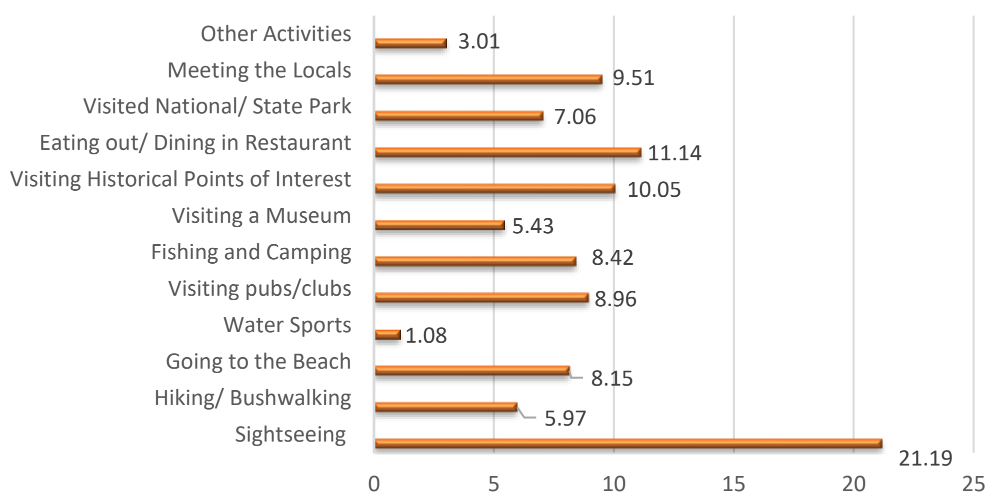
21 Visitors' Activities

This section of the report presents the percentage of visitors who did 12 activities when they visited the town or area. The related results are shown in the below table and graph.

Table 22: Visitors' Activities

Valid	Frequency	Percent
Sightseeing	78	21.19
Hiking/ Bushwalking	22	5.97
Going to the Beach	30	8.15
Water Sports	4	1.08
Visiting pubs/clubs	33	8.96
Fishing and Camping	31	8.42
Visiting a Museum	20	5.43
Visiting Historical Points of Interest	37	10.05
Eating out/ Dining in Restaurant	41	11.14
Visited National/ State Park	26	7.06
Meeting the Locals	35	9.51
Other Activities	11	3.01
Total	368	100.0

Figure 22: Visitors' Activities



Overall, as it can be seen, the most number of visitors (21.19 percent) preferred Sightseeing, while Water Sports were just done by 1.08 percent of them. Eating out and Visiting Historical Points of Interest were the second and third activities which were done by 11.14 and 10.05 percent of visitors.

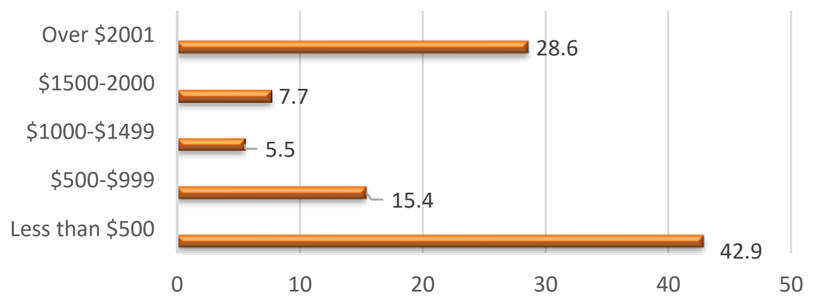
22 Visitors' Overall Budget

This section of the report presents the amount of visitors' overall budget which was spent by them during their trip. The related results are shown in the below table and graph.

Table 23: Visitors' Overall Budget

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less than $500	39	31.7	42.9	42.9
$500-$999	14	11.4	15.4	58.2
$1000-$1499	5	4.1	5.5	63.7
$1500-2000	7	5.7	7.7	71.4
Over $2001	26	21.1	28.6	100.0
Total	91	74.0	100.0	
Missing System	32	26.0		
Total	123	100.0		

Figure 23: Visitors' Budget



Overall, as it can be seen, the majority number of visitors (42.9 percent) spent less than $500 in their trip, and also with a small difference, 28.6 percent of visitors spend more than $2001 in their trip. Besides, from $1000 to $2000 was spent by 13.2 percent of visitors.

23 Visitors' Overall Budget

This section of the report presents the amount of money, which was spent by visitors for Accommodation in the Caravan Park (24-1), Other Accommodation (24-2), Food and entertainment (24-3), Transport and fuel (24-4), Sightseeing in the park (24-5), Sightseeing in the town (24-6), Other Cost (24-7) and The Total cost of these items (24-8). The related results are shown in the below table and graph.

Table 24-1: Visitors' Money for Accommodation in The Caravan Park

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**48**	**39.0**	**63.2**	**63.2**
$101-$200	12	9.8	15.8	78.9
$201-$300	4	3.3	5.3	84.2
$301-$400	4	3.3	5.3	89.5
More $401	8	6.5	10.5	100.0
Total	76	61.8	100.0	
Missing System	47	38.2		
Total	123	100.0		

TABLE 24-2: VISITORS' MONEY FOR OTHER ACCOMMODATIONS

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**17**	**13.8**	**65.4**	**65.4**
$101-$200	1	0.8	3.8	69.2
$201-$300	0	00.00	00.00	69.2
More $301	8	6.5	30.8	100.0
Total	26	21.1	100.0	
Missing System	97	78.9		
Total	123	100.0		

TABLE 24-3: VISITORS' MONEY FOR FOOD AN ENTERTAINMENT

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**37**	**30.1**	**61.7**	**61.7**
$101-$200	11	8.9	18.3	80.0
$201-$300	2	1.6	3.3	83.3
$301-$400	1	0.8	1.7	85.0
More $401	9	7.3	15.0	100.0
Total	60	48.8	100.0	
Missing System	63	51.2		
Total	123	100.0		

TABLE 24-4: VISITORS' MONEY FOR TRANSPORT AND FUEL

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**38**	**30.9**	**59.4**	**59.4**
$101-$200	13	10.6	20.3	79.7
$201-$300	3	2.4	4.7	84.4
$301-$400	1	0.8	1.6	85.9
More $401	9	7.3	14.1	100.0
Total	64	52.0	100.0	
Missing System	59	48.0		
Total	123	100.0		

TABLE 24-5: VISITORS' MONEY FOR SIGHTSEEING IN THE CARAVAN PARK

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**28**	**22.8**	**75.7**	**75.5**
$101-$200	5	4.1	13.5	89.2
More $201	4	3.3	10.8	100.00
Total	37	30.1	100.0	
Missing System	86	69.9		
Total	123	100.0		

TABLE 24-6: VISITORS' MONEY FOR SIGHTSEEING IN THE TOWN

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $300	**10**	**8.1**	**62.5**	**62.5**
More $301	6	4.9	37.5	100.00
Total	16	13.00	100.0	
Missing System	107	87.00		
Total	123	100.0		

TABLE 24-7: VISITORS' MONEY FOR OTHER ITEMS

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $100	**18**	**14.6**	**90.00**	**90.00**
More $101	2	1.6	10.00	100.00
Total	20	16.3	100.0	
Missing System	103	83.7		
Total	123	100.0		

TABLE 24-8: VISITORS' TOTAL COST

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Less $200	14	11.4	23.7	23.7
$201-$400	**19**	**15.4**	**32.2**	**55.9**
$401-$600	10	8.1	16.9	72.9
$601-$800	4	3.3	6.8	79.7
$801-$1000	1	0.8	1.7	81.4
More $1001	11	8.9	18.6	100.0
Total	59	48	100.0	
Missing System	64	52		
Total	123	100.0		

Overall, it can be seen that each row that represent the highest frequency is coloured in red. Moreover, the cost for the other items (Accommodation in the Caravan Park (Table: 24-1), Other Accommodation (Table: 24-2), Food and entertainment (Table: 24-3), Transport and fuel (Table: 24-4), Sightseeing in the park (Table: 24-5), Sightseeing in the town (Table: 24-6), Other Cost (Table: 24-7)) costs Less than $200. The total cost for most of visitors (32.2 percent) was between $201 and $400.

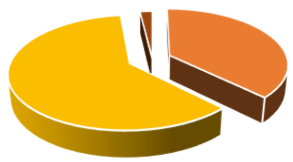
24 VISITORS' DEMOGRAPHIC INFORMATION

This section of the report presents the demographic information of visitors who responded to the questionnaire. This section consists of visitors' Gender (Table, Graph 25-1), visitors' Age (Table, Graph 25-2), Education level of visitors (Table, Graph 25-3), visitors' Occupation (Table, Graph 25-4) and visitors' Originally (Table, Graph 25-5). The related results are shown in the following table and graph.

TABLE 25-1: VISITORS' GENDER

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Male	40	32.5	37.3	37.7
Female	64	52.0	60.4	98.1
Other	0	0	0	98.1
I prefer Not To Say	2	1.6	1.9	100.0
Total	106	86.2	100.0	
Missing System	17	13.8		
Total	123	100.0		

FIGURE 25-1: VISITORS' GENDER

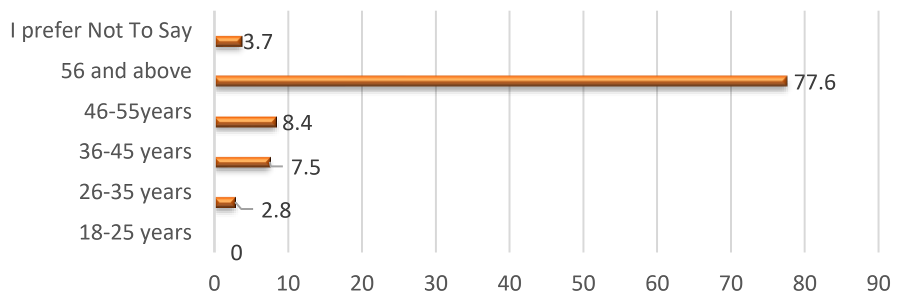


Overall, it can be seen that most of respondents were female (60.4 percent).

TABLE 25-2: VISITORS' AGE

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
18-25 years	0	0	0	0
26-35 years	3	2.4	2.8	2.8
36-45 years	8	6.5	7.5	10.3
46-55years	9	7.3	8.4	18.7
56 and above	83	67.5	77.6	96.3
I prefer Not To Say	4	3.3	3.7	100.0
Total	107	87.0	100.0	
Missing System	16	13.0		
Total	123	100.0		

FIGURE 25-2: VISITORS' AGE

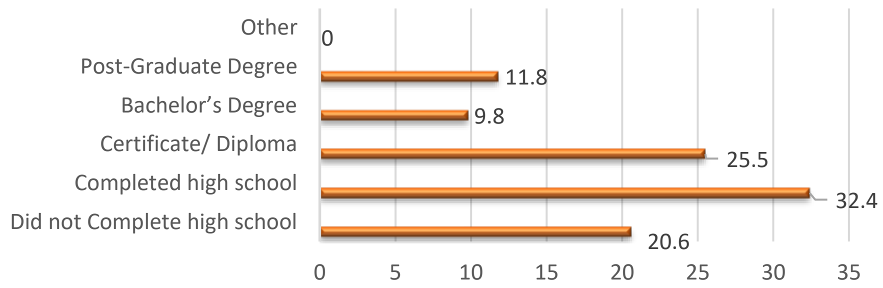


Overall, it can be seen that most of the respondents were above 56 years (77.6 percent).

TABLE 25-3: VISITORS' EDUCATION

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Did not Complete high school	21	17.1	20.6	20.6
Completed high school	33	26.8	32.4	52.9
Certificate/ Diploma	26	21.1	25.5	78.4
Bachelor's Degree	10	8.1	9.8	88.2
Post-Graduate Degree	12	9.8	11.8	100.0
Other	0	0	0	
Total	102	82.9	100.0	
Missing System	21	17.1		
Total	123	100.0		

FIGURE 25-2: VISITORS' EDUCATION

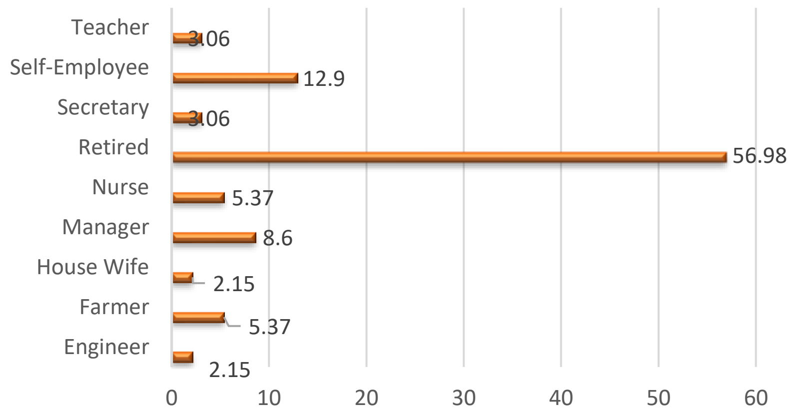


Overall, it can be seen that most of the respondents completed their high school (32.4 percent).

TABLE 25-4: VISITORS' OCCUPATION

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Engineer	2	1.6	2.15	2.15
Farmer	5	4.1	5.37	7.52
House Wife	2	1.6	2.15	9.67
Manager	8	6.5	8.60	18.27
Nurse	5	4.1	5.37	23.64
Retired	53	43.1	56.98	80.62
Secretary	3	2.4	3.06	83.68
Self-Employee	12	9.8	12.90	96.58
Teacher	3	2.4	3.06	100.0
Total	93	75.6	100.00	
Missing System	30	24.4		
Total	123	100.0		

FIGURE 25-4: VISITORS' OCCUPATION

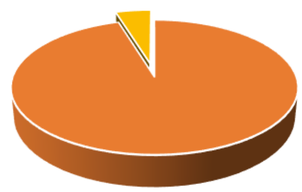


Overall, it can be seen that most of the respondents were retired (56.98 percent).

TABLE 25-5: VISITORS' ORIGINALLY

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
Australia	102	82.9	95.3	95.3
Other Countries	5	4.1	4.7	100.0
Total	107	87.0	100.0	
Missing system	16	13.0		
Total	123	100.0		

FIGURE 25-5: VISITORS' ORIGINALLY



Overall, it can be seen that most of the visitors were Australian (82.9 percent), while just 4.1 percent of them were from other countries.

Section B: Operational Management Results

1. Introduction: analysis of the caravan parks

A survey was undertaken for understanding the operating procedures and practices as well as the performance of caravan parks. Overall, 11 caravan parks responded to the survey, but not all of them provided answers to all the survey questions. The following sections analyse the data collected from caravan parks. First, the report describes the profile of the caravan parks responding to the survey (i.e. size, characteristics and services). It then continues by investigating the operational performance of caravan parks including cost and revenue management. Finally, the report provides insight into the operational management practices of the caravan parks and makes comments about the possible implications of the latter on their operational performance.

2. Profile of the respondents

2.1. Size of operators

Caravan parks responding to the survey represent operators of a quite diversified size (Table 1). Queen Victoria Jubille Park is the biggest operator with 100 Hectares, followed by Loxton Riverfront Holiday Park and Big 4 Barossa Tourist Park which represent smaller operators with a somewhat similar size (i.e. 35 and 25 hectares respectively). The remaining respondents represent quite significant small operators with a size ranging from 6.73 to 1 hectare.

Table 1. Size of caravan park (in hectares)

Name of Caravan Park	**Size**
Morgan Riverside Caravan Park	2.2
Loxton Riverfront Holiday Park	35
Queen Victoria Jubille Park (Williamstown Caravan Park)	100
Big 4 Barossa Tourist Park	25
Mt. Pleasant caravan park	6
Eden Valley Caravan park.	1
Yorketown Caravan Park	1
Black Point Caravan & Camping Grounds	0.404
Port Vincent Foreshore Caravan Park	0
Marion Bay Caravan Park	6.73
Point Turton Caravan Park	0
Average Size	**19.70**

2.2. Type and prices of accommodation services

Caravan / motor home site (powered and/or non-powered) and Cabin accommodation are the most typical types of accommodation provided by almost all the respondents irrespective of their size (Table 2). On average, these types of accommodation occupy 65% and 14% respectively of the total space of the caravan parks. Campsite / tent accommodation (powered and/or non-powered) represents the third most popular type of accommodation provided by a great majority of respondents. However, Campsite / tent accommodation (powered and/or non-powered) is provided only by the largest operator and the smaller operators (i.e. it is not provided by the medium sized operators). This type of accommodation also occupies a significant part of the caravans' space (i.e. 19% of the total space in average). Villa – bungalows and/or other specialist accommodation is offered only by the three very small operators, and it only represents a very small usage of their total space (caravan operators have available only very few villa/bungalows i.e. 1, 3 and 4 units respectively). It seems that this type of boutique style premium type of outdoor accommodation service is used by these very small operators in order to differentiate their business and gain an up-market, exclusive image.

Table 2. Type of Accommodation services

	Average		Morgan Riverside		Loxton		Queen Victoria		Big 4 Barossa		Mt Pleasant		Eden Valley		Yorke Town		Black point		Port Vincent		Marion Bay		Point Turton	
	1	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**	**1**	**2**
Caravan / motor home site (powered and/or non-powered)	75	65%	121		120		24	68%	170		100	20%	40	50%	16	80%	10	90%	98	80%	70	70%	60	
Cabin accommodation	14	14%	14		14		4	12%	45		0	0%	0	0%	2	10%	0	0%	13	15%	13	20%	10	
Villa – bungalows and/or other specialist accommodation	3	5%	0		0		0	0%	0		0	0%	0	0%	0	0%	0	0%	1	5%	4	5%	3	
Campsite / tent accommodation (powered and/or non-powered)	24	19%	0		0		8	20%	0		100	20%	20	50%	10	10%	3	10%	0	0%	4	5%	0	
Other – please specify	0	0%	0		0		0	0%	0		0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	

1: Number of available accommodation (1)

2: % of total caravan park space allocated per type of accommodation (2)

Findings about the rack rates per accommodation type (Table 3) also confirm the previous finding in terms of the role and use of villa / bungalows in defining the strategic positioning and image of the caravan parks. Specifically, the small operators providing this type of accommodation reported to charge higher rack rates than the total average rack rate for this type of accommodation. The same operators also reported to have higher rack rates than the average rack rates of the other type of accommodation services as well. Hence, the provision of villa – bungalows or other specialist accommodation is used by these small operators for adopting an up-market, premium service and price positioning. The small operators appearing to operate like premium boutique operators are: Port Vincent, Marion Bay and Point Turton.

Detailed findings related to the rack rates of each respondent (Table 3a, 3b, 3c, 3d, 3e, 3f, 3g, 3h, 3i, 3j, 3k) also revealed that price differentiation across the various seasons is not a standard practice and common for all the respondents. Almost half of the respondents do not differentiate rack rates between operating seasons, while the rest do. Further investigation is required to understand why respondents do not make use of this marketing-price management tool to maximise their revenue management. It will be interesting to find out whether it is because operators experience no fluctuations of demand within the year (i.e. stable demand patterns) or whether there are other operational, ownership or legal constraints refraining them to do so.

TABLE 3. RACK RATES PER ACCOMMODATION TYPE (AVERAGE RACK RATES PER TYPE OF SEASON)

	Rate in high season	**Rack Rate in medium season**	**Rack rate in low season**	**Average Rack Rate**
Caravan / motor home site (powered and/or non-powered)	$ 33,40	$ 30,43	$ 30,60	$ 31,48
Cabin accommodation	$ 140,83	$ 134,60	$ 126,33	$ 133,92
Villa – bungalows and/or other specialist accommodation	$ 230,00	$ 210,00	$ 198,75	$ 212,92
Campsite / tent accommodation (powered and/or non-powered)	$ 25,57	$ 25,20	$ 25,29	$ 25,35

TABLE 3A. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF MORGAN RIVERSIDE CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 36,00	$ -	$ 34,00	$ 35,00
Cabin accommodation (2)	$ -	$ -	$ -	$ -
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 28,00	$ -	$ 26,00	$ 27,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 31,00

TABLE 3B. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF LOXTON RIVERFRONT HOLIDAY PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 40,00	$ -	$ 34,00	37
Cabin accommodation (2)	$ 115,00	$ -	$ 105,00	110
Villa – bungalows and/or other specialist accommodation (3)	$ 200,00	$ -	$ 185,00	192,5
Campsite / tent accommodation (powered and/or non-powered) (4)	$ -	$ -	$ -	0
Other – please specify (5)	$ -	$ -	$ -	0
			Average Rack Rate Total	$ 113,17

TABLE 3C. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF QUEEN VICTORIA JUBILLE PARK (WILLIAMSTOWN CARAVAN PARK)

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 31,00	$ 31,00	$ 31,00	$ 31,00
Cabin accommodation (2)	$ 100,00	$ 100,00	$ 100,00	$ 100,00
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 31,00	$ 31,00	$ 31,00	$ 31,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 54,00

TABLE 3D. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF BIG 4 BAROSSA TOURIST PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ -	$ -	$ -	$ -
Cabin accommodation (2)	$ -	$ -	$ -	$ -
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ -	$ -	$ -	$ -
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ -

TABLE 3E. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF MT. PLEASANT CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 25,00	$ 25,00	$ 25,00	$ 25,00
Cabin accommodation (2)	$ -	$ -	$ -	$ -
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 20,00	$ 20,00	$ 20,00	$ 20,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 22,50

TABLE 3F. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF EDEN VALLEY CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 25,00	$ 25,00	$ 25,00	$ 25,00
Cabin accommodation (2)	$ -	$ -	$ -	$ -
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 20,00	$ 20,00	$ 20,00	$ 20,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 22,50

TABLE 3G. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF YORKETOWN CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 30,00	$ 30,00	$ 30,00	$ 30,00
Cabin accommodation (2)	$ 110,00	$ 110,00	$ 110,00	$ 110,00
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 30,00	$ 30,00	$ 30,00	$ 30,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 56,67

TABLE 3H. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF BLACK POINT CARAVAN & CAMPING GROUNDS

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 30,00	$ -	$ 30,00	$ 30,00
Cabin accommodation (2)	$ -	$ -	$ -	$ -
Villa – bungalows and/or other specialist accommodation (3)	$ -	$ -	$ -	$ -
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 25,00	$ -	$ 25,00	$ 25,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 27,50

TABLE 3I. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF PORT VINCENT FORESHORE CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 42,00	$ 32,00	$ 32,00	$ 35,33
Cabin accommodation (2)	$ 160,00	$ 113,00	$ 113,00	$ 128,67
Villa – bungalows and/or other specialist accommodation (3)	$ 320,00	$ 250,00	$ 250,00	$ 273,33
Campsite / tent accommodation (powered and/or non-powered) (4)	$ -	$ -	$ -	$ -
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 145,78

TABLE 3J. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF MARION BAY CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 40,00	$ 40,00	$ 35,00	$ 38,33
Cabin accommodation (2)	$ 220,00	$ 220,00	$ 200,00	$ 213,33
Villa – bungalows and/or other specialist accommodation (3)	$ 200,00	$ 200,00	$ 180,00	$ 193,33
Campsite / tent accommodation (powered and/or non-powered) (4)	$ 25,00	$ 25,00	$ 25,00	$ 25,00
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 117,50

TABLE 3K. RACK RATES PER ACCOMMODATION TYPE AND PER SEASON OF POINT TURTON CARAVAN PARK

	Rate in high season (1)	Rack Rate in medium season (2)	Rack rate in low season (3)	Average Rack Rate
Caravan / motor home site (powered and/or non-powered) (1)	$ 35,00	$ 30,00	$ 30,00	$ 31,67
Cabin accommodation (2)	$ 140,00	$ 130,00	$ 130,00	$ 133,33
Villa – bungalows and/or other specialist accommodation (3)	$ 200,00	$ 180,00	$ 180,00	$ 186,67
Campsite / tent accommodation (powered and/or non-powered) (4)	$ -	$ -	$ -	$ -
Other – please specify (5)	$ -	$ -	$ -	$ -
			Average Rack Rate Total	$ 117,22

2.3. Type of services / facilities

Laundry facilities (washer and dryer) and BBQs represent the most popular offered facilities, as they are provided by almost all the respondents (more than 82% of respondents). Indoor camp kitchen and free wifi are also popular facilities offered by more than half of the respondents. The greatest majority of the respondents are also pet friendly. However, although more than half (72%) of the respondents reported to offer pet friendly sites, only a small percentage of them (27%) reported to offer pet friendly cabins allowing theirs guests to have their pets staying with them inside the caravan accommodation. Children's playground and dump-point public are also offered by a significant number of respondents (although less than half of the respondents). On the contrary, specialists' facilities (such as outdoor camp kitchen, camp kitchen on enclosed veranda, games room, bounce pillow, dump-point guest only, swimming pool and fish cleaning) are offered only by a small percentage of the respondents (less than 27%).

TABLE 4. TYPE OF SERVICES AND NUMBER OF FACILITIES (SAMPLE AVERAGE AND PER RESPONDENT)

Type of service	Respondents offering the service		Average number of facilities provided	Morgan	Loxton	Queen Victoria	Big Barossa 4	Mt Pleasant	Eden Valley	York Town	Black point	Port Vincent	Marion Bay	Point Turton
	No	%												
Indoor camp kitchen	6	55%	1,0		1	1	1	0	0	0	0	1	1	1
Outdoor camp kitchen	1	9%	1,0			1	0	0	0	0	0	0	0	0
Camp kitchen on enclosed veranda	3	27%	1,0			1	1	0	0	1	0	0	0	0
BBQs	9	82%	3,3		4	2	7	0	2	1	1	6	4	3
Laundry Facilities-Washer	10	91%	2,6		2	2	2	2	2	2	1	5	4	4
Laundry Facilities-Dryer	9	82%	1,9		2	1	2	2	1	1	0	2	4	2

Dump point-Public	5	45%	1,0		1	1	0	1	0	1	0	1	0	0
Dump point-Guest Only	3	27%	1,0			0	1	0	0	0	0	0	1	1
Free WiFi	6	55%	1,0		1	1	1	0	0	0	0	1	1	1
Charged WiFi	0	0%	0,0			0	0	0	0	0	0	0	0	0
Games Room	2	18%	1,0			0	1	0	0	0	0	0	0	0
Children's Playground	5	45%	1,2			1	2	1	1	0	0	0	1	0
Bouncing Pillow	2	18%	1,0			0	0	0	0	0	0	1	1	0
Swimming Pool	1	9%	1,0			0	1	0	0	0	0	0	0	0
Fish Cleaning	2	18%	1,0			0	0	0	0	0	0	1	1	0
Pet-friendly sites	8	73%	73,3			28	170	100	40	16	0	98	74	60
Pet-friendly cabins	3	27%	2,3		4	0	2	0	0	1	0	0	0	0
Average number of facilities			70,2		15	39	191	106	46	23	2	116	92	72

Detailed data about the number of facilities offered per type of service by each respondent also reveal another interesting finding (Table 4 and 5). It appears that the number of facilities provided is not related to the size of the operator but to the premium quality of the caravan park. Specifically, although Queen Victoria is the largest caravan operator in terms of hectares and accommodation provided, it offers almost similar type of services as the medium and the small operators, as well as almost similar number of facilities per type of service as medium and small operators. The only differentiator of the largest operator in relation to the others is that it offers significantly more BBQs and children's playground facilities. On the other hand, the three premium-type caravan parks (namely Port Vincent, Marion Bay and Point Turton) appear to offer more type of services that the other operators as well as a greater number of facilities for each type of service. In other words, these premium caravan operators also differentiate their product offering (more diversified and more availability in order to avoid queues, crowds and congestion and offer better quality service to their guests).

TABLE 5. TYPE OF SERVICES AND NUMBER OF FACILITIES (SAMPLE AVERAGE AND PER RESPONDENT)

	Total facilities/ services offered per respondent	**Average number of services offered per respondent**	**Average number of services offered excluding pet friendly sites**
Morgan Riverside Caravan Park	0	0	0
Loxton Riverfront Holiday Park	15	2,1	1,8
Queen Victoria JubillePark (Williamstown Caravan Park)	39	3,9	1,2
Big 4 Barossa Tourist Park	191	15,9	1,9
Mt.Pleasant caravan park	106	21,2	1,5
Eden Valley Caravan park.	46	9,2	1,5
Yorketown Caravan Park	23	3,3	1,2
Black Point Caravan & Camping Grounds	2	1	1
Port Vincent Foreshore Caravan Park	116	12,9	2,3
Marion Bay Caravan Park	92	9,2	2
Point Turton Caravan Park	72	10,3	2

2.4 Characteristics of Caravan parks

Six out of 11 respondents (55%) are accredited caravan operators (Table 6). The majority of them (66%) are accredited by the Caravan Industry Association of Australia, while the other two operators are accredited by SA Parks and Williamstown Caravan Park respectively. It is also interesting noting that all the three premium caravan parks are also accredited, while the two medium ones (Big 4 and Loxton) are not accredited operators.

TABLE 6. ACCREDITATION OF RESPONDENTS

Accredited operators (accredited body)	Non accredited operators
• **Morgan Riverside Caravan Park** (SA Parks) • **Queen Victoria JubillePark** (Williamstown Caravan Park) • **Yorketown Caravan Park** (Caravan Industry Association of Australia) • **Port vincent foreshore caravan park** (Caravan Industry Association of Australia) • **Marion Bay Caravan Park** (Caravan Industry Association of Australia) • **Point Turton Caravan Park** (Caravan Industry Association of Australia)	• **Loxton Riverfront Holiday Park** • **Big 4 Barossa Tourist Park** • **Mt.Pleasant caravan park** • **Eden Valley Caravan park.** • **Black Point Caravan & Camping Grounds**

The greatest majority of the respondents (64%) also participate in a star rating system (Figure 1). All respondents that are star rated have a high star rating score, apart from one operator that has only 2 stars rating (Table 7). All the three premium caravan operators participate in a star rating system and they all have very high star score. It is also worth noting that the caravan operators that do not participate in a star rating are all very small operators.

FIGURE 1. STAR RATING SYSTEM PARTICIPATION RATE OF THE RESPONDENTS

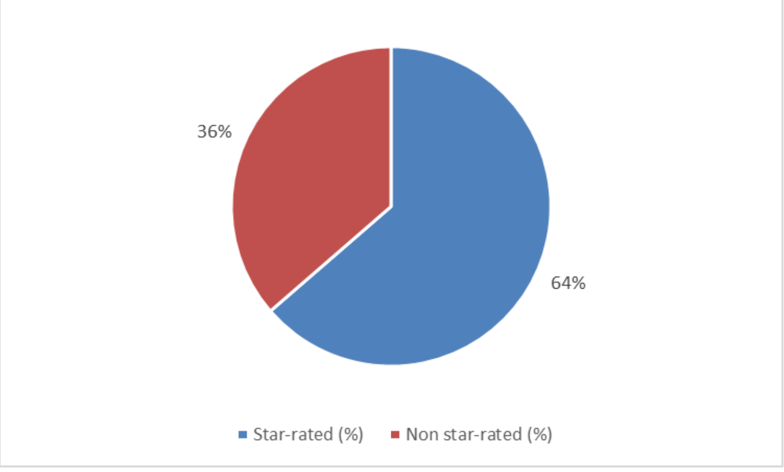


TABLE 7. STAR RATING SYSTEM PARTICIPATION OF THE RESPONDENTS (NUMBER OF STARS)

Member of a star rating system (number of stars)	Non-member of a star rating system
• Loxton Riverfront Holiday Park (4) • Queen Victoria Jubille Park (Williamstown Caravan Park) (3) • Big 4 Barossa Tourist Park (4) • Yorketown Caravan Park (2) • Port Vincent Foreshore Caravan Park (4,5) • Marion Bay Caravan Park (gold) • Point Turton Caravan Park	• Morgan Riverside Caravan Park • Mt. Pleasant caravan park • Eden Valley Caravan park. • Black Point Caravan & Camping Grounds

The greatest majority of the respondents (64%) are not part of a chain (Figure 2). Half of those that are part of a chain are members of the Family Parks, while the rest represent members of Big 4 and Top Parks (Figure 2). It is also worth noting that the largest caravan operator is not a member of a chain, while 2 out of the three premium caravan operators are also not part of a chain (Table 8). Members of a chain mainly represent medium size caravan operators and the one premium caravan operator.

FIGURE 2. MEMBERSHIP OF A CHAIN

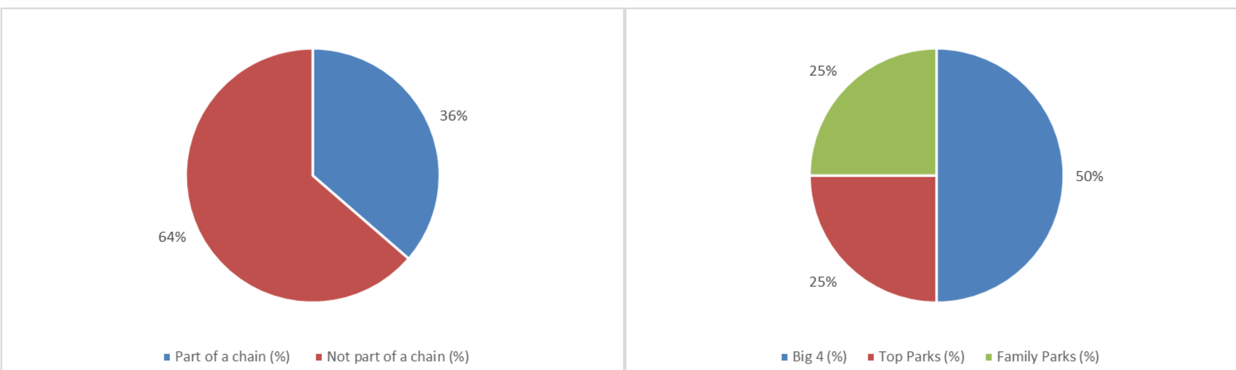


TABLE 8. MEMBERSHIP OF A CHAIN OF THE RESPONDENTS (NAME OF THE CHAIN)

Member of a chain (name of the chain)	Non-member of a chain
• Morgan Riverside Caravan Park (Top Parks) • Loxton Riverfront Holiday Park (Big 4) • Big 4 Barossa Tourist Park (Big 4) • Port Vincent Foreshore Caravan Park (Family Parks)	• Queen Victoria Jubille Park (Williamstown Caravan Park) • Mt. Pleasant caravan park • Eden Valley Caravan park • Yorketown Caravan Park • Black Point Caravan & Camping Grounds • Marion Bay Caravan Park • Point Turton Caravan Park

2.5 Ownership, membership and management structure of respondents

All the respondents belong to a governmental body. However, the greatest majority of them (45%) belong to a local body, significantly less (27%) belong to a state body, while only one caravan park belongs to a regional body and one to a national body (Figure 3). The premium caravan operators belong to a regional or state body, while the largest operator belongs to a local body (Table 9).

FIGURE 3. RESPONDENTS' MEMBERSHIP IN GOVERNMENTAL BODIES

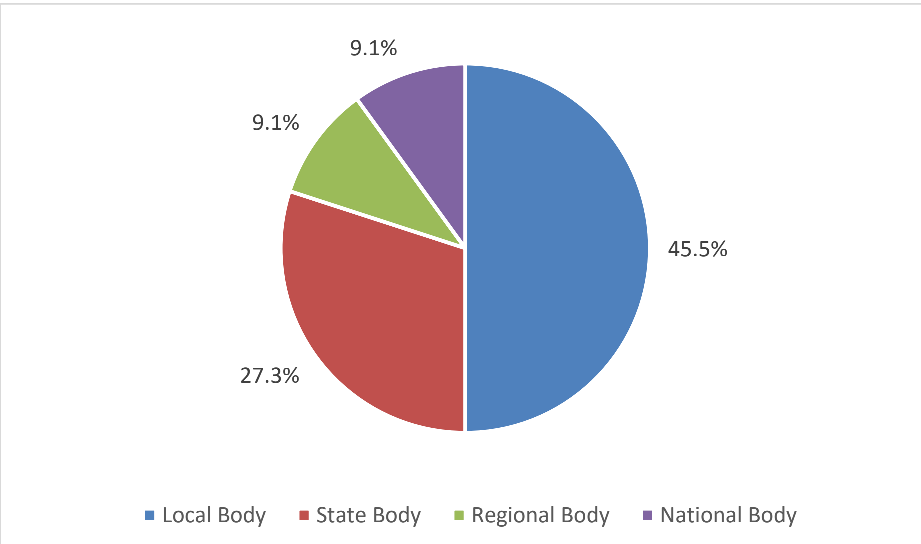
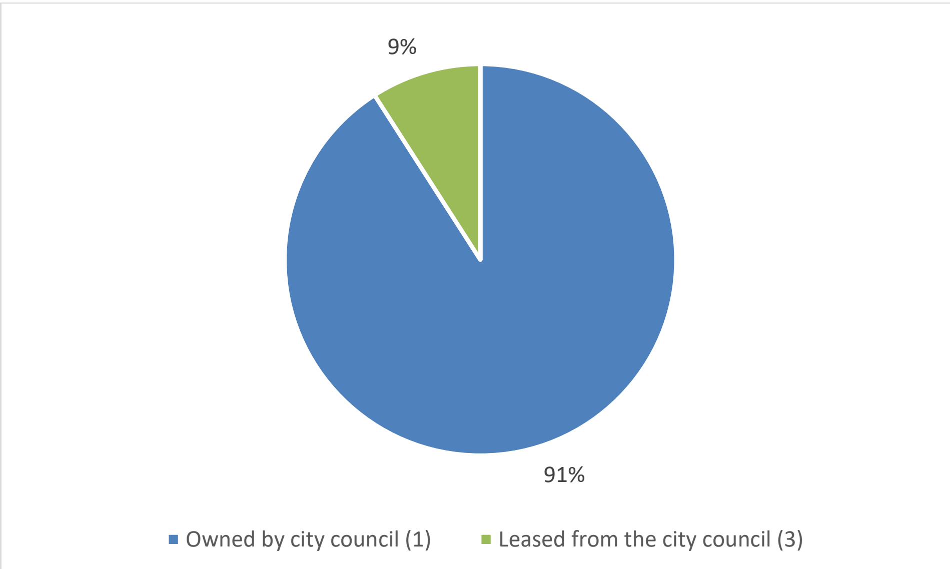


TABLE 9. RESPONDENTS' MEMBERSHIP IN GOVERNMENTAL BODIES

	Local Body	Regional Body	State Body	National Body
Morgan Riverside Caravan Park	Yes			
Loxton Riverfront Holiday Park				
Queen Victoria Jubille Park (Williamstown Caravan Park)	Yes			
Big 4 Barossa Tourist Park				
Mt. Pleasant caravan park	Yes			
Eden Valley Caravan park.	Yes			
Yorketown Caravan Park			Yes	
Black Point Caravan & Camping Grounds	Yes			
Port Vincent Foreshore Caravan Park			Yes	Yes
Marion Bay Caravan Park		Yes		
Point Turton Caravan Park			Yes	
Total Number of members	5	1	3	1
Percentage	45%	9%	27%	9%

The ownership type of the respondents is also aligned with their membership with governmental bodies. Almost all of the respondents (91% or 10 out of the 11) (Figure 4) are owned by a city council, while only one caravan operator (namely Morgan Riverside Caravan Park) is leased from the city council.

FIGURE 4. OWNERSHIP TYPE OF RESPONDENTS



The greatest majority of the respondents (55%) are managed by a private company, a significant percentage of the respondents (36%) are managed by a city council, while only one caravan operator (Big 4 Barossa) is managed by a local government (Table 10). Only one of the three premium caravan parks are managed by a private company; the other two premium caravan operators are managed by a city council. The largest operator is also managed by a city council. Private companies manage only small caravan operators.

TABLE 10. MANAGEMENT TYPE OF RESPONDENTS

Managed by the City Council (36% of respondents)	**Managed by a Private company** **(55% of respondents)**	**Other** **(9% of respondents)**
• Morgan Riverside Caravan Park • Loxton Riverfront Holiday Park • Queen Victoria Jubille Park (Williamstown Caravan Park) • Black Point Caravan & Camping Grounds • Port vincent foreshore caravan park • Marion Bay Caravan Park	• Mt. Pleasant caravan park • Eden Valley Caravan park • Yorketown Caravan Park • Point Turton Caravan Park	• Big 4 Barossa Tourist Park (local government)

2.6 Environmental practices

Only four caravan operators (36%) operate any type of environmental practice (Figure 5). Solar power and recycling were the only environmental management practices reported to be used by the caravan operators (Table 10). Three of the four operators applying environmental management apply only one type of practice, while only one caravan operator (the premium caravan operator) reported to use both practices. It is also worth noting that the largest caravan operator reported not to implement environmental management, which is concerning in relation to the number of guests it hosts and the size of land that it represents. In addition, two out of the three premium caravan operators reported to adopt environmental management, and the latter may be also used as part of their premium strategic marketing positioning.

FIGURE 5. ADOPTION OF ENVIRONMENTAL MANAGEMENT OF THE RESPONDENTS

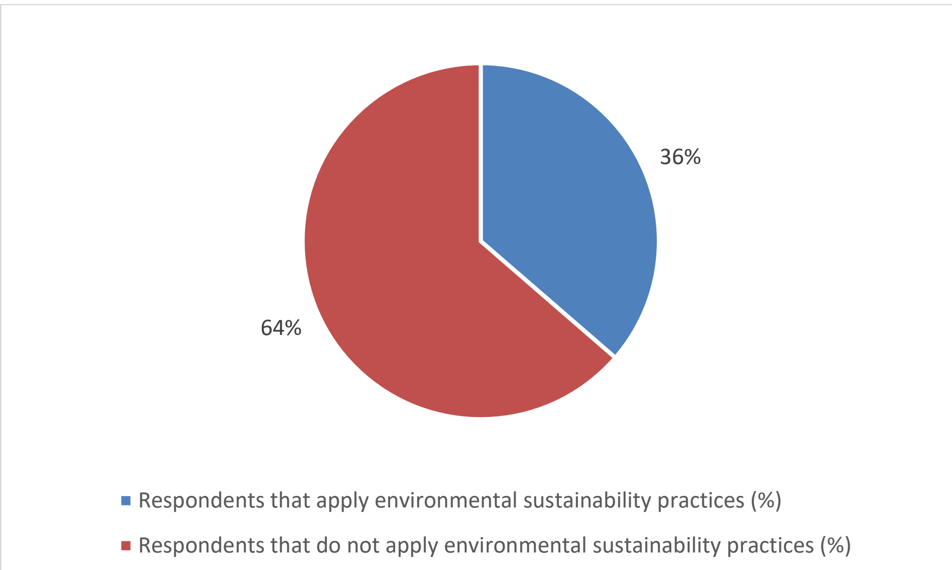


TABLE 10. ADOPTION OF ENVIRONMENTAL MANAGEMENT OF THE RESPONDENTS (TYPE OF ENVIRONMENTAL PRACTICES)

Adoption of environmental management (type of environmental practice)	No adoption of environmental management
• **Morgan Riverside Caravan Park** (Solar) • **Big 4 Barossa Tourist Park** (solar power) • **Port vincent foreshore caravan park** (recycling) • **Marion Bay Caravan Park** (some solar lights, bottle & can recycle)	• Loxton Riverfront Holiday Park • Queen Victoria Jubille Park (Williamstown Caravan Park) • Mt.Pleasant caravan park • Eden Valley Caravan park • Yorketown Caravan Park • Black Point Caravan & Camping Grounds • Point Turton Caravan Park

Table 11 provides a summary and overview of the respondents' profile.

TABLE 11. OVERVIEW OF RESPONDENTS' PROFILE

	Morgan Riverside Caravan Park	Loxton Riverfront Holiday Park	Queen Victoria JubillePark (Williamstown Caravan Park)	Big 4 Barossa Tourist Park	Mt.Pleasant caravan park	Eden Valley Caravan park.	Yorketown Caravan Park	Black Point Caravan & Camping Grounds	Port Vincent Foreshore Caravan Park	Marion Bay Caravan Park	Point Turton Caravan Park
Size in Hectares	2,20	35,00	100,00	25,00	6,00	1,00	1,00	0,40	0,00	6,73	0,00
Type of accommodation provided											
Caravan / motor home site (powered and/or non-powered)	121	120	24	170	100	40	16	10	98	70	60
Cabin accommodation	14	14	4	45	0	0	2	0	13	13	10
Villa – bungalows and/or other specialist accommodation	0	0	0	0	0	0	0	0	1	4	3
Campsite / tent accommodation (powered and/or non-powered)	0	0	8	0	100	20	10	3	0	4	0
Average Rack Rate	$31,00	$113,17	$54,00	$0,00	$22,50	$22,50	$56,67	$27,50	$145,78	$117,50	$117,22
Facilities and Services provided	11 (Not Provided)	9	7	1	3	6	8	10	2	4	5

Accreditation	Yes	No	Yes	No	No	No	Yes	No	Yes	Yes	Yes
Accreditation Body	SA Parks	N/A	Not provided	N/A	N/A	N/A	Caravan Industry Ass. of Australia	N/A	CIAA	Caravan Industry Association of Australia	CIAA
Star Rating	No Star Rating	4	3	4	No	No Star Rating	2	No Star Rating	4,5	Gold	No Star Rating
Part of a chain	Top Parks	Big 4	No	Big 4	No	No	No	No	Family Parks	No	No
Member of	Local Body	Not provided	Local Body	Not provided	Local Body	Local Body	State Body	Local Body	State Body and National Body	Regional body	State Body
Environmental Sustainability Practices	Solar	No	No	Solar power	No	No	No	No	Recycling	Some solar lights, bottle and can recycle	No
Ownership	Leased from the City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council	Owned by City Council
Management Structure	Managed by a Private company	Managed by a Private company	Managed by a Private company	Other - s.42 Local Govt Act	Managed by the City Council	Managed by the City Council	Managed by the City Council	Managed by a Private company	Managed by a Private company	Managed by a Private company	Managed by the City Council

3. Operating Performance of the caravan parks

3.1 Operating expenses

Two operators provided data in relation to their total amount of annual operating expenses (AUD) for the financial year 2017/ 2018. Port Vincent Foreshore Caravan Park reported a figure of 752.491,00, AUD, while Point Turton Caravan Park reported a total amount of annual operating expenses of 517.000,00 AUD.

Table 12 provides the detailed data of the Break-down (per type of costs) of the total annual operating expenses (financial year 2017/2018, AUD) of three caravan parks that provided the related information.

TABLE 12. BREAK-DOWN OF TOTAL ANNUAL OPERATING EXPENSES (FINANCIAL YEAR 2017/2018, AUD)

	Morgan Riverside Caravan Park	**Port Vincent Foreshore Caravan Park**	**Point Turton Caravan Park**	**Average per type of Cost**
Personnel – Human Resources	100.000,00	252.875,00	-	176.437,50
Energy – Electricity	75.000,00	58.651,00	27.000,00	53.550,33
Energy – Gas	20.000,00	19.697,00	18.000,00	19.232,33
Water	20.000,00	31.067,00	33.000,00	28.022,33
Cleaning	80.000,00	35.947,00	10.000,00	41.982,33
Maintenance (excluding salaries), e.g. infrastructure costs	80.000,00	98.891,00	63.000,00	80.630,33
Rubbish removal	5.000,00	29.418,00	20.000,00	18.139,33
Telephone – Internet	3.840,00	2.152,00	1.700,00	2.564,00
Insurance	12.000,00	7.120,00	4.500,00	7.873,33
Depreciation	-	110.314,00	71.000,00	90.657,00
Marketing / promotion / distribution (including reservation system, subscription / membership services / fees etc.)	12.000,00	19.325,00	4.000,00	11.775,00
Costs of outsourced services	15.000,00	-	-	15.000,00
Other costs – please specify	-	-	-	-
Total costs	**422.840,00**	**665.457,00**	**252.200,00**	**446.832,33**

3.2. Investments in infrastructure

Two operators provided data in relation to the percentage of annual income that had been invested in infrastructure or upgrades during the last three years (Table 13). It seems that one of the premium caravan operators had invested a lot in building its infrastructure during 2016, 2017 and 2018. This is not surprising considering the great number of services and facilities that this operator reported to provide.

TABLE 13. PERCENTAGE OF ANNUAL INCOME INVESTED IN INFRASTRUCTURE OR UPGRADES DURING THE LAST THREE YEARS

	2016	2017	2018
Yorketown Caravan Park			10%
Port Vincent Foreshore Caravan Park	15%	25%	5%

3.3 Operating revenues

Table 14 provides data about the total annual revenue (financial year 2017/ 2018) of three caravan parks that provided the related information. It appears that the premium caravan operator makes a significantly higher total annual revenue than the other two operators that are of similar or even bigger size. In other words, the premium positioning, differentiating pricing and variety/quantity of services provided does seem to make a difference in terms of total revenues achieved.

TABLE 14. TOTAL ANNUAL REVENUE OF RESPONDENTS (FINANCIAL YEAR 2017/ 2018, AUD)

Loxton Riverfront Holiday Park	660.000,00
Yorketown Caravan Park	68.982,10
Port Vincent Foreshore Caravan Park	1.011.250,00
Average Total Annual Revenue	580.077,37

Table 15 provides detailed data about the break-down of the total annual revenue (financial year 2017/2018) of three operators that provided the related information.

TABLE 15. BREAK DOWN OF TOTAL ANNUAL REVENUE PER REVENUE TYPE (FINANCIAL YEAR 2017/2018, AUD)

	Caravan / motor house site	Cabin accommodation	Villa, bungalows and/or other specialist accommodation	Revenue from other caravan services
Yorketown Caravan Park	21.550,00	35.724,00	-	1.225,00
Port Vincent Foreshore Caravan Park	545.183,00	415.272,00	21.222,00	29.573,00 boat ramps, linen hire, showers and storage
Point Turton Caravan Park	302.000,00	365.000,00	-	-

4. Management practices of respondents

4.1 Human Resource Practices

Table 16 provides information about the full and part time staff employed by six of the respondents that provided the related information (financial year 2017/2018). Overall, it seems that the three premium caravan parks employ significantly more full and part time staff than their equivalent non-premium caravan operators of the same capacity size. However, the amount and variety of services offered by these premium caravan operators do justify the employment of more staff.

TABLE 16. FULL AND PART TIME STAFF EMPLOYED BY RESPONDENTS (FINANCIAL YEAR 2017/2018)

	Full Time	Part Time	Relief staff
Morgan Riverside Caravan Park	2	5	
Mt. Pleasant caravan park	1	0	
Eden Valley Caravan park.	1	0	
Port Vincent Foreshore Caravan Park	2	5	2
Marion Bay Caravan Park	2	0	6
Point Turton Caravan Park	2	2	2
Average	1,7	4	

All the three premium caravan parks also reported to use relief staff. This is not surprising since these operators do not wish to compromise the level and type of quality service they provide to their guests when their staff take annual leave. One of the three premium caravan operators was also the only operator reporting to provide funds and/or opportunities for staff training and development (Table 17).

TABLE 17. FUNDS AND/OR OPPORTUNITIES FOR STAFF TRAINING AND DEVELOPMENT

Respondent	Conferences / symposiums – workshops	Seminars / professional development training courses	On the job training
Port Vincent Foreshore Caravan Park	Managerial Staff	Managerial Staff	Managerial Staff
			Operational Staff

4.2. Outsourcing Vs insourcing of services

Information provided by two caravan operators in relation to their in-house and outsourcing practices (Table 18) reveal that the operators rely and use outsourcing only for ad-hoc services required (e.g. Plumbing) and for electrical services. All other business operations are conducted inhouse.

TABLE 18. INHOUSE VS OUTSOURCED PRACTICES OF RESPONDENTS

	In-house (number of staff)	**Outsourcing (Amount of expense)**
Yorketown Caravan Park	Cleaning = 2 Maintenance = 2 Grounds – gardening = 2 Rubbish= 2	
Port Vincent Foreshore Caravan Park	Cleaning = 5 Maintenance = 1 Grounds – gardening = 1 Rubbish - = 1 Marketing – distribution= 1 Finance – accounting = 1	Electrical $ 1.540,00 Plumbing $ 5.500,00

4.3. Marketing: promotion – distribution practices

The greatest number of the respondents reported to use the following distribution – marketing channels: VIC, print media, social media, caravan park website, council website and trade and consumer shows (Table 19). RAA and Call centres were not used by anyone respondent answering this question, while only two respondents reported to use the chain membership, although many more operators reported to be part of a chain. The other channels were reported to be used by only two or one operators. Two operators also reported to use WikiCamps.

All the caravan operators reported to follow a multi-distribution strategy. However, two operators reported to use 2 or three channels, while the remaining reported to use many more channels.

TABLE 19. TYPE OF MARKETING- DISTRIBUTION CHANNELS USED

	Visitor Information Centres	Print media	Direct electronic marketing	Radio	RAA	Online Travel Agents, e.g. booking.com,	Social media	Website of the caravan park	Website of the local destination	Call centre	Mobile apps, e.g. campsite	Local tourism boards	Council websites	Trade and consumer shows	Chain memberships
Morgan Riverside Caravan Park	x	x	x	x		x	x	x			x	x		x	x
Mt.Pleasant caravan park	x							x					x		
Eden Valley Caravan park.	x							x							
Yorketown Caravan Park	x	x					x	x						x	
Port Vincent Foreshore Caravan Park	x	x	x	x			x	x	x		x	x	x	x	x
Marion Bay Caravan Park		x				x	x	x					x	x	
Point Turton Caravan Park	x	x					x	x					x	x	

Other channels used: wikiCamps

Table 20 provides more information about the way caravan operators manage their bookings and reservations. It appears that only two small operators reported to use a handwritten system / booking book, while the remaining (specifically the premium type of operators) rely on an electronic reservation management system, which can be more efficient for their operations.

TABLE 20. MANAGEMENT OF RESERVATIONS AND BOOKINGS

Morgan Riverside Caravan Park	Electronic reservation management system: Reservation Management System, e.g. NewBook, ResOnline or other software
Mt. Pleasant caravan park	Handwritten system / Booking Book
Eden Valley Caravan park.	Handwritten system / Booking Book
Yorketown Caravan Park	Electronic reservation management system: Reservation Management System, e.g. NewBook, ResOnline or other software
Port Vincent Foreshore Caravan Park	Electronic reservation management system: Reservation Management System, e.g. NewBook, ResOnline or other software
Marion Bay Caravan Park	Electronic reservation management system: Reservation Management System, e.g. NewBook, ResOnline or other software
Point Turton Caravan Park	Electronic reservation management system: Reservation Management System, e.g. NewBook, ResOnline or other software

4.4. Marketing – product strategies

Table 21 reveals that the most popular product strategy adopted by the respondents is the annual Vs residential sites. None respondents reported to use the metered Vs non metered sites product differentiation strategy. Two of the three premium caravan operators also reported to use the greatest number of product differentiation strategies (3 strategies), while the remaining operators use one or two strategies.

TABLE 21. MARKETING: PRODUCT STRATEGIES BY THE RESPONDENTS

	Powered Vs non-powered accommodation	Annual Vs residential sites	Metered Vs non-metered sites (referring to electricity)	Location of accommodation type, e.g. big ring, waterfront etc.	Amenities – services of accommodation type, e.g. glamping, luxury, basic accommodation	Total number of strategies per respondent
Morgan Riverside Caravan Park	Yes			Yes	Yes	3
Mt. Pleasant caravan park		Yes				1
Eden Valley Caravan Park	Yes	Yes				2
Yorketown Caravan Park		Yes				1
Port Vincent Foreshore Caravan Park		Yes		Yes	Yes	3
Marion Bay Caravan Park	Yes			Yes	Yes	3
Total number of respondents using each strategy	3	4	0	3	3	

4.5. Marketing: pricing strategies

Findings about the pricing strategies of the operators (Table 22) reveal that the respondents do not tend to use price differentiation strategies a lot. This is because the greatest number of respondents reported never to use or sometimes to use all the price differentiation strategies. The very few operators that reported to use price differentiation strategies reported to differentiate prices mainly based on type of accommodation, type of season, and less based on the timing of the booking and the type of customer (repeat Vs first time buyer).

TABLE 22. MARKETING: PRICING STRATEGIES (NUMBER OF OPERATORS)

	The type of accommodation, e.g. cabin, tent, powered Vs non-powered site	Type of season, e.g. low Vs high season	Type of market segment: e.g. special prices for students, seniors, families etc.	Type of distribution channel used for booking, e.g. caravan website Vs intermediary channel	Timing of booking, e.g. pre-sales, last minute bookings, pre-payments	Special offers to repeat customer or customers registered in your loyalty – frequent program	Packages with other local businesses, e.g. wine packages, activity packages etc.
Always	3	3	0		1	1	
Sometimes	2	1	3	2	2	3	4
Never	2	3	4	5	3	3	3

Detailed findings about the pricing strategies per respondent (Table 23) reveal that the three premium-type caravan operators tend to use pricing differentiation strategies more frequently, and use more price differentiation strategies than the other operators.

TABLE 23. PRICING STRATEGIES PER RESPONDENT

	The type of accommodation, e.g. cabin, tent, powered Vs non-powered site	Type of season, e.g. low Vs high season	Type of market segment: e.g. special prices for students, seniors, families etc.	Type of distribution channel used for booking, e.g. caravan website Vs intermediary channel	Timing of booking, e.g. pre-sales, last minute bookings, pre-payments	Special offers to repeat customer or customers registered in your loyalty – frequent program	Packages with other local businesses, e.g. wine packages, activity packages etc.
Morgan Riverside Caravan Park	Sometimes	Sometimes	Sometimes	Sometimes		Never	Sometimes
Mt.Pleasant caravan park	Sometimes	Never	Never	Never	Never	Never	Never
Eden Valley Caravan park.	Always	Never	Never	Never	Never	Sometimes	Never
Yorketown Caravan Park	Never	Never	Never	Never	Sometimes	Sometimes	Never
Port Vincent Foreshore Caravan Park	Never	Always	Sometimes	Never	Always	Sometimes	Sometimes
Marion Bay Caravan Park	Always	Always	Never	Sometimes	Sometimes	Always	Sometimes
Point Turton Caravan Park	Always	Always	Sometimes	Never	Never	Never	Sometimes

4.6 Capacity utilisation

Only four of the respondents reported to have facilities / operations allowing them to re-allocate the caravan park space per accommodation type (e.g. caravan site Vs tents) depending on demand. These operators included two of the three premium caravan operators and included the following:

- Morgan Riverside Caravan Park
- Mt.Pleasant caravan park
- Yorketown Caravan Park
- Marion Bay Caravan Park

One operator also reported that it does re-configurate utilisation of space depending on demand It specifically reported that it "…c*hange format of parking of vans when I have a caravan or motor home club come in with large numbers".*