Supply-side evolution of caravanning in Australia: an historical analysis of caravan manufacturing and caravan parks

Rod Caldicott, Southern Cross University

Available at: https://works.bepress.com/rod_caldicott/2/
Supply-side evolution of caravanning in Australia: An historical analysis of caravan manufacturing and caravan parks

Rodney William Caldicott

Bachelor of Business in Tourism

A thesis presented in partial fulfilment of the requirements of the Degree of Bachelor of Tourism and Hospitality Management with Honours

November 2011
Prelude

Sunlight breaks through the window of your bedroom. The mercury has already climbed to a healthy 30 degrees, not that you would know it with the air-conditioner silently cooling the inside air. You stumble out of bed and fall into the shower. The steady stream of water invigorates and washes the remnants of sleep away. Out of the shower and now clothed you venture into the kitchen to assemble breakfast. Cheese and tomato croissant warmed in the microwave and chilled orange juice from the fridge. With Pavarotti, Domingo and Carreras delivering another wonderful performance from the speakers of your new stereo, you sidle up to your Arizona-style sofa to read the paper and waste the morning away.

Sounds pretty good, doesn’t it - a holiday in the lap of luxury. None of these opulent offerings were found in the penthouse of a four-star hotel located in some large metropolitan centre.

In fact, the accommodation for the holiday described above would be more likely found in the midst of deep red sand or thick green rainforest - anywhere, in fact, where you can park a van. The advancement of caravan technology in recent years has meant that this sort of luxury can be made available in any part of Australia.

(Welch 1995)
Abstract

This exploratory study reviewed internal and external supply-side elements of caravanning in Australia, an area largely overlooked to date in the demand-side focused literature. More specifically, it investigated how caravan parks have developed over the passage of time and what role the caravan manufacturing sector (external element) and the park-based site-mix options (internal element) have had in shaping that development.

In 2011, the caravanning industry is only a mere shadow of its former glory days of the mid seventies, as recognised within its own national peak body, the Caravan, Recreational Vehicle and Accommodation Industry of Australia (CRVA), despite the current resurgence in caravanning as a subset of drive tourism.

The study was broken into three parts. Part 1 reports the broad historical account of caravan manufacturing in Australia; Part 2 examines the history of caravan parks in Australia; and Part 3 presents a case study of caravan park evolution at a single destination level.

Underpinned by the theoretical framework of Butler’s (1980) Tourist Area Life Cycle (TALC), the study historically analysed the rise and fall scenarios of the manufacturing and parks’ sectors of the industry. It also innovatively applied the theory to examine longitudinal trends in park-based site-mix options through a case study of caravan parks of the Tweed Shire in northern New South Wales.

A mixed-methods design was used to extract the ‘best of both worlds’ from the two dominant paradigms of interpretivism and positivism thus enriching the overall findings.

Caravanning in Australia was found to be at an interesting crossroad in its development cycle. While the caravan manufacturing side of the sector is currently experiencing a rapid growth phase, the second within the past four decades, the caravan park side sector of the industry is in gradual decline in respect to total site capacity: a trend that has been evident for the past decade and a half. Successful parks are maintaining and growing market share through
rejuvenation, while others have reinvented themselves as permanent living precincts. However, many coastal parks have closed due to urban development pressures. Traditional site infrastructure, geared toward mobile forms of caravans and tents, has given way to fixed forms of relocatable homes and ensuite cabins. In an environment of decreasing parks, and thus total capacity, where will the touring caravanner go?

The study concludes that the rise and fall pattern of development within the manufacturing sector and the parks sector of the national caravanning industry was also reflected in the evolutionary cycle of development at the destination level. The six stages of the TALC: Exploration, Involvement, Development, Consolidation, Stagnation and then Decline or Rejuvenation was shown to apply to the destination on broad terms and was also evident within the analysis of site-mix options. A model of caravan park evolutionary development was presented to assist the caravan industry in predicting its future and also to promote discussion and ideas for additional research on the supply-side of caravanning.

In the context of this thesis, the term caravan was used to include caravans, pop-tops, campervans, camper-trailers, tent-trailers, motor-homes, slide-on’s and 5th wheelers and is interchangeable with the term recreational vehicle (RV). Tents and cabins are not vehicles by the ‘caravan’ definition but as integral elements to the caravan park environment and function, they too were considered in the context of the caravan park site-mix. Some discussion unfolded throughout this study about permanent living in caravan parks and subsequently, relocatable homes. This non-mobile form of caravan park accommodation, however, was not included in the general concept of caravanning.
Certification

I certify that the substance of this thesis has not already been submitted for any other degree and is not currently being submitted for any other degree.

I certify that the sources of information used in preparing this thesis have been duly acknowledged

Rod Caldicott
14 November 2011
Acknowledgements

I would like to express my appreciation to all that have been involved in this amazing journey with me, allowing me the space, time, resources, support and opportunity to complete this study; particularly the Centre for Tourism, Work and Leisure for the scholarship support.

To Dr Erica Wilson, with whom I have enjoyed a professional industry relationship for now over a decade, thank you for the encouragement to return to Southern Cross University to pursue this higher academic award. To receive your guidance as the Honours Coordinator and support on behalf of the School of Tourism and Hospitality Management is much appreciated.

To Dr. Pascal Scherrer - you are a legend! Behind every good student is a great supervisor. Your quiet, calm, considered, patient, jovial, firm, thoughtful, logical, intelligent, resourceful, wily and technically savvy manner was just what this student needed to keep me on target, to pull me up when I was feeling beaten, to make me laugh when I was feeling pity and give me praise when I was doubting myself. Thank-you mate, we will get to have that beer soon!

Several other amazing people have assisted along the way and also deserve medals for their patience with me. Junee Boyd, as the master of Word, Excel, Merge Mail and PowerPoint, your smile and willingness to lend a hand has been an enormous relief for me. To the wizard of Endnote; Li Zhang –thank you so much. Operating Endnote is like being on a runaway train without a driver. One is always just waiting for the crash! Li you’re an amazing paramedic.

My personal gratitude goes to all the members of the caravan and camping fraternity that so willingly gave off their time to participate in this study. I trust it will serve your industry well and I look forward to working with you again.

Finally, a big thank you goes to my friends and family for their individual kindness and generosity shown to me along the way. I dedicate this thesis to my children, Gabriella and Tobias, who may not have understood why their Dad would want to stop work, and go back to school, but they made the space in their lives to give me that privilege.
## Contents

1  Study Introduction ................................................................................................ 1
   1.1  Introduction ................................................................................................. 1
   1.2  Background to the Study ............................................................................... 3
   1.3  Study Aim ...................................................................................................... 4
   1.4  Research Questions ...................................................................................... 4
   1.5  Significance of the Study ............................................................................... 4
   1.6  Outline of the Thesis ..................................................................................... 7

2  Literature Review ................................................................................................. 9
   2.1  Introduction ................................................................................................... 9
   2.2  Caravanning’s Position in Tourism History .................................................... 9
   2.3  Caravanning’s Contribution to Tourism - The Cinderella Syndrome ........... 12
   2.4  Driving Demand for Caravan Parks - Australian Leisure Patterns ............... 16
   2.5  Supply-side Research Gap ......................................................................... 26
   2.6  Tourist Area Life Cycle ............................................................................ 28
      2.6.1  Foundations .......................................................................................... 28
      2.6.2  Reviews ............................................................................................... 30
      2.6.3  Case Studies ........................................................................................ 32
   2.7  Filling the Supply-side Research Gap ......................................................... 34

3  Methodology ....................................................................................................... 35
   3.1  Introduction ................................................................................................. 35
      3.1.1  Research Approach - Part 1 and Part 2 ................................................ 37
      3.1.2  Research Approach - Part 3 .................................................................. 38

4  Findings Part 1 – The History of Caravan Manufacturing ................................. 42
   4.1.1  International Seeds ............................................................................... 42
   4.1.2  Humble Beginnings – The Australian Manufacturing Story ................. 44
4.1.3 Boom, Bust and Revival ................................................................. 49
4.1.4 An Australian Manufacturing Snapshot ........................................... 55

5 Findings Part 2 – The History of Caravan Parks ................................... 57
5.1 The Past ............................................................................................. 57
5.2 The Present ........................................................................................ 65
  5.2.1 Awards .......................................................................................... 66
5.3 The Site Mix Journey ......................................................................... 68
  5.3.1 Residential Themes ...................................................................... 72
  5.3.2 Resort Themes ............................................................................. 77
5.4 Caravan Park Associations ................................................................. 83

6 Findings Part 3 - Case Study - Tweed Shire Caravan Parks .................. 85
6.1 Caravan Parks Overview .................................................................... 85
6.2 Site-mix, Amenities, Services and Market Trends ............................. 99
6.3 The Societal Life Cycle of Tweed Shire Caravan Parks ..................... 115
  6.3.1 Stage One – Exploration c.1800-1850 .......................................... 115
  6.3.2 Stage Two – Involvement c.1850-1950 ....................................... 116
  6.3.3 Stage Three – Development c.1950-1980 ................................. 121
  6.3.4 Stage Four – Consolidation c.1980-2000 .................................. 128
  6.3.5 Stage Five – Stagnation c.2000-2010 ....................................... 131
  6.3.6 Stage Six – Decline c.2010 ....................................................... 133
  6.3.7 or Rejuvenation c.2010 ........................................................... 138
6.4 The Operational Life Cycle of Tweed Shire Caravan Parks .............. 139

7 Discussion ............................................................................................ 147
  7.1 The Societal Cycle .......................................................................... 147
  7.2 The Manufacturing Cycle ............................................................... 148
  7.3 The Caravan Park Cycle ................................................................. 149
List of Figures

| Figure 1 | Caravan park establishments from 1992 to 2009 | 6 |
| Figure 2 | Thesis structure | 8 |
| Figure 3 | Australia's earliest trailer caravan. Manufactured c.1923 | 11 |
| Figure 4 | Factors in the determination of tourist trends | 16 |
| Figure 5 | Camping at Greenmount Beach, Tweed Heads c.1911 | 17 |
| Figure 6 | Surf bathing at Greenmount Beach, Coolangatta c.1912 | 18 |
| Figure 7 | Patty Fagan’s Greenmount Guesthouse c.1908 | 19 |
| Figure 8 | The 'never never' | 21 |
| Figure 9 | Mobile residential outfit. c.2011 | 22 |
| Figure 10 | Jayco toy-hauler caravan. Manufactured c.2011 | 26 |
| Figure 11 | Tourist Area Life Cycle model | 29 |
| Figure 12 | Early Australian camp wagon. Manufactured c.1850 | 43 |
| Figure 13 | Touring the Rutherglen region by wagon. Manufactured c.1995 | 43 |
| Figure 14 | Early tear-drop model caravan. Manufactured c.1932 | 45 |
| Figure 15 | G C (Pop) Kaesler's motorhome. Manufactured c.1930 | 46 |
| Figure 16 | DIY bondwood caravan. Manufactured c.1940 | 47 |
| Figure 17 | DIY caravan built from a seaplane. Manufactured c.1948 | 48 |
| Figure 18 | Camper trailer. Manufactured c.2005 | 52 |
| Figure 19 | The 'Block' logo | 52 |
| Figure 20 | Jayco outback expana van. Manufactured c.2011 | 54 |
| Figure 21 | Lightweight A-Van. Manufactured c.2011 | 54 |
| Figure 22 | 5th wheeler. Manufactured c.1949 | 55 |
| Figure 23 | Mini 5th wheeler. Manufactured c.2010 | 55 |
| Figure 24 | National caravan (RV) manufacturing trends 1963 to 2010 | 56 |
| Figure 25 | Shady Acres Resort | 58 |
| Figure 26 | Water point at Cabarita Caravan Park. Est. c.1960 | 60 |
| Figure 27 | Electrical point at Cabarita Caravan Park. Est. c.1960 | 60 |
| Figure 28 | Laundry facilities at Cabarita Caravan Park. Est. c.1960 | 61 |
| Figure 29 | Ablutions block at Cabarita Caravan Park. Est. c.1960 | 61 |
| Figure 30 | Early caravan park design | 63 |
| Figure 31 | Site map of Boyds Bay Holiday Park - Tweed Heads | 65 |
| Figure 32 | Site map of Saltwater Holiday Park - Yamba | 66 |
| Figure 33 | Caravan park accommodation site-mix options | 69 |
| Figure 34 | Clustered ensuite caravan sites. Est. c. 2005 | 70 |
| Figure 35 | Mobile ensuite | 71 |
| Figure 36 | Swimming pool at Lismore Palms Caravan Park. Est.c.1970 | 78 |
| Figure 37 | Water-park at North Star - Hastings Point. Est. c.2011 | 78 |
| Figure 38 | Playground at Terrace Reserve - Brunswick Heads. Est. c.1990 | 79 |
| Figure 39 | Toddler’s playground at Billabong Holiday Park. Est. c.2010 | 79 |
| Figure 40 | Jumping pillow at Saltwater Holiday Park. – Yamba. Est.c.2010 | 80 |
List of Tables

Table 1 - Bed capacity comparison in Australia in 2009 ........................................ 5
Table 2 - Change in caravan park site capacity in Australia 2000 - 2009 .......... 6
Table 3 - Annual ‘new’ tourism beds provided by caravan industry ............... 15
Table 4 - Growth factors in evolution of tourism................................................. 24
Table 5 - Research design.................................................................................. 36
Table 6 - Six life cycle operational indicators...................................................... 41
Table 7 - State based legislation governing caravan parks.............................. 64
Table 8 - Tourism award winners....................................................................... 67
Table 9 - Summary of NSW residential park legislation................................... 74
Table 10 - Caravan industry structure................................................................ 84
1 STUDY INTRODUCTION

1.1 INTRODUCTION

This exploratory study reviews internal and external supply-side elements of caravanning in Australia. More specifically, it investigates how caravan parks have developed over the passage of time and what role the caravan manufacturing sector (external element) and the park based site-mix options (internal element) have had in shaping that development.

Caravanning is a subset of ‘drive tourism’ whereby ‘the vehicle has emerged as more than just the most convenient mode of transport between the origin and the destination – to one where the use of the vehicle is more central to the enjoyment of the trip as a whole’ (Carson et al. 2002:358). In the context of this thesis, the term caravan is used to include caravans, pop-tops, campervans, camper-trailers, tent-trailers, motor-homes, slide-on’s and 5th wheelers and is interchangeable with the term recreational vehicle (RV). Tents and cabins are not vehicles by the ‘caravan’ definition but as integral elements to the caravan park environment and function, they too are considered in the context of the caravan park site-mix. Some discussion unfolds throughout this study about permanent living in caravan parks and subsequently, relocatable homes. This non-mobile form of caravan park accommodation, however, will not be included in the general concept of caravanning.

Since its origins in the 1800s, caravanning has undergone significant changes and fluctuations. In 2011, the caravanning industry remains only a mere shadow of its former glory days of the mid seventies, despite a recent and ongoing resurgence, a situation recognised within its own national peak body, the Caravan, Recreational Vehicle and Accommodation Industry of Australia (CRVA) (B Yates 2011, pers. comm., 20 June).

This study examines these industry changes and fluctuations historically; first in the broader Australian context and then specifically with focus on the Tweed Shire in Northern New South Wales. As the overarching theoretical framework the study uses the concept of Butler’s (1980) Tourist Area Life Cycle. While the
TALC originated with respect to defined tourist areas it was adapted in this study to the context of caravanning and, in particular, caravan manufacturing and caravan parks. Butler highlighted the implications that cyclical tourism development has on the management of resources within destinations through the concept of the TALC. Being cognitive of the evolutionary processes taking place within the tourism industry provides opportunity for managers of resources (e.g. caravan park operators) to act appropriately in making strategic management decisions about the future of their enterprise and their industry sector as a whole.

The author’s personal involvement with the caravan industry, spanning almost 40 years, provided both the interest and background industry knowledge to pursue this study. That personal, private and public sector involvement presents as follows: Consumer - a user of caravan parks for annual family vacations both as a child and as a parent; Tourist Operator – a proprietor/manager of a family owned caravan park in North Queensland; Student – an undergraduate student conducting caravan park related research; and finally, Marketer – a local government tourism manager promoting the broader tourist destinations, tourist products and tourism services including caravan parks.

The study consists of three parts. Part 1 reports the broad historical account of caravan manufacturing in Australia. Part 2 examines the history of caravan parks in Australia. Part 3 presents a case study of caravan park evolution within the Tweed Shire of northern New South Wales which was informed, in part, through an analysis of internal site-mix, services and amenities from 1970 to 2010.
1.2 BACKGROUND TO THE STUDY

The author's prior family business connections with ‘Travellers Rest Caravan and Camping Park’ at Midge Point in North Queensland prompted this later interest to further research aspects of the Australian caravanning industry. During the period spent at Travellers Rest (1984-1992) it came to the author’s attention that there was a real sense of inequality between small business (e.g. caravan park) and large business (e.g. multinational hotel chain), as impending encroachment by an international integrated tourist development, on a neighbouring green-field site, rendered Travellers Rest Caravan and Camping Park, and other small businesses, vulnerable to impacts beyond immediate landowner control (Caldicott 1995; Caldicott & Jarrot 1990).

While completing the undergraduate tourism degree from 1994 to 1997, it became evident that the interests and management techniques of small to medium enterprises, many family-owned, were also often over-looked within the degree program in favour of larger corporate establishments of both national and international mode. A review of the tourism literature also revealed parallels to this observation at that time. Further analysis of the literature in recent times confirmed a distinct absence of articles pertaining to caravans and caravan parks within the academic journals, with the exception of the issue of long-term residency within caravan parks in relation to residents’ health and housing affordability (Greenhalgh 2003; Newton 2011; Stuart 2005).

Inquiries with the industry peak body, Caravan Industry Australia (CIA) in 1997, now CRVA, revealed that there was also very little industry-based research and assessment that had been undertaken to document the historical development of caravanning or the changing nature of caravan parks in Australia from a commercial perspective. In 2011, almost a decade and a half later, this situation had not changed. It was therefore clear that an historical profile of the industry would be useful to build a baseline framework for future studies.

This thesis has therefore arisen from an identified need to document the evolution of caravanning in Australia and to examine factors that enabled the industry to develop further.
1.3 Study Aim

The central aim of this research is to document how caravans and caravan parks have developed in Australia and what role the external caravan manufacturing sector and the internal caravan park site mix configuration had in shaping the development of caravan parks.

The theoretical construct of Butler’s (1980) Tourist Area Life Cycle (TALC) underpins the entire study, with a specific case study of the Tweed Shire caravan parks, in northern New South Wales further described within the TALC framework.

The following three research questions were developed to address the central aim and more deeply explore the various elements of interest.

1.4 Research Questions

1. How has the caravan manufacturing sector developed in Australia?
2. How has the caravan park sector developed in Australia?
3. Has the development of Tweed Shire caravan parks, and their site-mix options, amenities and services, aligned to the stages of the TALC?

1.5 Significance of the Study

Caravanning is a major component of Australia’s tourism industry. In 2009, caravanning generated revenue of $6.5 billion dollars and employment for 10,700 people (ABS 2010b). Caravan parks, as a discrete sub-sector of the caravanning industry, generated over 1.1 billion dollars in annual direct takings and provided direct employment to over 3,500 fulltime and part-time employees in 2009 (ABS 2010b).

At year-end December 2010, the caravan park sector of the Australian caravanning industry was supported by 1641 establishments, conservatively providing approximately 50% of total national tourism bed capacity (Table 1) (ABS 2010b).
Table 1 - Bed capacity comparison in Australia in 2009

<table>
<thead>
<tr>
<th>Caravan Parks</th>
<th>Other Accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sites</td>
</tr>
<tr>
<td>On-site vans</td>
<td>16934</td>
</tr>
<tr>
<td>Powered sites</td>
<td>138878</td>
</tr>
<tr>
<td>Unpowered sites</td>
<td>34910</td>
</tr>
<tr>
<td>Cabins/Villas</td>
<td>35260</td>
</tr>
<tr>
<td>Totals</td>
<td>225982</td>
</tr>
<tr>
<td>Market Share</td>
<td>46.30%</td>
</tr>
</tbody>
</table>

These figures clearly highlight the often underrated importance of caravan parks to the tourism industry and raise questions about their notable absence from national and state marketing campaigns and the academic literature.

However, caravanning is facing an interesting dilemma. On one hand, the number of caravan parks has been declining over the last fifteen years (Figure 1), driven predominantly by a conversion in coastal areas of beachfront land to high rise units and hotels (Prideaux & McClymont 2006).

While a change in data collection methods prevents a direct comparison of park numbers between 1992 and 2009, the continuation of a downward trend in earlier data remains evident reflecting a 10% fall between 2000 and 2009 from 1825 to 1641 parks respectively (CRVA 2011a).

Short and long term capacity of parks in terms of the number of sites has also decreased by 8% and 13% respectively between 2000 and 2009 (Table 2). Thus, total site capacity is declining nationally through closure of parks in favour of higher economic yielding development scenarios.

On the other hand, registrations of new caravans have recorded a 257% increase in the decade from 1995 to 2005 with total RV manufacturing continuing to climb a further 29% between 2005 and 2010, successfully challenging the impacts of the Global Financial Crisis of 2008/09 (ABS 2010a; RVMAA 2011).

1 Source: Adapted from ABS 2010 Cat. No. 8635.0
1. Study Introduction

Figure 1 - Caravan park establishments from 1992 to 2009

Table 2 - Change in caravan park site capacity in Australia between 2000 and 2009

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of sites in Dec 2000</th>
<th>Change</th>
<th>2009 as % of 2000</th>
<th>% increase/decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Short-term sites</td>
<td>Long-term sites</td>
<td>Short-term sites</td>
<td>Long-term sites</td>
</tr>
<tr>
<td>2000</td>
<td>172,865</td>
<td>54,739</td>
<td>72,040</td>
<td>29,874</td>
</tr>
<tr>
<td>2009</td>
<td>197,799</td>
<td>56,656</td>
<td>28,183</td>
<td>17,051</td>
</tr>
</tbody>
</table>

- Short-term sites = sites occupied for less than 60 days (Tourist sites);
- Long-term sites = sites occupied for greater than 60 days (Permanent sites);
- Short-term parks = parks where majority of paying guests occupy sites for periods less than 60 days;
- Long-term parks = parks where majority of paying guests occupy sites for more than 60 days.

Source: Adapted from ABS Cat No. 8635.0 – Figures for 1992 to 1997 are based on ABS data for all Australian caravan parks (Red). There was no collection in 1998, 1999, 2001 and 2002. From 2000 onward, the collection scope was reduced to caravan parks with 40 sites or more (Red). The green presentations for the years 2000 and beyond are an extrapolation of all caravan parks, assuming there had not been a change to scope of series (Green). ABS ceased collection of caravan park data post 2009. Due to the extrapolations, caution should be used in any replication of this demonstration model.

Source: Adapted from ABS 2010 Cat. No. 8635.0
New registrations and re-registrations totalling 48,504 for campervans and motorhomes alone were recorded in 2010, representing a 19.2% increase since 2005 in just this narrow sector of the caravan suite (ABS 2010b). These upward trends with registrations are in stark contrast to the declining total number of sites available to travelling caravanners.

As demand for the caravanning experience increases and the number of sites available for the touring caravanner decreases, the question arises - where the bloody-hell are the touring caravanners all going to go? The dilemma therefore warrants further investigation of broader caravanning environments.

This study contributes to the foundational knowledge required to support understanding of this question by examining past and likely future trends in the supply-side of the caravan industry. It also partially addresses the current void within academic literature in respect to supply-side of the caravanning industry. It adapts the theoretical concept of the TALC to an industry rather than an area and explores its potential for operationalisation through a regional case study.

1.6 OUTLINE OF THE THESIS

Figure 2 provides an overview of the thesis structure. Firstly, the thesis documents the historical perspective of the supply-side to Australian caravanning commencing from an international context before moving onto the domestic scene which is reviewed within the broad tourism landscape and historic leisure patterns of Australians. This is followed by an analysis of the evolution of caravan manufacturing in Australia (Part 1) and caravan parks in Australia (Part 2). Finally, a case study of the evolution of caravan parks in the Tweed Shire investigates past and future park development, site-mix, amenities, services and market trends (Part 3) to inform a broader discussion of caravan park evolution within the framework of the TALC.
Figure 2 - Thesis structure
2 LITERATURE REVIEW

2.1 INTRODUCTION

The historical evolution of the caravanning industry at both the caravan manufacturing level and the caravan park development level have not raised significant interest among researchers despite an emerging body of academic literature on caravanning as a component of ‘drive tourism’ (Carson et al. 2002). Current publications reference the establishment of caravans and caravan parks through fleeting mentions to ‘the first caravan’ or ‘the first caravan park’ (Huth 2006; Kelly 1994; McClymont et al. 2011). For the most part, however, the reference is merely in a brief contextual manner and rarely provides any meaningful insight into the deep, rich or colourful history of these supply-side elements to caravanning in Australia.

The majority of academic caravanning literature focuses on demand side issues, predominantly centred on consumer demographics (Glover & Prideaux 2009; Holloway 2007; Prideaux & McClymont 2006), segmentation (Marles 2006), motivations (Hardy & Gretzel 2011), mobility and travel patterns (Cridland 2003), satisfaction ratings (McClymont et al. 2011) and lifestyles (Hollaway & Hollaway 2011).

This chapter positions caravanning in tourism’s modern social history and describes caravanning as an important component of the nation’s tourism economic landscapes, recognising it as a demand driven industry with a rich and colourful history. Finally, the chapter addresses the supply-side gap in tourism’s caravanning literature and explores Butler’s (1980) TALC as a framework for further analysis of caravanning.

2.2 CARAVANNING’S POSITION IN TOURISM HISTORY

The conventional view of tourism’s past is dominated by the history of Western cultural experience (Murphy 1985). For many years, tourism was considered as being for the pleasure of a small minority; however, in the twentieth century it developed into an activity for the masses (Pearce 1989). Increased mobility and
additional holidays promoted travel as a social achievement (Baker 1988; Kripendorf 1987). Proponents of tourism in Australia, however, still tended to emphasise the more glamorous forms of international travel and downplayed the dominance of mundane forms of travel (Craik 1991).

In most elements of marketing, caravanning as the mainstream or mundane end of Australia’s holiday accommodation sector, has been losing out to the more capital intensive, integrated end of the holiday industry, dominated by the airline related resort destinations. This applies to advertising, promotion, access to information about facilities and prices, product and price differentiation, reservation systems, co-operative marketing and sales representation, a position under constant combat from caravanning industry associations (Bailey 2011). The nature of traditional tourism source material has tended to emphasise particular social groups and activities percolating down from a wealthy elite to the mass of the population (Counts & Counts 2004; Towner 1995).

Large scale and organised tourism developments such as beachside resorts, mass entertainment or travel companies, have tended to generate their own literature and commentary while fragmented and informal activities such as caravanning have tended to go unrecorded. This results in a perspective noted by Towner (1995:340) that views the past ‘more in terms of key personalities, firms and organisations (for example Thomas Cook; Sir William Butlin; and Walt Disney) technological innovation (railways, ocean liners, motor cars, aeroplanes) and business innovations (traveller’s cheques, package tours, charter flights), rather than more informal activities’, like self-drive and caravan experiences. In addition, the statistical measurement of tourism only began in the 1920s and even here the bias towards international tourism data underplayed domestic activity (Burkart & Medlick 1974; Pearce, 1992 in Long 1994; Towner 1995). Thus, social history reflects important local and regional variations in leisure practices as it questions simplistic notions of class emulation (Towner 1995).

This study deals specifically with caravanning: the more ordinary and routine practices of a wider cross-section of the community; an activity which has
traditionally been portrayed as a pastime for the mass underclass, socially and economically removed from the affluent (Towner 1995). Contemporary society, however, gave its members not only the motives but also the means of escaping from the mundane work day life (Jafari, 1989; Crompton, 1979); money in the form of higher incomes, and increased leisure time because of ever shorter working hours and longer holidays (Crompton 1979; Hall 1995; Hollaway 1985; Jafari 1989). Coupled with the most significant technological factor in the growth of caravanning, the development of the car (RACQ 1931b; The Economist Group 1996), Kripendorf (1987) asserted that free driving was for free people. The motor vehicle had liberated people, and with such freedoms increasing demands were being placed on the fledgling caravanning industry (Figure 3).

![Figure 3 - Australia's earliest trailer caravan. Manufactured c.1923](http://vintagecaravans.proboards.com)

---

4 Source: http://vintagecaravans.proboards.com
2.3 CARAVANNING’S CONTRIBUTION TO TOURISM - THE CINDERELLA SYNDROME

‘Tourism is not only a matter of leisure, but is indeed one of Australia’s most important economic industries’ (Department of Resources Energy and Tourism 2011:2). In 2009/10, tourism consumption of goods and services was valued at $94 billion. Direct tourism Gross Domestic Product (GDP) of $33 billion increased 3.2% over the same period, in contrast to national GDP that grew at the slower rate of 2.3%, thus strengthening tourism’s place in share of GDP at 2.6% in an otherwise slowing economic climate. Direct employment in the main tourism industries increased 1.4% to 500,500 persons, also surpassing total employment growth of 1.3% (Department of Resources Energy and Tourism 2010). On a national scale, tourism accounts for over nine percent of total exports (Department of Resources Energy and Tourism 2011).

On a state by state basis, New South Wales (NSW) is the nation’s number one tourism contributor in both economic contribution and number of jobs generated. Tourism is a $51.1 million a day industry in NSW and supports 160,300 jobs (Gray 2011). It is a larger industry sector than mining, agriculture, manufacturing and information technology (Gray 2011). Tweed Shire, the case study area, lies within NSW and the regional zone of Northern Rivers. This region’s domestic market share in 2010 was 11.0% of both visitors and nights, with international market share of 37.6% and 18.8% for visitors and nights respectively (Tourism New South Wales 2010).

The Tweed Shire has the greatest combined proliferation of private and government caravan parks of all shires in NSW. In terms of bed capacity, caravan parks are the single largest tourism accommodation sector in the Tweed (Integrated Site Design Pty Ltd 2010). However, despite the sector’s significance to the regional economy its individual contribution in terms of tourism market share, employment and revenues is unpublished. At the NSW level caravan parks provide 51% of paid tourism beds (Bailey 2011) and nationally 16% of total domestic visitor nights are spent in caravan parks (Tourism Research Australia 2009). At the national level, caravan parks are the
second highest provider of domestic tourism accommodation and the
caravanning industry, including parks, manufacturing, sales and support
services, contributes 25% to total tourism revenues. As caravanning’s
contribution to tourism economies is now extremely important, as demonstrated
through the tiers above, the lament of commentators in the past was that small
tourism businesses, such as caravan parks, continually struggled to gain
positive profile (Burkart & Medlick 1974; Pearce 1989).

As a pioneer of tourism research on supply-side caravanning, Kelly (1994:37)
described the Australian caravan industry as the Cinderella subsector of
tourism with ‘caravan parks ... not reflecting high level interest among tourism
commentators.’ This ‘almost invisible’ positioning of caravanning, within tourism
history, has continued to be at the centre of debate over recent decades (Kelly
1994; Towner 1995) and is further evidenced through industry conferences at
national, state and association-specific levels over the last two decades.
Proceedings at the 1995 National Tourism Conference held in Hobart
highlighted that there was no simple answer to the lack of recognition afforded
to small tourism businesses, for example caravan parks. The reasons for the
lack of recognition varied from region to region and were based on an amalgam
of economic, regulatory, social, environmental and historic issues. A clear
message from the Conference was that small independent tourism operators
had to become actively involved in promoting the benefits of tourism at the
regional level while supporting their industry associations to lobby or advocate
at state and federal levels. The caravan industry accepted this challenge and
although still dependent on legislative and promotional support from all spheres
of government the driving force for the industry, in 2011, is the private sector
(Bailey 2011; Gray 2011). As caravanning’s economic importance to gross
domestic product has increased through product sales and accommodation
revenues, despite the loss of park infrastructure, so has its acceptance in
mainstream tourism media. Speaking at the New South Wales Caravan and
Camping Association State Conference in Kiama, Gray (2011) emphasised ‘the
caravan and camping sector is also a vital part of our tourism industry and we
really value our strong working partnership with the Caravan and Camping
Industry Association (CCIA) in undertaking joint campaigns to grow the sector and drive visitation to the regions.’ But this has not always been the case.

Bureau of Tourism Research (BTR) figures, first released in 1992, confirmed that the Australian caravan and camping industry was much bigger than many people realised and that they were also unaware of just how fast it was going to grow (Hayes 1996b). Helping to fuel that growth was the increasing desire by many domestic and international visitors to experience the beauty of the Australian bush (Lynch 1996), a movement that continues today (Bailey 2011; Salt 2004b). To facilitate this growing movement, visitors needed the help of an active, forward thinking caravan industry. The continued lack of economic appreciation of small business, including the caravan industry, remained apparent as noted by Hayes (1996a:42) through his comment: ‘and the people planning Australia’s tourism promotions, and spending the promotion budget, do not appear to be aware of the caravanning demand or that it is further predicted that the industry will need another 300 parks with another 61,000 sites within the next five years’. In stark contrast to this prediction, and despite the continued growth of the industry, particularly within the manufacturing sector, total caravan park numbers peaked around that same time before commencing a slow but consistent decline. Park numbers and consequently total sites capacity have continued to decrease at a rate of 10% and 7% respectively since 2003 (CRVA 2011a).

As a result of the diverging trend, between manufacturing and parks, across the 15 year period from 1995 to 2010 the net movement within the total industry resulted in employment numbers declining from 15,000 to 10,700. In contrast, however, total revenues increased from $1.1 billion to $6.5 billion annually (ABS 2010b; CRVA 2011a). Across a parallel period, a 1996 Caravan Industries Association (CIA) report claimed 84% of all Australians had had some direct association with the sector, while 56% indicated current or previous ownership of a related product, and over one quarter of all Australians had stayed in an on-site unit at a caravan park. By 2011, industry figures for New South Wales alone report 87% of Australians have stayed in a park, and the
parks provide for 620,000 holidays per annum with 51% of available commercial tourism beds in caravan parks (Bailey 2011).

Apart from the category of ‘staying with friends or relatives’, more Australians choose to holiday in caravans, cabins or tents than any other individual category of accommodation (Bailey 2011; Gray 2011). Conservative estimates of Recreational Vehicle Manufacturers Association Australia (RVMAA) figures demonstrate that the caravan manufacturing industry injected 50,000 new beds into the Australian tourist market in 2010 (RVMAA 2010) (Table 3).

Table 3 - Annual ‘new’ tourism beds provided by caravan industry^5

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Beds per Unit</th>
<th>Total Beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caravans</td>
<td>9,600</td>
<td>2</td>
<td>19,200</td>
</tr>
<tr>
<td>Pop-tops</td>
<td>5,700</td>
<td>2</td>
<td>11,400</td>
</tr>
<tr>
<td>Campervans</td>
<td>250</td>
<td>2</td>
<td>500</td>
</tr>
<tr>
<td>Camp Trailers</td>
<td>4,100</td>
<td>2</td>
<td>8,200</td>
</tr>
<tr>
<td>Motor Homes</td>
<td>1,300</td>
<td>2</td>
<td>2,600</td>
</tr>
<tr>
<td>5th Wheelers</td>
<td>150</td>
<td>2</td>
<td>300</td>
</tr>
<tr>
<td>Cabins</td>
<td>1,500</td>
<td>5</td>
<td>7,500</td>
</tr>
<tr>
<td><strong>Total New Tourist Beds for 2010</strong></td>
<td><strong>50,000</strong></td>
<td><strong>50,000</strong></td>
<td><strong>50,000</strong></td>
</tr>
</tbody>
</table>

These estimates do not include tents, a subsector that is also displaying strong growth (Bailey 2011). No other industry sector puts as many new beds into the tourism industry annually.

The evolution of caravanning, and consequently the need for caravan parks, may therefore still be regarded as the result of the historic interplay between social, political, economic and technological forces on, and within, Australian society (Figure 4) (Cohen 1972a; Hall 1995; Peat 1977; Stretton 1989). As the nation’s attention has been focused on the fate of glamorous resorts and international tourism, a steady movement in the revival of the very affordable ‘Aussie’ touring caravan tradition is certainly picking up pace (Bailey 2011; CRVA 2011a; Gray 2011; Tourism Research Australia 2007).

^5 Source: Adapted from rounded RVMAA 2010 manufacturing figures
2.4 **Driving Demand for Caravan Parks - Australian Leisure Patterns**

Perhaps the first domestic tourists in Australia, broadly defined, were the indigenous people who moved ‘camp’ with seasonal regularity to find food and participate in ceremony (Kijas 2002). Next were the explorers and runaway convicts (Tweed Heads Historical Society 2009), followed by farmers and squatters from the outlying districts who travelled to the towns and villages for supplies and relaxation (Blainey 1975). It was not until the advent of the rail and later automobiles (Colwell 1972; Davis 1987) that the beach became the major focus of Australians’ leisure activities. For example, when rail access became available to Brighton Beach from Melbourne in December 1861, it was regarded as providing a means for healthy recreation to thousands and tens of thousands of the citizens of Melbourne (The Age, 21 December 1861 in Hall 1995). Similarly, trains would ferry day-trippers and tourists from the industrial city of Ipswich in Queensland to the coastal resort of Coolangatta at the turn of the century. On weekends and holidays, the foreshores were transformed into tent alleys (Figure 5) (Russell 1995; Tweed Heads Historical Society 2009).

---

6 Source: Adapted from Hall, C 1995
Most tourist activity and development in Australia has occurred at or near the beach, since at least half the population has always lived in the coastal capital cities. For the majority of Australians, the beach has been close, cheap and easy to get to (Craik 1991; Salt 2004b). The warm climate made it useable for most of the year. Despite this accessibility, holiday-making at the beach attracted moral censure throughout the nineteenth century as legislation enacted by the New South Wales and Victoria governments, in 1833 and 1841 respectively, prohibited surf bathing during daylight hours (Pearson, 1979 in Craik 1991). Beaches could only be used for ‘promenading, picnicking, and paddling’ (Art Gallery of NSW, 1982:4 in Craik 1991) with dress regulations applying to female apparel (Figure 6).

From the turn of the century holiday patterns forced the State (NSW) to sanction and cater for a burgeoning social habit, with surf bathing rapidly gaining in popularity as a beach culture developed (Blainey 1975; Pearce 1989; RACQ 1934, 1935, 1936b).

---

7 Source: Russell, R 1995:88
Subsequently, voluntary Surf Lifesaving Clubs were established. Firstly in Bondi (1903), Manly (1910) and Cudgen on the Tweed Coast in 1934 (Pearson, 1979 in Craik 1991; Hall 1995; Tweed Heads Historical Society 2009). The existence of these clubs gave a boost to surf/beach culture, attracting young people to join, and guaranteeing safe swimming.

The Gold Coast, in south-east Queensland, also grew rapidly during the first decade of the twentieth century. The earlier resorts of Southport and Coolangatta were soon to be challenged by Elston as the new drawcard of the Coast. The decision to rename Elston ‘Surfers Paradise’ in 1933 was prophetic. It quickly became Australia’s premier beach destination (Holthouse, 1982a in Craik 1991; Leiper 1995) with large camping grounds, later to become caravan parks, established at Main Beach to the north and Broadbeach to the south. The later is now the site of Queensland’s first casino, Conrad Jupiters.

Although critics ridiculed the rudimentary camping facilities that were available at many sites (RACQ 1931c), the habit of holidays was well entrenched.

8 Source: Sullivan 1982:60
According to a 1949 Queensland Bureau of Industry survey on holiday habits (Annon, 1950 in Craik 1991), most people had travelled by car and had visited a number of places rather than staying in one resort, 78% saying they sought ‘surf and water resorts’ as the site for their holiday. Most holiday-makers in Australia found their own accommodation (or stayed with friends and relatives) and made their own fun (Peat 1977). Organised holiday camps, for example those established by Butlin and Potter in England or even Club Mediterranee in France, were not replicated to the same extent in Australia. These organisations were in the business of providing a complete holiday experience; one week’s holiday for one week’s pay - including all meals, accommodation and organised entertainment (BBC 1995). Australian establishments which remotely resembled the 1950s Butlin style leisure concept, were those like the traditional Queensland guesthouses of ‘Beachouse’ and ‘Greenmount’ at Coolangatta (Figure 7), O’Reilly’s and Binna Burra on the Lamington Plateau or Mt. Buffalo and Mt. Buller in the Victorian Alps.

![Figure 7 - Patty Fagan’s Greenmount Guesthouse c.1908](image)

A caravanning attempt along Butlin lines was the development in 1972 of Valla Park, south of Coffs Harbour. Here a range of accommodation options were

---

9 Source: Russell, R 1995:85
offered, including tents, on-site vans and cabins, but the emphasis remained on communal dining and organised leisure activities. While the communal dining concepts at Valla Park were not successful and the original company went into receivership (N Leiper 1996, pers. comm., 15 March) the caravanning aspect continues to this day.

Many people return to beachside camping grounds, such as Valla Park and others before it, year in and year out as Marles (2006) described through her study on Repeat Visitation to Australian Caravan Parks. What began as a family getaway often turned into a long-standing tradition with multiple families, spanning several generations, in camp together (Northover 1995). The families usually started out in tents; however, kerosene cookers, pump lamps and rotten food in Coolgardie safes were replaced over time by powered sites, microwave ovens, television and pressured water in caravans and cabins (Northover 1995), often with an individual ensuite and direct cable telephones (Tweed Extra 1993). ‘It’s relaxation we look forward to and there’re a lot of families that have been coming here for a long time too, so we’ve made a lot of friends’ (Gascoigne 1994:23).

Through the 1960s and 70s, ordinary families took the pilgrimage with predictable regularity (Marles 2006). During the summer months, virtually overnight, tiny towns blossomed into caravan and tent cities where families had been holidaying for years, even generations (King 1994; Marles 2006; Onyx & Leonard 2005; Rohde 1996). However, toward the later part of the twentieth century, Australians became polarised in their quest for national cultural identity. At both extremes stood the ‘bronzed Aussie’, but there the similarity ended. Bondi, surf and sand, lifesavers and leisure may be the image which had been commonly portrayed in tourism promotions.

However, an icon depicting pioneering Australians, represented by explorers, settlers, drovers, and swagman of the ‘outback’ (Figure 8) was soon to serve as an equal draw-card for tourists, both domestic and international, as they were expressing a desire to experience more of the Australian bush (Bailey 2011; Cridland 2008; NTTC 1994).
As described by McGrath (1991), the ‘outback’ is a pivotal symbol of Australia and Australian culture; it is central to national mythology. The outback’s politically unifying symbolism is enhanced by its geographical spread, which overrides state boundaries and lacks ‘edges,’ and thus emerged as a nationalistic identification, synonymous with ‘Anzac’. Newmans, a motorhome and coach company, capitalised on this theme by advertising their 1990s products as a ‘Dreamtime Holiday’ a ‘Timeless Land Holiday’ a ‘Red Heart’ and a ‘Never Never Land Holiday.’

Similarly, the Northern Territory Tourism Commission (NTTC 1994) used the slogan - If you never never go, you will never never know - colloquially referring to the outback as the ‘never never’ (Gunn 1990). Most recently, Apollo Motorhome Hire of Brisbane introduced a specialist ‘off-road’ motorhome to their national suite of hire vehicles in recognition of the demand for rural

---

10 Source: Tainsh, D 1996:4
Australian experiences away from the tar (Hinchcliff 2011). Many of these experience-seekers have for several decades now, been retirees (Cridland 2003; Ming 1997).

As noted by commentators across at least three decades, retired people have more time for travel and many, having completed the major expenditures of purchasing a home and raising a family, now have more discretionary funds, including superannuation, available for travel (Cockerell 1993; Glover & Prideaux 2009; Guinn 1980; Onyx & Leonard 2005; Weaver et al. 1994). The retired sector of society has become an important element of the tourism market; although as Doxey (1983, in Murphy 1985) and Lago & Poffley (1993) warned; a lot depends on how society treats its elderly and prepares them for their increased leisure opportunities. Many retired people choose to travel in the off season, Australia’s winter months (Brann 2006; Cridland 2008), to avoid the crowds and to stretch their vacation dollar. Some invest in a motorhome or caravan to become the new nomads (Glover & Prideaux 2009; Ming 1997; Onyx & Leonard 2005) following the sun, while a growing element are also now simply choosing to live in the tourist zone (Holloway & Hollaway 2011), travelling and residing in the caravans and motorhomes 365 days of the year (Figure 9).

![Figure 9 - Mobile residential outfit. c.2011](image_url)

Others permanently retire to popular tourist destinations in the sun-belt regions, utilising relocatable home parks. While the latter are not strictly tourists, they settle in touristic areas and become an influential force in the development of these communities (Kijas 2010; Murphy 1985; Salt 2004a). The caravan
industry therefore cannot stand still and must continually revise its facilities, attractions and product to meet the changing demands.

In this regard, as the field’s foundational quantitative research on Australia’s ‘grey nomads’, Ming’s (1997) study of the ‘snowbirds’ in far north Queensland, is worth revisiting. The study of 308 caravanners revealed the following statistics:

- Element caravanners most like - Climate - 81.7%
- Most popular daily activity - Sightseeing - 94.8%
- State of origin - VIC - 39.2%; NSW - 32.7%; SA - 16.7%
- Average length of stay in one park - 34.9 days
- Average time away from home - 128.3 days
- Some people had travelled north for 40 years
- 81% however, have done it for between 1 and 10 years
- 89.9% have stayed in the same park between 1 and 5 years
- 53.3% travel with a 4.5 metre caravan, the most popular size.
- A total of 85% of caravans are under 5.1 metres
- 64.4% stayed in a caravan park before they bought their own vans

When travelling north, there was approximately an equal split of those travelling via the coast road most of the way and those travelling inland most of the way. Nearly 40%, however, travelled inland to Queensland and then headed over to the coast at some point, generally at a point from Bundaberg north. Many had no plans for their return route (Ming 1997).

Such demand-side themes have been further studied, replicated and/or appropriately expanded across the ensuing years through the works of Cridland (2003, 2008), Onyx & Leonard (2005), Marles (2006) and Prideaux & McClymont (2006) who each looked at mobility and trip patterns, friendship, repeat visitation and changing profiles of caravanners, respectively. While minor variations away from the individual statistics produced by Ming could be found through the latter works, the general themes remained solid. The notable
exception is the growing number of caravanners choosing freedom camping over commercial camping, thus reducing nights spent in caravan parks. This phenomenon has not gone unnoticed by others (Bailey 2011; Brooker 2011; Cridland 2008; Glover & Prideaux 2009; Holloway 2007; Prideaux & McClymont 2006) and is also acknowledged through several government enquiries (Morehead 2011; Nahan 2009).

Such shifts in consumer travel behaviour are not new to tourism. Murphy (1985) observed that when the first energy crisis of the 1970s resulted in a world-wide recession, a surprising number of newly unemployed people in the United States were booking overseas vacations and cruises. A survey of these visitors revealed that they were responding to the ‘growth factor’ forces (Table 4).

Table 4 - Growth factors in evolution of tourism\(^{11}\)

<table>
<thead>
<tr>
<th>Era</th>
<th>Motivation</th>
<th>Ability</th>
<th>Mobility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-industrial</td>
<td>Exploration and business</td>
<td>Few travellers, those that were involved</td>
<td>Slow and Treacherous</td>
</tr>
<tr>
<td></td>
<td>Pilgrimage-religion</td>
<td>were wealthy, influential or received</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Education</td>
<td>permission</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>Positive impact of education, print and</td>
<td>Higher incomes</td>
<td>Lower transport costs</td>
</tr>
<tr>
<td></td>
<td>radio</td>
<td>More leisure times</td>
<td>Reliable public transport</td>
</tr>
<tr>
<td></td>
<td>Escape from city</td>
<td>Organised tours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Colonial empires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer society</td>
<td>Positive impact of visual</td>
<td>Shorter working week</td>
<td>Growth of personal</td>
</tr>
<tr>
<td></td>
<td>communication</td>
<td>More discretionary</td>
<td>transportation</td>
</tr>
<tr>
<td></td>
<td>Consumer society</td>
<td>income</td>
<td>Faster and more</td>
</tr>
<tr>
<td></td>
<td>Escape from work</td>
<td>Mass marketing</td>
<td>efficient transport</td>
</tr>
<tr>
<td></td>
<td>routine</td>
<td>Package tours</td>
<td></td>
</tr>
<tr>
<td>Future</td>
<td>Vacations a right and necessity</td>
<td>Self-catering</td>
<td>Alternative fuels</td>
</tr>
<tr>
<td></td>
<td>Combined with business and learning</td>
<td>Smaller families</td>
<td>More efficient transportation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Double income household</td>
<td>Greater use of public</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Demographic trends</td>
<td>transport and package</td>
</tr>
<tr>
<td></td>
<td></td>
<td>favour travel groups</td>
<td>deals</td>
</tr>
</tbody>
</table>

For the first time they had cash in the form of severance pay and time (ability) to fulfil their dreams (motive), and they were not going to let a temporary setback deny them this opportunity. The author’s personal experiences, while managing ‘Travellers Rest Caravan and Camping Park’ in north Queensland,

\(^{11}\) Source: Murphy, P 1985:22
were that this cycle was mirrored during the late 1980s and early 1990s in Australia as confirmed with Victorian Caravan Club member, J Baird (1996 pers. comm., 29 October) ‘a considerable number of people in their forties were travelling as the result of “redundancy payouts”. Some were looking to relocate to Queensland from southern states while others were simply enjoying the freedom of finally having the ability to travel, which they would not otherwise have had’.

Another shift within the Australian social and travel scene occurred during the 1980s; an era when a lot of children were growing up without ever having been in a caravan. Instead they learnt to be international travellers as competition from resort development and cheap packaged Pacific holidays intensified. ‘Given the choice between six nights in Fiji for $799 and having $9,000 invested in a caravan, holidaymakers took Fiji’ (E Hayman 1996, pers. comm., 25 October).

After several years of concentrating on luxury pop-tops and vans designed for two - with their eyes firmly fixed on the boom in early retirees and ‘golden hand-shake’ recipients - manufacturers are once again addressing budget conscious family caravanners and the not so budget conscious adventure (toy-hauler) tourists (Jayco Corporation 2011) (Figure 10). As evidenced by sales at the 2011 caravan and camping shows, manufacturers would be pleased by the demand once again for family accommodation (CCIA 2011b). Show organisers in every state reported an increase in attendance on previous years with a new generation of young campers, families and touring caravanners, whose demands and buying power are once again sparking a shake-up in caravan design, industry marketing and caravan park supply (CCIA 2011a).
2.5 Supply-side Research Gap

‘Although caravanning is a popular form of tourism in Australia, Europe, South Africa and the USA, this sector remains an under researched aspect of tourism’ (Prideaux & McClymont 2006:450).

Caravanning and caravan parks, as discrete subsets of the Australian domestic tourism sector, have only recently been illuminated by the growing number of ‘grey nomads’ (Cridland 2003; Higgs & Quirk 2007; Holloway 2007) or ‘snowbirds’ (Ming 1997; Onyx & Leonard 2005) now observed towing their caravans along national coastal motorways, regional inland highways, local rural service roads and remote outback ‘kangaroo’ tracks, 365 days of the year. This high visibility has brought new prominence to the caravanning sector, one largely unrepresented in existing academic literature, despite the current maturity and dimension of the industry internationally. There is a common view that with ‘relatively low attention having been paid to caravanning (and caravan parks) as a social phenomenon and even less in terms of their business dimensions’ (Hayllar et al. 2006:112) there is considerable scope to expand
research into this rapidly expanding form of drive tourism (Hardy & Gretzel 2008; Kelly 1994; McClymont et al. 2011; Prideaux & McClymont 2006; Van Heerden 2008).

Notable exceptions to the caravan-related research void are evident, however, in the disciplines of social planning and social welfare. The triangulated association between long-term caravan park residency (Greenhalgh 2003; Lay 1998), affordable community housing (Beckwith 1998; Boer 1978; Mowbray & Stubbs 1996; Squires & Gurran 2005; Stuart 2005) and community health (Eddy nd; Grigg et al. 2008; Llewellyn-Jones et al. 2004; Newton 2011; Zenner & Allison 2010) has been extensively reported. Many caravan parks originally developed for tourism have over time converted to permanent living precincts, an irony as in many regional areas this was the genesis of caravan parks.

The transition often causes friction between permanents and tourists and vice-versa, as the change creeps in. Again, ironically, some of these same parks, particularly those in coastal zones, are now under a new threat; that of redevelopment away from existing permanent and annual-van use rights back to tourism (Benny-Morrison 2010; Caton 2011a; Northern Star 2010; Tweed Daily News 2011; Weekes 2010). As reported in the press, ‘One of the hottest topics of the moment on the Tweed is caravan parks’ (Caton 2010; Tweed Daily News 2011:8) describes community sentiment over plans for redevelopment of several foreshore caravan parks in the Tweed Shire. Squires (2005) promotes the concept of local policy makers developing holistic housing strategies to protect and promote affordable housing, including the maintenance of minimum residential sites in caravan parks, an issue highlighted right across the country (Nahan 2009; Paddenburg 2011).

Kelly’s (1994) metaphoric ‘Cinderella’ reference to caravanning for touring is supported through the tourism literature. Firstly, this is due to the perceived positioning of the sector at the ‘non-sexy’ end of the accommodation spectrum in terms of domestic and international tourism marketing with ‘studies of the [tourist] accommodation industry in Australia having tended to ignore the caravan sector’ (Kelly 1994:39). Secondly, ‘the sector is under-recognised for its economic value in terms of both gross tourism expenditure and also
domestic accommodation capacity’ (Hayllar et al. 2006:112). Thirdly, as Hardy and Gretzel (2008:2) so bluntly quote Counts and Counts’ (2004) US perspective that ‘the lack of interest in this group of travellers may be associated with the stigma associated with transient lifestyles and the assumption that RV’ers [caravanners] are cheap, poor and comparable to gypsies or “trailer trash”. In steep contrast to this latter notion, the UK government maintains extensive statistics on “Gypsy and Traveller Caravans” through a bi-annual census of authorised and unauthorised transit pitches [caravan sites] (Department of Communities and Local Government 2009). Additionally, the symbolism of wealth among the Australian caravanners of today is, in some respects, exemplified by the popular RV brand of Winnebago, a far cry from “trailer trash”.

The growing demand for caravanning services and infrastructure from the grey nomad gypsy lifestylers, families and younger off-road recreationists is placing dichotomised pressure on the caravan industry. In such an environment it is critical for leaders and managers of the industry’s resources to have a understanding of supply-side infrastructure if it is to sustainably service this new wave of caravanning interest. Recognising the fickle nature of consumer preferences for travel and leisure experiences, and the cyclical nature of resource allocation, this study sets caravanning within the context of a destination to review the industry from the TALC perspective.

2.6 TOURIST AREA LIFE CYCLE

2.6.1 FOUNDATIONS

A noticeable omission from the current range of tourism case study literature is the application of Butler’s (1980) Tourism Area Life Cycle (Figure 11), or any other models, as a conceptual framework of analysis for the supply-side caravan park sector. The scope of this thesis does not allow the author to debate, in great detail, the complete merits of, and challenges to, the TALC as a framework for destination analysis. As the model has now been in the tourism research domain for over 30 years it will be assumed that its theory is well understood, even if not fully accepted. Noted challenges to the model are acknowledged and will be discussed later in this chapter.
As the TALC is a fundamental component of this research, a brief overview of the model and a summary of critical reviews, by others, follow. Butler’s (2006a:4-5) explanation of the TALC is as such:

The pattern which is put forward here [through the hypothetical evolution of a tourist area] is based on the product life cycle concept, whereby sales of a product proceed slowly at first, experience a rapid rate of growth stabilise and subsequently decline: in other words, a basic asymptotic curve is followed. Visitors will come to an area in small numbers initially restricted by access, facilities, and local knowledge [Exploration/Involvement Stage]. As facilities are provided and awareness grows, visitor numbers will increase [Development Stage]. With marketing, information dissemination, and further facility provision, the area’s popularity will grow rapidly [Consolidation Stage]. Eventually,
however, the rate of increase in visitor numbers will decline as levels of carrying capacity are reached [Stagnation Stage]. These may be identified in terms of environmental factors, (e.g. land scarcity, water quality, air quality), of physical plant (e.g. transportation, accommodation and other services), or of social factors (e.g. crowding, resentment by the local population). As the attractiveness of the area declines, relative to other areas, because of the overuse and impact of visitors, the actual number of visitors may also eventually decline [Decline Stage].

2.6.2 Reviews

Of the numerous insightful articles that have explored the TALC concept from conceptual, theoretical, operational and predicable standings (Butler 2006a, 2006b, 2009; Cooper 1992; Getz 1992; Haywood 1986; Hovinen 2002; Prosser 1995), a very early adverse reaction to the TALC was presented through Haywood’s (1986) article – *Can the tourist area life cycle be made operational?*

Haywood’s (1986) discussion is particularly pertinent to the current study that seeks to explore the TALC’s potential for operational ability in respect to caravan parks. He argued that ‘the true test of the importance of the life cycle must be based on its possibility to be used as a tool for the planning and management of tourist areas’ (1986:154). Thus, Haywood contested that prediction is essential to determining specific management actions. As such, to predict unambiguously the exact position or stage of the cycle in which a tourist operation sits requires the researcher to define six operational indicators: (1) unit of analysis; (2) relevant markets; (3) pattern and stages of the tourist area of life cycle; (4) identification of the area’s shape in the life cycle; (5) unit of measurement; and (6) determination of the relevant time unit (Haywood 1986).

Most tourist area lifecycle studies have focused on tourist destinations as the unit of analysis; however, no a priori rule has been established as to the correct unit. Rather, the selection should be based on the need and intended use of the information. Similarly, most past studies have focused on visitation at the total market level. Haywood (1986) submits that there are occasions in which it may be appropriate to consider the resort-area lifecycle by market type, distribution method or market segment. Similarly, the unit of measurement could go beyond the typical visitation and/or expenditure models to include
market share or profitability with an arbitrary percentage rise or fall across discrete timeframes, indicating that movement was occurring between stages.

These parameters would not normally be questioned in the practical sense, although Butler (2011) reminds us that the TALC, as a conceptual model, was presented merely to draw attention to the dynamic nature of destinations as they go through six identifiable stages of development rather than presenting discrete time scales or units of measurement required for empirical predictions. Without sustainable and strategic management intervention, during each stage, Butler (2011) argues that the inevitable conclusion is demise, thereby having implications for management of resources and operational survival in a competitive and changing environment.

Contrary to Haywood’s (1986) position, other commentators including Hovinen (Hovinen 1982) and Weaver (1988, 1990) came out in support of the model. Weaver found that tourism developments on the Caribbean islands of Antigua and Grand Cayman ‘did conform in many critical respects with Butler’s model’ (Weaver 1990:15) with notable management intervention through the 'implementation of a development plan to regulate growth' (Weaver 1990:14). However, contrary to the normal form of the TALC, in the Grand Caymans, Weaver found that during the development phase, when local ownership and control is usually diminishing in favour of external or international capital injections, the opposite occurred due to the dominance of the industry to the island’s total economy, employment and way of life.

Other variances, away from particular stages, have also been advanced. Hovinen (2002:211) cites Agarwal (1994) who suggests that unlike the inference in the original model, ‘a destination is made of multiple products rather than being singular in nature’. Thus consideration of the wider environment and the unit of analysis are critical. Baum (1998a) proposes exit and entry points within the rejuvenation stage to extend the lifecycle by multiple reinventions; and Russell and Faulkner (2004) emphasise the management intervention aspect that is so implicit in Butler’s (1980) paper by introducing chaos theory and the role of entrepreneurs. This intervention aspect implies that it is “nurture” rather than “nature” that creates the conditions that move a
destination through the stages of evolution, a notion also supported by McKercher (1999). The applicability of each of these viewpoints, with respect to a case study of Tweed Shire caravan parks, is that each park will be surveyed as an individual unit but will also be aggregated so as to form a subset of a whole product, Tweed Shire Parks, which, as a cluster, sit within the broader regional tourism destination of Tweed Shire.

Recognising the conceptual and empirical limitations of the TALC, Prosser (1995) provided further critique and highlighted three main factors that contributed to the enduring attraction of the TALC concept: (a) the model is easy to comprehend and fills a void in tourism conceptual frameworks; (b) it has intuitively strong appeal to researchers as it has sufficient descriptive power at a superficial level: and (c) that research already exists in a range of different tourism arenas that provide qualified empirical support for the model. Prosser (1995:318) confirmed that a number of these studies have led to refinements and embellishments of the model to account for specific evolutions of destinations or particular interests of the research. However, he concluded, without dismissing its problems ‘that the destination life cycle provides a valuable framework for the description and analysis of tourism development processes’.

2.6.3 Case Studies

Considerable examples of the TALC underpinning research case studies at a country or county level (Hovinen 1982; Marois & Hinch 2006), island level (Aguíló et al. 2005; Douglas 1997; McElroy & Hamma 2010; Reisenwitz 2007; Terkenli 2005), destination level (Faulkner & Tideswell 2006; Getz 1992), city precinct level (Snepenger et al. 2003) and attraction level (Clave 2010) have been published. Also, attempts to compare rise and fall scenarios of hotels (Claver-Cortés et al. 2007; Solnet et al. 2010), industry sectors such as conference or honeymoon venues (Reisenwitz 2007; Whitfield 2009), city precincts (Snepenger et al. 2003), ski resorts (Müller et al. 2010; Nordin & Westlund 2009), beach resorts (Russell & Faulkner 1998) backpacker hostels (Brenner & Fricke 2007), ethnic or cultural tourism (Morais et al. 2006) and the likes, to the standard ‘s’ curve of the TALC have all been reported.
Alternative approaches to modelling resort development have also been developed, including the Resort Development Spectrum (RSD) (Prideaux 2000). While Prideaux’s RSD displays superficial similarities to the TALC in that it too presents development passing through five stages, its approach is from an economic perspective. Price, demand, supply and equilibrium are the economic forces that drive the market and consequently move the development across stage boundaries, not necessarily automatically or sequentially. The discrete markets of: (a) Local; (b) Regional; (c) National; and (d) International create the demand across the RDS. However, carrying capacity, a hotly debated and denigrated concept, and the role of external political and economic forces, among others, influence the final stage of stagnation, rejuvenation or decline. ‘The model represents the growth path of resorts, based on partial equilibriums at specific points in the development process on a continuum’ (Prideaux 2000:225), rather than the discrete steps of the TALC.

While it is important to recognise the RDS and other modelling frameworks that exist to explain the development cycle - Chaos approach (McKercher 1999) and Synthetic approach (Papatheodorou 2003) and Travel Balance approach (TBA) (Toh et al. 2001) for example - each has not been subjected to the same level of critical review through the academic literature as the TALC. Nor have they been so widely adopted to underpin case study tourist area development. To this end, the TALC remains the most relevant theory to underpin the aim of this current research.

Acknowledged by Butler himself (2011:3) ‘rather surprisingly the model proposed ... is still being cited. That fact alone makes the TALC somewhat extraordinary.’ Ironically, Butler is alluding to the notion that most models in themselves bear the cross of time and eventually out-live their usefulness, or in fact, as with destinations, pass through their own ‘lifecycle’. However, the breadth and depth of literature and case studies, all underpinned in some way by the TALC, highlights the validity, robustness and ongoing relevance of the model and give credence for further academic endeavour in this area.
2.7 FILLING THE SUPPLY-SIDE RESEARCH GAP

This study makes a contribution to the existing body of literature, partially filling the supply-side gap. It provides a valuable benchmark to inform future caravan park management and development strategies in the preservation and sustainable promotion of the Australian caravanning culture; firstly, at a whole-of-Australia level and, secondly, at a specific regional level.

At the regional level this study analyses Tweed Shire trends, in both park development as a whole product sector and then site-mix elements as sub-sectors, through the period from 1970 to 2010 against Butler’s (1980) Tourist Area Life Cycle model.
3 METHODOLOGY

3.1 INTRODUCTION

This study proposes a ‘concurrent mixed-methods design’ as described by Teddlie and Tashakkori (2006:20) whereby both qualitative and quantitative techniques have been considered through the phases of the study design: conceptualisation, data collection, data analysis and inference. The data was collected and analysed in three parts, each leading to its own set of discrete findings reported in individual chapters. The three parts are outlined in Table 5.

The terms ‘methodology’ and ‘methods’ are often incorrectly interchanged. Dunford (2004) reminds us that while methods refer to how the data will be collected, methodology relates to why the theory of the data collection method is most appropriate for the research question. However, a mixed-methods study (Creswell 2009; Teddlie & Tashakkori 2009) combines, integrates or mixes quantitative and qualitative techniques, where neither type is inherently linked to any particular inquiry paradigm. This ‘pragmatic approach’ (Tashakkori & Teddlie 2003:xi), supported by Morgan (2007) and Green et al (2008) is a substantive paradigmatic shift from the traditional, dominant or purist view which states the contrasting dualism that positivism and constructivism should not be mixed and that the research should firmly take either a quantitative or qualitative approach.

Teddlie and Tashakkori (2006) argue that mixing enhances understanding of the given enquiry problem through convergence in stories, thus enriching the overall findings. The core principle of such an approach is that the sum of the parts is greater than that of any methodological stance if adopted alone, ‘challenging the incompatibility of paradigms argument’ (Creswell 2009:102).

In summary, mixed-methods expands the scope of the study (Greene et al. 2008) thereby providing significant enhancement (Tashakkori & Teddlie 2003) to the outcomes. It is therefore considered an appropriate design in relation to the central aim of the study and more specifically, the individual research questions as presented in Chapter One.
Table 5 - Research design

<table>
<thead>
<tr>
<th>Research</th>
<th>Part 1</th>
<th>Part 2</th>
<th>Part 3</th>
<th>Part 3A</th>
<th>Part 3B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective</strong></td>
<td>Interpret the history of <em>caravan manufacturing</em> in Australia</td>
<td>Interpret the history of <em>caravan park</em> development in Australia</td>
<td>Measure caravan park <em>site-mix</em> historical development within Tweed Shire from 1970 to 2010</td>
<td>Describe evolution of Tweed Shire <em>caravan parks</em> from 1820 to 2010 within the TALC framework</td>
<td></td>
</tr>
<tr>
<td><strong>Paradigm</strong></td>
<td>Interpretivist</td>
<td>Interpretivist</td>
<td>Positivist</td>
<td>Pragmatist</td>
<td></td>
</tr>
<tr>
<td><strong>Ontology</strong></td>
<td>Multiple realities</td>
<td>Multiple realities</td>
<td>Universal truths</td>
<td>Integrations</td>
<td></td>
</tr>
<tr>
<td><strong>Epistemology</strong></td>
<td>Subjective</td>
<td>Subjective</td>
<td>Objective</td>
<td>Inter-subjective</td>
<td></td>
</tr>
<tr>
<td><strong>Methodology</strong></td>
<td>Qualitative</td>
<td>Qualitative</td>
<td>Quantitative</td>
<td>Abductive</td>
<td></td>
</tr>
<tr>
<td><strong>Methods</strong></td>
<td>Unstructured interviews</td>
<td>Content analysis</td>
<td>Chronological analysis</td>
<td>Unstructured interviews</td>
<td>Structured survey Open and closed questions with coded responses</td>
</tr>
<tr>
<td><strong>Respondents</strong></td>
<td>Industry experts</td>
<td>Industry experts</td>
<td>Tweed Shire caravan park owners or managers</td>
<td>Park owners or managers Industry experts Local historians</td>
<td></td>
</tr>
<tr>
<td><strong>Selection technique</strong></td>
<td>Purposeful expert or snowballing choice (n=17)</td>
<td>Purposeful expert or snowballing choice (n=20)</td>
<td>Census or saturated sample approach (N=28)</td>
<td>Mixed - see Parts 1,2&amp;3a</td>
<td></td>
</tr>
<tr>
<td><strong>Collection frame</strong></td>
<td>Longitudinal</td>
<td>Longitudinal</td>
<td>Longitudinal</td>
<td>Longitudinal</td>
<td></td>
</tr>
<tr>
<td><strong>Data points</strong></td>
<td>1970 – 2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Data Source</strong></td>
<td>Personal letters Written memoirs Conference presentations Speeches Company reports Association files Oral (personal or telephone) life-history interviews E-mail communications</td>
<td>Personal letters Written memoirs Conference presentations Speeches Company reports Association files Oral (personal or telephone) life-history interviews E-mail communications</td>
<td>Real and coded data sets retrieved from survey responses Oral verifications Web verifications</td>
<td>Mixed – see Parts 1,2&amp;3a</td>
<td></td>
</tr>
<tr>
<td><strong>Data analysis</strong></td>
<td>Reduction, display, conclusion forming and verification</td>
<td>Reduction, display, conclusion forming and verification</td>
<td>SPSS, descriptive - measures of central tendency and frequencies</td>
<td>Mixed - see Parts 1,2&amp;3a</td>
<td></td>
</tr>
<tr>
<td><strong>Presentation</strong></td>
<td>Descriptive text, historic images, tables and graphs</td>
<td>Descriptive text, historic images, tables and graphs</td>
<td>Descriptive text and graphs</td>
<td>Meta-inference Descriptive text, images and a model</td>
<td></td>
</tr>
</tbody>
</table>
3. Methodology

3.1.1 Research Approach - Part 1 and Part 2

Parts 1 and 2 of the study translate the historic evolution of the Australian caravanning industry from the personal correspondence, writings, memories, and interpretations of a small and purposely selected range of respondents. A qualitative constructivist paradigm (Creswell 2009; Jennings 2010; Ponterotto 2005) is assumed to best satisfy the exploratory research objectives of these two stages of the study.

Participants were identified in two ways: (a) through an advertisement in a popular industry magazine; and (b) through a snowballing or expert choice approach (Brotherton 2008). As contact was made, either through their direct contact with the author in response to the advertisement or through the author’s direct approach to them as a referred expert, participants were verbally advised of the study purpose and offered further written materials outlining the purpose, method and proposed outcomes of the research. A key driving factor for participant contact was their direct engagement, either current or previous, in the industry. As such, all participants were very generous with their time and very willing to have not only their story, but the history, told.

A simple but systematic, manual cross-case analysis as described by Babbie (2010) was adopted to elicit ‘time series’ or ‘chronological’ patterns (Veal 2005) from secondary sources obtained from the participants and through supplementary archival libraries. These sources included direct correspondence to the author, conference key note addresses, company summary reports and annual reports, speeches, and grey literature. Historic developmental milestones are reported in a purely descriptive, narrative and chronological manner. In addition, personal verbal communication with each respondent took the form of an unrecorded and unstructured interview (Minichiello et al. 1995) where the social interaction between the interviewee and the interviewer, with their permission, facilitated quotable notes to be taken that supplemented existing written material previously sent, or to elicit new material where gaps existed.

The distinct advantage of this form of interview over structured interviews is that it allows for greater in-depth probing to unearth values, opinions and attitudes.
of the participants (Jennings 2010). As such, while every participant’s interview was totally individual, and sometimes multiple, it quickly became evident through the process that an ‘informal and remote’ interest group was forming in the background as several participants were liaising between themselves and then relaying various third party reports to the author on behalf of others. For example, it was not uncommon for a participant within one association (e.g. State level) to be relaying conversations that had taken place between themselves and a colleague within another association (e.g. national level) about what each had provided or were looking to provide to support the ‘story’ of their industry; the research project. This informal ‘research team’ approach was very productive. On other occasions a participant would phone, or e-mail, to enquire whether files, databases or material promised from another participant had actually been received, simply in the interest of helping out further where, or if, required.

In essence, the study was informed by numerous interested individuals directly involved in the industry, both past and present, including: park operators, caravan club members and representatives of the CRVA, RVMAA, Caravan Trades and Industry Associations (CTIA) and Caravan Parks Associations (CPA) from each State. Additionally, telephone and e-mail consultations were had with NSW government representatives of the Land and Property Management Authority, and departments of Local Government, Health, Consumer Affairs, Fair Trading and the Office of Environment and Heritage. Another valuable resource was the popular press which included a review of historical magazines dating back to the 1920s. For example: magazines including ‘The Queensland Motorist,’ ‘Woman’s Weekly,’ and ‘Australasian Post’, leading metropolitan newspapers such as the ‘Brisbane Courier Mail’, ‘Sydney Morning Herald’ and ‘The Age’, as well as regional publications of the ‘Northern Star’, ‘Tweed Daily News’ and the ‘Gold Coast Bulletin’ were reviewed.

3.1.2 RESEARCH APPROACH - PART 3

Part 3 of the study deals specifically with the case study of Tweed Shire Caravan Parks and is further broken down by parts A and B.
3. Methodology

3.1.2.1 PART 3A

This part quantifies the recent historical fabric of caravan parks in the Tweed Shire from 1970 to 2010. Firstly, a review of total park capacity, in terms of past and future land-use, is presented, followed by a review of the internal support infrastructure of site-mix options, site amenities, site markets and site services, over the period 1970 to 2010. It took a quantitative positivist approach, which supported identification of development patterns of predetermined variables (park attributes) in a controlled and systematic manner (Altinay & Paraskevas 2008; Creswell 2009; Ponterotto 2005).

A mail-out, self completion questionnaire, encompassing both closed and open ended questions was administered to tourist park manager/owners of the Tweed Shire via Australia Post on two separate occasions: January 1997 and June 2011. In preparation for the mail-out, a four step process was undertaken. Firstly, the questionnaire (Appendix 1) was formulated in close consultation with the Executive Officer and a Life Member of the national caravanning industry body to ensure industry relevance and rhetoric protocols were maintained. Secondly, it was pilot tested for ease of understanding and level of completion through four independent caravan park operators in neighbouring shires to the Tweed. The pilot testing allowed for minor presentation details to be amended, assisting respondents with clarity/definition at some questions. Thirdly, a personal introduction of the researcher to potential respondents (Appendix 2), by the local branch President of the New South Wales Caravan and Camping Industry Association at a local Chapter meeting; and fourthly, an introductory letter from the researcher (Appendix 3), including an information sheet (Appendix 4) outlining the purpose, method and proposed outcomes of the research was presented. This letter also advised the ethics approval number (Appendix 5), reassured confidentiality and reminded respondents of the voluntary nature of participation. The use of a pre-set survey instrument minimised potential researcher bias arising from that ongoing relationship with industry (Onwuegbuzie & Johnson 2006).

A saturated sample, or census approach, of the caravan park population was adopted due to the small size of the population (Jennings 2001; Zikmund 1991). Although historically mail-out surveys generally elicit low response rates
(Ticehurst & Veal 2000; Zikmund 1991), a census approach was deemed achievable in 2011 given the researcher’s well established network and professional relationship with the industry; achieved census in the 1997 data collection event; and continued interest for the research from the same population. The 2011 Brisbane Caravan and Camping Show fell neatly within the data collection phase and thus provided further opportunity to engage with respondents face-to-face to encourage repeat participation. As an incentive for participation in the 2011 collection event, an individually tailored data summary from the 1997 collection event was provided with the survey. Follow-up phone calls and personal collection were arranged if required. Data collected on two occasions, January 1997 and June 2011, achieved data points for the years of 1970\(_N=14\), 1980\(_N=25\), 1990\(_N=27\), 2000\(_N=28\) and 2010\(_N=27\) engaging the complete population of caravan parks at each data point.

The data was de-identified, coded and entered into the data management and analysis software SPSS. Analysis included descriptive and longitudinal summary analysis of combined parks over the forty year period from 1970 to 2010 and snapshot representations for the years of 1997 and 2011. Data was expressed as means (average), median (middle) or percentage (proportion of total) in the analysis (Field 2000).

An adaption of Haywood’s (1986) operational indicators, to focus on infrastructure (supply) rather than visitors (demand), was used to examine the potential to operationalise nine site-mix options for positioning along the life cycle curve as a forecasting tool. The indicators are presented in Table 6.
### Table 6 - Six life cycle operational indicators

<table>
<thead>
<tr>
<th>Conceptual Operational Indicator</th>
<th>Case study Operational Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit of analysis</td>
<td>Traditional caravan parks of the Tweed Shire</td>
</tr>
<tr>
<td>Relevant market</td>
<td>Nine site-mix options, supported by amenities and services as delineated through the survey</td>
</tr>
<tr>
<td>Pattern and stage of TALC</td>
<td>Change in site-mix and capacities over 40 years at 10 year intervals exploring sequential entry and exits for each site-mix element</td>
</tr>
<tr>
<td>Area’s shape in TALC</td>
<td>Site-mix elements reviewed against the S shaped logistics curve based on the quantitative amalgam of site-mix curves</td>
</tr>
<tr>
<td>Unit of measurement</td>
<td>Sites - individual capacities within nine site-mix options</td>
</tr>
<tr>
<td>Unit of time</td>
<td>1970 to 2010 at decade interval data points</td>
</tr>
</tbody>
</table>

#### 3.1.2.2 PART 3B

This part combines the qualitative methods of parts 1 and 2 with the quantitative methods of part 3A to support the interpretation of past and future development activity of Tweed Shire caravan parks in the context of the six stages of the TALC.

---

13Source: Adapted from Haywood, M 1986:155
4 PART 1 – THE HISTORY OF CARAVAN MANUFACTURING

This chapter reports on the qualitative findings of the engagement with the participants of the caravan manufacturing sector supported by archival documents and the literature. It presents an overview of the international origins of caravanning followed by the Australian manufacturing story. Finally a snapshot of production statistics is presented.

4.1.1 INTERNATIONAL SEEDS

Caravanning is one of the oldest forms of travelling *in reasonable comfort* known to man (Elon 1996). The term ‘caravan’ originally meant a convoy of covered wagons travelling together for protection and forming a compound called a ‘caravanserai’ at night (R Wright 1996, pers. comm., 4 November). Thus, merchants, hawkers, gypsies and showmen have been using caravans for hundreds of years to travel overland along world trade routes and between population centres (Bradley 2011; Deen 1995; Steensgaard 1974; Winser 1968). The covered wagon, in effect a caravan, played an important part in the rapid spread of civilisation throughout the United Kingdom, Europe, America, Asia, Africa and indeed Australia (Figure 12).

Of the ‘gentlemen-gypsies’, in the latter half of the nineteenth century, Wilson (1986) suggests perhaps the most famous is Dr. R. W. Gordon Stables, who travelled throughout England in a horse drawn caravan built around 1884. Stables wrote boys’ adventure stories and in his book, *The Cruise of the Land Yacht Wanderer*, he describes many of his adventures. His land yacht (caravan) appears to be the first recorded caravan built specifically for leisure purposes (Hassler 1989; Huth 2006; Lay 1998). The custom at that time was for the family to take along a groom or footman, who tended the horses, cooked and cleaned, and slept in a separate tent (Bradford 1982). Interestingly, innovative tourism operators, particularly around the wine districts in several parts of Australia, have reintroduced a new breed of horse drawn wagon for holiday hire (Figure 13).
While Stables may have been the first to use the humble wagon for private touring purposes, the caravanning concept for mass tourism had already begun. In December 1868, Thomas Cook gave the British an opportunity to

---

14 Source: Ross L n.d.
15 Source: On the Road 1994:20
make a pilgrimage to the Holy Land. New Christians could make a trip to their main holy sites with comfort and security. Sixty people crossed the desert with an impressive caravan of 65 horses for the pilgrim tourists, 87 pack-horses along with a huge number of mules and donkeys, all loaded with the necessary provisions. The pilgrims were accompanied by 77 staff, among them guards that were armed with carbines and dogs. Pious Christians came to a complete delight from such ‘comfort’ services (Anon 2011).

Many kinds of caravans have been developed through the years. Every mobile caravan outfit consists of a living unit - the caravan itself - and a source of power to move it with. These units may be built separately, as with a trailer caravan and a tow car, or they may be combined as a motorhome or campervan (ABS 2009; Hassler 1989; Winser 1968). Neither version of motor-powered caravan was seen in Australia until after World War I, and the Great Depression of the late 1920s. Around this time a few adventurous souls with a touch of wanderlust in their hearts decided to build for themselves simple mobile living accommodation utilising motor power instead of horses or bullocks (Hassler 1989). Since that auspicious occasion, caravanning has taken on a life of its own in Australia; sometimes through rapid growth and sometimes through steep decline (Kelly 1994; Prideaux & McClymont 2006). However, not every unit was intended for touring. Thousands of people across the years have taken to living permanently in caravans that are semi-permanently anchored to a site (Glover & Prideaux 2009; Greenhalgh 2003; Nahan 2009; O’Flynn 2011). These units have been superseded in recent years to be replaced by dwellings often referred to as ‘mobile homes’, ‘demountables’ or ‘relocatables’ (F Yates 2011, pers. comm., 12 August)

4.1.2 HUMBLE BEGINNINGS – THE AUSTRALIAN MANUFACTURING STORY

The history of caravan manufacturing in Australia dates from 1928. Towards the end of that year, Mr R. J. Rankin, then a young Sydney businessman and keen outdoor sportsman, decided to have a caravan constructed for his own use. After six months of planning, he had completed the plans of the small ‘Covered Wagon.’ Lightly constructed and lacking floor space and head room (Walker, 1996), it was at least a caravan in which one was reasonably

44
comfortable, and it could be towed by a small car. This little caravan proved such a success that several of Rankin’s friends asked him to build one for them. Rankin immediately commenced manufacturing in a small workshop which was set up for this purpose in Missenden Road, Newtown (Winser, 1968). Commercial production was achieved in 1929 and a larger model designed with steam bent coachwood frame, body steel exterior and plywood lining was marketed during 1932 (Figure 14).

![Figure 14 - Depiction of early tear-drop model caravan. Manufactured c.1932](image)

By 1934 this new ‘industry’ was firmly established and a hire fleet grew to approximately 25 caravans. This was the beginning of Caravan Park Pty. Ltd., later to be known as Carapark Ltd., the first major caravan manufacturer in Australia. The company proceeded on to a bigger factory in Newcastle and continued until 1962 when it was purchased by ‘Motels of Australia,’ later to become part of the Travelodge group (N Chesney 1996, pers. comm., 19 November).

At a similar time, but in a different state and by different means, the first recorded motor powered caravan for Australia was also in the making. In 1929 Mr. G.C. (Pop) Kaesler of Nuriootpa (SA) took his family for a holiday in his hand-crafted motorhome. The body was made of patterned pressed steel, as used in houses of that era, and the base was a Dodge truck (Coote 1995a; Griffith 1995).
Motorhomes have historically been more popular in America than Australia as the Americans appear to have a love affair with ‘houses on wheels,’ taking their whole world around with them (Tuckley 1996). Caravans have tended to suit Australians better. ‘They like to be able to find a nice caravan park, book in for the night, unhitch the car, drive down to the local RSL club for a meal and a play on the pokies, then go back to the van for the night’ (Tuckley 1996:14). There is no such flexibility with a motor home. It goes where you go. However, while this purpose built form of caravanning has been popular in the fly/drive holiday market, particularly in New Zealand and Tasmania (Brewer 2011; Brown 2010), its mainstream appeal to the domestic grey nomads is now growing exponentially. However, the touring caravanner who tows a caravan behind the family car has been seen, in Australia, as the real holiday caravanner and thus the forerunner of other forms of caravanning and associated products/facilities that have evolved (R Chapman 1997, pers. comm., 14 June).

---

16 Source: Library of South Australia – B59120.
Between the first and second world wars, caravanning in Australia was a pastime for a few enthusiasts, and was not highly organised. During this period manufactured caravans were scarce. This produced a plethora of ‘do-it-yourselfers’ (DIY) (Figure 16) and plans for caravan construction began to emerge. Several versions were published in books and motoring magazines including those by Arkwright (1964), Winser (1960), RACQ (1937) and RACQ, (1936a) (Appendix 7).

Figure 16 - DIY bondwood caravan. Manufactured c.1940

During the Second World War (WWII), the caravan industry was virtually non-existent and did not get going again until materials and manpower once again became readily available. Straight after the war, when materials were still nearly impossible to obtain, the real inventiveness of the enthusiastic Australian caravanner came to the fore. Caravans resembled anything surplus to the war effort from packing cases to DC3 and sea-plane fuselages (Figure 17) (Coote 1995b).

17 Source: Eustace, C n.d.
From 1945 to 1948, right around the country, many small caravan manufacturers established themselves. In Brisbane alone, half a dozen manufacturers set up shop. During this time brand names began to appear and the industry was to go through a growth period which has been unequalled by any Australian industry (N Chesney 1996, pers. comm., 19 November)

![DIY caravan built from a Martin Mariner seaplane. Manufactured c.1948](image)

Between 1948 and 1950, brand names such as Jenneson-Pathfinder and Gypsy were established in Sydney, while in Victoria, pioneers of the industry were Landcrusier, Roadhaven and Don, with the latter complete with trademark leadlight windows being the leading brand. Furness, with innovative sliding windows, Roadmaster and Globetrotter were setting up in Adelaide, South Australia, which was to become the leading caravan producing city by 1955.

According to Porter's (1949:5) account, ‘today in Australia it is the correct thing to own a caravan. Some years before the last war [WW2] caravanners were generally considered “freaks”, but that is all changed now, as the caravan owner is very much in the picture, and is not dependent on boarding-house keepers and inferior hotels at most of our summer holiday resorts.’

---

18 Source: Coote, D 1996:7
By the 1950s, the most radical advance in Australia’s caravan industry, the production line, had begun, although no-one realised it at the time - they were too busy being part of the new developments. Four companies with very small beginnings were to become very large very quickly because of the zeal of their founders. These companies were Viscount, Franklin, Millard and Chesney, and they soon became known as the ‘big four’ within the industry (Hassler 1989). Millard commenced in Sydney and was soon joined by Viscount, which transferred from Adelaide. At this time Franklin had already established in Ballarat and Chesney was soon to follow in Brisbane (N Chesney 1996, pers. comm., 19 November).

Each of their founders had great faith in their own ability, thrived on hard work, and had the foresight to visualise the possibility of making attractive family sized caravans in large numbers. By using a percentage of unskilled and semi-skilled labour they were able to achieve a much lower cost per unit. It happened at precisely the right time when Australians were particularly receptive to such ideas as caravanning earned public recognition as a leisure activity (Hassler 1989).

Through the 1950s, availability of caravans began to increase with a boom in caravanning for the masses occurring during the 1960s (Bradford 1982; Stretton 1989). As O’Brien (2011 pers. comm., 6 October) recalls:

The aftermath of the Menzies [Australian Prime Minister] enforced credit squeeze of 1960 bought an upsurge in demand by families, in particular, to take advantage of the “good times” and as a result the demand for caravan holidays and destinations exploded.

4.1.3 BOOM, BUST AND REVIVAL

During the early 1960s the industry went through its second major phase. Ron Rankin, who had also introduced the ‘motel’ concept into Australia as a major adjunct to caravans, sold Carapark Ltd., and Caravilla, the motel subsidiary, to ‘Motels of Australia’ and the manufacturing and retailing operations were sold off. Thus the name Carapark was soon to vanish from the scene.
Western Australian caravan production commenced in 1964 with the Fleetwood Caravan Company of Perth also selling bondwood vans. This company grew to own and operate a chain of caravan and residential home parks in Western Australia while continuing to manufacture and sell caravans (M Kestel 1996, pers. comm., 25 September). The Fleetwood Corporation, in 2011, is the parent company to Coramal Caravans and Winsor Caravans, the second and fourth largest Australian caravan manufacturers, respectively, in 2010 (Price 2010). Additionally they are one of the largest park home, transportable home and portable accommodation providers to the retirement and resources industries in Australia. Camec, the largest caravan spare parts, accessories and marine equipment manufacturers, wholesalers and retailers in Australasia, is also a subsidiary to Fleetwood Corporation (Price 2010).

From 1965 the industry settled down to a four-way battle with the ‘big four’, Viscount, Millard, Franklin and Chesney, by then, producing over 80% of the total van production in Australia. Major changes in style and features started to develop and caravans started to resemble their American counterparts more than their English cousins. Painted interiors gave way to prefinished plywoods, timber frames gave way to aluminium and exteriors from plywood to acrylic aluminium (N Chesney 1996, pers. comm., 19 November). Thus the second wave of the industry had begun as observed by Stretton (1989:117), ‘sales were booming in the 1960s and early 1970s thanks to post-war baby boomers with young families whose vans trailed easily behind their V8 Valiants, Holdens and Falcons.’

During Christmas of 1974 Cyclone Tracy devastated Darwin. This created an urgent need for accommodation for homeless families. The Federal Government ordered over 1000 caravans from three major manufacturers to be delivered immediately. Chesney, Viscount and Franklin increased production to fill these orders in record time (K O’Brien 2011, pers. comm., 6 October). Similarly, the mining and construction boom of the late 1960s and early 1970s created demand for caravans to accommodate itinerant workers (R Chapman 1997, pers. comm., 14 June). Following such high demand, however, the caravan industry was experiencing a severe downturn by the late 1970s. This
coincided with changes in Australian holidaying trends from traditional domestic vacations at the beach towards more overseas travel, excessive fuel prices, smaller motor cars, and the flooding of second hand caravans (ex Darwin) onto the market and lower interest rates which made traditional housing more affordable (R Chapman 1997, pers. comm., 14 June; N Chesney 1996, pers. comm., 19 November). These observations, by founding industry colleagues Chesney and Chapman, were confirmed by K O’Brien (2011, pers. comm., 6 October) as he recalled that production, at that time, was about 40,000 units per year, but sales were less than 18,000 units:

In other words, there was an equivalent of two and a half years stock in dealer’s yards around the continent in relation to selling rate and that rate was declining. Additionally, world parity pricing for Australian crude oil production in 1975 resulted in a huge increase in fuel price at the pump. The populace generally perceived that the cost of driving and especially towing a caravan, was not economical (K O’Brien 2011, pers. comm., 6 October).

Between 1975 and 1980 some major brands disappeared from the Australian caravanning scene, with Chesney and Franklin being sold to public companies, which, after a few years of operation, closed them down (N Chesney 1996, pers. comm., 19 November). Millard went into receivership and was taken over by Viscount in 1978 (L Ashenden 1996, pers. comm., 18 October), which was also to go into receivership in 1989 (Stretton 1989). Winsor, Coronet, Murrumba Star, Hillandale, Newland and many more names also vanished into the hands of receivers during this time.

In response, the industry moved in several major directions over the next two decades. Pop-tops and camper trailers were much more in demand (G Ryan 1996, pers. comm., 16 September). Families were attracted to camper trailers (Figure 18), as when combined with the new but increasingly popular four wheel drive towing vehicle and with a growing interest in nature-based holidays, remote locations become more accessible (Salt 2004b). Retirees were seeking pop-tops, a smaller, lighter and more aero-dynamic alternative to the standard van, giving greater fuel economy on that lifetime trip around the ‘block’ (Figure 19) (Lingane 1994).
Cabin accommodation was replacing the ‘on-site’ caravan in most tourist parks (R Catto 1996, pers. comm., 12 December) while relocatable homes were developing from the demand for permanent accommodation within parks.

19 Source: Tainsh, D 1996:8
(Greenhalgh 2003; Lay 1998; Price 2010). Motorhomes began to receive belated support, particularly within the fly/drive tourist market and from members of motorhome clubs (Brown 2010; CMCA 2011).

By the turn of the century, a new wave of manufacturing entrepreneurs had emerged to replace the fading memories of the original dominant manufacturers of the 1970s. The new ‘big four’ of the twenty-first century are Jayco (Figure 20), Coromal, A-Van (Figure 21) and Winsor respectively. These new heavyweights of the industry are producing lightweight vans, collectively controlling approximately 70% of the 2010 market (RVMAA 2011). In an era when demand is once again outstripping supply, a repeat of the early 1970s, strong challenges for production supremacy is being mounted by an array of smaller Australian manufacturers, the likes of Imperial, Majestic, Galaxy and New Age (G O’Brien 2011, pers. comm., 27 September).

The surge in the family market, back to caravanning, is also supporting a new proliferation of camper trailer and tent trailer manufacturers (R Chapman 2011, pers. comm., 12 June). Jayco, the leading RV manufacturer in 2011 has introduced a range of new products for both markets; caravanners and campers (S Hollaway, 2011, pers. comm., 14 June). While motorhomes continue to attract interest from a growing number of grey nomads and new retirees, the strengthening or re-emergence of 5th wheelers into the Australian caravanning scene is a sign that Australia is maturing in its thirst for luxury touring, following the lead of American RVers.

Caravan imports from Germany, America and China have been displayed through the 2011 round of state caravan and camping shows (Caravanners Forum 2011; Explore Oz 2011). However, as the disastrous Darwin cyclone created false opportunity for Australian caravan manufacturers in 1974, in 2011 the new insatiable appetite for caravans by the Australian public may very well augur toward further imports, to the detriment of Australian manufacturers, if demand continues to outstrip local supply (B Yates 2011, pers. comm., 18 June). Nevertheless, at the end of the first decade of the twenty-first century, almost 100 years from where it all began, Australian caravan manufacturers remain optimistic for their future (G O’Brien 2011, pers. comm., 10 October).
Findings Part 1 – The History of Caravan Manufacturing

Figure 20 - Jayco outback expana van. Manufactured c.2011

Figure 21 - Lightweight A-Van. Manufactured c.2011
4.1.4 **An Australian Manufacturing Snapshot**

After a steady but consistent growth in caravanning across the period post World War II through to 1970 the industry grew exponentially in the early seventies as indicated by the peak annual manufacturing output of 37,000 units in 1975 (Figure 24).

---

20 Source: Eustace, C n.d
21 Source: Eustace, C n.d.
However, this boom had been short-lived with caravanning interests waning and outputs falling back below or on par with those of the sixties by the 1980s. After almost two decades of decline from its heyday in the mid-seventies, the Australian caravanning industry bottomed at less than 5000 units of output in 1991. It wasn’t until the mid-nineties that the manufacturing industry finally turned a corner to start a very long recovery. However, even after the past 17-year growth phase, the industry has only regained a small part of its former popularity with outputs of 23,000 units in 2010. The manufacturing peak body, Recreational Vehicle Manufacturers Association of Australia (RVMAA) forecasts this climb to continue through 2011 with a projected 10% growth on 2010 figures.

Figure 24 - National caravan (RV) manufacturing trends 1963 to 2010

Source: RVMAA 2011. Note - Figures for 1963 to 2003 are based on ABS registration data. Figures from 2004 onward are based on data provided by RVMAA members including estimation of units manufactured by non-members (approximately 7%).
5 Part 2 – The History of Caravan Parks

This chapter reports on the qualitative findings of the engagement with the participants of the caravan park sector, supported by archival documents and the literature. It presents an overview of the domestic origins of caravan parks and the legislative framework, design elements and standards of quality that evolved to support the sector. This is followed by the Australian site-mix story describing the different accommodation options, amenities and services available in caravan parks before a discussion on residential park living. The tourist site evolution is then discussed with a closing section on the sector associations.

5.1 The Past

‘A holiday is made up of two essential elements - the journey and the sojourn in a Tourist Park’ (Winser 1968:31)

The range of accommodation options available to Australian holiday makers is extensive, including hotels, motels, rented houses, flats and apartments, campervans, caravans, tents, boats, hostels and guest houses or at the house of a friend or relative. The type of accommodation used on holidays is sometimes the end product of all the other decisions; it is sometimes a question of cost. In some cases it is determined by the appeal of the type of holiday for example ‘let’s go camping’ or of a particular establishment ‘let’s spend Easter at “Travellers Rest” caravan and camping park’. The choice of park accommodation ranges from primitive bushland settings to 5-star resorts on private beachfronts, in high snow country, in large metropolitan cities, quiet country towns or the wide outback (Figure 25).

This however, has not always been so. The facilities and infrastructure that are taken for granted in 2011 have been recognised by several commentators across the decades as being hard fought for (Barby 1996; Longbottem & Logan 1995; Porter 1949; Wise 1996).
The advantage the industry has today is the voice of strong state and national associations that advocate for change and improvement on behalf of the park owners and travelling public alike (Bailey 2011; CRVA 2011b). Some, the unconverted as they say, would still to this day question:

What is the charm of motor camping and caravanning? The uninitiated must wonder why folk will spend - in some cases - over 3000 pounds in order to sit in a wet field. An answer is to be found in the ever-increasing number of devotees, drawn from people in all walks of life, but who have common interests in loving freedom of movement and appreciating the multiplicity of delights which nature provides (Yoxall 1957:1).

The caravan park sector, however, has come a long way since its humble beginning as a fragmented assortment of rudimentary camping reserves. This section describes the evolution since the 1940s.

---

23 Source: Tainsh, D 1996:4
There is not one town in Australia that did not have its origin from a settlers’ camp or a surveyor’s camp – usually 25-30 miles apart (1/2 days horse ride or 50-60 miles apart (1 day’s horse ride). The camps were besides water. Have grass for livestock. Trees for shade. Toilets behind tree – as more people used them – someone would make an earth closet with a hessian screen – or a screen from bashed out kerosene tins – or sheets of corrugated iron. As these areas became popular the council would declare that area as a camping reserve and would build a more permanent toilet block with storm water tank for drinking water. Caravan park is only an update of camping area (R Wright 1996, pers. comm., 12 December).

Before the 1940s, caravan parks were few and far between. Most people went tent camping or ‘motor camping’ (RACQ 1931b) in the bush or in state forests or beachside reserves during their holidays. There were often sub-standard amenities presented for public use.

_Tewantin Camp Reserve – The Queensland Motorist Club has requested the Noosa Shire Council to effect improvements to the camping reserve at Gympie Terrace, Tewantin, before Easter. The provision of a tank (a well having proved unsuitable) for water, and of adequate sanitary conveniences at least, have been suggested (RACQ 1931a:45)._
Figure 26 - Water point at Cabarita Caravan Park. Est. c1960

Figure 27 - Electrical point at Cabarita Caravan Park. Est. c.1960
Figure 28 - Laundry facilities at Cabarita Caravan Park. Est.c.1960 (washing machine newer)

Figure 29 - Ablutions block at Cabarita Caravan Park. Est. c.1960
As more parks were built, operators had to become more competitive, so they added swimming pools and entertainment rooms etc (I Beadel 2011, pers. comm., 14 June). By 1968 the Harvey Bay Chamber of Commerce had officially registered the Harvey Bay area as the ‘Caravan Capital of Australia’ (Winser 1968:4). The exponential growth of parks forced government to revise regulatory legislation in regard to design and health standards.

Design, planning and facilities of caravan parks as proposed by Wills (2004) is reliant on three main factors: legislation and regulation, social and economic issues and engineering design. A plethora of state based legislation (Table 7) has been introduced, specifically or incidentally covering the overnight provision of ‘structures on wheels, tents, caravans etc.,’ (McKay 1959:668) since the early twentieth century. However, very little enforcement of license conditions regulating camping and caravan parks was undertaken prior to the 1950s.

The following paragraph responds to legislation reform for caravan parks of the era:

> Caravans have become a very important factor in the economic life of this country, especially within the past few years. Municipalities are being, and will be, called upon to make necessary provision for those people who desire to live in caravans to join their community, and the day is not far distant when all municipal councils should and will make provision for caravanners, either on a permanent or semi-permanent basis. This can only be done by the establishment of modern caravan parks. Most of the larger towns and a great deal of smaller ones have come now to the realisation that the caravan is here to stay and are making or attempting to make adequate provisions for the use of caravans within their town limits. ..... caravanners are rightly here to stay and are, or can be made by proper measures, an asset to the community, instead of the possible menace that a certain few municipalities, in the first flourish of a new ‘problem’ seem to have regarded them (Porter 1949:15).

Porter outlined the features which he considered, at that time, to be appropriate to meet the growing demand for caravan sites. A very comprehensive list ranging from location, layout (Figure 30) and site settings through to
infrastructure, services and facilities was also presented in relative detail (Appendix 6).

Also in 1949, specific legislation regarding campgrounds was formulated, firstly in Queensland, in an effort to improve the health and hygiene within makeshift establishments on Crown reserves and private establishments previously governed by the *Land Act 1910*. The resultant campgrounds regulation, enacted under the *Health Act 1949*, was not again amended until 1987. Similar patterns emerged in other states with most legislation originating from the Local Government Acts or Crown Lands Acts relevant to the particular state, if it existed at all. The more significant pieces of legislation of recent times revolve around the permanent living within parks with the introduction of Caravan Parks

---

24 Source: Porter J 1949:15
and Unmovable Dwellings Act 1988, Caravan Parks and Movable Dwellings (Registration and Standards) Regulation 1993 and the Caravan Parks and Movable Dwellings (Registration and Standards) Regulation Amendment 2011.

Table 7 - State based legislation governing caravan parks

<table>
<thead>
<tr>
<th>State</th>
<th>Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queensland</td>
<td>Motor Traffic Act 1909</td>
</tr>
<tr>
<td></td>
<td>Land Act 1910</td>
</tr>
<tr>
<td></td>
<td>Health Act (Campgrounds Regulation) 1949</td>
</tr>
<tr>
<td></td>
<td>Lands Act (Amendment) 1962</td>
</tr>
<tr>
<td></td>
<td>Campgrounds Regulation (Amendment) 1987</td>
</tr>
<tr>
<td></td>
<td>Mobile Homes Act 1988</td>
</tr>
<tr>
<td></td>
<td>Building Code of Australia 1990</td>
</tr>
<tr>
<td></td>
<td>Land Act 1994</td>
</tr>
<tr>
<td></td>
<td>Residential Tenancy Act 1995</td>
</tr>
<tr>
<td></td>
<td>Campgrounds Regulation (Amendment Part II) 1996</td>
</tr>
<tr>
<td>New South Wales</td>
<td>Crown Lands Consolidation Act 1913</td>
</tr>
<tr>
<td></td>
<td>Local Government Act 1919 (Ordinance 71)</td>
</tr>
<tr>
<td></td>
<td>Fair Trading Act 1936 (Code of Practice)</td>
</tr>
<tr>
<td></td>
<td>Landlord &amp; Tenant Act 1948 - 1957 (Division 4A)</td>
</tr>
<tr>
<td></td>
<td>Residential Tenancy Act 1995</td>
</tr>
<tr>
<td></td>
<td>Crown Lands Act 1989</td>
</tr>
<tr>
<td></td>
<td>Building Code of Australia 1990</td>
</tr>
<tr>
<td></td>
<td>Mobile Homes Act 1992</td>
</tr>
<tr>
<td></td>
<td>Local Government Act 1993</td>
</tr>
<tr>
<td></td>
<td>Local Government (Caravan Parks, Camping Grounds and Moveable Dwellings) Regulation 1995</td>
</tr>
<tr>
<td></td>
<td>Local Government (Manufacturer Homes Estates, Caravan Parks, Camping Grounds and Moveable Dwellings) Regulation 2005</td>
</tr>
<tr>
<td></td>
<td>Holiday Parks (Long-Term Casual Occupation) Act 2002</td>
</tr>
<tr>
<td></td>
<td>Holiday Parks (Long-Term Casual Occupation) Regulation 2009</td>
</tr>
<tr>
<td></td>
<td>Residential Parks Act 1998</td>
</tr>
<tr>
<td></td>
<td>Residential Parks Regulation 2006</td>
</tr>
<tr>
<td></td>
<td>Residential Tenancies Act 2010</td>
</tr>
<tr>
<td>Victoria</td>
<td>Caravan Parks and Unmovable Dwellings Act 1988</td>
</tr>
<tr>
<td></td>
<td>Caravan Parks and Movable Dwellings (Registration and Standards) Regulation 1993</td>
</tr>
<tr>
<td></td>
<td>Caravan Parks and Movable Dwellings (Registration and Standards) Regulation Amendment 2011</td>
</tr>
<tr>
<td>South Australia</td>
<td>Development Planning Act 1993</td>
</tr>
<tr>
<td></td>
<td>Development Planning (Residential Parks Zone, Caravan and Tourist Zone) Amendment 2008</td>
</tr>
<tr>
<td>Western Australia</td>
<td>Caravan Parks and Camping Grounds Act 1995</td>
</tr>
<tr>
<td></td>
<td>Land Administration Act 1997</td>
</tr>
<tr>
<td></td>
<td>The Residential Parks (Long-stay Tenants) Act 2006</td>
</tr>
<tr>
<td>Tasmania</td>
<td>Code of Practice for Caravan Parks 2007</td>
</tr>
</tbody>
</table>

25 Source: Developed through various personal communications
5.2 THE PRESENT

Interestingly, for a developer wishing to construct a modern caravan park, there would be little need to venture past the basic principles and recommendations that were put forward by Porter 62 years ago, assuming the site dimensions accommodated such a design. The site layouts for Brisbane Holiday Village constructed in 1990, Boyds Bay Holiday Park at Tweed Heads in 1992 (Figure 31), and Saltwater Holiday Park at Yamba in 2004 (Figure 32), all appear to be closely based on Porter’s design.

Figure 31 - Site map of Boyds Bay Holiday Park - Tweed Heads

---

Unfortunately for both the industry and the touring public, many parks were built that did not conform to the standard Porter outlined. As a result, caravan parks suffered from a demoralising identity crisis and consequently gained a poor public image. In 2011, thanks to tighter government legislation and guidelines, together with committed manufacturer and operator peak bodies, caravan parks are now receiving more positive (Bailey 2011; CRVA 2011b).

5.2.1 AWARDS

To encourage their members to excel in all aspects of business, the individual caravan and camping industry associations host annual awards that are designed to recognise and celebrate raised quality and standards. Additionally, the caravan park sector is also now recognised by the National Tourism Alliance and has been represented at the national, state and regional tourism awards since 1993 (National Tourism Alliance 2011; TNSW 2011). The awards provide a tangible opportunity for park owners to benchmark their properties,

Source: Saltwater@Yamba Holiday Park brochure
and the improvements made, against other parks within similar categories. Table 8 highlights a selection of national and state award categories and their recent winners. ‘The Awards of Excellence’ is the industry’s highlight event, that recognises business excellence in the caravan and camping sector and is the highest accolade that a caravan, RV or camping business can achieve (B Bailey 2011, pers. comm., 30 June). The more recent edition to the award categories is the Gumnut Environmental Award that recognises various levels of accreditation for environmental sustainability, based on an individual park’s Integrated Environmental Management Plan.

Table 8 - Tourism award winners

<table>
<thead>
<tr>
<th>Category</th>
<th>Winner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best of the Best NSW 2011</td>
<td>North Star Holiday Park – Hastings Point</td>
</tr>
<tr>
<td>Best Park (4 ½ to 5 stars) &gt; 100 sites NSW 2011</td>
<td>North Star Holiday Park – Hastings Point</td>
</tr>
<tr>
<td>Best Park (4 ½ to 5 stars) &lt; 100 sites NSW 2011</td>
<td>BIG4 Deniliquin Holiday Park</td>
</tr>
<tr>
<td>Best Nth Coast Park (3 ½ to 4 stars) &lt; 100 sites NSW 2011</td>
<td>Soldiers Point Park – Port Stephens</td>
</tr>
<tr>
<td>Crown Lands Environmental Excellence Award NSW 2011</td>
<td>Clarks Beach – Byron Bay</td>
</tr>
<tr>
<td>Best Residential Caravan Park NSW 2011</td>
<td>Casino RV Village – Casino</td>
</tr>
<tr>
<td>Best Tourist and Caravan Park NAT 2010</td>
<td>Cairns Coconut Holiday Resort</td>
</tr>
<tr>
<td>Excellence Award in Sustainable Tourism NAT 2010</td>
<td>Lane Cove River Tourist Park</td>
</tr>
<tr>
<td>Best Tourist and Caravan Parks WA 2011</td>
<td>Aspen Parks – Exmouth Cape Holiday Park</td>
</tr>
<tr>
<td>Best Tourist and Caravan Park VIC 2011</td>
<td>Big 4 Beacon Resort - Queenscliff</td>
</tr>
<tr>
<td>Best Family Friendly Holiday Park NSW 2011</td>
<td>Ocean Beach Holiday Park – Umina Beach</td>
</tr>
<tr>
<td>Best Family Friendly Holiday Park QLD 2011</td>
<td>Treasure Island Holiday Park – Gold Coast</td>
</tr>
<tr>
<td>Gumnut Environmental Award NSW 2011</td>
<td>Pyramid Caravan Park – Tweed Heads</td>
</tr>
</tbody>
</table>

Adapted from National Tourism Alliance, NSW CCIA and individual park websites
5.3 The Site Mix Journey

If public perception is that caravan parks are for caravans alone, then that perception is false (P Redman, 1996, pers. comm., 4 October)

In 1975, the Australian Bureau of Statistics (ABS) defined a caravan park as: ‘A tourist accommodation establishment which provides powered sites for caravans with shower, laundry and toilet facilities for paying guests’ (Horwath and Horwath Services 1986). While this may have been true for some caravan parks, the Queensland Tourist and Travel Corporation (1982) contended that the definition should have also included those establishments which offer the above facilities plus some or all of the following:

- Long-term occupancy for mobile homes;
- Cabins available for hire on a short-term basis;
- On-site vans;
- Camping amenities.

Noting the Queensland interjection, the ABS modified the definition to distinguish between short and long term (more than two months) accommodation options. However, by 2009, there is still no specific reference to camping amenities or recreation facilities beyond basic toilet, shower and laundry facilities (ABS 2009).

Various categories of caravan parks also developed over time in response to demand from the different sectors of the public. The four mainstay categories as recognised by Horwath & Horwath Services (1986), Kelly (1994) and Tourism Research Australia (2007) are still valid in 2011. They are distinguished by purpose and location. Transit parks, or over-night parks, are located on major highways and cater primarily for shorter-term visitors. Town parks are located near major population centres to cater for permanent or semi-permanent residents and short-stay travellers, while resort parks gain most of their business from holidaymakers. Additionally, nature parks are, by definition, located close to natural scenic attractions such as forests, mountains, rivers or similar features of interest. Some parks are a combination of two or more of the four general categories. With many people now living permanently in caravan
parks, supported by specific tenancy legislation, the additional category of relocatable-home park, catering solely for that permanent market, has emerged since 1986.

The great diversity of accommodation options provided within caravan parks is not recognised within much of the published research data and definitions from the Australian Bureau of Statistics or Tourism Research Australia. As highlighted in Figure 33, ‘short-term sites’ for the touring public represent only one stream of the range of accommodation available within caravan parks. Although this single touring classification covered the original purpose of caravan parks, it can clearly be further broken into sites for tents, camper trailers, pick-up campers, pop-top vans, standard vans, campervans, motorhomes and cabins. As Kelly (1994) observed, short-term sites represent in many cases, perhaps most cases, an insignificant proportion of a caravan park’s total income. With occupancy and site-mix shifts being continually experienced in parks, Brooker (2011:82) describes one operator’s observation as ‘the 30 cabins in my park now produce more revenue than 147 long-term annual sites.’

![Total Caravan Park Accommodation](image)

With an increasing number of people living permanently or semi-permanently in caravan parks, en-suites became fashionable both in caravans (Greenhalgh
Many tourist parks with en-suites sites report ‘longer-stays’ and therefore higher returns to the park operators (J Olhome 1996, pers.com., 3 October). Neil Chesney, founder of Chesney Caravans, recognised this new trend in the early nineties and quickly established a manufacturing plant in Brisbane to specifically produce precast concrete ensuite units to capitalise on it. Vanotel En-suites, as they were known, were ready for delivery to caravan parks as a cheaper alternative to on-site construction methods (B Neck 1996, pers. comm., 11 June). The incorporation of en-suite facilities in caravan parks evolved from public pressure as both short and long-term caravanners demand more and more luxury in the way of home comforts. The holidaying expectation was to have something as good as, or even better, than they had at home (Hammond 1996; Lawson-Hanscombe 1996). This luxury or convenience has, in 2011, evolved in several ways. Some facilities remain as hard infrastructure designed to service multiple sites in a cluster (Figure 34), while others are modular units that can be increased or decreased to cater to changing visitor numbers during special events or peak seasons.

Figure 34 - Clustered ensuite caravan sites. Est. c. 2005
A further advancement is in the fully mobile units (Figure 35) that are introduced to a site, just for temporary demand or to reduce environmental impacts.

Every Queen’s Birthday weekend annually our friends and their families gather somewhere within two hours of Brisbane for a weekend of four wheel driving, wine tasting, camp fires, roast dinners and fun. This year we decided to hold it in our own back yard of 6 acres. I was worried about how cold it would be and how my hot water would last with 23 people here. Luckily for me I found Brisbane Bathroom Hire on the net and booked a luxury portable bathroom. It was the best thing we could have done. Everyone commented on how great it was to be able to use a proper flushing toilet that went directly into the septic tank (no chemicals) and a continuous hot water system. The bathroom was sealed, warm and private. It made the weekend. Everyone was so impressed with Brisbane Bathroom Hire’s luxury portable bathroom. They had never seen anything like it before (Ayres 2011).

Figure 35 - Mobile ensuite
5.3.1 Residential Themes

Permanent residences, annuals and cabins emerged as more significant markets through the mid-nineties as they are less prone to the seasonal fluctuations that tourist sites experience (ABS 2010b; Bailey 2011; CRVA 2011a). The Australian Bureau of Statistics (ABS 2010b) figures illustrate that long-term residents contribute significantly to the viability of caravan parks in general, thus the permanent market is important to the majority of park operators (I Beadel 2011, pers. comm., 12 June).

Long-term accommodation in caravan parks has, in the past, been portrayed as low cost interim accommodation for those unable to afford more conventional housing (Beckwith 1998; Boer 1978; Mowbray & Stubbs 1996; Powell 1987). However, more recent research (Greenhalgh 2003; Integrated Site Design Pty Ltd 2010; Nahan 2009; Squires & Gurran 2005) also shows that many people live permanently in such accommodation by choice. This has promoted the growth of ‘manufactured’ or ‘residential’ home parks as opposed to traditional parks with mixed markets. In 1983, local authorities in Queensland were expressing concern about the number of caravan/houses being erected in parks. By 1984 a building advisory committee bulletin was sent to all Queensland councils directing that relocatable homes were no longer recognised as a movable dwelling under the 1909 Motor Traffic Act, but were now structures under the terms of the National Building Code. The Department of Housing, Local Government and Planning (Qld) consequently prepared guidelines to assist park owners, developers, community groups and long-term park residents to meet ‘quality of living’ standards which were comparable to the wider Australian community (Mackenroth 1994).

In 1986 the New South Wales Department of Local Government undertook a similar committee review which resulted in the amendment of Ordinance 71 of the Local Government Act, 1919 through the introduction of the State Environmental Planning Policy No. 21 – Caravan Parks (SEPP 21), that facilitated legalised long-term occupation of caravan park sites (Integrated Site Design Pty Ltd 2010). Many parks, while discretely but illegally permitting permanent occupation, were now able to actively promote the lifestyle. This
generated a flood of new customers, or a new market segment, to the traditional tourism-based industry.

Other Australian states and territories have now enacted similar legislation to provide policies and protection to long-term park residents. For example, the Caravan Parks and Unmovable Dwellings Act 1988 and the Caravan Parks and Movable Dwellings (Registration and Standards) Regulation 1993 were the two most significant pieces of legislation, specific to caravan parks that emanated from Victoria. The former is mainly concerned with tenancy while the latter prescribes standards for dwellings as its main focus. As with Ordinance 71 in NSW, the new legislation legalised long-term living in caravan parks. In 1992, under the Mobile Homes Act, Ordinance 71 was amended to allow park owners to offer 20-year leases to residents. It also provided better protection for caravan dwellers through the Residential Tenancy Tribunal that was established under the Residential Tenancy Act 1987. This afforded long-term caravanners similar rights as those who rent traditional accommodation (Integrated Site Design Pty Ltd 2010; Nahan 2009). The legislation made way for the creation of 'manufactured' or 'residential' home estates - quite distinct from traditional caravan parks - using community title systems. It was also anticipated that the legislation would help to remove the social ‘prejudices’ and ‘stigma’ associated with people living in non-traditional housing (Chong 1992; Department of Lands 1990; Finlay 1978; Harris & Crowe, 1972 in Kelly 1994; Stretton 1989).

The regulation of residential parks has come a long way since permanent living in parks was first legally recognised just 25 years ago with the major events summarised by timeline below.
### Table 9 - Summary of NSW residential park legislation

<table>
<thead>
<tr>
<th>Year</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1986</td>
<td>Local Government Ordinance No. 71 was introduced, which made it legal to live permanently in a residential park.</td>
</tr>
<tr>
<td>1987*</td>
<td>Permanent occupation arrangements in parks initially came under the Residential Tenancies Act 1987. Park residents had similar rights to tenants of ordinary premises.</td>
</tr>
<tr>
<td>1991*</td>
<td>The Residential Tenancies Act was amended to give the Tribunal powers to resolve disputes over park rules.</td>
</tr>
<tr>
<td>1992</td>
<td>NSW became the first jurisdiction anywhere in Australia to introduce specific legislation for the parks industry, in the form of a mandatory Caravan and Relocatable Home Park Industry Code of Practice under the Fair Trading Act.</td>
</tr>
<tr>
<td>1994*</td>
<td>Amendments were made to the Residential Tenancies Act to recognise for the first time that residents of parks who owned their dwelling required greater protection than residents who were renting both the dwelling and the site.</td>
</tr>
<tr>
<td>1995</td>
<td>Ordinance 71 was replaced by the Local Government (Caravan Parks, Camping Grounds and Moveable Dwellings) Regulation. The Residential Tenancies (Moveable Dwellings) Regulation was also introduced to separate the standard agreements and some other provisions from the tenancy laws.</td>
</tr>
<tr>
<td>1998*</td>
<td>Coverage under the tenancy laws ceased with the introduction of the Residential Parks Act. Queensland, South Australia and Western Australia subsequently followed the NSW lead by introducing separate legislation for residential parks.</td>
</tr>
<tr>
<td>2002*</td>
<td>The Holiday Parks (Long-term Casual Occupation) Act was introduced, setting out the law in cases where dwellings are left on a site but only used for holiday purposes.</td>
</tr>
<tr>
<td>2005*</td>
<td>A range of amendments were made to the Residential Parks Act following a statutory review. These reforms included changes to rent increases, compensation payments for relocation, improve disclosure and residents committees. The Local Government Regulation was remade.</td>
</tr>
<tr>
<td>2006</td>
<td>The Residential Parks Regulation was remade.</td>
</tr>
<tr>
<td>2011</td>
<td>The Residential Parks Act was amended in order to create a register of all residential parks in New South Wales.</td>
</tr>
</tbody>
</table>

(* denotes the year the Act was passed)

Source: Fair Trading NSW 2011
The shift in acceptance of the role that caravan parks play in Australian society is slowly coming about as demonstrated by the fluidity of the regulation amendments. The register for all residential parks was only introduced in April 2011 and the NSW government released a discussion paper in November 2011 to seek further stakeholder comment on improving the governance of residential parks. Although the caravan industry has been virtually ignored in the tourism and hospitality literature to date, long-term residency in caravan parks has long been the centre of considerable attention, generally negative, from health, psychology and demographic social scientists, the popular media and government departments. Various articles regularly appeared in the archive of newspapers (Chong 1992; Kiely 1981; Pitt 1996; Stretton 1989), magazines (Finlay 1978; Van-Assche 1978) and journals (Powell 1987; Williamson 1981). Several government inspired reports include the NSW Department of Planning (1993), Geggie & James (1992a, 1992b), Victorian Department of Consumer Affairs (1992), NSW Department of Lands (1990), Department of Housing (1973), and NSW Government Caravan Parks Committee (1972).

Following trends started in the United States, assisted by the above mentioned legislation, ‘transportables’ or ‘relocatables’ rapidly became well established in many parks, particularly on the Australian east coast. People of all ages were quick to realise that life in a relocatable home was the sensible alternative to the high cost, high maintenance, high density housing in the city and suburbs. It was the ‘Great Australian Dream’ come true for many who could not afford traditional housing, whereas others just simply preferred the lifestyle that residential parks offered (M Kestel 1996, pers. comm., 25 September). Gone were the days when the only option for permanent living in a park was to live in a caravan designed for short-term holiday use. Now, in 2011, many parks cater for modern two and three bedroom homes on large sites with areas for the exclusive use of permanent residents, for example Burpengary Pines (Qld), Casino Village (NSW) and Premier Leisure Village Group (WA). Obvious social benefits include neighbourly concern, increased security, and village-type atmosphere. This was the beginning of the ‘lifestyle’ era that many still call ‘like
being on a permanent holiday’ in your own manufactured home (J James 2010, pers. comm., 14 June).

These homes were initially produced in factories, using the latest technology and were custom made to suit individual tastes and budgets before being transported to the parks (L Ashenden 1996, pers. comm., 18 October). Today, many are built on site in the same manner as traditional housing. Most are built with substantial verandahs and carports and come with the structural and insurance guarantees provided by the relevant state building services authority. The internal finish of a manufactured home is the same as a traditional home. All have an internal laundry and full bathroom facilities thus negating the need for site en-suites or communal ablution facilities (Norfolk 2011). Initially, the homes were taken up by middle-aged people and young families (Chong 1992).

However, the retirement village concept was quickly seized upon by developers of residential home parks with many establishments maintaining ‘minimum age’ entrance barriers. The significance of the ‘over fifties’ concept is realised when park owners are levied higher taxes, specifically land tax in New South Wales, for properties with less than 50% of available sites dedicated to permanent residents over 50 years of age (F Yates 2011, pers. comm., 17 July). This single piece of legislation triggered a further transformation of parks; away from short-term tourist sites toward long-term residential sites, in order to reduce operational taxes and maintain non-seasonal incomes.

Some local government parks engaged in the permanent resident market. However, due to their prime coastal locations, the strong demand for prime tourist sites ensured that council parks were able to sustain higher tourist occupancies across the year than private parks located away from the beach. The Land and Property Management Authority, the NSW Crown Lands Department responsible for the government parks, therefore developed a Crown Lands Caravan Park Policy to regulate the ratio of permanent sites to tourist sites within their parks (R Adams 2011, pers. comm., 8 August). However, private enterprise quickly seized the opportunity to increase revenues by converting short-term sites across to long-term sites, for which many park owners had waiting lists, thereby reducing the seasonality factor. Cash flow
was assured year round with the permanent residents. Initially, most parks had a mix of permanent and tourist sites. However, a fork in the road was created at that time as some parks continued to evolve down the permanent road, now having no tourist sites at all. These parks also changed their names to rebrand and market themselves with a focus more on the over 50s village lifestyle.

5.3.2 Resort Themes

Strategies to improve the image of parks so as to appeal to a wider tourist market have involved the adoption of new terminology in both promotional literature and industry language (Brooker 2011; Hughs 1989). Terms such as ‘outdoor hospitality park’, ‘holiday home park’, ‘holiday village’, and ‘holiday resort’ all imply that a caravan park holiday is much more than just a ‘low budget’ escape; the accommodation and activity setting is so complete that visitors need not leave the park during their stay (J Oholme 1996, pers. comm., 3 October). Although many modern tourist parks do offer a resort holiday in the best tradition with an amazing variety of things to do and facilities to enjoy (I Beadel 2011, 14 June) the resort theme marketing ‘ploy’ (Mintzberg 1991) also has the potential to cause customer dissatisfaction if unscrupulous operators use it as such. Amenities like swimming pools (Figure 36) that have evolved into themed water parks (Figure 37), generic play grounds (Figure 38) into age relevant adventure zones (Figure 39) and jumping pillow zones (Figure 40), games rooms into video gaming consoles (Figure 41) and park kiosks into resort style boutiques. Health, wellbeing and fitness options including spas, saunas, lap pools and massage/beauty therapy are now commonplace in many high quality parks (Figure 42).
Figure 36 - Swimming pool at Lismore Palms Caravan Park. Est. c.1970

Figure 37 – Water-park at North Star - Hastings Point. Est. c.2011
Figure 38 - Playground at Terrace Reserve Holiday Park - Brunswick Heads. Est. c1990

Figure 39 - Toddler's playground at Tweed Billabong Holiday Park. Est. c.2010
Figure 40 - Jumping pillow at Saltwater Holiday Park. – Yamba. Est. c.2010

Figure 41 - Entertainment room at North Star - Hastings Point. Est. c. 2005
Although, as highlighted by Schuurman (2011) at the NSW Caravan and Camping Industry Association Conference, Australian parks have not ventured to the extent of some of their European counterparts that are now providing specialist 'third party' services for intensive therapies and treatments such as blood dialysis. Most domestic parks introduced holiday entertainment in the early 1990s with daily videos and other activities for the energetic and not so energetic (J Olhome 1996, pers. comm., 3 October). Organised recreation and entertainment, that is still popular in some European parks (Figure 43), was, in the past, a traditional attraction of guest house accommodation in Australia. However, the perceived resistance to the organised holiday situations (the Butlin Camp), that was considered to be the demise of caravanning establishments such as Valla Park, certainly appear again to be growing momentum within caravan parks today (North Star 2011; Treasure Island 2011).
Those properties offering additional activities are attracting higher occupancies. As stated by Olhome, proprietor of Cairns Coconut Resort (1996, pers. comm., 3 October) and reinforced through Brooker (2011), the recreation and activities should generally be free, thus giving people value for money (Figure 44). ‘People remember the quality long after the price is forgotten - value for money for sure.’ The success of Olholm’s philosophy is reflected in the Resort’s occupancy statistics and the extensive list of regional, state and national tourism awards they have received (National Tourism Alliance 2011; Queensland Tourism Industry Council 2010). Tourism Queensland also recognises that through the introduction of increased facilities and organised activities, Australian families are ‘rediscovering’ caravan parks as a way to enjoy value-for-money holidays with resort-style conveniences (Tourism Queensland 2011).

30 Source: Schuurman, E 2011
5.4 CARAVAN PARK ASSOCIATIONS

As the evolution of caravan parks has progressed across the past century, so too have the industry bodies that govern, regulate, support, advocate and promote them. K O’Brien (2011, pers. com., 6 October) recalls the anxiety of industry leaders in 1990, after 13 years of continual industry decline, who recognised something had to be done to reverse the trend.

The industry needed to be resuscitated. A campaign to have a national body to represent the industry as a whole, instead of fragmentation by state and industry sector alienations was begun. Caravan Industry Australia (CIA) emerged in 1992 as the peak national tourism body representing industry businesses ranging from caravan parks, manufacturers and retailers of industry products, suppliers of goods and services, and service providers (R Chapman 1996, pers. comm., 14 June). The national industry structure in 2011 (Table 10) is illustrated from a Queensland perspective. Representing over 4,000 members, the peak body today is the Caravan, Recreational Vehicle Association (CRVA 2011b).

Table 10 - Caravan industry structure

<table>
<thead>
<tr>
<th>Sector</th>
<th>State Level (Qld) Representative Bodies</th>
<th>National Level Representative Bodies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreational Vehicle Manufacturing</td>
<td>Caravan Trade and Industry Association</td>
<td>Recreational Vehicle Manufacturing Association of Australia (RVMAA)</td>
</tr>
<tr>
<td>Recreational Vehicle Servicing</td>
<td>Motor Trades Association of Qld Caravan Trade and Industry Association</td>
<td>Recreational Vehicle Consumer Group</td>
</tr>
<tr>
<td>Recreational Vehicle and Accessories Retailing</td>
<td>Caravan Trade and Industries Association</td>
<td>Motor Homes Australia</td>
</tr>
<tr>
<td>Caravan Parks</td>
<td>Caravan Parks Association Queensland</td>
<td>Caravan Recreational Vehicle and Accommodation Association of Australia (CRVA)</td>
</tr>
<tr>
<td>Marketing or Franchise Chains</td>
<td></td>
<td>Family Parks of Australia</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big 4 Holiday Parks Australia</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Tourist Parks of Australia</td>
</tr>
<tr>
<td>Clubs</td>
<td>Combined Caravan Club of Queensland</td>
<td>Campervan and Motorhome Club of Australia</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Its main responsibility, besides engaging in political activity on issues that affect the industry nationally and facilitating a national accreditation program, is to market and promote the industry lifestyle to Australian consumers. The CRVA national marketing and promotional campaigns aim to increase the awareness of the industry through highlighting the many lifestyle benefits on offer to consumers who have yet to holiday using the industry's products and services (B Yates, 2011, pers. comm., 18 June). The CRVA is governed by a national board that includes two representative from each State; one trade and one caravan parks association (except Northern Territory and Tasmania who have a single combined representative) and one representative from the Recreational Vehicles Manufacturers Association of Australia (RVMAA) who gather to deliberate on national issues of interest to the overall well being of the caravan, camping and motorhome industry (CRVA 2011b).

32 Source: Adapted from CRVA 2011
6 Part 3 - Case Study - Tweed Shire Caravan Parks

Parts 1 and 2 have explored the history of manufacturing and caravan parks in the broadest sense using qualitative techniques. This chapter narrows the focus to the evolution of caravan parks at a single local government level. Direct findings are initially presented in quantitative format. They firstly describe Tweed Shire parks as an overview (Section 6.1) and secondly the site-mix configurations and their influencing factors (Section 6.2). Thirdly, a discussion (Section 6.3) on the historic evolution of Tweed Shire parks within the context of the TALC provides a synthesis of both quantitative and qualitative findings.

6.1 Caravan Parks Overview

The Case Study Framework

Tweed Shire is the most northerly local government area in New South Wales along Australia’s east coast (Figure 45). There are 27 caravan parks in 2011 that operate within the scope of ‘traditional caravan park’ for this study.

The 27 parks collectively host a total of 3,360 sites. While five other park establishments operate within the Tweed Shire their business model is outside the scope of this study. Also excluded from the scope were low level camping grounds provided in national parks and state forest areas as well as roadside rest areas that are frequently used as over-night camping places.
Figure 45 - Caravan parks location map

Source: Tweed Shire Council
The business focus of the parks existing at the commencement of the study period, in 1970, had a strong, if not 100%, tourism orientation. By 2011, the various parks offered a range of site-mix options along a spectrum, from 100% tourist sites (short-term) through to 100% permanent sites (long-term) (Figure 46). The tourist orientation is demonstrated herein, for several parks to have moved down the spectrum to varying degrees with some parks moving to the 100% permanent extreme by the close of the study in 2011.

![Tweed Shire Caravan Park Framework](image)

The range of facilities and services offered across the suite of Tweed Shire parks also moves along a spectrum from very primitive (walk-in sites, no permanent structures and only a cold outdoor shower) (Figure 47) through to the very luxurious (ensuite drive-thru sites, two story, three bedroom spa cabins, indoor recreation rooms, resort themed water parks, health/day spas and WiFi hotspots) (Figure 48).

![Figure 46 - Tweed Shire caravan park framework](image)
Figure 47 - Primitive camping ground - Hastings Point. Est. c.2005

Figure 48 - Two storey villa - North Star Holiday Park. Est. c.2005
This section describes the development characteristics of the combined Tweed Shire Parks.

**The Rise and Fall of Total Parks**

The study period spans four full decades; 1970 to 2011. There were 14 parks in the Tweed Shire at the beginning of the study period. An additional 14 parks were established across the period with the latest park opening in 1992. Conversely, three parks closed during the period with another currently in the decommissioning process, now having no tourists on site and only a handful of permanent residents remaining due to legislative requirement within their long-term leases. Two of the three closures occurred prior to the first data collection event in 1997, thus no raw data was available and consequently, they do not reflect in the following analysis. Additionally, one new park is in the master planning stages although not due for opening before 2017, thus it too is not included in any of the analyses that follow. Twenty-seven parks remained in 2010 (Figure 49).

![Figure 49 - Tweed Shire park population](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of Parks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>14</td>
</tr>
<tr>
<td>1980</td>
<td>25</td>
</tr>
<tr>
<td>1990</td>
<td>27</td>
</tr>
<tr>
<td>2000</td>
<td>28</td>
</tr>
<tr>
<td>2010</td>
<td>27</td>
</tr>
</tbody>
</table>

N = population
Year of Establishment

Seven percent of Tweed Shire parks were established prior to 1950 with a further 18% developed up to 1960 (Figure 50).

The two decades from 1960 to 1980 were the premier park building periods with a total of 17 new parks (57%) of the population established during that time. Park development waned through the 1980s with only four new parks (14%) before the final Tweed Shire park opening in 1992.

Location of Parks

Twenty four of the 27 traditional parks are located within three kilometres of the Pacific Ocean as illustrated in Figure 45. The location of the three parks that closed across the study period, the two non-traditional parks and three relocatable home parks are also highlighted.

In 2011, the largest group of respondents, at 32%, nominated their park as being located within a village atmosphere while a further 18% nominated a highly built up environment. Collectively these two groups form 50% of the total population of Tweed Shire parks (Figure 51).
Figure 51 - Park settings in 2011

Despite enjoying a reputation as being a coastal destination with over 30 kilometres of magnificent surf beaches, only 11% of parks were recorded as having direct beach access, with a further 11% of respondents advising that their establishment was within 400 metres of the beach. Importantly, the largest proportion of parks, at 21%, is located along a river or estuary with only 4% located within a rural setting, despite the Shire also hosting several easily accessible World Heritage listed rainforest environments. A combination of location descriptors was nominated by 7% of park owners/managers. This group mainly combined the locations of river and village.

**Proprietorship**

In 2011, 26%, or seven, of the 27 parks are directly controlled by the local government authority, Tweed Shire Council by way of Tweed Coast Holiday Parks Trust. The remaining 20 parks, or 74%, are owned by private enterprise. At the 1997 collection event there was one further private enterprise park (now
closed) making the government private ratio of 25% to 75% at that time, only slightly smaller than today.

**Legal Entity**

In respect to the legal operating entity of the parks, the mix of entities is unchanged between collections with the exception of one further private enterprise park (now closed) that was operating as a sole trader in 1997 over 2011.

While trusts, in 2011, form the largest group at 43%, this group also includes the seven local government parks (Figure 52). Family companies, at 18%, occupy the second highest group of owners reflecting a high degree of inter-generational involvement with parks. At 18%, partnerships ranked third with only 7% of owner/managers nominating sole trader as their legal entity status. Collectively, family companies, partnerships and sole traders represent 57% of the operating entity status, also reflecting the high propensity of ‘family’ or ‘mum and dad’ operations that caravan parks are renowned for.

![Figure 52 – Legal entity 2011](image)
Historic Land-use

To monitor trends in total site capacity the measures of central tendency: mean (average) and median (middle) were each considered. Figure 53 illustrates the number of respondents, the range of total sites, the mean and median for Tweed Shire parks for each of the five collection data points.

![Figure 53 - Total sites overview](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>Mean</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>72</td>
<td>20</td>
<td>200</td>
<td>50</td>
</tr>
<tr>
<td>1980</td>
<td>91</td>
<td>20</td>
<td>200</td>
<td>78</td>
</tr>
<tr>
<td>1990</td>
<td>136</td>
<td>20</td>
<td>290</td>
<td>147</td>
</tr>
<tr>
<td>2000</td>
<td>141</td>
<td>25</td>
<td>332</td>
<td>160</td>
</tr>
<tr>
<td>2010</td>
<td>124</td>
<td>25</td>
<td>332</td>
<td>112</td>
</tr>
</tbody>
</table>

Across the study period, the minimum number of sites across the parks remained quite low at 20 for 1970 through to 1990 and then only marginally increased to 25 in the last two decades. The maximum number of sites across the parks increased incrementally, from 200 to 332, with a strong growth period was between 1980 and 2000. The median reflects that the majority of parks had total sites in the lower end of the range and, with the exception of 1990 and 2000, less than the mean. Therefore, Tweed Shire parks have historically emerged from a foundation of small scale parks with lower number of sites and this trend dominated the Shire’s site capacity across the first two decades.
While the maximum range in 1970 and 1980, at 200 sites, does reflect a reasonably substantial scale for parks on a national basis, this scale was only evidenced within one park of the Tweed Shire until the growth phase in 1990. Through this growth period, a number of new larger scale parks developed while some existing parks also expanded their capacity.

![Figure 54 - Total sites trends](image)

The median trend line in Figure 54 reflects that the total capacity of sites peaked in 2000 at 159 sites before retreating to 112 in 2010 representing a 29% fall in total median site capacity from the 2000 peak.

**Future Land-use**

Respondents were asked to consider the future for their establishments by indicating if they believed their park would remain in its current form, i.e. stay the same; or go through an internal upgrade to be redeveloped as a modern or specialized caravan park; or finally, if the site would be redeveloped for another purpose, completely different to caravan park. During both collection events, most respondents were readily able to offer predictions for their immediate future, less than five years, but the longer term predictions were less forthcoming. This is reflected through dips in responses at 2010 from the 1997 collection and again at 2020 and 2025 from the 2011 collection (Figure 55).
On both collection events, park owner/managers were quite confident with their park status within the broader commercial landscape as suggested through their high responses of 57% and 68% respectively, to staying the same. This was further supported by the strong responses to the option to upgrade, expand or modernise through internal redevelopment. Collectively, this demonstrates that 68% of respondents in 1997 and 93% of respondents in 2011 felt the immediate future (<5 years) for their land holding remained with the operation of a caravan park. The 1997 longer term predictions (+10 years) were not so optimistic with only 49% indicating future caravan park operations on the site with 14% suggesting their site would be redeveloped for another purpose. The optimism was a little more evident though in 2011 with 59% responding that they felt their site still had a future in caravanning while only 11% predicted a change in use by 2020. While only 21% of respondents offered a prediction for 2025, they all remained steadfast in their resolve that a caravan park would continue to operate from their land holding.

In cases where respondents indicated a change of use for their land, they were asked to nominate or predict the type of activity that was likely to replace their caravan park.

The notable shift in the predictions offered between the two collections, as illustrated in Figure 56 and Figure 57 is that the initial 100% emphasis placed on residential development, even though of varying styles, has been reduced significantly to 33% with the balance offered to commercial functions. While the
integrated resort option, at 34%, by definition would offer a residential component, the focus of this style of development is often directed toward tourism and commercial precincts. Direct commercial interest, the likes of shopping centres or service centres, as nominated by several respondents, occupies 33% of the 2011 space.

Figure 56 - Development scenarios 1997

Figure 57 - Development scenarios 2011
Reasons Offered for Redevelopment Scenarios

Finally, respondents were asked to nominate reasons that they felt would cause or contribute to the redevelopment scenarios that they had offered above. Clearly, Figure 58 indicates that over two-third of respondents chose not to offer any explanation. The rising value of the occupied land was the most significant response provided with owner/managers indicating their return on investment (ROI) was diminishing. There was an even spread of respondents, at 6% each, that suggested council activities, a trend away from caravans to relocatable homes and opportune location for park development were the factors influencing their predictions in 1997.

Figure 58 - Development scenarios explained 1997
By 2011, the range of predictions, and their explanations for them, had changed dramatically (Figure 59). While the ROI issue, opportune location for park development and the affordable housing - caravans to relocatable homes - option remained prominent, the latter was directly cancelled out in 2011 by an inverse swing toward the conversion of permanent sites back to tourist sites by 12% to 15% respectfully. This swing, in part, is driven by tenancy issues and their associated legislative constraints that featured at 4% in 2011 but were not evident in 1997. Legislation can act as an enabler or a constraint as evidenced by 19% of respondents indicating that they were simply doing business, or planning for change, within the opportunities of permissible land use legislation. Twelve percent nominated lifestyle choice for their predictions while 4% of parks had closed by the 2011 collection.

Figure 59 - Development scenarios explained 2011
6.2 SITE-MIX, AMENITIES, SERVICES AND MARKET TRENDS

Total Short-term Sites vs Total Long-term Sites

Mean short-term sites, at the commencement of the study period, was 63 sites. By 1990 these had declined 15% before recovering a substantial 12% by 2000 with only mild further improvement of 1.2% through to 2010. Short-term sites finished with a net loss of 4.2%, or 2.5 sites, across the study period. Conversely, mean long-term sites grew strongly through the period to 1980 before a dramatic rise of 1314% to peak in 1990 at 95 sites per park before subduing consistently until 2010, 62% down from the peak at just 60 sites per park. As reflected within Figure 60, the peak of long-term sites in 1990 did come at the marginal expense of short-term sites within existing parks.

![Figure 60 - Short-term vs long-term totals](image-url)
**Trends Across the Short-term Sites**

*Tent Sites*

Tent sites took a consistently negative trajectory across the first two decades from 1970 to 1990 from a mean of 32 sites down to 12 sites, losing 62% of the total capacity. In the ensuing two decades to 2010, tent sites remained stable at their new equilibrium with only marginal additional losses finishing at 11 sites or 64% below the 1970 starting capacity (Figure 61).

![Figure 61 - Short-term sites (a)](image)

*Non-ensuite Caravan Sites*

From 1970 to 1980, non-ensuite sites had a minor 5% increase to peak with a mean of 52 sites before sliding steeply through the 1980s to 35 sites. While small gains were achieved up to the year 2000, non-ensuite caravan sites in 2010 were 39% below the peak and 36% below the 1970 level (Figure 61). This is a further reflection of the loss to short-term sites demonstrated at Figure 60.

*Ensuite Caravan Sites*

In 1970, the ensuite caravan site was non-existent in the Tweed Shire. However, by 1980 the concept had been readily adopted, peaking at a mean of 5 sites through the sacrifice of some traditional non-ensuite sites to accommodate this product upgrade. This is evidenced through the
corresponding decline in non-ensuite sites. This new site attribute remained stable across the next three decades to finish at 5 sites, just 14% below the peak in 2010. This negative net effect indicates that the introduction of ensuite caravan sites into new or expanded park development did not keep pace proportionately with general total site capacity (Figure 62).

![Figure 62 - Short-term sites (b)](image)

**On-site Caravan, Non-ensuite Cabin and Ensuite Cabin**

On-site over-night caravans enjoyed steady gains in popularity across the 1970s and 1980s to peak at a mean of 3 sites in 1990. The non-ensuite cabin range of accommodation mirrored on-site caravans across this period before both modes took the brunt of the strong rise in ensuite cabins that were introduced during the 1980s. This new product gained rapid strength to have a single capacity, in 1990, of 6 sites. This was more than the non-ensuited caravans and cabins held collectively, at 5 sites. While on-site caravans and non-ensuite cabins continued to lose space share through to 2010, in contrast, the ensuite cabin reflected continuous growth right through 2000 to finish at a peak of 9 sites in 2010 (Figure 62).
Trends in Long-term Sites

Relocatable Home Sites

Relocatable home sites and permanent caravan sites were not sufficiently differentiated by owner/managers of many Tweed Shire parks in respect to site classification. They both occupy long-term sites within a mixed park environment. Consequently, the category of ‘relocatable home’ has been adopted to represent the two combined. The dramatic increase in relocatable home sites in the 1980s (Figure 63) is supported by the corresponding sharp rise in long-term sites in the same decade (Figure 60). Climbing from a very low base, this ‘new product’ quickly gained space within parks to reach, on average, 17 sites by 1990, albeit at the marginal expense of short-term sites (Figure 60). Growth continued for relocatable homes across the next two decades finishing with 21 sites in 2010, a 22% rise from the 1990 level.

Annual Caravan Sites

Annual caravan sites have enjoyed a strong position within Tweed Shire parks across the study period although dipping severely in 1980 by 48% on the 1970 level before regaining the status quo in 1990 (Figure 63). At the end of the study period, annual sites had declined a total of 12% across the four decades from 1970 to 2010.
Long-term Park Cabins

Long-term park cabins have only ever held a low position within the total long-term site mix, peaking in 1990 at an average 2 sites (Figure 63). They continue to display declining trends with a 23% and 48% loss of site share respectively across the last two decades.

Summary of Site-mix Trends

Figure 64 reflects a combined picture of the nine individual site-mix options previously described, in relative context to each other in terms of mean volume of sites across the four decade study period. Clearly non-ensuite caravan sites still command the premier position in total capacity terms. The steep decrease from the 1980 peak across the decade to 1990 followed by further decline through to 2010 is exposing the vulnerability of this site option, with 36% net capacity loss across four decades. Tent site displays a 64% net loss across the study period, suffering the greatest slide in the first two decades before leveling to a minimal negative gradient across the last two decades. Annual van sites have seen fluctuation across the period, but are holding capacity ground with only minor negative inclination reflected in the last decade. Non-ensuite van, long-term park cabin and on-site caravan sites have almost collapsed in stature and remain in a downward trending position at the close of the study.

The outstanding growth site-mix option, particularly from its late entry into the cycle is the relocatable home site with a 22% rise from 1980 to 2010. Ensuite park cabin site is the only other site-mix option to show continuous growth, also since it late 1980s introduction, to record exponential growth in its first decade with consistent 15% annual increases through to 2010.
Figure 64 - Site-mix options, sequential entry and development trends$^{34}$

$^{34}$ Note: The trend lines have been rounded for demonstration purposes to assimilate trends in the form of life cycle curves. This effect may produce visual variation from direct data points for some site-mix options.
Park Services and Amenities

Park Amenities

The general park services’ range consists of five independent services or amenities that are provided across the park to support the overall function of the park and public enjoyment of all guests therein. These are sealed roads, shop or kiosk, camp kitchen, barbecue and service station (Figure 65).

Sealed roads within parks were not recorded by any respondent in 1970. By 1980, 60% of respondents indicated sealed roads were a feature of their park, increasing to 85% in 2010. The only other amenity to exhibit growth across the full period was undercover camp kitchens through two recorded periods of strong movement. Firstly, growth occurred between 1980 and 1990 and secondly, between 2000 and 2010. At the end of the study, 37% of respondents had introduced a camp kitchen. This feature has come at the expense of the traditional outdoor barbecue that enjoyed strong support across the period peaking in 2000 at 85%. The decline in this amenity through to 2010 coincides with the strong rise of camp kitchens. Shops or kiosks were a feature of many caravan parks in the early decades of the study, peaking in 1980 at 70% of respondents. This feature in parks has seen a continual decline across the past three decades to just 44% of respondents maintaining an on-site shop or kiosk in 2010.
Site Amenities

This suite of five amenities services the comfort of individual guests at their individually allotted caravan site. These amenities consist of water and electricity, sullage, concrete pads, television port and ensuites (Figure 66).

Three of the five services, being water and electricity, sullage and concrete pads, all increased in unison across the five decades from a base of 33% of respondents. These services enjoyed strong growth in the early stages to 1980 before flattening off across 1990 to 2000 before experiencing a new wave of positive movement through to 2010. At least 96% of respondents indicated that their parks were providing these basic services to individual sites by 2010. Provision of an individual ensuite and television port to sites was non-existent in 1970 but both features peaked in 2000 with 45% of respondents nominating that they provided these features. Both have since lost ground, to reflect values of 29% and 14% respectfully, in 2010.
Recreation Amenities

This suite of five amenities provides for the recreation and comfort of all guests within the public domain of the park. They are swimming pool, children’s playground, undercover recreation area, tennis, boat hire, spa and bowls (Figure 67).

![Figure 67 - Park recreation amenities](image)

Swimming pools, children’s playgrounds and undercover recreation areas were very quickly adopted by park owner/managers through the 1980s with the former two peaking at 69% and 63% respectfully in 1990 while the recreation areas continued to experience moderate growth through to 2000. By 2010 these park recreation amenities had each lost ground, decreasing to 56% for swimming pools, 37% for children’s playgrounds and 33% for undercover recreation areas. These trends represent major losses, down from their peak periods by 24%, 33% and 68% respectfully.

While bowls didn’t even make it onto the radar, tennis has maintained a low but steady profile across the first four decades at 10% before experiencing moderate positive growth toward 2010. A small number of respondents introduced boat hire in 2000 as a service to their guests, with just 4% of respondents in 2010 indicating that they also provided spa facilities to guests.
Infrastructure and Services Forecasts

Respondents were asked to forecast imminent changes that they envisaged within their parks in respect to both hard infrastructure and customer services, simply by indicating if they thought the category would see an increase or decrease in supply. On both collection events, eight predetermined categories were presented with respondents also able to nominate other options (Figure 68).

![Figure 68 - Infrastructure and services forecasts](image)

The primary desire of respondents across both collections was to increase their range of park cabins. This was followed by ensuite caravan sites, although 2011 showed a 20% higher regard to this category than 1997 figures. While development of larger individual sites was of some interest to respondents in 1997, that interest doubled in 2011. Resort style development was important for 1997 owner/managers, however that leaning had reduced in 2011 to 60% of the earlier interest. Provision of on-site entertainment also was of lesser importance to 2011 respondents reflected at 80% of 1997 values. The biggest decrease in predicted services was experienced through shuttle bus services with nil registrations in 2011, down from a modest prior interest. Package deals
as a customer service or marketing opportunity also lost 50% appeal among respondents between the collection periods. Other categories nominated by respondents were predominately related to the provision of internet and WiFi services in 2011.

**Scenarios for Infrastructure and Services Forecasts**

Respondents were asked to nominate reasons that had influenced or contributed to the infrastructure and services forecast scenarios offered above through Figure 68. Responses were grouped into two recurring rationales (Figure 69). While both relate to change in markets, they are in fact juxtaposed. The major group of owner/managers, at a consistent 18%, indicated that they were increasing their tourist capacity or even reversing their business focus back to tourists and away from permanents. This necessitated increased cabin capacity and larger caravan sites with ensuites. The smaller, but growing, group suggested that their parks would have an increased focus on permanent residents in relocatable homes and thus the tourist orientated infrastructure and services were no longer relevant.

![Figure 69 - Infrastructure and services forecasts explained](image-url)
Trends within Market Segments

Respondents were asked to recall changes that they had observed between market segments (customers) visiting their parks in respect to each of the four decades, 1970 through to 2010. Respondents simply indicated if they thought the category had experienced an increase or decrease in demand. Six predetermined categories and an ‘other’ option were presented for response as described through Figure 70.

![Figure 70 - Net trends in market segments](image)

Couples, families and internationals rated positively at the commencement of the study while retired couples, bus groups and special interest commenced at a net zero-base. This indicates that the latter group was not considered important markets to park owner/managers in the early decade.

While bus groups remained of minor interest to respondents across the full study period and special interest groups peaked in 2000, retired couples were shown in stark contrast with strong rises through every decade. Particularly sharp increased registrations reflected for the period 2000 to 2010. Clearly the retired couple has been the most consistent growth segment to Tweed Shire parks across the study period and forms the new benchmark for market share. Families, although commencing at a higher base than retired couples, also experienced strong growth, particularly since 1990. However, this segment has
lost significant market share to close in 2010 at just 47% of retired couples. Other couples and internationals also remained important customer bases for Tweed Shire parks. While internationals remained flat across the last decade other couples lost 10% market share from their peak in 2000. They each closed the study period at 41% and 53% of the value for retired couples respectively. The small, but emergent segment of singles was nominated by several respondents in 2010, through the ‘other’ option.

**Caravanner Trends**

Respondents were asked to rank three predetermined market segments; families, retired couples and other couples to establish which market segment was the highest user of caravan sites. Figure 71 clearly reflects the importance of retired couples in relation to families and other couples for caravan site occupancy within Tweed Shire parks. In 2011, one in every four caravanning customers was a retired couple. While retired couples lost marginal ground in the 2010 collection over 1997, respondents were more discerning in their responses between retired couples and other couples than in 1997 as other couples did not register at all in that collection. From these results alone it is not clear as to whether the other couples segment is an emerging market or if park owner/managers in 2011 were more diligent in their market segmentation than in 1997. Families showed a very strong 42% growth against themselves across the collections, but still remain at just 12% of the retired couple share in 2011.

![Figure 71 - Caravanner trends](image)

---

**Figure 71 - Caravanner trends**
Cabin User Trends

Respondents were asked to rank three predetermined market segments; families, retired couples and other couples to establish which market segment was the highest user of park cabins. In contrast to caravanners, Figure 72 clearly reflects the significance of families for Tweed Shire parks in the cabin market. While families climbed 26% against themselves across the collections, the significant growth was again recorded in retired couples. With families as the benchmark, retired couples grew from less than one in four (23%) in 1997 to almost one in two (42%) in 2011. Other couples lost the most prominence between collections losing 50% of ground against themselves to finish, in 2011, at just 16% of families, down from 44% in 1997.

![Figure 72 - Cabin user trends](image-url)
Star Rating Trends

There are two significant trends reportable from the star rating trends illustrated in Figure 73. Firstly, the downward trend in respondents indicating that their park was rated at less than 3.5 stars reflects an overall increasing standard of parks across the Tweed Shire. This is supported by the upward trend in respondents reporting star ratings above 3.5, at least through to 2000. The deceptive appearance of a slide occurring in the category of >3.5 stars, between 2000 and 2010, leads to the second reportable trend. That being the dramatic increase shown in percentage of respondents who indicated that they no longer have their parks rated at all. This movement is represented as nil in 1990, 6% in 2000 and 32%, or almost one third of Tweed Shire parks, unrated in 2010.

![Figure 73 - Star rating trends](image_url)

Respondents were asked to nominate reasons that had caused or contributed to the shift in their individual star rating (Figure 74). Improvements and increased facilities was the most significant trigger for additional stars in 1997 and 2010 at 25% and 14% respectively. For those respondents with decreased ratings, or those that had opted out of the rating system all together, two further trends emerged. Firstly, in the past decade, several Tweed Shire parks have moved down the ‘tourist to permanent’ spectrum illustrated in Figure 46 to the
extreme ‘permanent’ end. Therefore the star rating system, designed for tourist parks, was no longer applicable to their model of operation. Secondly, a further group of owner/managers who operate mixed parks nominated physical land restrictions and restrictive council regulations as two reasons that have made it increasingly difficult to maintain or improve facilities. A third group indicated that the rating system was inequitable or just simply irrelevant for their business in respect to compliance and therefore chose not to be rated.

The above scenarios help to explain the apparent decline in >3.5 star properties reflected in 2010 at Figure 73 above. By comparison, the combined reasons, at 12%, for physical land restrictions, restrictive council regulations and inequitable or irrelevant rating criteria virtually cancel out the 14% improved or increased facilities. In effect, there are fewer parks left in the rating system in 2010 than any other decade.

![Figure 74 - Star rating trends explained](image-url)
6.3 **THE SOCIETAL LIFE CYCLE OF TWEED SHIRE CARAVAN PARKS**

This section of part 3 sets the recent operational history of Tweed caravan parks for the period 1970 to 2010, obtained from the quantitative findings of sections 6.1 and 6.2, within the broader societal setting of Tweed Shire to explore the holistic development patterns of the caravan parks from 1820 to 2010. The findings within this section are supported by qualitative data arising from the open-ended survey responses, as well as from archival material and unstructured interviews with representatives from the manufacturing sector (Part 1) and the caravan park sector (Part 2). This guides the interpretation of past and future caravan park development with consideration to the descriptive capacity indicators Butler used to define stages and movement through the TALC.

6.3.1 **STAGE ONE – EXPLORATION C.1800-1850**

Many parks in the Tweed Shire evolved from rustic and makeshift camping grounds, mostly on state government owned lands beside a beach, river or estuary, almost in the shadows of the first explorers and free settlers that discovered the bounty of the Tweed Valley in 1823. The Bray family is recorded as making regular visits to Wommin Bay in these early days, travelling down the Tweed River by boat and landing at Cudgen Wharf, known today as Chinderah. From there, they would walk over the rough scrub track which connected the river to the ocean before setting up camp on the beach (Tweed Heads Historical Society 2009).

In keeping with Butler’s first stage of development, the unregulated and makeshift campsites were the only form of site-mix, at that time, and were very primitive with no specific on-site visitor facilities provided; for the Bray family or others that followed them soon after. There were only small numbers of visitors to the area at that time, usually typecast as allocentrics (Plog 2001) with individuals requiring to be quite resourceful in making their own travel arrangements to the area. The area’s appeal was in its natural features and these were largely unchanged by the limited tourism intrusion. Tourism was of little consequence to the local economy although tourists did have high local contact, relying on them for key commodities, social engagement and, most often, transport.
6.3.2 STAGE TWO – INVOLVEMENT C.1850-1950

By 1850, visitor numbers were increasing with free-enterprise facilities emerging to cater primarily for the travelling public or exclusively for tourists.

*Tom Boyd’s Half-way House built at Chinderah, facing the Tweed River, provided travellers with the only roof over their heads between Casino and Brisbane (Tweed Heads Historical Society 2009:6).*

By the turn of the century, Cudgen on Wommin Bay, could boast having two hotels with the new Grand Pacific obviously aimed at tourists who might wish to be close to the sea. The Turnock family store in Chinderah, in 1908, was delivering supplies as far as Duranbah in the north and, at holiday times, to campers at Cudgen Headland. Clearly a tourist season was starting to come by 1912.

*Surf bathing was already the rage, land was booming at Coolangatta, and “Cudgen Headland” as it was known, as already popular for its safe bathing amongst local farming families (Tweed Heads Historical Society 2009:26).*

The boom in open surf bathing, the growth in private motor vehicle ownership and the improvement in the district roads all helped to establish the Tweed as a distinct tourist area. Specific tourist marketing had commenced by 1915, attracting new visitors.

*A few intrepid Queensland motorists were venturing south by negotiating a tortuous route from Nerang, via Tallebudgera, Tomewin and Murwillumbah and then along the southern bank of the Tweed, crossing a small vehicular ferry at Chinderah before reaching Coolangatta. Some ventured further and discovered the quiet beauty, safe swimming and good fishing of Cudgen Headland, in spite of the difficult sandy track connecting the beach to Cudgen Wharf (Tweed Heads Historical Society 2009:28).*

At a similar time, trains would ferry day-trippers and tourists from the industrial city of Ipswich in Queensland to the coastal resort at Coolangatta. On weekends and holidays the foreshores were transformed into tent alleys (Russell 1995). By 1925 Cudgen Headland was well known in the Brisbane
market and with increasing government infrastructure, of bridges and ferries, between Brisbane and Tweed the way was paved for a whole new world of holiday trips for Brisbane and Ipswich motorists. Pressure was then placed on the local government of Tweed to provide facilities to support this new wave of tourist.

In anticipation of this, and to assist with motor access to the resort, Tweed Shire constructed a metalled road from Chinderah to Wommin Bay in 1923, financed by a special rate levy. Before scheduled motor bus services, service cars such as Dinsey’s Big Six Studebaker assisted tourists to reach their destinations, collecting them at railheads such as Murwillumbah or Tweed Heads, or from the Tweed River wharves, such as Chinderah, and bringing them to Cudgen Headland (Figure 75) (Tweed Heads Historical Society 2009:33).

Figure 75 - Dinsey's studebaker bus

By 1931, at the height of the depression, Cudgen Headland’s popularity as a holiday resort also saw several private enterprises spring up to service the growing tourism demands.

One will find boarding houses, a butcher, baker and …..after a little meander through the honey suckle trees, never altogether losing sight of the ocean, a

35 Source: Tweed Heads Historical Society
delightful reserve where tents are pitched among the thickly growing trees. One need not take any provisions if he intends camping there … as regular deliveries were made from the four local stores (Tweed Heads Historical Society 2009)

Described as the natural seaside resort of Murwillumbah and the upper Tweed, Cudgen was attracting a fair share of Queenslanders, who formed the majority of campers. Barney’s Point Bridge, as the last vital works on the Pacific Highway between Brisbane and Murwillumbah, was completed in 1936 (Figure 76).

Connecting Coolangatta with Chinderah, this bridge allowed readier access to Cudgen Headland during holiday periods and opened the door to caravanning, as it is known in 2011, in Tweed Shire.

Rotund and gleaming like a newly shined hippopotamus, the trailer caravan was to be found in its dozens along our beaches this holiday season. It is hardly likely that the caravan will superseded the humbler forms of camping in future years but the vogue is certainly popular and the journeys become more

---

36 Tweed Heads Historical Society
and more enterprising. At least two of the caravans were from Melbourne, while several had undertaken the long trek down from north Queensland. Only in its motorized form is this travel vogue something new. I expect there are still readers who remember holidays with horse drawn caravan in the years when country roads were bumpy but peaceful (Tweed Daily News 1939).

With the growing tourism interest in the Tweed area, additional camping grounds were already well established along the Queensland and New South Wales Border at Coolangatta, along the Tweed River at Chinderah and along the shores of Terranora Inlet. The local engagement continued through the provision of these camping grounds and the servicing of this new growth industry. Clearly social patterns were beginning to change in the Tweed Shire as tourism was establishing itself as an important economic driver (Figure 77). The tourists were now inter-mingling with the locals on a daily basis. The Marine Parade camping reserve at Cudgen, now Kingscliff, spread out along the esplanade between the shops and the beach, had become an integral part of the village and its economy (Figure 78).

Figure 77 - Caravan park fees and charges board

Figure 77 - Caravan park fees and charges board

Source: Tweed Shire Council n.d. (Photo courtesy of Louise Devine)
The holiday seasons were extending, however, some locals were already beginning to have serious doubts about the hectic pace of change.

*With the advent of the crowds, is Cudgen losing one of its chief attractions? A few residents claim that its privacy has been its charm – a place where a family could enjoy a quiet, undisturbed week-end (Tweed Daily 1931).*

The wartime boom in mineral sand mining came to the Tweed Shire in 1939 and remained a feature for 35 years. A prominent landmark was the Cudgen-RZ Limited plant at South Kingscliff, connected to Kingscliff by a wooden traffic bridge constructed by the company in 1961. The industry also became the incentive for the first modern north south road construction, parallel to the beach. Previous main arterial roads were of east-west orientation, servicing the coast from the hinterland population centres and railheads at Murwillumbah, Burringbar and Mooball (K Foster 2011, pers. comm., 4 August). The first distribution of mains power to the lower Tweed coast was also installed by the mining companies, opening the southern beaches to potential real estate development and tourism (K Cherry 2011, pers. comm., 22 July).

---

38 Source: Tweed Heads Historical Society
6.3.3 **STAGE THREE – DEVELOPMENT c.1950-1980**

Rutile and zircon dredge-mining (Figure 79) continued to progressively transform the Kingscliff, formerly Cudgen, foreshore with the undulating beach scrub slowly giving way to the hungry dredge. Wommin Bay and Kingscliff Progress Associations were formed in 1954 and 1957 respectively. They raised funds through management of the two beachside camping grounds to enact improvements and foreshore works including the grassing and tree planting of the remodelled gently sloping reserve post the dredging.

Figure 79 - Dredging operation along the Tweed Coast c.1960

They were also successful in lobbing Tweed Shire council for the extension of reticulated water to Kingscliff in 1961. This new infrastructure, and reserve, later named Foyster Park, supported the formalisation of Kingscliff Beach Caravan Park from a rudimentary camping ground that, in 2011, is one of seven parks under the Tweed Coast Holiday Parks mantle (K Foster 2011, pers. comm., 4 August).

---

39 Source: Tweed Historical Society
By 1970, caravan parks were a well established feature of the Tweed Shire’s commercial and accommodation fabric. The parks were regulated under the Local Government Act and had clearly defined sites, roads, and reception area with water and electricity supplied to individual sites. The physical site change that caravans required, over the rudimentary camp site, particularly with regard to hard infrastructure, quickly changed the appearance, and appeal for some, of these parks (Figure 80).

![Figure 80 - Kingscliff Caravan Park c. 1967](image)

The appeal of the natural environment, as the place to have fun, was giving way to artificial, or replica environments. Swimming pools were replacing the beach; solid barbecues and later camp kitchens were replacing the open fire; and children’s playgrounds, tennis courts and even television became the new source of recreational activity in the caravan park. Certainly, these new recreational pursuits, completely self-contained within the park, were not in keeping with the traditions of mixing it with the locals during beach swimming, pipi hunting and fishing.

---

40 Source: Tweed Heads Historical Society
Well defined tourist markets had been established, particularly in southeast Queensland, and volume advertising was undertaken in these generating regions. Progress of development came at some cost to local involvement as control and local facilities began to disappear in favour of external investment. The era from 1960 to 1980 was the premier park building period with 17 new parks, or almost two-thirds of the Tweed park population, built during those two decades. The new investment bought with it new ownership of the parks and new labour to service them. Much of this new injection came through domestic migration as Tweed Shire became popular with city people looking for the sea change.

No matter where a new migrant came from, when, why or to which area of the Tweed they moved, the Shire Council usually penetrated some aspect of the settling process. I think during the late ‘60s one began to notice the growth starting to occur on the coast. Tweed Heads was beginning to grow. Hastings Point, an old fishing village, became of great interest and more particularly Pottsville. Developers moved in and developed land east of the [new coast] road (K Foster 2011, pers. comm., 4 August).

Caravans and caravan parks featured prominently in this migration phase. Joan Davidson recalls, through her memoirs in Caravans and Communes (Kijas 2010:103), that she and her husband Doug came from a farming district near Tamworth in New South Wales arriving in 1971. Not knowing what they were going to do or where they would settle, they soon saw the need for a caravan park away from the coast (Figure 81). To the surprise of some locals, they successfully developed the Wollumbin Caravan Park near Mt Warning over a 12 year period (Figure 82).

People wanted to go up to the resorts at O’Reilly’s and Binna Burra and there was no way in those days that you could tow a caravan up there. So we saw the need for something down here that was much more attractive. A park where people could come and relax and feel refreshed when they left, and where people could afford to stay, because even at that stage parks along the coast were starting to become quite expensive (Davison, J cited in Kijas 2010).
Figure 81 - Wollumbin Caravan Park site c. 1973\(^{41}\)

Figure 82 - Wollumbin Caravan Park c. 1976\(^{42}\)

\(^{41}\) Source: Kijas J 2011:104 (Photo courtesy of Joan Davidson)
Caravans also served as temporary housing while housing blocks were being bought and homes were being constructed.

_Initially the van was sited down by the creek at Hastings Point, where you were allowed to go in those days. Finally, we were made to come over to the new caravan park (Figure 83 & Figure 84). Eventually, I moved from the caravan park and put the van on our block, got some electricity to it and we spent the next four years at weekends owner-building my home (D Macdonald cited in Kijas 2010)._ 

Physical and demographic change within the area, buoyed by the rapidly increasing demand for holiday and permanent accommodation during the 1970s, fostered a caravanning boom. Caravanners, though, were becoming institutionalised (Cohen 1972b) with little difference in their basic requirement for shelter, but strongly segmented by their site-mix patronage within the parks. Parks began to broaden their product range through the introduction of on-site vans as over-night accommodation for both the travelling public and later the increasing demands for semi-permanent occupation (Figure 85).

Later, this site-mix option was upgraded to the small square-line, or box-shaped, non-ensuite cabin. This was the first radical move away from mobile ‘caravan-like’ accommodation to mobile ‘building-like’ accommodation within parks and they quickly became very popular with travellers as an alternative to motel rooms. With sliding doors and windows, basic kitchen facilities and often multiple bunks, families were certainly attracted to this new site-mix offering. These cabins, by default, soon became home to itinerant workers, the new migrants and others, often in the lower socio-demographic category, seeking low cost housing (Figure 86).

---

42 Source: Kijas J 2011:105 (Photo courtesy of Joan Davidson)
Figure 83 - North Star Caravan Park - Hastings Point c.1974

Figure 84 - North Star Holiday Park - Hastings Point c.2010

---

43 Source: Kijas J 2011:70 (Photo courtesy of Louise Devine)
Figure 85 - On-site vans at Greenhills Caravan Park – Murwillumbah. Est. c.1975

Figure 86 - Non-ensuite cabins at Greenhills Caravan Park – Murwillumbah. Est. c. 1980
This all began to place opportunity in front of caravan park owners in respect to broadening their revenues and diminishing tourism’s seasonal influences through further diversification to multiple site-mix option as displayed graphically at Figure 64. However, this placed even further burden on local government.

Local government was growing you know – diversity in what it had to do – becoming more complex, more costly. Because we would not tolerate, at that time, permanent or long-term living in our holiday parks, this became an issue (K Foster 2011, pers. comm., 4 August).

Tweed Shire Council went on to produce a set of rules and regulations for their caravan parks to deal with the long-term residential situation. These regulations attracted the interest of the Minister for Lands in New South Wales and they developed sufficiently to inform significant legislative reform in 1986 (K Foster 2011, pers. comm., 4 August). This single event, the amendment of Ordinance 71 of the Local Government Act 1919, was the catalyst for legalising permanent living in caravan parks; changing forever the appearance, profile and demographics of the humble, holiday orientated, caravan park.

6.3.4 STAGE FOUR – CONSOLIDATION C.1980-2000

The next two decades from 1980 to 2000 saw a distinct slowing of the growth curve for park development with only four new parks constructed in this period.

The demand for tent sites and non-ensuite caravan sites, the foundation of Tweed Shire caravan parks, was rapidly giving way to the ‘new’ site-mix sectors of relocatable homes and non-ensuite cabins. Parks were officially classified into short-term and long-term with the differentiating factor being that the majority of sites were either occupied for periods less than or greater than 60 days (ABS 2009). Similarly, sites within both category of park were also classified with short and long-term use rights. For the first time, parks were distinguishing themselves between being a tourist park, permanent park or a combination of the two.

While the population of Tweed parks had peaked by 2000 across Butler’s (1980) standard TALC ‘S’ curve trajectory, short-term and long-term sites followed a rollercoaster path. Short-term sites, while remaining reasonably consistent
across the decade from 1970 to 1980, did suffer in capacity through to 1990 at the expense of the dramatic increase to the long-term sites. These long-term sites were being created to cater to the burgeoning demand for relocatable home sites that, in direct contrast to short-term sites, had peaked by 1990.

It was not long before a new wave of external development ceased upon the opportunity to capitalise on the relocatable home phenomena. Purpose built relocatable home parks were introduced to the Tweed Shire, separate from the original caravan park developments and ownership of several local mixed-site parks transferred to distant owners that had their eyes set on the increasingly lucrative ‘permanent’ market.

Major marketing campaigns continued to be developed through regional and local tourism organisations in unison to caravan industry publicity to extend the reach of the caravanning market and also extend the season (P Villiers 2011 pers. comm., 19 September; R Adams 2010 pers. Comm., 12 June).

In the smaller coastal villages, the tourist numbers in peak seasons often doubled or even trebled the local population, even though the rate of increase in tourist arrivals was slowing down. While caravan park occupiers, owners, developers and suppliers all made very significant contributions to the Shire’s economic base and provided employment for its residents, local opposition did develop in pockets as prime beachfront land, occupied by the caravan parks, was no longer available for local recreational opportunity; it was regulated for exclusive use of the visitor. Conversely, as several parks were earmarked for redevelopment, closure of these parks meant certain displacement of many permanent residents and also many annual van owners. The annuals, by legislation, only occupied their vans for a maximum of 180 days per year although the van remained permanently on site (Figure 87) (Integrated Site Design Pty Ltd 2010).

The loss of permanent living sites (Figure 88) and annual van sites continues to cause successive waves of controversy to sweep across Tweed caravan parks, the local communities and Tweed Shire Council (Caton 2000; Griffith 2006; Koffke 2011).
Findings Part 3 – Tweed Shire Case Study

Figure 87 - Annual van - Boyds Bay Holiday Park - Tweed Heads. Est. c.2005

Figure 88 - Relocatable home at Royal Tourist Retreat – Chinderah. Est. c.2007
As the face of the Tweed parks changed to accommodate the increasing permanent populations so too did the options for holiday and over-night accommodation. Ensuite cabins had entered the site-mix race with parks now replacing the older non-ensuite accommodations with these very desirable new units (Caton 2001a, 2001b). The public was becoming more demanding in their expectations of caravan park accommodation. Old facilities, both parks and site options, were seen as second rate and not desirable by tourists (T Gooley 2011, pers. comm., 17 January)

*Holiday parks which have been in place for many years often have ‘tired’ and failing infrastructure. Inadequacies that stem from poorly performing and outdated infrastructure can only be repaired for a limited period. In the long term a point is reached where ‘band-aid’ treatments must give way to significant upgrades if the park is going to maintain its market place acceptance and relevance (Integrated Site Design Pty Ltd 2010).*

6.3.5 STAGE FIVE – STAGNATION C.2000-2010

Capacity levels in parks were being stretched by 2000 as relocatable homes continued to consume space within the overall site-mix and ensuite cabins of a variety of forms (Figure 89 and Figure 90) were emerging as the new threat to the traditional non-ensuite caravan and tent sites.

Although caravan parks in the Tweed were well established, they were losing their market appeal within the proliferation of accommodation options springing up around them and along the adjacent Gold Coast. Additionally, two new major developments deprived the Tweed of the competitive advantage that it had enjoyed for so long.

Firstly, a change in Queensland gaming and liquor legislation meant the loss of New South Wales as the sole domain of poker machines in Australia (Christiansen & Gray 2008). This meant that visitors were able to experience holiday parks in Queensland, with similar climate, similar natural features and similar coastal environments but now with similar access to poker machines.
Figure 89 - Ensuite cabin at Boyds Bay Holiday Park – Tweed Heads. Est.c.2005

Figure 90 - Ensuite cabin at Tweed Billabong Holiday Park – Tweed Heads. Est. c.2005
Secondly, natural attractiveness was being superseded by artificial attractions. Three major theme parks; Sea World, Dream World and Movie World all established in the northern part of the Gold Coast in Queensland (van Vonderen 2011). These major ‘artificial’ attractions were luring the families away from traditional Tweed Shire caravan parks to those that were closer to the theme parks and consequently peripheral to the original tourist area.

In an endeavour to increase their market share, in a slowing visitation economy, Tweed parks continued to franchise (Big 4) or join chains (Top Tourist, Family Parks of Australia) to leverage their marketing spend and increase occupancies through referrals and incentives from their fellow, up or down the chain, members. Discount accommodation was also offered to the travelling public as an incentive if they displayed their membership status of state automobile association’s such as NRMA and RACQ.

On the back of the slowing family market, the grey nomads which follow the winter sun became the life-line for site-mix options within Tweed parks. Visiting in the traditional ‘off’ season, this new market was also habitual, often returning to the same park for several consecutive years. This repeat trade was very important to maintaining the viability of many parks that otherwise would have been dealing with surplus site capacity. In 2011, one in every four caravanners was a retired couple while the en-suite cabin site-mix option continued to be popular with families.

6.3.6 Stage Six – Decline c.2010

As reported by park owners and managers at the June 30, 2011 North Coast Region Caravan Parks’ Committee meeting, an obvious softening of the market was occurring:

Caravanners are travelling inland with Lake Eyre now full - also the problems in Queensland have caused people to choose other destinations this year additionally with the strong AU $ many are travelling overseas (Beadel, I 2011, pers. comm., 5 July).

Additionally, dilapidated caravans and square-lines, as permanent accommodation choices, were reported to be tarnishing the amenity of many
Tweed parks and that there appeared to be no way park owners could require the van owners to upgrade with some now reaching the stage of unsafe living. Concessions with land tax and the inconsistency of its application was also an issue for park owners (A Tribe 2011, pers. comm., 30 June). The Caravan and Camping Industry Association (NSW) have these matters on their agenda for legislative review of the Residential Parks Act in an attempt to find solutions (b Brown 2011, pers. comm., 30 June).

Illegal camping at show grounds or similar public venues was also discussed. This activity was to be targeted by CCIA if such land holdings were unlicensed or not compliant with the Local Government (Caravan Parks, Camping Grounds and Moveable Dwellings) Regulation 1995. Pressure was to be applied to either close them down or encourage them to become compliant. As many illegal camping grounds are on State or council controlled reserves, local caravan park owners are now becoming increasingly upset and frustrated by this unfair competition (B Brown 2011, pers. comm., 30 June). Conversely, many councillors and politicians are being lobbied by the Campervan and Motorhome Club of Australia, and similar caravan clubs, to provide these facilities, at reduced rates, in their town on the basis of broader community economic gain under the RV Friendly Town Scheme (Berry, P 2009, pers. comm., 19 August; Bailey, B 2010, pers. comm., 3 November).

It was further advised to the North Coast Region Caravan Parks’ Committee meeting that the issue of road-side camping is completely different and must be kept separate to the illegal camping agenda. The meeting felt that road-side camping was an area that would never be resolved although members were encouraged to inform CCIA of any evidence of free camping in the state. It would only be then that the problem, if appropriate, could be addressed (B Bailey 2011, pers. comm., 30 June). Clearly, the park owners were concerned over a range of legislative, infrastructural and tenancy issues coupled with shifting consumer trends. Arising from discussions had with several park and association members at this meeting several questions were forming for the author, reinforcing the significance of this study. Were Tweed parks losing their
appeal to vacationers, becoming more attractive to permanent settlement at the loss of the tourist facilities completely? Would the continued infrastructure conversion of parks to residential housing, apartments, retirement villages or commercial service centres continue to erode the attractiveness and thus viability of the remaining parks? Would the newer Gold Coast attractions, geographically removed from the Tweed Shire continue to erode demand for Shire caravanning infrastructure and experiences? Was increasing ownership turnover creating a ‘milk and strip’ mentality; the seeking of quick cash returns on investment by distant owners rather than a ‘nurture and grow’ attitude among local owners? Local owners who were interested in the long-term sustainability of their future through a re-emerging caravan park sector within an industry buoyed by the strength of the thriving manufacturing sector and sales?

Barry Baillie, CEO of the New South Wales Caravan and Camping Industry Association, implored park owners that this was not the time to withdraw. Instead, he commented that during slow periods, it is imperative that owners to redress their product offering and consider new opportunities through upgrades and or the inclusion of new site-mix infrastructure. Advertising to attract new customers and to encourage repeat trade was an essential parallel business strategy.

*Although the use of new mediums is growing, with many people now using web sites to access information, it wasn’t the time to throw away the old ideas and it was still important to advertise in the CCIA directory (B Bailey 2011, pers. comm., 30 June).*

In 2011, caravan parks of the Tweed Shire are at a critical cross road of change. With consistent downward spiraling trends across each of the traditional caravan park site-mix elements of non-ensuite caravan, tent, annual caravan, long-term park cabin, non-ensuite cabin and on-site caravan, the sector must now choose its road to the future. The ‘do-nothing’ approach is not realistic. Decline would be inevitable. Change and renewal is required if the Tweed parks are to operate sustainably with an
appropriate economic, social and environmental return for their owners and the community.

With several parks located within such close proximity to the Pacific Ocean, erosion is possibly the greatest immediate environmental challenge facing some coastal parks (Figure 91), both in their existing state and certainly those seeking to redevelop their park to a level of site-mix amenity commensurate to contemporary consumer demands. However, with broader environmental and cultural public awareness in 2011, together with a greater social and community conscience, the residents of the Tweed are ensuring a watchful eye is kept on future caravan park evolution in the Shire (Caton 2011b; NBN News 2011). Kingscliff Beach Holiday Park, having been closed for several months through 2011, has only reopened for business in November. Seven cabin sites have been lost to that park as a result of the recent erosion event (R Adams 2011, pers. comm., 14 November).

![Figure 91 - Erosion at Kingscliff Holiday Park c.2011](image)

The ever increasing cost of land has forced some park owners to leave the industry completely and others are no longer able to make sufficient return on investment from the model and scale of caravanning operation that they are presently running. Consequently, they too are leaving the caravan industry.
Consultants for the owners of the almost 50-year-old caravan park opposite the junction of [.....] and the Tweed Coast Road have blamed rising costs for making it a marginal business operation. According to the consultants, the units would replace the original development “being a caravan park which has operated... since 1962”. They said the “limited size of the site prevents any significant upgrade of the caravan park as economies of scale required are not available to justify the required capital investment” (Tweed Daily News 2010).

Council activities feature again in the decision-making process for some of these operators. While there is recognition that the Tweed is still starved for affordable housing (Housing NSW 2011) this influences their resolve to pursue the long-term park road over remaining with short-term sites and tourism. Alternatively, several are considering redeveloping their parks outright into bricks and mortar residential (Figure 92). Two-thirds of the park owners that did not see their future in caravanning suggested the land holding would be converted to a form of residential or commercial service centre development within five years.

Figure 92 – Redeveloped site of the former Hastings Point Caravan Park. Est. c.2010
Star ratings, as a measure of caravan park quality, amenity and service levels, as introduced through the 1970s, reflects Tweed Shire parks as having undergone continual improvement across the last three decades. Improved facilities and increased marketing have been the two major triggers for the improved ratings. Conversely, star ratings also tell another story. A story of gradual changes in that several parks, have already chosen their path to the future by electing to refocus their orientation away from tourism, with mainly short-term sites, to cater exclusively to customers of long-term caravan sites; permanent residents. In some instances, this transition has been gradual but for others, specific events or activities are influencing more advanced change. For some parks the physical constraints of their land holding is preventing them from growing and re-vamping in a viable manner. For others, Council activities in the form of land zoning, particularly the flood zone, is the barrier to rejuvenation (Caton 2004a, 2004b). Consequently, for this group of park owners the star rating system, designed for tourist parks, is simply no longer relevant.

Overwhelmingly though, park owner/managers were confident with their place in the Tweed commercial community and forecast that their future remained in caravanning for at least the next decade (I Beadel 2011, pers. comm., 14 June). Beyond that they were considerably less prescriptive, although a core of parks suggested they had a life-time and life-style invested in their operation and couldn’t see it changing, even through succession to future generations (C Cherry 2011, pers. comm., 8 June). The strong influence and profile that the Council controlled parks have across the full suite of Tweed Shire parks cannot be ignored. This group of seven parks is managed under a Council trust and operates within a business plan that is open to public scrutiny (Integrated Site Design Pty Ltd 2010). This trust operator remains confident in the caravanning space and this is demonstrated through the extensive redevelopment and improvement program it has for the existing parks, with an additional tourist park to be brought on line over the next five years at an estimated cost of $22 million dollars (R Adams 2011, pers. comm., 21 June).
With the continual shift in markets subsequently placing varying demands on specific site-mix elements, park facilities and services, parks in the Tweed Shire are facing challenging times ahead. Only two of the nine site-mix options, relocatable home and ensuite caravan, have shown strong and consistent growth over the past decade from 2000 to 2010. The former being a long-term site candidate and the latter being a short-term site candidate.

### 6.4 The Operational Life Cycle of Tweed Shire Caravan Parks

This study, in part, explored the potential to operationalise the TALC by using empirical finding to observe the evolutionary cycle of nine site-mix options between 1970 and 2010 and then subjectively interjecting these within the broader historical context of caravan park development in the Tweed Shire. The body of knowledge gained through the combined quantitative and qualitative parts of the study also further informs a descriptive model of site-mix elements and parks, as a homogenous unit, set along the standard TALC (Figure 93). This caravan park evolutionary development model is presented to further stimulate this discussion and to generate future research on caravan parks.

As Haywood (1986:158) warned, ‘it is not at all clear whether a tourist area’s position in its life cycle and its shift from one stage to another can be identified simply by observing the historical pattern of the number of tourists.’ This study therefore allowed the ‘change’ in site-mix infrastructure as reported by caravan park owner/managers from 1970 to 2010, to determine the pattern of the life cycle curve for the nine individual predetermined site-mix options in the Tweed Shire from 1970 to 2010.

Clearly, as demonstrated at Figure 64, there is a variety of site-mix ‘cycle of evolution’ curves, each having its own sequential entry and exit point. With this quantitative foundation from the earlier sections of this chapter (Section 6.2) and the mixed findings (Section 6.3) supported by the broader qualitative findings of chapter four (Part 1 - manufacturing) each site-mix element was independently considered to descriptively position it along the standard ‘s’
curve within the general framework of Butler's (1980) TALC (Figure 11). Finally, caravan park, as a single homogenous unit, is also subjectively positioned along the curve. The placement of the parent ‘parks’ was made in consideration of the consistent decline of national establishments since 1995 (Figure 1), the corresponding fall of total parks within the Tweed Shire across a similar time period (Figure 49), and the influences of the historic internal site-mix elements measured across the study period, 1970 to 2010 (Figure 64) and the contemporary trends of external caravan manufacturing outputs (Figure 24).
Figure 93 - The caravan park evolutionary development model of Tweed Shire
Although Haywood (2006) revisited several of his earlier criticisms of the TALC, Butler (2011) confirms that Haywood’s original reservations on the difficulty of identifying stages still remain mostly unaddressed in the academic literature. Toh et al (2001:432) concluded in their travel balance approach study of Singapore, that their approach quite nicely approximates the Haywood formulation of the TALC model in both length and sequence of stages of the life-cycle. However, it did not conform to the decline stage as tourist arrivals for larger geographical areas simply do not decline unless there is a large and permanent catastrophe. Even if all stages were determined through objective empirical indicators, the question would still lay in whether they matched perceptions of the decision makers; the operators of services and facilities within the tourist area (Butler 2011).

In light of the above, a brief interpretation of the Caravan Park Evolutionary Development Model (Figure 93) is as follows:

- Onsite caravan, non-ensuite cabin and long-term park cabins are clearly heading toward extinction on a very steep decline curve. They have lost flavour within parks to be largely superseded by ensuite cabins.

- Annual caravans are also sliding away toward decline as their value to caravan parks is ever diminishing in respect to economic return per site. However, while some annual vans have already been displaced through closure or redevelopment of parks, they are less likely to be ordered out of parks, wholesale, due to strong historic sentiment and community backlash. Rather, they will decline through natural attrition and by having no place in a redevelopment scenario.

- Tent site, non-ensuite caravan and ensuite caravans all remain in the stagnation stage.
• Tents have been losing site-space share for over four decades. They are low economic yielders as un-serviced sites. While they will continue to decline in the short-term, due to priority being placed on other options that will bring more immediate returns, the rejuvenation of this site-mix element will come through demand for specialised fully-serviced sites, catering exclusively for the new breed of camper-trailer that is gaining popularity. These new sites will be in a good position to command a stronger return per site than their un-serviced predecessors.

• Non-ensuite caravan sites mirror the tent site curve but due to their potential to increase revenues per site at a faster rate they will be treated by park owners earlier in the frame. The exponential growth in caravan manufacturing, coupled with the need for parks to maintain various price points, will ensure this site-mix option retains a place in the new caravan park site-mix suite. Consideration to the new RV designs, including rear opening doors, slide-out extensions and large (long) motorhomes must be given in new site configurations.

• Ensuite caravan sites have the greatest potential in the shortest timeframe to start driving new business for parks. Park owners are recognising that consumers are more demanding in their quality and service expectations and there remains a sufficient quantity of caravanners that has the propensity to pay for this exclusive service. Families opting for this downscale accommodation option can still enjoy the luxury of an ensuite.

• Relocatable homes are still in consolidation; however, the demand for affordable housing will continue to see growth in this site-mix sector for some time. A stronger shift is likely for these units to be concentrated into relocatable home parks in future rather than featuring heavily in new tourist park developments.

• Ensuite cabins are the new kid on the block and very much still in the development phase. While not a completely new product, having been in parks for three decades, their evolution in respect to design, configuration, amenity
level, theming and segment matching is still to be realised. It will not be too distant when specialist ‘cabin’ parks with the appropriate segmentation based recreational facilities and niche ‘branding’ are developed exclusively for this site-mix option, the likes of the range of Accor Hotel brands that offer differentiated positioning matching varying price points in the market.

- Lastly, caravan park, as the homogenous parent unit to the nine site-mix scenarios described above, is at a multi-forked crossroad. While in total park-capacity terms it sits on the decline side of the curve, it still remains in the stagnation zone. Strategic management intervention, calculated entrepreneurial risk and injection of new investment will determine the future for Tweed caravan parks. Entrepreneurially-focused park operators will move radically forward in the climate of high consumer demand and a proactive manufacturing sector, while traditional operators, whose fresh thinking is minimal, remained focused on short-term annual returns and an unwillingness to invest will require life support of their own.

Market forces have, to date, propelled the parks of the Tweed Shire to their current stage of the TALC. However, the path to a sustainable future will only be determined through proactive management intervention. For those that ‘do nothing’ excess demand over supply may bring short-term financial reward at the further expense of product quality and carrying capacity, thus, echoing Butler’s (1980) concern, rendering decline inevitable. For those who are innovative and respond through pursuit of informed sustainable management intervention, a positive future is just a little further along their life cycle curve.

Based on historical genius of Tweed caravan parks, including the long involvement stage and the more recent trends in site-mix options, facilities and services, as exhibited throughout this chapter, the evolution of Tweed Shire caravan parks has been shown to sympathise with the stages of the TALC. Rejuvenation or decline is now the critical question for some park operators, and definitely some site-mix options, if long-term survival is to dominate over a mere band-aid revival, driven by current demand. A number of elements are
identified as being important in the rejuvenation of a successful and sustainable tourist caravan park for the Tweed Shire. These are:

- The provision of park facilities and site amenities that are specifically targeted to service existing grey nomad demand, satisfy business from emerging market segments, including families and couples, and to attract new off-peak business market segments; health allied or conferences as examples.

- The inclusion of a variety of communal recreation amenities and services that cater to all guests of the park. They must provide for relaxation, meeting and mingling, preparation of food, active and passive recreation, health and pampering and sophisticated children’s play facilities, including age or lifestyle appropriate zones.

- The inclusion of a variety of individual sites’ amenities such as drive through sites, sites with ensuite, sites to cater to larger recreational vehicles and motorhomes, campsites equipped with facilities equal to caravans and large enough to handle the new camper-trailer configurations with access to a modern camp kitchen.

- The provision of cabin and villa accommodation architecturally designed and set in appropriately landscaped environments, to reflect the style or theme of the caravan park or destination. The cabins will need to exhibit high levels of amenity and configurations to cater to a variety of price points within the emerging markets of families and younger couples.

- The positioning of the caravan park within the tourism market place as a ‘preferred’ holiday choice rather than merely the ‘affordable’ choice through greater market segmentation.

- The development of partnership with external suppliers for the seamless delivery of a range of holidaying consumer wants and needs. These could range from child care, pet care, hair care, car repair, van towing, airport
transfers, allied health services, learn to dance, learn to surf, grocery delivery, car and van storage and any other service tailored specifically to the customer base, location or other specialist services provided within the destination.
7 DISCUSSION

This chapter provides a discussion of this exploratory study. It commences with preceding comment on general societal cycle observations, manufacturing cycle observation and then caravan park cycle observations within the TALC framework.

It draws upon the literature of chapter two, the qualitative findings of chapter four (Part 1 - manufacturing) and chapter five (Part 2 - parks) and the quantitative and qualitative findings of chapter six (Part 3 - Tweed Shire Case Study).

7.1 THE SOCIETAL CYCLE

The foundation of the TALC lies with the product life cycle (PLC) which asserts that sales of a product proceed slowly at first, experience a rapid rate of growth, stabilise and subsequently decline. For over 30 years it has held intuitive appeal to researchers in their quest to explain development patterns of destinations as vast as an entire country, as contained as an island and even down to specific city precincts, attractions or business operations. Prosser’s (1995) review of the TALC concluded that its appeal lay both in its simplicity to comprehend and also its descriptive power. With a void in the academic literature on supply-side caravanning the TALC provided a valid framework within which to undertake this exploratory supply-side study of this under represented form of drive tourism.

The basic caravan park, as subsector unit within the broader tourism accommodation suite, including hotels, resorts, apartments and guesthouses has, in recent decades, been perceived by the public as the symbol of caravanning. It is also intermittently reported in published statistical literature. With shifting tourism trends, enabled by changes in political, social, economic and technological forces (Hall 1995) and coupled with growth factors of motivation, ability and mobility (Murphy 1985), the symbol of caravanning has changed. Moving population demographics, with an increasing baby-boomer
skew, has had a particular effect on recent caravanning developments. The focus is now more on the caravan itself and its serviceability as a long-term, touring, residential unit rather than as a temporary, short-term holiday unit to be parked in a caravan park.

Additionally, the market for caravans, for a period around the turn of the century, seriously moved from families to retired couples, with manufacturers responding to meet the retirees’ needs in respect to internal configurations and provision of amenity. This shift came to the detriment of family-friendly caravans. However, families are now re-entering the market through high occupation of the new style of luxurious park cabin and also the camper-trailer. This modern version of the tent has rapidly become an RV accommodation of choice. These varying markets, however, frequently demand different amenities and services within caravan parks as described by McClymont et al (2011). They profiled three market clusters (basics, basic extras and blue ribbon) that were determined by combined factors of age, travel party and length of travel.

Thus the symbiotic relationship between external caravan manufacturing and internal caravan park site-mix options, as shown through the study, is evolving in cyclical forms. Butler’s (1980) original concerns were for the sustainability of destinations and the concept of strategic management of resources to intervene in such cycles that become counterproductive to operational survival.

7.2 THE MANUFACTURING CYCLE

Caravan manufacturing, when set in a chronological context and expressed in units of production (Figure 24), displays in a very strong asymptotic cyclic curve. So much so that the manufacturing sector has completed one complete cycle and is moving through the development stage of cycle two. This pattern reflects Baum’s (1998b) observation in a small island environment of extending the lifecycle by multiple reinventions. Management intervention as proposed by Russell and Faulkner (2004) during the low manufacturing ebb of the 1990s is also reflected in O’Brien’s (2011, pers. comm., 6 October) concern for the industry and the consequent forming of the national industry association, CRVA, to work collectively on recovery strategies.
This cycle, and the subsequent management intervention, was repeated in 2009 when the GFC started to impact negatively on consumer spending and demand for caravans declined over two consecutive years. In unison with the federal government’s stimulus package (Hudson 2009), CRVA proactively and aggressively went to market with a national advertising campaign to ensure that their industry was well positioned to receive favourable consumer consideration for their redirected or ‘bonus’ holiday spend (Ockenden 2009). The stimulus resulted in strong consumer confidence in the domestic holiday product and this translated well for the caravan manufacturing industry to promote a rebound of production outputs in 2010, firmly above the previous peak of 2007 (Figure 24). Caravan parks also reported increased occupancies across 2009 in the face of an otherwise decreasing or flat tourism market (Brooker 2011).

7.3 THE CARAVAN PARK CYCLE

Caravan parks, when set in a chronological context and expressed in number of establishments, on a national level, also display a clear but milder asymptotic curve (Figure 1), albeit, with a long declining tail. Records are unavailable for periods prior to 1992, and with a number of series adjustments (ABS 2011) across the period, direct comparisons are difficult to make. However, from the peak in 1995 there has been a steady and consistent decline across most years, with the number of parks recorded in 2009 being 10% less than a decade earlier.

Butler (1980) proposed that the decline of tourist areas was directly related to the carrying capacity of the area being exceeded in that the area had moved beyond the critical range of elements of capacity. This excess could be manifested through a number of capacity indicators from environmental degradation, infrastructure degradation or social degradation. As the national statistic for number of parks is generated from multiple tourist areas in each state and territory, some coastal, some inland, some along highways and others in metropolitan areas, it is important for one to look at wider economic and societal carrying capacity indicators, other than strong environmental indicators of carrying capacity, to explain the national decline, that was also evident within the Tweed case study.
Just as the shifting political, social, economic and technological enablers described by Hall (1995) supported Murphy’s (1985), growth factors of motivation, ability and mobility to change the public’s perception on caravans positively, these same forces were playing out negatively on caravan park operators.

The fundamental premise of running a business is to make a profit. How best to do that in a competitive and dynamic business climate is always the source of debate. Drucker (1985) suggests entrepreneurial knowhow is the secret, a concept supported by Brooker (2011). However, Mintzberg and Porters’ opposing strategies of emergent thinking versus planning thinking, as critiqued by Moore (2011), both offer plausibility for the fate of the declining caravan park sector. Is there a lack of planning, including government planning and policy (Getz 1992; Glover & Prideaux 2009) across the sector as a whole as proposed by O’Brien (K, 2011, pers. comm., 6 October) when considering the fate of the manufacturing sector in 1990? Or is there a lack of entrepreneurial innovation as reported by Brooker (2011:31) when he observed caravan park operators to be passive, or market driven, rather than individually or collectively being aggressive new market drivers.

The juxtaposing trend lines between caravan manufacturing, particularly in respect to the recovery post the GFC, and caravan park establishments suggests that despite the CRVA umbrella, the two sectors still have different cultures. History shows manufacturing has been much more exposed to the vagaries of fluctuating consumer trends thus they aggressively develop new markets to fill gaps. Caravan parks, on the other hand, have traditionally been financially stable operations, often successful family business that have been happy to just hold the status quo approach.

As the national decline of parks across the past decade and a half cannot be ignored, many factors are placing pressure on park owners and their management decisions. On one hand the shifting social need towards more
affordable housing is growing, as highlighted by Glover (2009). More government intervention is required through policy development to protect caravan sites as a means to meeting these needs (Squires & Gurran 2005). Escalating land prices and consequently land value based taxes, particularly in coastal areas, is promoting an economic environment whereby caravan parks cannot always remain viable through their current business models. Subsequently, the squeeze facilitates the conversion of beachfront land to high rise units and hotels. As identified by Prideaux and McClymont (2006), in some cases this includes caravan park land. The demands of accreditation are also driving some operators to exit the industry: particularly to meeting environmental guidelines (Integrated Site Design Pty Ltd 2010); new regulatory reform of consumer protection for long-term tenants (NSW Fair Trading 2011); and intensifying public scrutiny on redevelopment initiatives, either for upgrading (Catón 2011b) or to cater for new RV models and configurations (Integrated Site Design Pty Ltd 2010).

Unlike the inference in the original TALC model of destinations being insular, Hovinen (2002) emphasizes Argwal’s 1994 proposition for the need to treat the tourism area not in isolation but as a component of a more complex and dynamic environment with multiple products and stakeholders that each play interwoven parts in the shaping of the destination. The multiple ‘pressure points’ contributing to national caravan park decline strengthen Hovinen’s position and are further highlighted through the case study of caravan parks of the Tweed Shire. However, through further research, using a larger and more geographically dispersed sample for the site-mix analysis, the Caravan Park Evolutionary Development Model, as a pilot, exhibits real potential for operationalising the TALC in respect to forecasting internal site-mix scenarios to inform future caravan park development.
7.4 CARAVAN PARKS OF THE FUTURE

The caravan park (owner/manager) of the future will need to think laterally; to change the attraction upon which their traditional market was based; to ensure additional man made attractions contain element of uniqueness; to take advantage of ‘untapped’ natural resources around them; and re-orientate to ‘off’ season markets to make their park an all-year-round attractive proposition. They must segment markets and seek out special interest opportunities, the likes of education or health (Brooker 2011; Schuurman 2011). Combined marketing is essential, both within their caravan park fraternity but of equal importance is the support from regional and state agencies in broader marketing campaigns (Bailey 2011; Gray 2011).

In the face of the Global Financial Crisis of 2008, evidence from caravan park operators has indicated that demand for their product has increased.

*The OHP [Outdoor Holiday Parks] sector has been an anomaly within tourism as more Australians holidayed domestically in 2009, and discovered the upgrades undertaken by many OHPs in the past ten years (Brooker 2011:97).*

The need to identify radical innovation within the broad Australian tourism industry is referenced indirectly in Jackson’s (2009) review of Australia’s domestic tourism industry. The report clearly articulated the need for forward thinking and introduction of new ideas, new markets and new products, rather than acting in a reactionary manner through incremental improvements (Brooker 2011). The need for such an approach was previously articulated by Drucker (1985) who suggested that a business or organisation would not survive during periods of rapid change unless they acquired and enacted entrepreneurial know-how.
In 2012, and beyond, with the continued promotion of caravanning by the CRVA and strengthening sales of RVs delivered from the RVMAA manufacturers buoying the existing, emerging and experimenting consumer markets, a rejuvenated stage of caravanning will most certainly evolve across Australia. This will support new caravan park developments and new site-mix opportunities.

The study clearly established that the cyclic patterns of site-mix development within the Tweed Shire have contributed to shaping that area’s caravan parks in alignment with the six stages of the TALC: Exploration, Involvement, Development, Consolidation, Stagnation and then Decline or Rejuvenation as proposed by Butler (1980). Supplementary evidence from the study also shows that caravan manufacturing and caravan parks on a national scale have also traversed the asymptotic life cycle curve during their Australian history. It is evident that manufacturing is much more responsive to contemporary consumer needs and actively drives new markets accordingly. Caravan parks, on the other hand, are market followers with little evidence of outstanding or radical innovation to date. The fate of the caravan park sector in the future is in its ability to continually reinvent supply with new product offerings targeted to new consumers.
8 CONCLUSION

8.1 SUMMARY OF THE STUDY

The central aim of the study was to document how caravans and caravan parks have developed in Australia and what influences the external caravan manufacturing sector and the internal caravan park site mix configuration had in shaping the development of caravan parks.

Limited studies have been conducted on caravanning as observed by several commentators (Hardy & Gretzel 2011; Hayllar et al. 2006; Holloway 2007; Kelly 1994; Van Heerden 2008) with much of the existing body of knowledge focused on demand-side studies (Cridland 2008; Hollaway & Hollaway 2011; McClymont et al. 2011; Onyx & Leonard 2005; Prideaux & McClymont 2006).

As a supply-side study the findings were presented in three parts, as described through the research design (Table 1), to address the following three questions:

1. How has the caravan manufacturing sector developed in Australia?
2. How has the caravan park sector developed in Australia?
3. Has the development of Tweed Shire caravan parks, and their site-mix options, amenities and services, aligned to the stages of the TALC?

The TALC provided the theoretical framework for the study and a specific case study of caravan parks of the Tweed Shire, in northern New South Wales assisted to explore the research questions.

8.2 KEY FINDINGS

The symbiotic relationships between caravan parks, their internal site-mix elements and the external manufacturing sector have been seen, through different eras of history, to be at times intersecting, collaborating, colliding, moving parallel and even diverging in their quest for progress. However, the rollercoaster journey that each has taken, even with sequential entry and exit points, by and large, conforms to the principles of the TALC. Each has had a
slow exploratory beginning, moving through various stages of growth and consolidation before stagnating into a rate of decline.

Caravan parks matured from their humble nineteenth century beginnings as camping reserves when the first home-made caravans started to demand a share of the rudimentary holiday sites in the 1930s. Thus the evolution of the site-mix had begun: tent sites for tents and caravan sites for caravan. As large bulky units, not so easy to manoeuvre within the constraints of the crossed guy ropes and tent pegs they soon found they were being ostracised into separate areas within the camping ground.

As commercial caravan production increased after World War II, caravanners were also demanding greater amenities within caravan parks to service their new gadgetry; running water to internal sinks replaced buckets and kerosene tins to draw water from a well; overhead wiring brought electric light to stamp out hurricane lanterns; and electric followed by gas stoves ushered out the open fire and liquid fuel stoves. These new luxuries were readily adopted by the Australian public who, through that era, were enjoying the post war freedoms of motor transport; shortened working hours and increased holidays, with holiday pay, were driving a manufacturing bonanza through to the 1970s. Caravan parks were being regulated in their design and construction by local government to more adequately cope with the changing site-mix patterns and manufacturers were improving quality and safety of their product; all the while making the caravan more like a home on wheels.

For some people, their caravan was literally their home. The mining boom of the 1970s in Queensland and Western Australia was driving demand for mobile accommodation for itinerate workers. Then, the disaster of Cyclone Tracey in 1974 required manufacturers to ramp up production further to meet the demand for emergency housing. The manufacturing boom that peaked at 37,000 units per year in 1975 was short lived, as towns were created to service the miners. A spike in world oil prices forced motorists into to smaller more efficient vehicles unsuited to towing heavy caravans and the ex-Darwin vans started to make their way back into the second hand market post-reconstruction. This was a severe blow to manufacturers but a windfall for caravan parks. As the
market flooded with cheap caravans, the public once again took to the road after the oil spike eased through the 1980s, creating unprecedented demand for caravan sites. This period through to 1995 was the premier caravan park construction era with total Australian establishments peaking at 2716 in 1995; some 20 years post the manufacturing peak.

The three decades, from 1970 to 2000 fostered a revolution in site-mix options available in caravan parks. As caravans became living units and not just holiday units, parks introduced on-site accommodation; firstly through on-site caravans, then small non-ensuite cabins before the full ensuite units. Additionally, legislative reform in 1986 legalised full-time residential living in caravan parks for the first time. For some residents this was a means to affordable housing, for others it was a lifestyle choice. Either way, it triggered another site-mix evolution with parks, and sites, now classified as short-term or long-term. The delimiting factor was if the occupation of sites was for less than or greater than 60 days.

As park living increased through the turn of the twenty-first century and caravan site capacity started to decline, tourist sites for mobile caravan and tents were being squeezed. Ensuite cabins were delivering higher yields per site and many parks sacrificed annual van sites and caravan sites to increase their cabin capacity. Families, a market that had been ignored by the manufacturing sector for almost a decade in favour of the grey nomad market, were starting to return to caravan parks to enjoy the additional comforts, configurations and amenities of the modern cabin. Manufactured camper trailers, once the poor man’s caravan, are now much more sophisticated and luxurious in their amenity and are also quickly becoming the RV of choice for some consumers. This new wave of enthusiasm for a product, without all the homely luxuries of a caravan, is also promoting additional on-site and on-park amenities to cater specifically to them. Facilities such as ensuite sites, camp kitchens and indoor recreation rooms all support the camper in modern caravan parks.

The overall development of caravan parks is continuously evolving as a result of the ‘action and reaction’ cycle interplaying between external manufacturing and their internal site-mix options. With the diverging trend today, between
inclining manufacturing and declining establishments, enormous potential exists for the two sectors, manufacturers and parks, to collaborate on future development of exciting new product opportunities to take caravanning into a new iteration of the evolutionary cycle.

8.3 MANAGEMENT IMPLICATIONS ARISING FROM THE STUDY

The benefit to owners of caravan parks and executives of industry associations is that, for the first time, some base-line data is available to demonstrate where or how their product sits within the evolutionary history of their industry through the six stages of the TALC – Exploration, Involvement, Development, Consolidation, Stagnation and Rejuvenation or Decline.

With the hindsight of these findings it is posed that owners and managers are better informed to make strategic and sustainable business decision to take their product and their industry forward. It provides them with an objective overview, something that is often missed as they, as individuals, focus heavily on day-to-day operations within their business and not so much on the strategic view over their business. Brooker (2011) found that such a lack of knowledge often promotes a culture of traditional thinking with parks only embracing change after it has been tried by somebody else, with very few operators seriously pondering the future.

Through observation and personal communications with a range of industry leaders it is apparent to the author that the manufacturing and caravan parks sectors are still operating in parallel to each other instead of being more collaborative. The formation of CRVA has been a very powerful step in not only the rebirth of the manufacturing sector but also the unification of parks across the nation and the subsequent lobbying and marketing pull it provides. As the divergent trends have also not gone un-noticed by CRVA, it is proposed that some foundational understanding has emanated from this study to assist industry and political leaders in their future deliberations on this aspect.

Tourism agencies at federal, state and regional levels have largely overlooked the caravan industry, and its contribution to the state of the economy. If the parks sector mirrors its past decade of decline over the coming decade, a
serious shortfall in tourism beds is likely to develop. Accordingly, employment within the sector would fall and revenues would suffer. Policy makers at each level of government may find some understanding within this study to support political and practical reform to address this issue - before it becomes a crisis.

In light of the significance of the caravanning industry to the Australian domestic tourism economy, and the Australian social fabric, it is reasonable to expect that both researchers and practitioners; direct park operators, association members, destination planners and tourism marketers will be interested in the findings.

8.4 Contributions to Knowledge

The study contributes to the current body of knowledge in five ways:

1. It partially addresses the current void within academic literature in respect to supply-side of the caravanning industry by reporting park driven responses to past development and future opportunities for their sector.

2. It expands the literature on drive tourism by exposing the supply-side opportunities and constraints within caravan parks and caravan manufacturing.

3. It adds to the history literature by promoting the genius of Australian caravan manufacturing and its contribution to the development of the present tourism industry.

4. It adds to the tourism economics and marketing literature by exposing caravan parks as significant contributors to gross domestic product.

5. It contributes to the tourist area development literature by presentation of the Caravan Parks Evolutionary Development Model in response to the potential of operationalising the TALC.
8.5 LIMITATIONS

The research presents limitations within each of the three parts to the study.

Part 1 – History of Caravan Manufacturing

Due to the qualitative methods employed to identify and then interact with the manufacturing respondents, the exact nature and content of the responses received would unlikely be received by another researcher (Jennings 2010). Although the invitation to participate in the study was open to a national population, the responses were heavily skewed toward the eastern states. As the majority of manufacturing also occurs in these states, the sample of 17 did produce saturation on many key issues. Thus the author feels confident that the sample size was sufficient and the findings are validated (Leech et al. 2010).

Part 2 – History of Caravan Parks

Similar qualitative methods were again engaged to seek respondents to participate in the history of caravan parks’ study. It too was open to a national population and due to each state having an industry association the spread of respondents was more proportionate. However, as the majority of caravan parks also occur in the eastern states, the sample of 20, although skewed toward New South Wales and Queensland, also produced saturation on key issues. The author feels confident that the sample size was sufficient as attributes were able to be readily cross-checked or confirmed through more than one respondent.

Part 3A - Tweed Shire Case Study

This study utilised a quantitative technique of conducting a saturated sample or census of the known and contained geographic population of caravan parks (Zikmund 1991). Despite the success of the census approach, the small population (N=281997; N=272011) that was delimited to a single local government area may not support direct national inferences to be made (Jennings 2010). This part of the study did not intend to draw such inference.

As a longitudinal study covering four decades from 1970 to 2010 the data collection was restricted to two events; 1997 and 2011. The lapse in time prior
to the collection events may have produce respondent error. These were more likely in data collection event one as respondents were invited to provide responses covering historic periods up to 25 years. Data collection event two also required recall over a 15 year period. However, with the adoption of computer technology in that later time period the availability of data was enhanced.

8.6 RECOMMENDATIONS FOR FURTHER RESEARCH

As exploratory research, the ground still remains fertile for future supply-side research to emanate from these early stages of discovery.

1. As outlined through the methodology and reinforced through the limitations, the case study of Tweed Shire parks does not support inferential findings: particularly in respect to the Caravan Parks Evolutionary Development Model. However, as a pilot, the Tweed model could be further tested against a larger sample with greater geographical spread. It is therefore recommended that future research be undertaken to gain a greater understanding of the site-mix relationships within different geographical settings. These could be coastal versus inland or city versus rural or tropical versus temperate. Additionally, a comparative study could assess Australian experiences against overseas experiences to establish why differences or similarities occur and the implications they bring to the industry.

2. The vast but fragmented array of regulation, as identified through chapter five, that has emanated from each different state in response to caravan parks is at best confusing and certainly cumbersome, but it also often leads to conflict. Conflict between states, within states, within park associations, between individual parks and councils and between park owners and park residents. As each conflict often arises through a separate piece of legislation, opportunity presents for several studies to undertake state-based comparative analysis on specific issue areas. Two issues identified through the Tweed Shire case study involve park development or redevelopment scenarios. Firstly, whether the current land use and zoning legislative frameworks were presenting barriers or enablers to development and redevelopment of parks. Secondly, the balance between legitimate
interests of park owners to develop and sustain efficient and effective business operations and the appropriate protection for park residents seeking security and stability through tenancy legislation.

3. The supply of accommodation is just one single aspect of a visitor’s needs when holidaying in a tourist destination. Traditionally, caravanning customers have sourced their additional needs from service providers external to the caravan park. As highlighted at chapter six and seven, opportunity exists for park operators to partner with external service providers to support seamless delivery and single chargeback points for a range of caravanning consumer needs. Further investigative research could provide insights into how seamless service delivery readily adopted within other tourism sectors like hotels, resorts, restaurants and airlines, could translate to the caravan park environment. What services consumers were seeking and what propensity they have to pay for such services? This aspect could involve external service providers or present new internal product opportunity for caravan parks through provision of non-essential facilities of supervised recreation or child care, health and fitness or personal health care, as examples.

4. The obvious supply issue that requires additional research is the divergence between manufacturing and site capacity. As demonstrated through chapters one and six, caravan parks are in decline nationally but the demand for sites driven by strong manufacturing and consumer preference is growing. The big question is: where the bloody-hell are all the touring caravanners going to go? Evidence abounds that many caravanners are now seeking freedom camping opportunities (Bailey 2011; Cridland 2008; Explore Oz.com ; Morehead 2011; Nahan 2009). Some of this demand is driven by desire to experience the freedoms of non-regulated, non-commercial accommodation, some by a desire to make their limited budgets go further and some as a result of sales pitch at the point of purchase of their RV convincing consumers they have a totally independent living unit. The interesting point from this current study’s perspective is that caravan parks, in some respects, emanated out of the need to standardise, and raise
standards, at over-used and under-regulated freedom camping sites on government lands. It is therefore recommended that further research is undertaken to explore the freedom camping phenomena at a government policy level. Comparative analysis of state legislation could be reviewed against the practical implementation, enforcement and implications at local community levels.
9 References


—— 2010a, Motor vehicle census, 9309.0, Canberra.

—— 2010b, Tourist accommodation Australia, 8635.0, Canberra.


Bailey, B 2011, Caravan and camping industry profile, Caravan and Camping Industry Association NSW, Sydney.

Baker, A 1988, When was that? chronology of Australia, John Ferguson, Sydney.

Baum, T 1998a, 'Taking the exit route: extending the tourism area life cycle model', *Current Issues in Tourism*, vol. 1, no. 2, pp. 167-175.


Beckwith, A 1998, 'The role of caravan parks in meeting the housing needs of the aged', *Urban Policy and Research*, vol. 16, no. 2, pp. 131-137.


Brooker, E 2011, 'In search of entreprenurial innovation in the Australian outdoor hospitality parks sector', PhD thesis, Griffith.


Caldicott, R & Jarrot, J 1990, 'Whitsunday Gold Pty Ltd - application for rezoning', public access presentation and submission to Pioneer Shire Council, Mackay Qld.

Carson, D, Scott, N & Waller, I (eds) 2002, *Drive tourism: up the wall and around the bend* Common Ground Publishing.


—— 2004a, 'Van park rules 'have been bent'', *Tweed Daily News*, November 26, p. 4.


Coote, D 1995a, 'Early motorhome tackles the outback', *On the Road*, June 17, p. 34.

—— 1995b, 'It's a plane ... no it's a caravan', *On the Road*, October 7, p. 34.


Department of Planning 1993, *State environmental planning policy no. 36 - manufactured home estates*, Sydney.


Finlay, K 1978, 'Why 250 000 Australians are living in caravans', *Australian Women’s Weekly*, July 19, pp. 4-5.


Gray, L 2011, 'Keynote address', paper presented to NSW Caravan and Camping Industry Association, Kiama, NSW, 26 July.


Griffith, B 1995, 'This is our oldest motorhome', *On the Road*, June 17, p. 34.


Hardy, A & Gretzel, U 2008, 'It's all about me; understanding recreational vehicle usage on the Alaska Highway', paper presented to CAUTHE, Surfers Paradise, QLD.


Hayes, P 1996a, 'An industry on the move', *On The Road*, March 23, p. 3.

—— 1996b, 'More heads outdoors', *On The Road*, May 4, p. 3.


Hinchcliff, M 2011, 'Ditch the tame terrain', *The Courier Mail*, 21 May.
Hollaway, DJ & Hollaway, DA 2011, 'Everyday life in the tourist zone', *Journal of Media and Culture*, vol. 14, no. 5, p. 'zone'.


Kiely, R 1981, 'Home is 5cm of polystrene foam and an aluminium skin on six wheels', *The Age*, June 5, p. 11.


Marles, K 2006, 'Repeat visitors to Australian caravan parks', Phd thesis, Griffith University.


McGrath, A (ed.) 1991, Travels to a distant past: the mythology of the outback, Traveller, Journeys, Tourists - Australian Cultural History No 10, University of New South Wales.


Morehead, E 2011, Inquiry into developing Queensland's rural and regional communities through grey nomad tourism, Economic Development Committee,
References

Queensland Parliament, viewed 9 October 2011,


Nahan, M 2009, *Provision, use and regulation of caravan parks (and camping grounds) in Western Australia*, Legislative Assembly of Western Australia, viewed 3 October 2011,

National Tourism Alliance 2011, *NTA- Qantas Australian tourism awards*, viewed 9 October 2011,


Paddenburg, T 2011, 'Is this the most expensive caravan park in the world', *Sunday Times*, 3 April, p. 17.


Powell, S 1987, 'Temporary insecure - and expensive', *Australian Society*, vol. 6, no. 10, p. 50.


Queensland Tourism Industry Council 2010, *Qantas Australian tourism awards*, viewed 9 October 2011,

RACQ 1931a, 'Easter holiday touring notes', *The Queensland Motorist*, March 16, p. 54.


—— 1931c, 'Your ideal tourist resort', *The Queensland Motorist*, May 1, p. 41.

—— 1934, 'An interesting incidence of a world tour', *The Queensland Motorist*, February 1, p. 11.

—— 1935, 'The great American roadway: roadside developments we may look forward to in Australia', *The RACQ Journal*, March 1, p. 22.


—— 1936b, 'Rolling homes: will the trailer caravan become popular throughout Australia', *The RACQ Journal*, April 2, p. 11.


Snepenger, D, Murphy, L, O’Connell, R & Gregg, E 2003, 'Tourists and residents use of a shopping space', *Annals of Tourism Research*, vol. 30, no. 3, p. 567.

Solnet, D, Paulsen, N & Cooper, C 2010, 'Decline and turnaround: a literature review and proposed research agenda for the hotel sector', *Current Issues in Tourism*, vol. 13, no. 2, pp. 139-159.


Teddlie, C & Tashakkori, A 2009, Foundations of mixed methods research: integrating quantitative and qualitative approaches in the social and behavioral sciences / Charles Teddlie, Abbas Tashakkori, SAGE.


The Economist Group 1996, 'Taming the beast: a survey of living with the car', The Economist, June, p. 22.


Van-Assche, M 1978, 'Caravan parks have a glitter but they are not gold', *Australian Property News*, October 6, p. 26.


Weekes, P 2010, 'Low profit may can caravan park sale', *Northern Star*, 7 October, p. 6.


## APPENDICES

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.1</td>
<td>2011 Survey Instrument with 1997 Summary Data</td>
<td>186</td>
</tr>
<tr>
<td>10.2</td>
<td>Researcher introduction from CCIA</td>
<td>189</td>
</tr>
<tr>
<td>10.3</td>
<td>Letter of introduction from Researcher</td>
<td>191</td>
</tr>
<tr>
<td>10.4</td>
<td>Research Information Sheet</td>
<td>192</td>
</tr>
<tr>
<td>10.5</td>
<td>Research Ethics Approval <em>(ECN-11-107)</em></td>
<td>194</td>
</tr>
<tr>
<td>10.6</td>
<td>Early Caravan Park Design (Porter, 1949)</td>
<td>197</td>
</tr>
<tr>
<td>10.7</td>
<td>Plans for Building a Trailer Caravan</td>
<td>199</td>
</tr>
</tbody>
</table>
10.1 Survey Instrument with Summary Survey Data

The purpose of this study is to document the changing nature of caravan parks with emphasis on the Tweed Shire of Northern New South Wales. Particular attention will be placed on site-mix trends that have developed over the life of the Park. Through completion and return of this survey you will be deemed to have given consent to participation. The current data collection (clear areas) will be aggregated with the 1997 collection (shaded areas) to form the final report. Your assistance in completing this questionnaire, by making comment on the clear sections/questions where appropriate, would be greatly appreciated. Only mark the shaded sections if you believe the values to be different to those previously supplied by a representative from your Park in 1997. I sincerely value your time taken to complete this survey. The findings of this research will be made available to you at completion of the study.

Section 1 - History

<table>
<thead>
<tr>
<th>Question</th>
<th>Sample Park</th>
</tr>
</thead>
<tbody>
<tr>
<td>10. What is the name of your park?</td>
<td></td>
</tr>
<tr>
<td>11. Are you the owner or manager of this park?</td>
<td>Owner: [ ] Manager: [ ]</td>
</tr>
<tr>
<td>12. How long have you owned/managed this park?</td>
<td>Years: [ ]</td>
</tr>
<tr>
<td>13. Please nominate contact person for future correspondence.</td>
<td></td>
</tr>
<tr>
<td>14. Please indicate which year the park was established.</td>
<td>1977</td>
</tr>
<tr>
<td>15. Please indicate the number of original sites.</td>
<td>36</td>
</tr>
<tr>
<td>16. Please indicate the present number of sites.</td>
<td>Total: 1997 182 2010</td>
</tr>
<tr>
<td>17. What is the current proprietorship?</td>
<td>Private Enterprise: [ ] Local Government: [ ]</td>
</tr>
<tr>
<td>18. Under which legal business structure does your park currently operate?</td>
<td>Sole Trader: [ ] Partnership: [ ] Family Company: [ ] Public Company: [ ] Trust: [ ]</td>
</tr>
<tr>
<td>19. Please nominate a location for your park. (More than one may be ticked)</td>
<td>Rural: [ ] Village atmosphere: [ ] Urban (highly built up area): [ ] Close to beach (within 400 metres of entrance): [ ] Beach (direct beach access): [ ] Other (please nominate): [ ]</td>
</tr>
</tbody>
</table>

Questions continued on Page 2

Further Information: Rod Caldicott Ph: 0450 835752 E-mail: r.caldcott.10@scu.edu.au
CHANGING NATURE OF CARAVAN PARKS - QUESTIONNAIRE

It is acknowledged that the level of details requested on this page is quite demanding. However, it is extremely important to obtain an accurate picture of the trends which have shaped the current industry. I therefore strongly urge you to give careful consideration to this critical aspect of the survey. If true figures are unavailable please provide estimations where possible. Only mark the shaded sections if you believe the values to be different to those previously supplied by a representative from your Park in 1997.

1. Please estimate total number of sites available in:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) *short-term</td>
<td>151</td>
<td>185</td>
<td>182</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) long-term</td>
<td>79</td>
<td>68</td>
<td>80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Please breakdown short-term sites from the total above at 12a

Note: Australian Bureau of Statistics data does not adequately breakdown elements within long-term and short-term sites as requested in this survey.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*unpowered (tent) sites</td>
<td>55</td>
<td>36</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>non-ensuite caravan sites</td>
<td>11</td>
<td>21</td>
<td>43</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ensuite caravan sites</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*on site *o’nite caravans</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>non-ensuite cabins</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ensuite cabins</td>
<td>3</td>
<td>7</td>
<td>20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Please breakdown long-term sites from the total above at 12b

Note: Australian Bureau of Statistics data does not adequately breakdown elements within long-term and short-term sites as requested in this survey.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*permanent caravan sites</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>permanent home sites</td>
<td>64</td>
<td>107</td>
<td>94</td>
<td></td>
<td></td>
</tr>
<tr>
<td>relocatable home sites</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Please indicate if the following amenities were offered in the nominated years. (Indicate by ticking year of introduction)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>e.g. spa</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>concrete pads</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>cold water amenities only</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>hot and cold water amenities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>individual water and electricity points to sites</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>individual sullage points to sites</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>individual TV connection to sites</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>individual ensuite sites</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>bar-b-ques</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>undercover camp kitchen</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>sealed roads</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>reception on-site</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>shop/bistro on site</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>service station on site</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>children’s play ground</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>undercover recreation area</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>swimming pool</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>spa/wauna</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>tennis court</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>bowls</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>boat hire</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Other (please nominate) e.g. Internet, WiFi</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

5. Please provide occupancy estimates for each of the site mix options within the nominated years.

Note: Australian Bureau of Statistics data does not adequately breakdown occupancies between long-term and short-term sites as requested in this survey.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>tent sites</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>non-ensuite caravan sites</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ensuite caravan sites</td>
<td>70</td>
<td>65</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>on site *o’nite caravans</td>
<td>80</td>
<td>50</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>permanent caravan sites</td>
<td>80</td>
<td>70</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>permanent home sites</td>
<td>100</td>
<td>100</td>
<td>90</td>
<td></td>
<td></td>
</tr>
<tr>
<td>relocatable home sites</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>long term park cabins</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Please indicate number of staff in nominated years.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>4</td>
<td>6</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Casual</td>
<td>4</td>
<td>4</td>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Please indicate star rating in nominated years.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>5</td>
<td>4</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. Indicate year of affiliation with industry associations.

<table>
<thead>
<tr>
<th>Year</th>
<th>Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>BIG 4</td>
</tr>
</tbody>
</table>

9. Indicate year of affiliation with referral chains. (e.g. Big 4, Top Tourist, Family Parks of Australia)

<table>
<thead>
<tr>
<th>Year</th>
<th>Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>BIG 4</td>
</tr>
</tbody>
</table>

21a. How many other caravan parks in your region do you consider.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>16</td>
<td>18</td>
<td>18</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

21b. What percentage of caravan park business do you estimate

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

21c. Estimate of capital expenditure over period for major refurbishment or additional infrastructure

(exclude routine maintenance)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>200</td>
<td>400</td>
<td>1000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section 2 - Future

1. Was your park originally established as:
   a) a tourist park
   b) a permanent park
   c) a combination with 40% tourist sites: and 60% permanent sites.

2. If this has changed since 1997 please indicate how and when these changes occurred.

3. Do you see further change within your park towards:
   (Please indicate by ticking)

<table>
<thead>
<tr>
<th>Park feature</th>
<th>More</th>
<th>Less</th>
<th>Unchanged</th>
</tr>
</thead>
<tbody>
<tr>
<td>More</td>
<td>Less</td>
<td>Unchanged</td>
<td></td>
</tr>
<tr>
<td>park cabins</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>ensuite caravan sites</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>larger individual sites</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>resort style development</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>on-site entertainment</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>on-site sporting facilities (bowling, tennis etc)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>shuttle bus to attractions</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>package deals</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Other (Please nominate) e.g. motor home sites</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
4. Can you identify changes in the type of customer using your park over time?

- Families
- Couples
- Retired Couples
- International Tourists
- Bus Tour Groups
- Special Interest Groups
- Other (Please nominate)

5. Which group is currently making up the larger percentage of touring customers?

(please rank in order 1, 2 and 3)

6. Which group is currently making up the larger percentage of park cable occupants?

(please rank in order 1, 2 and 3)

7. Please estimate the proportion of cabins booked independently compared to those as part of a prepaid package.

(please rank in order 1, 2 and 3)

8. As a general future trend, is it expected that your business market share will:
   a) increase annually
   b) remain the same
   c) decrease annually

   [Please indicate the segment: Domestic, International, Other]

9. As a general future trend, is it expected that the star rating of your business will:
   a) increase
   b) remain the same
   c) decrease

10. Do you consider that your park will remain in use in its present form or do you expect the park to be redeveloped in the foreseeable future?

    - Stay the same
    - Re develop as caravan park
    - Re develop for another purpose
    - What would you expect to replace it

11. Please offer some suggestions as to why you predict the scenario indicated above:

12. Please feel free to make additional comments regarding aspects of this questionnaire or any other issue you think is relevant to this study.

Thank you for your participation.
Please return in the reply paid envelope.
10.2 RESEARCHER INTRODUCTION FROM CCIA

June 6, 2011

Tweed & Ballina Branch CCIA
C/- BIG4 North Star Holiday Resort
Tweed Coast Road
Hastings Point
NSW 2489

Dear Member,

This letter is to introduce Rod Caldicott from the Southern Cross University - Centre of Tourism.

As an honours student with the school of tourism, Rod has chosen the Caravan Industry for his thesis.

Rod's study should provide a valuable insight into our industry, enabling us to develop strategies that will assist us to take our industry forward over the next decade.

I would appreciate any assistance you are able to give him.

Yours faithfully,

Ben Beadle
Secretary Tweed & Ballina Branch.
June 7 2011

The Proprietor/Manager
<<Company Name>>
<<Address Line 1>>
<<City>>
<<State Zip Code>>

<<Greeting Line>>

My name is Rod Caldicott and I am an Honours Candidate in the School of Tourism and Hospitality Management at Southern Cross University (SCU), Lismore Campus. I am conducting a research project titled:

Caravanning in Australia - A Historical Analysis
Case study of Caravan Parks in the Tweed Shire of Northern New South Wales and the Tourist Area Life Cycle

You may better remember me in my recent role as the Local Government Tourism Manager from Richmond Valley Council, a position held from 1996 to 2011. If you have been in your park for some time, you may also recall participating in an earlier SCU research project with me in 1997. Yes, that is some time ago now and before that I was a co-manager of the family business, Travellers Rest Caravan Park, in the Mackay/Whitsunday region between 1985 and 1994.

Unfortunately, the 1997 project was never completed due to my gaining fulltime employment with Richmond Valley Council. However, through that role I had the distinct pleasure of continuing my connection with caravan park operations by working with many of you in promoting the Northern Rivers, and subsequently caravan parks, through the various regional promotions and industry trade shows. It was always a delight to reconnect with the park operators of the Northern Rivers through these annual promotions. As you would also be aware, Richmond Valley Council managed Silver Sands Holiday Park at Evans Head until the hand over to the NSW Crown Lands Department (LPMA) in April 2011, again providing opportunity for me to continue engagement with the industry.

I have now resigned from Richmond Valley Council, and intend, as a full time student, to resume my studies and in so doing complete the caravanning research commenced in 1997. The gap in research pertaining to the supply side (infrastructure) of the caravanning industry is still just as valid today as it was 14 years ago despite the amazing advances in caravanning interests and manufacturing technologies. Today, I invite you to re-engage in this exciting research venture with me in an attempt to partially fill that void; finally bringing some real and tangible result directly back to you as a park operator - the core of the caravanning industry.

I have outlined on the enclosed information sheet further details about the aims, objectives and projected outcomes of the study. Participation is completely voluntary and you may withdraw at any time. Through completion and return of this survey you will be deemed to have given consent to participation. As the population of Tweed tourist parks is already quite small, approx 20 in number, it is desirable that all eligible parks will participate on a census basis to ensure valid representation of your sector, making for stronger results back to you.

I am very much looking forward to working with you on this exciting project, I will also endeavour to reconnect with you at the Brisbane Show if you are exhibiting this year. My contact details are provided on the information sheet enclosed if further clarification is required.

Regards

Rod Caldicott
10.4  **Research Information Sheet**

Dear Tourist Park Proprietor/Manager

I invite you to participate in the following research project:

**Caravanning in Australia - A Historical Analysis**

*Case study of Caravan Parks in the Tweed Shire of Northern New South Wales and the Tourist Area Life Cycle*

What is the Project about?
In order to better understand the broader phenomenon of Australian caravanning, from a historical *supply side* perspective, this research aims to document the evolutionary development of caravanning in Australia with a specific case study of Tweed Shire caravan parks. More specifically, *how have caravan parks developed in Australia and what influences have the external caravan manufacturing sector and the internal caravan park site mix configuration had in shaping that development?*

Why the Tweed?
The Tweed Shire has long been recognised as an important tourism region where caravan parks have continued to play a significant role in the provision of accommodation to the travelling public and also to those that have chosen the Tweed as their destination of vacation choice. The popularity of the Tweed, in this regard, is reflected within the high proportion of caravan park establishments within the Shire when compared to neighbouring Northern Rivers' Shires.

Why is the Project important?
The caravan park sector of the Australian tourism industry provides almost 40% of total domestic accommodation capacity. Recent statistics show a gradual decline in caravan park establishments, however, registrations of new campervans and motorhomes alone recorded a 19.2% increase between 2005 and 2010, with 48,504 new registrations in 2008/10 (ABS 2010). The growing interest in the Grey Nomad lifestyle and a new wave of younger off-road recreationists may be fuelling the new vehicle registrations. However, the inverse relationship between downward-trending park capacity and upward-trending RV registrations, coupled with a growing shift surrounding park cabins is worthy of further investigation.

What's in it for you?
This project will provide you with direct, up-to-date and independent information that will give an increased understanding of how the parks have developed within the region, how site-mix and facilities are being modified to keep pace with contemporary consumer expectations and whether such change will ultimately have implications on the viability of parks. A copy of the findings will be provided to you upon completion. Additionally, the thesis will be freely available on the Internet through the University's electronic library catalogues. The research is also expected to be published in peer-reviewed journals and presented at State and national caravanning industry conferences.

How can you participate?
This stage of the research, in which you are being asked to participate, involves the completion of a self-administered questionnaire. To achieve the maximum results for the research, the aim is to have every 'tourist park' participate on a census basis. Participation will take approximately one hour and is completely voluntary.
This study has been evaluated to show limited risk to you, with loss of productive time taken to complete the questionnaire sincerely acknowledged. This factor has been mitigated as much as possible by the self completion method that will allow you to fit this task intermittently around your primary business demands. The questionnaire has also been pre-populated with information provided by a representative of your Park in 1997, to further reduce your time commitment.

You will not be asked to provide any sensitive financial records and information provided will only ever be reported in a manner that cannot be identified to a single source. All information collected for this research will be stored securely by the University for a period of seven (7) years. Only the researcher and supervisor will have access to the information that you provide in its raw form.

What if you change your mind?
You are free to withdraw from the research at any point, without giving reason for your decision. If you do wish to withdraw, however, I encourage you to advise me as soon as possible. Through completion and return of this survey you will be deemed to have given consent to participation.

How can you get more information?
If you have any enquiries regarding this research, please do not hesitate to contact me or my supervisor at any time. The relevant contact details are as follows:

RESEARCHER - Rod Caldicott
Honours Candidate
School of Tourism and Hospitality Management
Southern Cross University
Lismore Campus
Office Phone 02 6620 9589
Mobile Phone 0450 836752
Email r.caldicott.10@scu.edu.au

SUPERVISOR – Dr Pascal Scherrer
Research Fellow
School of Tourism and Hospitality Management
Southern Cross University
Lismore Campus
Office Phone 02 6620 3024
Email pascal.scherrer@scu.edu.au

How can you get independent verification?
This research has been approved by the Southern Cross University Human Ethics Committee. The Ethics Approval Number is ECN-11-107. To make independent contact, or to report any concerns about the ethical conduct of this research, you should write to:

The Ethics Complaints Officer
Southern Cross University
PO Box 157
Lismore NSW 2450
ethics.lismore@scu.edu.au
10.5 RESEARCH ETHICS APPROVAL

HUMAN RESEARCH ETHICS COMMITTEE (HREC)
HUMAN RESEARCH ETHICS SUB-COMMITTEE (HREC)

NOTIFICATION OF APPROVAL

To: Dr Pascal Scherrer/Rod Caldicott
    School of Tourism and Hospitality Management
    r.caldicott.10@scu.edu.au, pascal.scherrer@scu.edu.au

From: Secretary, Human Research Ethics Committee
      Division of Research, R. Block

Date: 30 May 2011

Project: Caravanning in Australia – A Historical Analysis.

Approval Number ECN-11-107

The Southern Cross University Human Research Ethics Committee has established, in accordance with the National Statement on Ethical Conduct in Human Research – Section 5/Processes of Research Governance and Ethical Review, a procedure for expedited review by a delegated authority.

This application was considered by two members of the HREC, on behalf of the Chair, HREC. It has been approved. There is one condition and would you please respond to this within one month of this notification and before research commences.

Condition

It is requested that the researcher provide either a consent form, that must be completed by participants and submitted prior to receiving the questionnaire, OR make it very clear in the letter of invitation and on the questionnaire that any park owner/manager agreeing to complete the questionnaire will be deemed to have given consent by virtue of completing and returning the questionnaire.

This approval is subject to the usual standard conditions. Please note these.

Standard Conditions in accordance with the National Statement on Ethical Conduct in Human Research (National Statement) (NS).
Standard Conditions in accordance with the National Statement on Ethical Conduct in Human Research (National Statement) (NS).

1. Monitoring
   NS 5.5.1 – 5.5.10
   Responsibility for ensuring that research is reliably monitored lies with the institution under which the research is conducted. Mechanisms for monitoring can include:
   (a) reports from researchers;
   (b) reports from independent agencies (such as a data and safety monitoring board);
   (c) review of adverse event reports;
   (d) random inspections of research sites, data, or consent documentation; and
   (e) interviews with research participants or other forms of feedback from them.

   The following should be noted:
   (a) All ethics approvals are valid for 12 months unless specified otherwise. If research is continuing after 12 months, then the ethics approval MUST be renewed. Complete the Annual Report/Renewal form and send to the Secretary of the HREC.
   (b) NS 5.5.5
      Generally, the researcher/s provide a report every 12 months on the progress to date or outcome in the case of completed research specifically including:
      • The maintenance and security of the records.
      • Compliance with the approved proposal
      • Compliance with any conditions of approval.
      • Any changes of protocol to the research.

      Note: Compliance to the reporting is mandatory to the approval of this research.
   (c) Specifically, that the researchers report immediately and notify the HREC, in writing, for approval of any change in protocol. NS 5.5.3
   (d) That a report is sent to HREC when the project has been completed.
   (e) That the researchers report immediately any circumstance that might affect ethical acceptance of the research protocol. NS 5.5.3
   (f) That the researchers report immediately any serious adverse events/affects on participants. NS 5.5.3

2. Research conducted overseas
   NS 4.8.1 – 4.8.21
   That, if research is conducted in a country other than Australia, all research protocols for that country are followed ethically and with appropriate cultural sensitivity.

3. Complaints
   NS 5.6.1 – 5.6.7
   Institutions may receive complaints about researchers or the conduct of research, or about the conduct of a Human Research Ethics Committee (HREC) or other review body.
Complaints may be made by participants, researchers, staff of institutions, or others. All complaints should be handled promptly and sensitively.

Complaints about the ethical conduct of this research should be addressed in writing to the following:

Ethics Complaints Officer
HREC
Southern Cross University
PO Box 157
Lismore, NSW, 2480
Email: ethics.lismore@scu.edu.au

All complaints are investigated fully and according to due process under the National Statement on Ethical Conduct in Human Research and this University. Any complaint you make will be treated in confidence and you will be informed of the outcome.

All participants in research conducted by Southern Cross University should be advised of the above procedure and be given a copy of the contact details for the Complaints Officer. They should also be aware of the ethics approval number issued by the Human Research Ethics Committee.

Sue Kelly
HREC Administration
Ph: (02) 6626 9139
E. ethics.lismore@scu.edu.au

Prof Bill Boyd
Chair, HREC
Ph: 02 6620 3650
E. william.boyd@scu.edu.au
10.6 EARLY CARAVAN PARK DESIGN

- **Location** - Easy access to main highways; to main artery of travel convenient to stores, theatre, school and churches in the town nearest to the park.
- **Terrain** - Level, well drained and preferably timbered.
- **Environment** - Attractive natural surroundings; shade trees and shrubbery highly desirable.
- **Enclosure** - High ornamental fence or hedge with distinctive entrance and exit beneficial to the locality.
- **Capacity or Size** - Governed by possibility of keeping park well filled; basis, 20-25 caravans per acre of park as whole allowing for other usual park features.
- **Lot Size** - Minimum, 600 sq ft (20ft x 30ft or 15ft x 45ft). Diagonal parking preferred with alternating drive-ins to avoid caravan windows directly facing each other and to allow one open side to all caravans.
- **Roads** - Minimum width in park, 15 ft. Traversing both front and rear of lot to permit driving on and off lot without backing.
- **Electricity** - Wires to extend to each lot or between every two lots - at very least, between every cluster of four lots - with separate socket connections for each lot; wiring preferably in pipes under the ground for safety, but if on poles or trees at least 10-12 ft above ground with sockets no more than 7ft above ground. Individual coin metres for each unit recommended; if not used individual fuses in locked boxes of 6 amperes each for lights only, with 15 amperes for appliances at additional charge per day or week for larger size. Lights at toilets and bath-houses to be lit from one-half hour after sundown to one-half hour before sunrise. Adequate outdoor floodlights from 35ft poles for entire grounds.
- **Water** - Absolutely pure water, officially certified, piped to lots like electrical wiring (individual connections to caravans ultimate method); faucets outside toilets and bath-houses or otherwise conveniently located for filling pails if not piped to lots; one or more hose connections in park for filling car and caravan water tanks. Hot water piped to lavatories, bath-houses, and laundry, heated 24 hours daily.
- **Drains** - One each lot, connecting to sewer to avoid mosquitoes and for better camp sanitation.
- **Lavatories, Toilets, Baths, Slop Sinks** - Individual water and sewer connections to caravan bathrooms, men's and women's washrooms, toilet rooms, and bathrooms in separate buildings or in building with tight partitions to ceiling dividing into sections for each sex, with separate paths leading to each building or section, providing one lavatory for each sex per 12 caravans, one toilet and one shower for each sex per 12 caravans, one urinal per 20 caravans and one slop sink per 20 caravans, all located in buildings not more than 200ft from caravan units using them - plumbing in accordance with code. Adequate sewer connections for parks within municipal limits; proper septic tank where such connections are not available.
- **Garbage and Trash Disposal** - Receptacles with tight tops for garbage and separate baskets for trash, located in similar ratio and manner electrical connections (pits recommended to hide containers); daily disposal service imperative. Incinerator required and located to avoid being a nuisance.
- **Laundry** - Separate building preferable with one, two compartment, tub for each 20-25 caravans and adequate number of ringers, ironers or boards, hot water heater and tank and dryer or drying space. (Outside cloths lines not tolerated unless screened from view).
- **Community Kitchen** - One or more ranges with ovens. Transient usage dictates ratio. If possible gas or electric with coin meters.
- **Community Hall** - Auditorium, social centre and lounge where gatherings, parties, dances and indoor games can be held, conforming to size of park and environment; open porches desirable.
- **Recreation Areas** - Swimming pool, tennis, horseshoe and croquet courts, shuffle board alleys and putting greens.

---

44 Source: Porter J 1949
- **Children's Play Ground** - With usual playground equipment.
- **General Store, Post Office and Headquarters** - Commissary desirable adjunct, stock of goods to be regulated by accessibility of local stores; mail, telephone and telegram service; office of park.
- **Restaurant** - Scope determined by local conditions.
- **Filling Station** - At least limited service both desirable and profitable; facilities dependent on size of park and local competition.
- **Service Garage** - Same as 'Filling Station'.
- **Car Wash Stalls** - Specific spot set aside in park with faucet, hose and drain.
- **Delivery Service** - Regular daily mail deliveries to park from post office and telegraph office and telephone to caravans, also arrangements with local source for newspapers, ice, milk, and dairy products, farm produce and laundry.
- **Fire Protection** - Adequate number of approved fire extinguishers in buildings and throughout park, according to size of park; also hose and real at car washing stalls or other central points near faucets.
10.7 Plans for Building a Trailer Caravan

Source: RACQ 1936a; 1936b; 1937
10. Appendices

No. 1—Construction of the Chassis

During the past year numerous requests have been made by members of the Club for particulars concerning the lay-out and building of a taller caravan. We endeavoured to secure these particulars from England and America, but were unsuccessful. We have now pleasure in stating that by kind co-operation of the South Australian Motor, we are able to provide for our readers a very comprehensive plan for the building of a caravan suitable to Australian conditions.

The illustration on page 17 shows the type of trailer caravan for which details are given.

The first two articles deal with construction and later in the series other aspects of the subject will be dealt with. The plan and specifications provide for a roomy, yet light and sturdy caravan, styled in the modern streamline.

While readers will no doubt have their own ideas on many items, the plans included here will serve as a useful guide in regard to method of construction.

In this particular model an arrangement of interior fittings gives equal distribution of weight and ensures good roadability. An underslung axle of good design maintains a low centre of gravity and at the same time provides a spring seat as close to the wheel as possible. The tubular construction of the axle reduces the unsprung weight to the minimum.

Construction begins with the sills. Fig. 1 gives a perspective view of the under-frame assembled, and in Figs. 4 and 5 are the essential dimensions. The sills, A, in Fig. 1, are of selected hardwood, 2 in. by 4 in. in cross section, and are joined by spruce cross members, B, 1 1/2 in. by 3/4 in. in section. All joints are morticed and secured with 5/16 in. carriage bolts. Take particular notice from Fig. 4 that all the cross-members except the ends, are spaced on centres. A section of each sill between the third and fifth cross-members, is rabatted to take the fender, as shown in Fig. 1, and the detail at the left in Fig. 5. With this rabbot cut at the bench, sills and cross-members can be morticed.

The care used in mortising determines to a great extent the rigidity and strength of the frame. Accuracy in laying out the spacing and depth of the cuts and the use of a miter box in sawing down the shoulders of the mortises will ensure a close fit! Scooping the depth of each mortise with a marking gauge will aid in chipping out the waste with the two members as though they were one piece. Waterproof cancin glue is used in all joints of the under-frame. With this assembly set up and bolted together, be sure, before the glue hardens, to score with a sharp chisel, as the last few chips will break off at the scored line. Level two saw horses on the floor and place the sills on these. Then with the cross-members in place check the fit of all the joints and bore the 5/16 in. holes for the bolts. When boring these holes clamp the parts tightly together so that the bit goes through sets, to check the frame at each corner with a square. If necessary, put clamps on the frame to hold it in the square position until the glue is dry.

Fitting Lower Rails

Now for the lower rails, fenders, springs, and the curved end members. The cross-members are halved at the ends to take the lower hardwood rails which are 1 in. by 13 in. in section. These rails, part D in Fig. 1, are bolted to the cross-members with 5/16 in. bolts. There are two longitudinal pieces halved into the cross-members directly over the axle.

These form an opening for the water tank. Fig. 3 shows the curved end members, F, and G. Those at the rear are cut on a shorter radius than those at the front. The lower detail in Fig. 5 shows how these curved pieces are bolted to the frame. Fenders can be made up from heavy galvanised iron, but a tinsmith with proper equipment can do a neater job in far less time and at a nominal cost. The fenders are cut on a 16 in. radius, but not to a full semi-circle, as they are only 14 in. deep and 10 in. wide. Springs are mounted on the sills as in Fig. 1, the shackles brackets should be a snug fit in the holes bored through the wood. It is a good idea to use lock washers on all bolts in the under-frame.
Axle Construction

As shown in Fig. 2, this is a simple affair, consisting of two wheel-spindle brackets of electric steel joined with a chrome-molybdenum tube. The tube can be bought, but it will probably be necessary to make the spindle brackets. The additional cost of this work will be money well spent, as this type of axle is so far superior to anything that can be improvised from standard auto parts. After the axle is made up as suggested in Fig. 2, make a trial fit on the springs, but do not attach the axle permanently to the frame, as the latter must remain on the saw horses until the upper structure is set up.

Two jobs remain to be done before the under-frame is complete. The first is making and installing the 14-gallon water tank, which is dimensioned in Fig. 6 and shown in position in Fig. 4. Once again, a tinsmith can save a lot of time and bother in building such a tank. The filler pipe is made in an S-shaped bend so that when the tank is installed the top end of the pipe will project outside the sheathing. Two brackets, bent from 3/16 by 3/4 in. flat iron, support the tank. These are affixed to the cross-members with either small bolts or heavy screws. The next thing is the cross brace at the rear, and the 1 by 24 in. channel iron A-frame, which carries the coupler and the castor wheel at the front. Details on the construction of the A-frame are given in Fig. 7, and the cross brace is shown installed in Figs. 1 and 4. The A-frame calls for a simple welding job and the fitting of a bushing to take the spindle of the castor wheel. The bushing can be made from a short length of tubing. The A-frame is not installed permanently at this time, as it would interfere with the body sheathing.

Of Interest to Motorists

Very frequently a motorist finds the need of having in his car a disinfectant solution. It may be needed for use in cleaning a car or for disinfecting purposes when out camping or on a tour, or for thoroughly disinfecting a cottage where he intends to spend a holiday. The difficulty of carrying liquid disinfectant has frequently been realised owing to the danger of the container being broken and causing damage. This difficulty has now been overcome by the production of what is known as the Feeta-Block. This is an Australian product, manufactured in Melbourne, and is in the form of a solid, packed in a tin of the size of the ordinary one uses tobacco tin.

Not only can this be carried in the car with perfect safety, but in a few minutes, by cutting off a small portion of the block and dissolving it in water, a perfect disinfectant of guaranteed strength is produced.

The hundred and one uses to which a motorist could put such a product will readily be recognised.

The cost is 1/4 per tin, which suffices to make three gallons of strong disinfectant. Feeta-Block may be obtained from all chemists and should prove a boon to every motorist.

Two folding jacks will be needed to support the rear end of the trailer when it is parked. These are attached to the sills with a bracket, as in Fig. 1, to serve to prevent tipping and ease the weight resting on the jacks. In connection with the fitting of these pieces, see the lower detail in Fig. 5, which shows the curved end member, B, bolted both to the cross-member and the filler piece, C. This assembly is not completed until the studs are set up at the four corners, as the studs are glued and screwed to the cross-members before the filler piece is put in place. When cutting these filler pieces be sure of the length. Properly cut and fitted, with the studs in place, they contribute greatly to the strength and rigidity of the whole structure. At this stage check the frame over for slight inequalities which might cause trouble when laying the floor. A straight edge will show up any high spots on the cross-members. If necessary, level up with a plane. To ensure close fit of the studs scrape away any excess glue where the cross-members join the outer rails. For wheels any of the standard wire auto wheels, fitted with a 5.50 by 17 in. tire may be used. Suitable bearings should be purchased to fit the wheel spindles.

To finish up give all the parts of the under frame two coats of black paint, a primer first, then follow with a body coat. It is well, in painting, not to cover those sections of the lower rail where the cross members join the rear and the end of the cross-member, as glue is to be used in these joints.

The next article in this series will deal with the construction of the body.

ROYAL AUTOMOBILE CLUB OF QUEENSLAND

Night Reliability Contest

Night Reliability Trial to be held over a course of 182 miles commencing from outside the Boys' Grammar School, Gregory Terrace, at 6 p.m. on 14th November, 1926, and finishing outside the R.A.C.Q. Building, Queen Street.

Held under the General Competition Rules of the A.I.A.C.R. and of the A.A.A.

STAY AT

"WESTHOLME," Stanthorpe

Every Modern Convenience

Recommendations from all over the Commonwealth

Write for Prices

Mrs. Robinson, Proprietress
Building a Trailer Caravan

Part 2. Construction of the Body

This series commenced in our November issue with an illustrated article on the construction of the caravan chassis. In this article we proceed to give details of the construction of the body.

Now that you have completed the trailer chassis, Fig. 8 shows what is next. Notice first, from Figs. 11 and 14, that the position of the vertical and horizontal members differ on the two sides of the frame. The end frames, Fig. 9, are identical, with exception of the top cross member, which is one inch lower on the rear frame. To start the framing, set up the corner studs, B in Fig. 8, then follow with the top rails, H, and these across the ends, M, which are double at the lower ends, the studs are halved and screwed to the cross members B. Then the filler blocks, C in Fig. 8, are screwed to the lower rail, D, to complete the joint. All joints in the entire frame are set in waterproof casing glue and wherever vertical and horizontal members join, the two parts are halved to make a flush joint which is held with a one-inch screw. Some care is necessary in mortising, as a tight joint adds greatly to the strength of the structure.

Profiles of the roof and raised centre section are given in Fig. 10. Roof beams are of pine hand-sawn to the curve given and made in three sections with lap joints. The beams, Fig. 8, are set temporarily on the studs to mark locations of the mortises. Each individual will probably have his own method of assembly, and whichever method achieves the purpose with the least complication should, of course, be chosen. Note, from Fig. 11 that dimensions between the studs are not given as these are determined by the notches in the side rails of the chassis frame. Windows are identic
on both sides, but the door, of course, is only on the right side.

The framing for the raised centre section of the roof is erected upon the inner beams, J in Fig. 8, and cross members are installed, being mortised at the joints. Locations of the cross members are given in Fig. 12. These pieces are the same size as the studs and rails, and are mortised into the curved members of both roof and raised centre section.

In order to leave space for the plywood roof, on top of the curved inner members, the short studs or uprights, P, Fig. 8, are notched at the bottom. This construction assures a rain-tight joint.

A cross section of the completed body is given in Fig. 9. This also illustrates the installation of a hardwood guard rail along the bottom, secured to cross members with bolts and angle brackets. This guard will prevent possible damage to the side of the trailer in parking lots and on the highway. An automobile bumper, attached to the stiles by means of extension bars, will be a wise precaution for protecting the rear of the trailer.

When the upper structure is all complete, the floor can be laid. This is ½ inch pine, tongued, and grooved. Screws are used to fasten it in place. In this way it will add greatly to the rigidity of the structure. This done, the entire frame is given a priming coat of paint.

Tail and clearance lights are connected to the towing car through the usual plug and armoured cable, and a storage battery placed on the left side back of the fender takes care of the four ceiling lights. These are the standard automobile type with individual switches. The wires from the storage battery are run up a post at the corner of the stove compartment and along a cross member of the roof to the lights on the other side.

For outside sheathing there are several lines of pressed composite board, both waterproof and fireproof, which are available from local hardware and timber merchants. These are usually sold in four feet widths and up to 12 feet lengths and give a smooth finish and rigid structure. It should be accurately marked by tacking to the frame temporarily, and outlining with a sharp pencil. Cut with sharp fine-tooth saw and smooth the edges with No. 00 sand-paper.

It is all installed with flat-headed three-quarter inch brass screws nearly countersunk. The joints of the panels meet in the centre of studs or other frame members, but around windows and door frames the edges should come flush with the inside of the frames. On the right side, before the panel is screwed on, the filler cap and pipe for the water tank should be installed. If you wish to make double walls you can use the same material on the interior walls. Some minor changes in the interior, such as position of cabinets and wiring, will be necessary if you decided on double walls.

On the curved ends of the body, heavy galvanized iron sheets are installed, using flat-head brass screws. Composite panel board is used for
the sides of the raised centre section of the roof, but the roof proper is entirely covered with 3/16 inch plywood. This is later covered with a suitable roofing material. The plywood is cut in four pieces.

There are two ways of finishing the exterior. One is to cover with duck or canvas, and the other to fill seams with plastic wood to make an invisible joint, and spray the body with automobile lacquer or enamel. Both finishes are very effective, especially when the lower half is in a dark colour to match the car and the upper portion, above the window sills, in aluminium, with window mull to match the lower part of the body. For that matter any colour that matches your car will give a pleasing contrast with the aluminium-painted top.

Before the sheathing is put on it is well to decide on the interior finish. If you prefer all one tone, the painting can be done any time on the interior. If, however, you like a light framing contrasted with dark panels, paint the wood before the sheathing is set on.

COMPETITORS' NOTES

(By C.G.)

TWO LVE tired but happy competitors out of thirteen starters, finished the Night Trial held on Saturday, 14th ultimo, at between 1.30 and 2.30 a.m. on Sunday morning, and when Secretary Alf Jones emerged flushed but triumphant from his battle with the Control Sheets, Route Cards and sundry masses of paper, the winner was Mr. Barron. Claudie to you—with an Oldmobile Saloon and a credit balance of 50 points, in spite of being troubled over the early stages with semi-choked jets. A very stout effort.

Thirteen proved unlucky for R. V. Winder, who retired before reaching Caboolture; but everyone else finished without a single mechanical defect or broken seal.

The detailed results and analysis are given elsewhere in this issue and you will notice that though no one got a possible, only one competitor had a debit balance. So the new system of scoring worked out extremely well, and resulted in a very close finish.

Furay (Morris) and Taylor (Delage) got temporarily lost and had some trouble getting back to schedule and Gordon Lee had a blow-out almost in the Villeneuve Control.

Whatmore (Birley) Kyne (Morris), respectively Second and Third proved most consistent. They have been high up in almost every event in which they have competed.

A slight misunderstanding seems to have existed about the watches, as not all controls were competitors checked on their own sealed watches, as they should have been. Official watches are only to correct for a very large error having arisen in the sealed watch between controls and even then the Competitor should be checked on the sealed watch and the watch unsealed, corrected and sealed again.

The only lady competitor, Miss G. O'Connor—Mrs. Sparks' Dodge having failed to come to the Starting Line—finished with the fine aggregate of 1023 points, which was an excellent performance for both her and her young navigator on a first attempt.

That even the most careful and experienced can have trouble was shown by one veteran, whose navi-

NEW Queensland Batteries

Made in Queensland

Heavy Duty

Sold with Two Years’ Guarantee

SUNLIGHT SUPER GRADE—Super Quality Plates. New Hard Rubber Cases, best Port Oxford Cigar Separators, 6-Volt 23-Plate 45/-, 6-Volt 21-Plate 39/-, 12-Volt 45/-, Water Cylinders (Guaranteed 12 Months only) 25/-.

QUEENSLAND FIRST GRADE—First Quality Plates, Picked Used Hard Rubber Cases, best Port Oxford Cigar Separators, 6-Volt 23-Plate 35/-, 6-Volt 21-Plate 29/-, 12-Volt 40/-, 12-Volt 45/-, 24 Volt for Baby Car 27/-.

DISCUSSION STANDARD GRADE—Standard Quality Plates, Used Hard Rubber Cases, Second Grade Separators, 6-Volt 13-Plate 20/-.

Queensland Storage Battery Co.

374 ANN STREET, BRISBANE

Phone B 7825 opp. St. Martin's Hospital Phone B 7826

LLOYD'S INSURANCE

Fire --- Accident --- Burglary

Enquire—

A.M.P. Building, Brisbane

204
No. 3—Finishing Off

ONE glance at the outlay view above shows the whole story of the interior furnishings. There are kitchen, dining and living room, and two bedrooms with clothes closet space. When stopping for the night there is nothing to unpack, or ropes or awnings to bother with. Simply uncouple the trailer from the car and park it where required. One person can handle it without difficulty, even when it is fully loaded.

Remaining exterior details are application of the roof of canvas, and if desired on, a fabric covering of the body. In putting on the latter apply the lower half of the wall covering first, then lap the upper half over it, using copper tacks. A strip of binding is tacked over the seam.

The sectional views, Figs. 19 and 20, and the detail in Fig. 21, shows what to do when finishing up the top at the outer edge and around the ventilator openings in the sides of the raised centre section.