



**Fraser Coast Regional Council  
Recreational Vehicle (RV) Strategy  
Final Report  
March, 2019**



<b>Executive Summary.....</b>	<b>3</b>
<b>Introduction.....</b>	<b>6</b>
<b>Guiding Principles for the Strategy.....</b>	<b>7</b>
<b>Camping and RVs and Planning for a Diverse Market.....</b>	<b>8</b>
<b>Camping and Caravanning Trends in National and Queensland Markets.....</b>	<b>9</b>
<b>Market Trends: Implications for the Strategy.....</b>	<b>10</b>
<b>RV and Camping Trends in the Fraser Coast Region.....</b>	<b>12</b>
<b>Economic Value of the RV and Camping Sector for Fraser Coast in 2017.....</b>	<b>13</b>
<b>Growth Potential of the RV and Camping Sector in Fraser Coast in 2023.....</b>	<b>15</b>
<b>Positioning Destinations as being RV and Camping-Friendly.....</b>	<b>16</b>
<b>Current Campsite and RV Site Provision.....</b>	<b>19</b>
<b>Context Provided by Queensland Government Guidance .....</b>	<b>21</b>
<b>Fraser Coast Policy Content.....</b>	<b>24</b>
<b>Effective Site Management and Development as a driver of Stakeholder and Customer Satisfaction.....</b>	<b>26</b>
<b>Legal and Policy Framework.....</b>	<b>28</b>
<b>Stakeholder Perspectives .....</b>	<b>30</b>
<b>Recommendations.....</b>	<b>32</b>
<b>Site Definitions.....</b>	<b>36</b>

# Executive Summary

Tourism is a key driver of the Fraser Coast economy, injecting \$415 million through direct overnight expenditure in 2017. The RV, caravan and camping sector is a key component of our overall market. This Recreational Vehicle Strategy provides a roadmap for the sustainable management and growth of the sector, ensuring that it delivers its full potential as part of a prosperous Fraser Coast visitor economy.

The current Fraser Coast Camping Options Study is a comparatively recent document (2015), with many of its recommendations remaining valid. The existing Camping Options Study has provided an excellent starting point for preparation of this document which aims to:

- Identify challenges and opportunities for RV's on the Fraser Coast;
- Deliver a sustainable RV presence on the Fraser Coast focused on tourism and industry development;
- Respond and adapt to shifting demand patterns and changing industry trends;
- Determine the feasibility of establishing a consultative model in developing local laws, policies and procedures for caravan and camping in the region; and
- Identify a program of short, medium and long term actions which implement identified strategic directions.

Fraser Coast Regional Council has been at the forefront of local government work in implementing best practice with regard to reflecting the Queensland Government's planning policy and guidance for managing camping, caravans and RVs. Council has shown a commitment to facilitating an appropriate balance of good quality caravan and camp site provision alongside a fair and equitable competitive environment. Amendments to the planning scheme and local laws have already gone a long way towards ensuring that the policy framework supports a competitive caravan and RV sector (commercial and non-commercial providers) which contributes towards a healthy Fraser Coast visitor economy.

Fraser Coast's regulatory framework, marketing and business support programs need to keep pace with evolving visitor demand and the needs of all Fraser Coast visitor economy businesses. The RV and camping market continues to evolve and it is important that Fraser Coast continues to respond to market trends and provide a diverse range of camping options to meet the needs of a broad range of travellers and support growth in existing and emerging investment opportunities.

## The Importance of RV, Caravan and Camping Sector to Fraser Coast

A camping holiday or RV trip is an integral part of the Fraser Coast tourism experience for large numbers of international and domestic visitors. Whether looking for a short break or a touring holiday, camping is a great way for visitors to experience the region's coastal and hinterland destinations.

The sector is a major economic contributor to Fraser Coast's visitor economy - the region currently has 41 sites (25 commercial sites, 6 Council owned and managed camping sites, 4 Council owned and managed RV sites, and 4 Council owned caravan sites) across coastal and hinterland locations.

In 2017, the region attracted **202,631 caravan and camping visitors** who contributed **\$68.8 million in visitor expenditure**. Based on Regional Tourism Satellite Account calculations for Fraser Coast, where every \$66,345 of visitor expenditure supports the equivalent of 1 FTE, it can be estimated that visitor expenditure in the sector supports **1038 direct FTEs**.

Trend analysis indicates that of the Region's 172,584 caravan and camping annual visitors (average visitation over 2014-2017), **54% (91,782 visitors, generating \$36 million per annum)** stayed in commercial sites and **46% (80,802 visitors, generating \$23 million p.a.)** stayed in non-commercial sites. Trend analysis has shown non-commercial camping gaining in popularity, with visitation to non commercial sites likely to overtake commercial site visitation volumes in the near future if current trends continue.

## The Opportunity for Fraser Coast – Building on our Strengths

Alongside a market that continues to show sustained growth Australia-wide, Fraser Coast's coastal and hinterland assets and destinations provide a great opportunity to position the region as a premier RV, caravan and camping destination, generating additional visitors and expenditure, and support for jobs.

In 2017, the region captured **7.3% of Queensland's caravan and camping visitors**. If by 2023, we can grow our share of the market by 0.5% to **7.8%**, this will mean **118,000 visitors staying in commercial sites** and **121,500 visitors staying in non commercial sites – a total of 239,500 RV, camping and caravanning visitors**. Achieving this market share growth between 2018 and 2023 will mean:-

- 24,500 more commercial camping visitors, generating \$14 million (a growth of **27.4%** between 2017 and 2023)
- 24,000 more non-commercial camping visitors, generating \$11 million (a growth of **29.6%** between 2017 and 2023)
- A total of **\$89 million** in visitor expenditure from the sector (commercial and non commercial)

Our aim is to attract more visitors throughout the region, who stay longer and spend more – supporting businesses and broader supply chains. To achieve our ambitions we need to be on the front foot with effective governance and co-ordination, innovative marketing, impactful branding, productive and collaborative partnerships, and carefully targeted infrastructure and facility investment.

At state-wide and local levels there has been significant growth in the use of non-commercial sites (especially National Parks). The customer is now seeking a fulfilling experience as well as a pleasant place to stay – we need to simplify the process of meeting and exceeding customer expectations. There is a need to effectively manage the range of camping options available to caravans, campers, and RV travellers while minimising environmental and social impacts, maximising the value of the visitor economy and providing drive visitors with a range of accommodation and experience choices without compromising existing future private investment in caravan parks and associated infrastructure.

**By providing a range of well-appointed commercial and non-commercial camping options, the region has a great opportunity to capture an increasing market share of Queensland’s caravan, camping and RV markets.**

## Challenges to be Addressed

Touring visitors use a wider range of commercial and non-commercial accommodation than ever before – needs of different markets are increasingly varied. This presents both opportunities and challenges to local governments, communities and businesses.

The reality is that a significant proportion of the RV visitor market actively seeks out free or low cost parking and camping opportunities rather than utilising commercial sites – by definition these visitors are travelling in self-contained vehicles. They primarily require safe and secure locations for short stays, with minimal levels of other amenities. Research indicates that 16% of visitors will only ever choose a low cost or a free site (approximately 50% of the market utilise both commercial and non-commercial options).

If the region does not provide appropriately located sites which meets demand from this sector, visitors will either park in illegal/inappropriate locations, generating an enforcement requirement for Council, or they will travel on to a more welcoming destination, with the region losing the economic benefits from spending in local businesses.

Where commercial operators have not been in a position to provide a market-driven solution which addresses demand from this visitor market, Council and the voluntary sector, have become engaged in provision of low cost RV and caravan sites. To maximise economic benefits for the region as a whole, we need to continue providing range of camping options that meets the needs of these diverse markets.

## Strategic Directions

Realising the economic potential of Fraser Coast’s caravan and camping sector is based on the following strategic directions and recommended priority actions:-

1. Positioning and marketing of the region as a premier RV, caravan and camping destination;
2. Business development which grows overall destination competitiveness;
3. Infrastructure investment and management which creates an RV, caravan and camping-friendly environment;
4. Establishing a transparent policy framework as the basis for decision making;
5. Effective site management and development as a driver of stakeholder and customer satisfaction; and
6. Building awareness of the benefits of the RV, caravan and camping sectors.

Visitors who stay in commercial and non commercial sites on average spend less on a daily basis than visitors who stay in other forms of serviced accommodation, therefore it is essential that average length of stay continues to be built, and visitors are provided with information which maximises spending opportunities before they commence in the inspection/planning cycles of their travel plans.

As well as sector-specific marketing and communications, an over-riding priority is also to support the sector by investing in, and packaging up a wide range of compelling experiences and reasons to visit, especially in the shoulder and off peak periods.

In actioning the Strategic Directions a number of challenges need to be addressed to manage the RV, caravanning and camping market as a whole, ensuring business and community benefits are maximised. Specific challenges include:-

- Providing facilities and services which ensures that the Fraser Coast is meeting the evolving needs of an increasingly diverse RV, caravan and camping sector;
- Supporting dispersal of visitors throughout the region through ensuring that camping options are available
- Upgrading site facilities and infrastructure where there is an evidenced need and demand;
- Embedding cost recovery principles into Council's site investments, where supported by the market;
- Clear communication and wayfinding including websites, social media and supporting print, as well as sign posting and interpretive information;
- Cross-selling and promotion of experiences throughout the region to build average length of stay and yield;
- Being intelligence-led - information to base management and investment decisions has been limited to this point.

# Introduction

This RV Strategy and Implementation Plan provides a roadmap for the sustainable management and growth of camping and RV tourism which contributes fully to a prosperous Fraser Coast visitor economy.

The Strategy has been prepared within the context of:-

- Progress in delivering Council’s current Camping Options Strategy (2015);
- Current and emerging Queensland Government guidance on managing caravanning, camping and RVs;
- Local stakeholder, community and industry perspectives; and
- Evolving consumer trends and market demand.

## Background

Fraser Coast Regional Council recognises that the RV and caravanning sector is a complex one, with a range of stakeholder groups holding strong views. This Strategy aims to provide recommendations which balance the concerns and needs of various stakeholder groups in a manner which secures long-term benefits to the entire region.

For best results, management processes should aim to minimise the potential for negative flow-on effects to local communities, operators and the environment, commit to protecting commercial investments of operators, and secure positive visitor engagement processes which allow dispersal of economic benefits throughout Fraser Coast communities.

It is recognised that the caravan and RV sector is a leading part of the region’s visitor economy - initiatives also need to focus on the areas of support necessary to grow profitability and competitiveness among commercial providers – supporting the sector to better cater for evolving RV and caravanning requirements.

## Purpose of the Strategy

- Identify challenges and opportunities for RVs on the Fraser Coast;
- Deliver a sustainable RV presence on the Fraser Coast focused on tourism and industry development;
- Respond and adapt to shifting demand patterns and changing industry trends, catering for all users providing an accessible destination;
- Determine the feasibility of establishing a consultative model in developing local laws, policies and procedures for caravan and camping the Region; and
- Provide an Action Plan of short, medium and long term actions (including marketing, promotions and programs).

# Guiding Principles for the Strategy

The Strategy is supported by a series of guiding principles, as follows:-

## **1. Supporting and Growing the Visitor Economy**

Camping options need to maximise impact on the visitor economy and facilitate memorable experiences throughout the Fraser Coast Region. Visitors' whole experience influences their perception of the region and can determine if they choose to return in the future. Proactive marketing is required if the Fraser Coast's natural advantages are to fully capitalised on and economic benefits delivered.

## **2. Balancing Commercial and Consumer Needs to Secure Maximum Benefits for the Region**

The strategy recognises that there are a diverse range of camping and RV user groups, and that a range of options are required to meet market needs including commercial sites and low cost options. The reality is that a significant proportion of the RV visitor market actively seeks out free or low cost parking and camping opportunities rather than utilising commercial sites. If the region does not provide appropriately located sites which meets demand from this sector, visitors will either park in illegal/inappropriate locations, generating an enforcement onus for Council, or they will travel on to a more welcoming destination, with the region losing the economic benefits from spending in local businesses.

## **3. Safe Place to Stay, Safe Road Users**

Sites must be safe for those staying overnight and should appeal to users. The sites should be maintained regularly so that the site manifests itself as a clean, safe and welcoming environment

## **4. Environmental Protection**

Sites should be managed and maintained in order to protect their environmental and cultural assets and values. Overnight locations should be managed in a way that ensures the health and wellbeing of the people staying in them while ensuring environmental values are not compromised. Healthy environments will facilitate long-term sustainable use of the sites for all to enjoy.

## **5. Transparency in Decision Making**

Site management and procedures must be clearly outlined and policies must be implemented to ensure transparency in all decision-making moving forward. Items to be addressed include site assessment, site compliance, and overflow management

## **6. Diversity of Options**

The overnight sites available to the public need to provide a diverse range of options to meet travellers' needs and expectations. The options must also be of a quality standard and be well maintained. The variety of options will create a diversity of experiences to RV travellers on the Fraser Coast Region.

## **7. Managing Quality and Standards**

Offering quality camping experiences to a variety of markets and ensuring site rules are enforced is vital to Council's approach to RVs being well-received by users. Overnight sites should support and sustain a sense of community in each place. The aim is for Fraser Coast Region to be known for high quality camping options experiences.

Appropriate signage is an important aspect in achieving this ambition; as clearly marked and consistent signage across the region will enhance visitor experience and minimise disturbance to residents by easily directing traffic and outlining terms of use and penalties for misuse. Having this information mirrored on Council's website and through other distribution channels is also a critical factor in communicating camping options to visitors.

# Camping and RVs: Planning for a Diverse Market

The camping market is a diverse one, however it can be categorised into three principal groupings:-

## COMMERCIAL CAMPERS

These travellers, either due to preference or a lack of amenity in their private vehicles, prefer to pay for amenities found at commercial caravan and camping sites. Some are seeking a safe harbour for their vehicles or a level of luxury not found on the road.

## FREE (OR “LOW COST”) CAMPERS

Free campers, either due to preference or an abundance of amenity in their private vehicles, prefer to avoid commercial sites and generally only require occasional use of amenities, dump points or powered sites.

## BUSH CAMPERS

Bush campers are normally adequately self-sufficient and tend to avoid populated areas including commercial sites or low-cost areas. They may occasionally require access to dump points or amenities after a long period away from available amenities.

While displaying distinct behaviour, it is also widely accepted that factors such as weather, length of time spent on the road and income do play a role in encouraging cross-use of commercial sites between market segments.

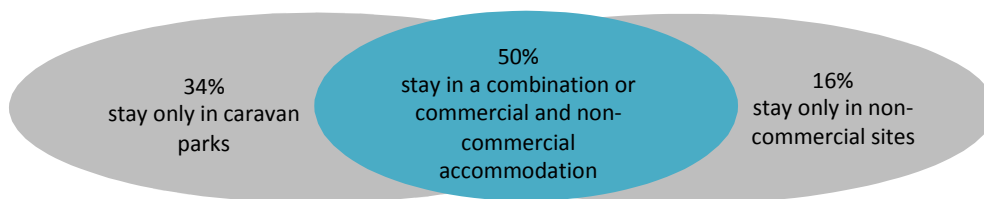


Figure 1: Visitor accommodation types<sup>1</sup>

## Those surveyed<sup>2</sup> in commercial caravan sites tend to:-

- Spend the majority (**85%**) of their nights in commercial accommodation or camping grounds
- Stay **4 nights or longer** (49% of campers) with 34% staying 2-3 nights and only 17% staying 1 night
- Spend approximately \$576 at each location (excluding accommodation) or **\$73/day**.

## Those in non-commercial<sup>3</sup> camping sites tend to:-

- Spend most of their nights (**71%**) in non-commercial accommodation or camping grounds
- **Also stay at commercial sites** (30% of the time), but an equal number (30%) try to avoid staying at commercial sites
- **Stay 3 nights or less** (74%) in each location, of which 34% are for 1 night
- Spend approximately \$213 at each location (excluding accommodation) or **\$53/day**
- Be retired (only 12% still employed full time).

<sup>1</sup> (Central West Outback Queensland Visitor Survey 2011)

<sup>2</sup> BDO, 2013

<sup>3</sup> ibid



# Camping and Caravanning Trends: National and Queensland Markets

## Commercial Caravan Parks

Commercial caravan parks received 6.8 million visitors throughout Australia, while Queensland received 1.2 million visitors (YE Dec 2017). Commercial caravan park visitation saw the lowest increase when compared with growth for non-commercial camping locations and national parks, noting a 2% increase per annum in both Australia and 3% in Queensland from 2013-2017.

## Non-Commercial Camping Locations

Non-commercial sites received 2.9 million visitors throughout Australia and 1.4 million visitors in Queensland (YE Dec 2017). Non-commercial camping locations increased by 18% per annum in Australia and 11% in Queensland from 2013-2017.

## Caravan Ownership in Australia and Queensland

Caravan ownership within Australia is experiencing consistent growth, with a 4.5% growth between 2016 and 2017. In Queensland, campervan ownership has grown by 21% since 2012, indicating a growing market preference for self-contained camping and caravanning activities.

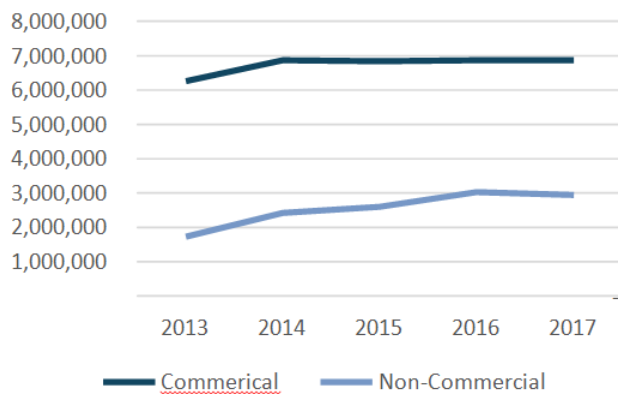


Figure 2: Visitors to Australia by type of Camping

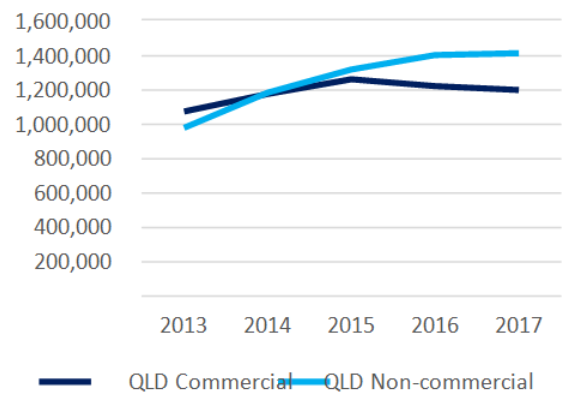


Figure 3: Visitors to Queensland by type of Camping

- Australia experienced a 18% per annum increase in visitors to non-commercial caravan parks while commercial caravan parks experienced 2% per annum increase.
- Queensland experienced a 11% per annum increase in visitors to non-commercial caravan parks while commercial caravan parks experienced an average 3% per annum increase between 2013-2017

# Market Trends: Implications for the Strategy

## Sector Performance

Sector performance in Queensland remains strong, with visitor numbers participating in camping continuing to grow. Analysis of the Tourism Research Australia data, suggests the most significant change in the market between 2013 and 2017 is a significant growth in popularity of National Parks as camping locations.

- National Parks: +52,000
- Commercial camp sites: +78,000
- Non-commercial sites: +61,000

Caravan Industry Association of Australia data suggests that unit occupancy is greatest in cabins, followed by powered and unpowered tourist sites. Performance is reasonably consistent all year, with the exception of powered tourist sites which show strong seasonality peaking in the July to Sept and Oct to Dec periods.

Figure 4: Queensland Camping Visitors 2013-2017

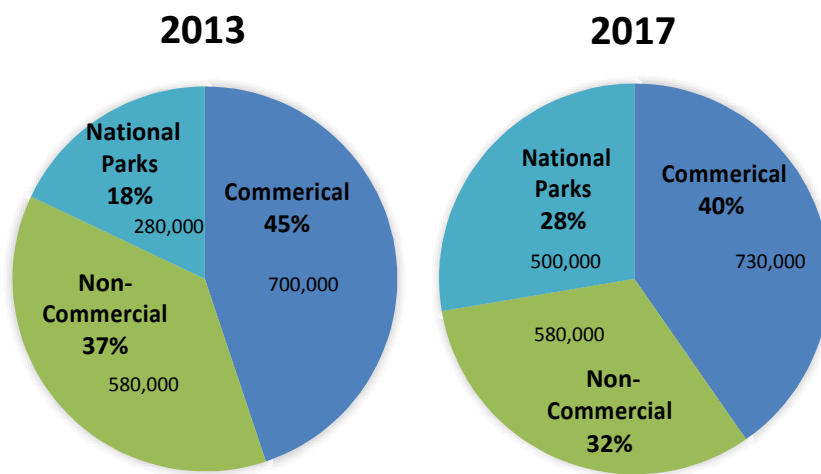


Figure 5: Cabin, Powered/Unpowered sites occupancy rates (Queensland)

Queensland	Jan to March	April to June	July to Sept	Oct to Dec
Cabins	55%	53%	64%	54%
Powered Tourist Sites	20%	28%	50%	46%
Unpowered Tourist Sites	12%	10%	11%	16%

Source: CIAA State of the Industry Report 2017

## **IMPLICATIONS FOR THE STRATEGY**

### **Continued Growth for the Overall Caravan and Camping Market**

Overall RV and camping visitation trends show continued growth, despite Queensland visitation experiencing some falls from peaks in 2015. Campervan ownership also is continuing to rise.

### **Continued Growth in Demand for Free/Low Cost Camping Options**

Visitors using non-commercial sites account for approximately 54% of the overall Queensland RV and camping visitor market.

### **The emergence of three markets**

The future of camping appears to have three segments that need to be considered:-

- A market looking for greater comfort and facilities that provide for their needs, including a growing family market;
- A market looking to keep it simple and keep the cost down; and
- A market looking for the 'experience' of camping in the bush.

It is essential that the Region continues to provide options which cater for a diverse range of traveller needs – both commercial and low cost options are required if economic opportunities are to be fully captured.

At the low cost/ free end of the market, many visitors are looking for a straightforward set of facilities:

- A dump point (with toilets if possible) and a tap to refill freshwater tanks;
- A welcome and an appreciation of their business;
- Good tourism information that clearly shows all attractions and facilities;
- Short-term parking close to the general shopping area; and
- Somewhere to park and stay longer term that is safe and quiet but slightly away from the main population.

# RV and Camping Trends in the Fraser Coast Region

## Camping in the Fraser Coast Region



Average Length of Stay is **5 nights (domestic)**



**94,529** visitors to Commercial Caravan Parks and Camping Grounds in 2017



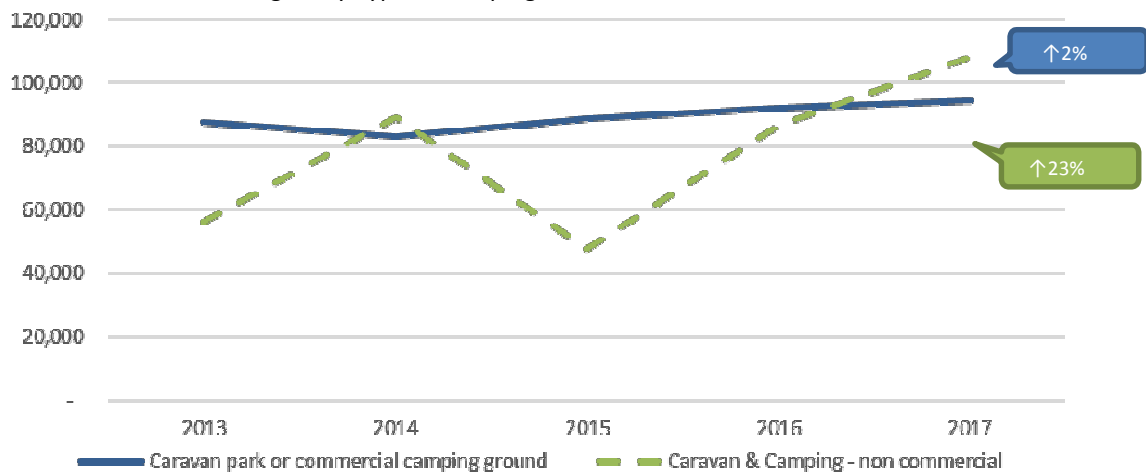
**108,101** visitors to Non-Commercial Locations in 2017

Over the past decade, Commercial Caravan Parks and Camping Grounds have attracted a strong visitation base. In 2017, this market had a 11.5% share of all overnight visitors to the Fraser Coast Region (3 year average, 12.1%)

Visitation to non-commercial sites has experienced greater fluctuations since 2013, and accounted for 13.1% of all visitors in 2017. The three year average for non-commercial RV, camping and caravanning use is 10.5%

Combined domestic and international visitation, usage of commercial campsites increased by 2% since 2013, while non-commercial site usage increased by 23% during the same time period.

Figure 6: Visitors to Fraser Coast Region by Type of Camping Accommodation



### Implications for the Strategy

Analysis of tourism data since 2013 shows strong growth in the popularity of non-commercial camping accommodation. While visitor numbers have fluctuated year on year, clearly facility provision needs to provide for visitors who are seeking both commercial and non-commercial options.

# Economic Value of the RV and Camping Sector for Fraser Coast in 2017

## Value of Commercial Camping

Best available industry information<sup>4</sup> suggests that in 2017 commercial campers spend approximately \$79.50 per day. Based on this, commercial RV, caravan and camping in 2017 is estimated to have generated **\$37 million in visitor expenditure** to the local economy. This equates to approximately 567 direct jobs within the region.

## Value of Non-commercial Camping

Non-commercial camping and caravanning represents a significant element of the Fraser Coast camping and caravanning market.

Failing to provide a spectrum of options to suit a range of travellers and varied budgets has a significant flow-on effects for the local economy.

Providing for low cost camping options generates approximately **\$31 million in visitor expenditure** to the local economy. As non-commercial visitor spending excludes accommodation costs to a significant extent (which typically account for approximately 25% of visitor spending), economic benefits are mainly felt in via visitor spending in local retail, entertainment, transport and related supplier industries.

**In total, visitor expenditure from the RV, caravan and camping sector supports the equivalent of 1038 direct FTEs in the Fraser Coast region during 2017.**

Sector	Estimated Value	Estimated FTEs supported
Commercial Camping	\$37.6 million	567 Direct
Non-commercial Camping	\$31.2 million	471 Direct
TOTAL	\$68.8 million	1038 Direct

Figure 7: Visitor Expenditure Generated By Fraser Coast Caravan and Camping Visitors in 2018

## Forecast Growth in Visitor Numbers and Expenditure

If the region follows the current Tourism Forecasting Panel (TFP) forecast, by 2023 this potentially means an **additional 20,513 commercial campers and over 20,300 non-commercial campers**. This projection is based on high level state forecasts so should be treated with a degree of caution, however it is indicative of what is anticipated to be a growing visitor market.

If these numbers are generated, the **commercial and non-commercial camping sectors would generate \$86.6 million by 2023, a growth of \$17.7 million**. Based on Tourism Satellite Account calculations for regional Queensland where every \$66,345 of visitor expenditure (domestic) supports the equivalent of 1 FTE, which means that by 2023, RV and camping visitation in the region will support 1,305 direct FTEs.

<sup>4</sup> Adapted from CRVA Economic Benefit Report (2013)

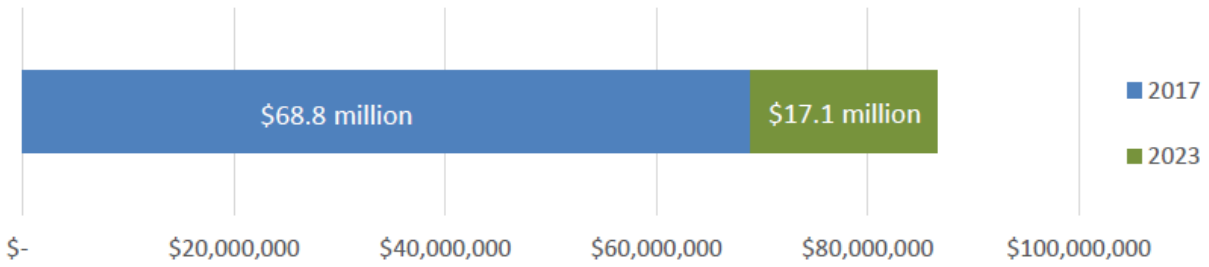


Figure 8: Forecast Visitor Expenditure Generated By Fraser Coast Caravan and Camping Visitors in 2023

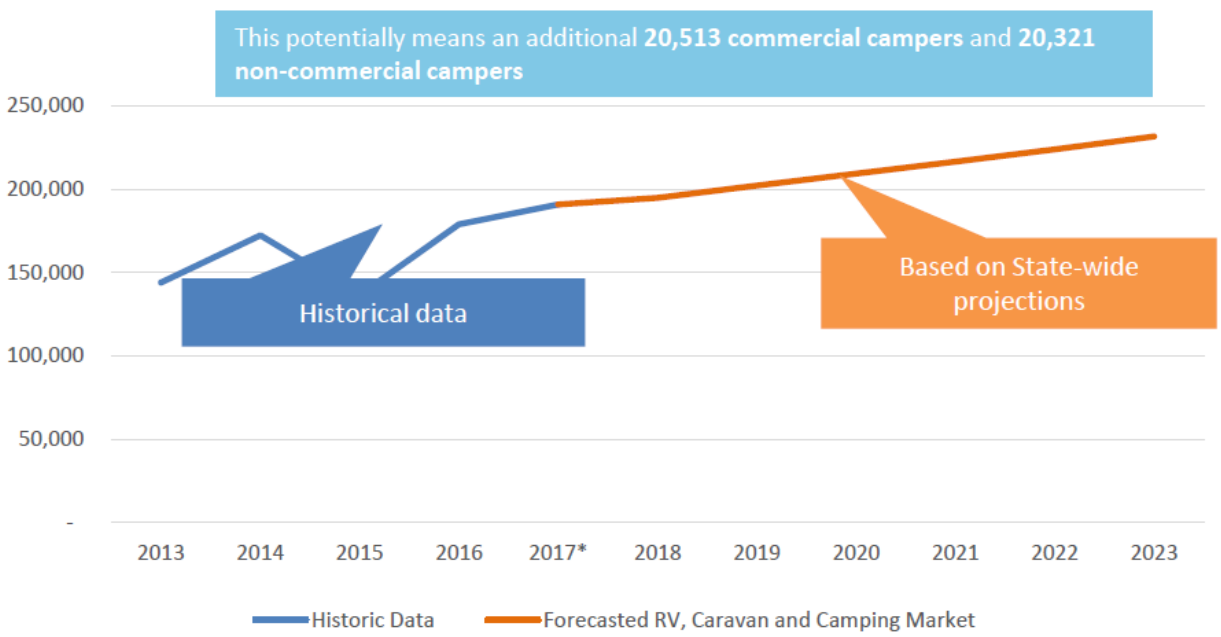


Figure 9: Projections of Camping Visitation to Fraser Coast (2013-2023)

# Growth Potential of the RV and Camping Sector in Fraser Coast in 2023

## Growing Caravan and Camping Visitation Above Trend

The TFP forecast growth referred to earlier is sometimes described as *business as normal* i.e. growing with the market. However if Fraser Coast is successful in its ambition to position itself as a premier RV, camping and caravanning destination, then it is realistic to expect that additional visitors and expenditure can be generated.

At present **the region captures 7.3%\* of Queensland's RV, caravan and camping visitors**. If, by 2023 this is grown to **7.8%** of the state's RV, caravan and camping visitors, then alongside the natural overall market growth that will occur during this time, the sector will then generate:-

- 118,000 commercial and 121,500 non-commercial visitors
- \$51 million in visitor expenditure from the commercial sector
- \$38.3 million in visitor expenditure from the non-commercial sector
- This total expenditure will support the equivalent of 1,348 direct FTEs (using 2016/17 RTSA calculations)

If this higher market share target is achieved, it **equates to 7,700 visitors and \$2.8 million in visitor expenditure above the TFP forecasts by 2023**.

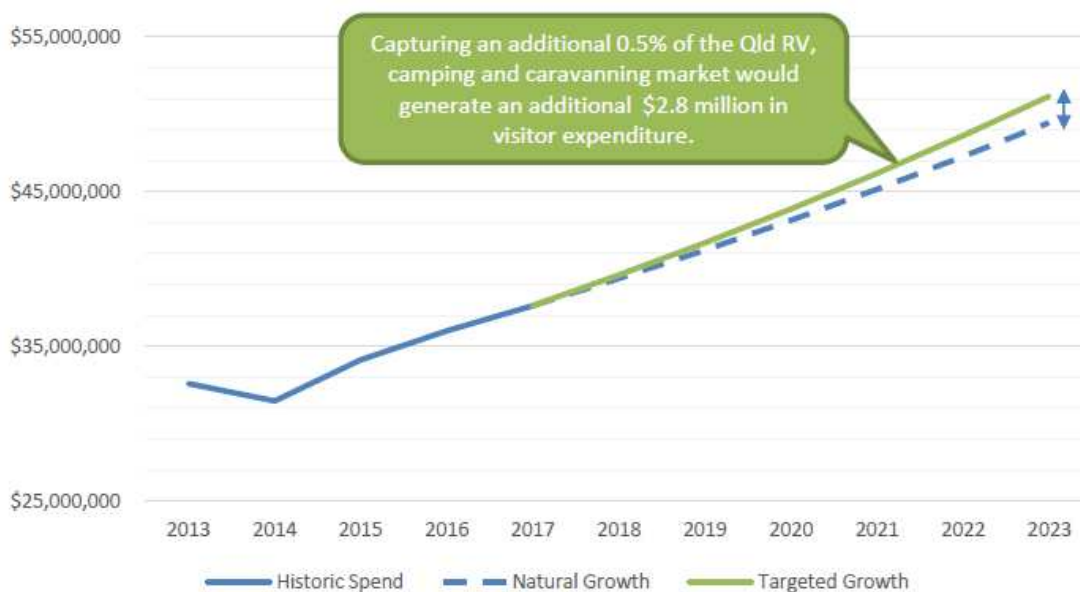


Figure 10: Sector Growth by 2023 if Fraser Coast Grows its Market Share of Regional Queensland RV, Caravan and Camping Visitation

# Positioning Destinations as being RV and Camping-Friendly

## The Importance of Being Responsive to Visitor Demand

The caravan, motorhome and camping industry continues to be the fastest growing domestic tourism sector in Australia, according to research by the Caravan Industry Association of Australia (CIAA). Consumer preferences are influencing the industry with caravan and holiday parks enhancing the quality of accommodation and facilities provided. In 2016 alone, demand for longer towable recreational vehicles (for accommodating increased living space) experienced a 5% growth.

The RV and camping sector is not exempt from the ever increasing service and experience expectations of visitors - being responsive to customer expectations is essential for individual businesses and the destination as a whole. This can include; facilities, standards of service and welcome, flexibility in opening hours and arrival. Level of facilities and service in many larger parks is now high, in keeping with the expectations of resorts. However innovation can be found in parks of all levels, with commercial park operators increasingly recognising the needs of discrete market segments by incorporating provision of a low cost option as part of their sites. In an increasingly segmented and diverse market, one size does not fit all.

## The Importance of Positioning and Marketing

The majority of Australia's regional tourism destinations rely to varying extents on touring visitors as a key part of their overall visitor markets, with camping options being an important aspect in servicing and appealing to this market. The sector is competitive, and the nature of touring trips means that visitors often have options on where they choose to stay, whether it's a one night stop or a longer stay. As such, effective and impactful marketing to raise profile of a destination is essential, alongside clear information which makes it as easy as possible for visitors is essential.

Marketing and communication activities can range from dedicated promotional initiatives to opportunities such as: trade engagement, signposting and wayfinding, social media, partnerships with neighbouring regions and caravan sector specialists, and RV-friendly designations. Social media and dedicated forums play an increasingly important role in influencing the RV community - social media provides the opportunity to reach out to these audiences quickly and directly, however it also provides the means for visitors to easily share experiences (good and bad).

It should also be noted that while dedicated marketing initiatives for the RV and camping sector have clear merit, most benefit in terms of generating trade for the sector as a whole (commercial and non-commercial sites) is likely to be achieved through lifting overall awareness and appeal of the destination as a place visit - in practical terms this can mean creating new reasons to visit (events, experiences or new places to visit) and well as initiatives which focus on lifting overall destination preference and awareness. These issues are particularly important in shoulder and off-peak periods.

## Marketing – The Current Situation

In addition to the marketing investments of individual operators, action and initiatives include:-

- Council's website (in the community section) provides practical information on available facilities including, details of bush and basic non-commercial camping grounds, dump points and contact details for reporting illegal camping. Council's website is not intended as a consumer platform, therefore links are provided to a dedicated website for its beachfront parks, to [www.visitfrasercoast.com](http://www.visitfrasercoast.com), and via the 'camping and caravan' guide to the journeys landing page of [www.visitfrasercoast.com](http://www.visitfrasercoast.com).
- Fraser Coast Tourism and Events are the lead agency for promotion of the region as a whole, including the caravan and camping sector. Lead activities include:-
  - Promotion of caravan and camping options from the region's four accredited Visitor Information Centres located at Hervey Bay, Maryborough, Tiaro and the Hervey Bay Airport.
  - Inclusion of a dedicated section on the Fraser Coast Official Holiday Planner publication
  - Representation of the sector in tourism-trade activities
  - The 'stay' search function of the website which allows searches for caravan and camping options - the listing focuses on available commercial options, but not free or low cost options
  - The 'Journeys' section of the website provides a range of touring itinerary options which include some camping options



At present, analysis indicates that sector marketing of the sector is largely passive - clicking on the “caravan and camping guide’ link on Council’s website currently takes visitors to the journeys landing page of [www.visitfrasercoast.com](http://www.visitfrasercoast.com), not a dedicated camping page. While information is clear and factual on Council and FCTE’s websites, there is not currently the breadth or specificity of content which matches with the aspiration to be a premier RV and camping destination.

A review of current marketing activity suggests that there is scope for further dedicated and more proactive activity to support the region’s aspirations for growing the sector and becoming a premier RV and camping destination.

### **RV Designations**

The RV market has been recognised by National and State organisations through the establishment of two programs that help communities identify themselves as welcoming to RVs. When visitors see the signs erected in town, they are reassured that specific amenities and provisions are available to them.

These programs are managed by Caravanning Queensland and the Campervan & Motorhome Club of Australia. Only Maryborough currently has an ‘RV friendly’ designation.

#### Community Welcomes Recreational Vehicles

This initiative was launched by Caravanning Queensland to offer Local Government Areas the opportunity to positively promote their communities as welcoming to RV visitors.

This scheme is in practice across Australia and New Zealand with the purpose of recognising a community as being welcoming to RV visitors even though they may not have ‘RV Friendly’ status from Campervan & Motorhome Club of Australia.

The ‘Community Welcomes Recreational Vehicles’ campaign was adopted by Caravanning Queensland to promote communities that embrace recreational vehicles, serving as a positive promotion scheme.

Essential provisions of ‘Community Welcomes Recreational Vehicles’ communities include:-

- Easily accessible towns, or plans to make the town centre easily accessible for RVs (parking and signage);
- Visitor Information Centres, or directional signage to local information;
- Commercial caravan park in town; and
- No free camping locations in town centre.

#### RV Friendly

The RV Friendly program is offered by the Campervan & Motorhome Club of Australia to assist those travelling throughout the country in recreational vehicles. Locations are clearly identified with signage. The following two designations have been developed to provide business owners the opportunity to capture these visitors:

RV Friendly Town<sup>™</sup> (<https://members.cmca.net.au/content/rvftgov>)

An RV Friendly Town<sup>™</sup> is one that has met a set of guidelines to ensure they provide a certain amount of amenities and a certain level of services for the travellers. Essential provisions of RV Friendly Towns<sup>™</sup> include:-

- Appropriate parking within the town centre, with access to a general shopping area for groceries and fresh produce;
- Short term, low-cost overnight parking (24/48 hours) for self-contained RVs;
- Access to potable water; and
- Access to a free dump point at an appropriate location.

RV Friendly Destination (<https://members.cmca.net.au/content/rvftgov>)

The RV Friendly Destination program is a CMCA initiative aimed to assist small towns that are not able to meet the criteria of the CMCA RV Friendly Town<sup>™</sup> program. Local Government/Councils, Progress Associations and businesses, can participate by selecting a suitable site within the town to become the RV Friendly Destination. Essential provisions of RV Friendly Destinations include:

- Provision of short term, low-cost overnight parking (24/48 hours) for self-contained RVs;
- The parking area needs to be on a solid, level surface; and
- There must be enough room for large vehicles to manoeuvre.

## Implications for the Strategy

At present, marketing of the sector is largely passive. A review of current marketing activity suggests that there is scope for further dedicated and more proactive activity to support the region's aspirations for growing the sector and becoming a premier RV and camping destination. Specific opportunities may be available in the form of:-

- Proactive marketing of the region's camping options and positioning as a premier camping/RV destination to be guided by a concise marketing action plan
- Further integration of camping options into itineraries and journeys as part of FCTE's marketing program. Development of the Discover Fraser Coast initiative – a federally funded regional wayfinding partnership between Fraser Coast Regional Council and Fraser Coast Tourism & Events and led by Council.
- Engagement of camping business in initiatives – awareness of business opportunities.
- Seeking RV-friendly designations for the region's towns.
- Proactive PR and social media program to engage directly with caravan and RV user groups.
- Active participation in caravan and RV trade events to raise the destination's profile.
- Building awareness of low cost options by ensuring that key sites are registered on the Australian Tourism Data Warehouse (ATDW).
- In the short term, investigating the merit of a dedicated RV, caravan and camping landing page on [www.visitfrasercoast.com](http://www.visitfrasercoast.com).
- Investigate the opportunity for cooperative campaigns with players such as Jayco, Jucy, Apollo, Britz Maui etc to educate customers on the do's and don'ts at free/low cost sites.
- Ensuring caravan and camping businesses are aware of up to date sector intelligence and product/experience information for the whole Fraser Coast region.
- Ensuring high quality visitor information is available at all sites, as a means of raising awareness of experiences, contributing to growing average length of stay.

# Current Campsite and RV Site Provision

A comprehensive audit of existing sites was carried out as part of the Strategy's preparation. At the time of the preparation of the Strategy, the region had:-

- 25 commercial sites;
- 6 Council owned and managed camping sites;
- 4 Council owned and managed RV sites; and
- 4 Council owned caravan sites.

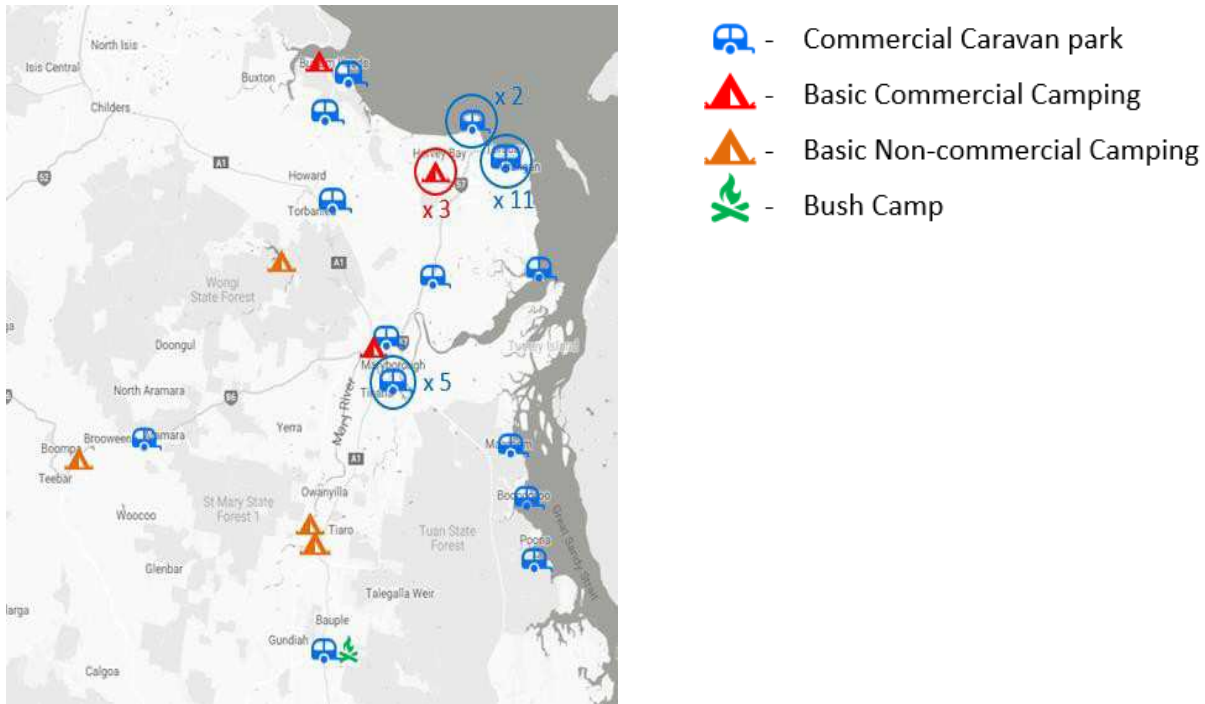
Clusters of commercial providers are located in Hervey Bay and surrounds, Maryborough, Burrum Heads and along the Great Sandy Strait. Council managed sites primarily serve the region's smaller towns and hinterland where commercial site options are not currently in place.

Appendix C contains a comprehensive summary of the audit conducted on the region's commercial sites and parks.

Figure 11: RV and Camping Sites in the Fraser Coast Region

Council camping sites	
Bauple Drive	Rosendale Park
Lake Lenthall	Teebar Sports Ground
Petrie Park	Tiaro Memorial Park
Council RV Sites	
Alan & June Brown Car park	Hervey Bay Visitor Information Centre
Burrum District Community Centre	Maryborough Showgrounds and Equestrian Park
Council owned caravan sites	
Burrum Heads Caravan Park	Scarness Beachfront Tourist Park
Pialba Caravan Park	Torquay Caravan Park
Privately Owned or Managed Commercial sites	
Australian Adventure Park	Huntsville Caravan Park
Big 4 Point Vernon Holiday Park	Ingenia Holidays Hervey Bay
Boonooroo Caravan Park	Lazy Acres Caravan Park
Burrum River Caravan Park	Maaroom Caravan Park
Cheery Nomad RV Park and Farmstay	Maryborough Caravan Park
Discovery Parks - Fraser Coast	Poona Caravan Park
Discovery Parks – Hervey Bay	Shelley Beach Caravan Park
Doon Villa Self-Contained RV Park	Sunlodge Oceanfront Tourist Park
Fraser Coast RV Park, River Heads	Susan River Homestead
Fraser Coast Top Tourist Park	The Palms – Hervey Bay
Harbour View Caravan Park	Wallace Motel and Caravan Park
Hervey Bay Caravan Park	Windmill Caravan Park
Hillcrest Holiday Park	

Figure 12: Map of Current RV Sites



### Implications for the Strategy

Council-owned Caravan Parks are located in the region’s principal tourism hubs. All sites are long-standing assets, and are delivered by providers who have been contracted through formal procurement/tendering processes. At the time of preparation of this Strategy Council was in the process of undertaking a master planning process for these parks.

Council-owned RV sites: With the exception of Lake Lenthall site, sites are currently free of charge. In line with the principal of competitive neutrality, a consideration for Council is applying fees to these sites, in line with market demand – making them ‘low cost’ to the consumer rather free. In terms of managing reputational risk, Council may also wish to give consideration to the cleanliness and upkeep of sites, and the application of fair and consistent enforcement action.

Time limits for visitor usage of the sites vary from location to location, reflecting market demand and location-specific circumstances. Site usage rules should be reviewed on an annual basis to ensure the sites continue to meet with market demand and ‘fair use’ principles.

Considerable negative feedback has been received on the Hervey Bay VIC location which is viewed as unsuitable. While respecting commercial stakeholder perspectives on low cost provision in principal tourism hubs, there is an identified need to seek an appropriate new location.

# Context Provided by Queensland Government Guidance

The implementation of an RV Strategy in Fraser Coast Region should build on State Government guidance and extant legislative and policy frameworks.

## Legal Basis for Camping in Queensland

To camp in Queensland is defined under the *Recreation Areas Management Act 2006* as including 'to pitch, place or erect a tent, caravan or another structure that may be used for camping for the purpose of staying overnight by using the tent, caravan or structure'. The *Local Government Act 2009* does not specifically define or legislate around camping. It requires local governments to develop and adhere to a planning scheme for all lands they manage. Section 26-38B allows each local government to pass a local law to enforce camping guidelines. The Queensland Caravan Park Policy (PUX/901/102) allows land to be classified as a 'reserve for recreation'. This allows for camping with limited facilities for a maximum of 3 nights. Local governments wishing to pursue this must create a local law to authorise the activity. The Secondary Use of Trust Land (PUX/901/209) allows for the use of trust land for other purposes as long as the use does not diminish the purpose of the trust land or adversely affect any local licensed caravan and/or tourist park owners. Stays may be limited to no more than 3 nights.

## Queensland Planning Regulation

The Queensland Planning Regulation (QPR) is a state planning instrument under the *Planning Act 2016* and provides a consistent form for the preparation of planning schemes across Queensland. The QPR prevails over all other guidelines and includes the following definitions:

### Nature-based Tourism

Nature-based tourism means the use of premises for a tourism activity, including accommodation for tourists, for the appreciation, conservation or interpretation of an area of environmental, cultural or heritage value; a local ecosystem; or the natural environment. Examples of nature-based tourism are noted as including — environmentally responsible accommodation facilities such as cabins, huts, lodges and tents.

### Tourist Accommodation

Tourist accommodation means the use of premises for providing accommodation of less than 3 consecutive months to tourists or travellers.

### Short-term Accommodation

Short-term accommodation means the use of premises for— providing accommodation of less than 3 consecutive months to tourists or travellers.

### Tourist Activity

Tourist activity means:-

- (a) nature-based tourism; or
- (b) a resort complex; or
- (c) a tourist attraction; or
- (d) a tourist park; or
- (e) tourist accommodation, or accommodation for employees, that is ancillary to a use stated in paragraphs (a) to (d);  
or
- (f) a commercial use that is ancillary to a use stated in paragraphs (a) to (d).

### Tourist Park

Tourist park means the use of premises for:-

- (a) holiday accommodation in caravans, self-contained cabins, tents or other similar structures; or
- (b) amenity facilities, a food and drink outlet, a manager's residence, offices, recreation facilities for the use of occupants and their visitors, or staff accommodation, if the use is ancillary to the use in paragraph (a).

### Resort Complex

Resort complex means the use of premises for:-

- (a) tourist and visitor accommodation that includes integrated leisure facilities (examples of integrated leisure facilities include bars, meeting and function facilities, restaurants, sporting and fitness facilities) ; or
- (b) staff accommodation that is ancillary to the use in paragraph (a); or
- (c) transport facilities for the premises, including, for example, a ferry terminal or air service.

### Tourist Activity

Tourist Park means the use of premises for:-

- (a) holiday accommodation in caravans, self-contained cabins, tents or other similar structures; or
- (b) amenity facilities, a food and drink outlet, a manager's residence, offices, recreation facilities for the use of occupants and their visitors, or staff accommodation, if the use is ancillary to the use in paragraph a.

### **Rest Areas Policy & Best Practice (DTMR)**

Over 700 rest areas are provided through Queensland as part of the State's commitment to road safety and fatigue management. Sites are located in the road reserve and are either managed by the Department of Transport and Main Roads or managed by local government on behalf of the State. Sites typically have a 20 hour limit for fatigue stops, are located less than 80km apart with clear signage, basic facilities (shelter, and non- potable water) and vegetation cover to allow drivers to rest away from noise and glare. A Best Practice guide for roadside rest areas in Queensland was released in 2014 which encourages sites to be 'fit for purpose' as opposed to 'one size fits all'. Where sites are designed for visitors they should include toilets and where they are for RV users a dump point is also desirable. Availability of Wi-Fi is also a consideration.

#### **Implications for the Strategy**

Fraser Coast Council has been at the forefront of Queensland Councils in implementing best practice with regard to reflecting the Queensland Government's planning policy and guidance for managing camping, caravans and RVs.

The local planning framework has been amended to reflect Queensland Government advice on tourism definitions. New RV sites, located within existing tourist parks and certain planning zones, are positioned with the Fraser Coast Planning Scheme as self assessable developments.

The Queensland Camping Options Toolkit (2015) provides the current best-practice guidance for local governments, the camping and caravanning industry and communities.

The toolkit outlines a clear structure for developing a range of options for travellers which are suitable to local contexts and acceptable to local industry and communities. This Strategy adheres to these processes and reflects the three stage process (outlined below).

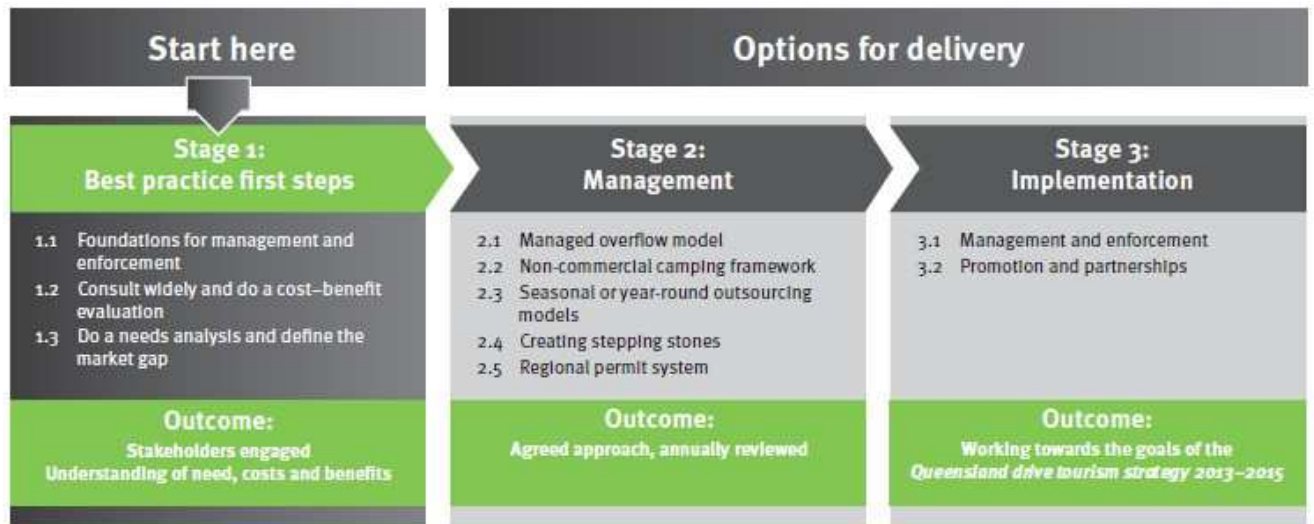
The opportunity in re-applying these best practice management processes to the Fraser Coast Region is provided through a comprehensive health-check of the current situation – Stage 1 as shown in Figure 1 below. Results of the health check will enable Council to respond to stakeholder feedback and evolved market circumstances, ensuring that outcomes and processes fulfil the goal of providing for a range of travellers in a manner which is appropriate for the local community and supporting commercial providers.

Acknowledging the roles and functions of established RV and camping site throughout the region, Stages 2 and 3 of the toolkit process provide for a range of management solutions, which will be applied as appropriate to Fraser Coast's circumstances.

This approach is intended to provide a solution to any situation where need or suitability of sites may have changed since the current Fraser Coast Camping Options Strategy was published, and provides an opportunity to review and adapt management processes and site designations to new and emerging situations across the Fraser Coast Region.

An updated version of Camping Options Toolkit is currently being prepared by the Queensland Government. The updated guidance was not published at the time of this document’s preparation, therefore, content and recommendations is based on the 2015 Toolkit. It is recommended that the Strategy is updated to reflect the revised State Government guidance when it is formally published.

Figure 13: Queensland Camping Options Toolkit – Management Approach



# Fraser Coast Policy Content

Fraser Coast Regional Council has provided for regulation of camping and caravanning activities within the Fraser Coast Planning Scheme 2014 (version 10), and in Local Laws No.1 and No. 4, and Subordinate Local Law No.1.

## Fraser Coast Planning Scheme 2014

The Fraser Coast Planning Scheme 2014 (Version 10) includes definitions and strategic directions which are relevant to this Strategy as noted in the following section of the report. It is also noted the planning scheme was reviewed and amended in 2016 to encourage the development of commercial and non-commercial RV grounds in the region.

### ***Self-contained recreational vehicle ground***

Land designated and managed for the purpose of short term lodging in self-contained recreational vehicles (RVs), motorhomes and campervans. The use does not include camping, cabins, or constructed guest facilities such as sports courts, swimming pools or kiosk.

### ***Nature-based tourism***

Use of premises for a tourism activity, including accommodation for tourists, for the appreciation, conservation or interpretation of an area of environmental, cultural or heritage value, or; a local ecosystem or; the natural environment. Examples include environmentally responsible accommodation facilities including cabins, huts, lodges and tented camps.

### ***Tourist Park***

Use of premises for holiday, accommodation in caravans, self-contained cabins, tents or other similar structures; or amenity facilities when ancillary to holiday accommodation. Also referenced as camping ground, caravan park or holiday cabins.

## **Section 3.4.2.4 (Tourism)**

The Strategic Framework of the Planning Scheme notes:-

- a) A diverse range of tourism activities contributing to the economic growth of the Fraser Coast are supported in a manner that capitalises on, and at the same time protects, the natural and heritage assets and key character and lifestyle attributes of the Fraser Coast.
- b) Established tourist-servicing nodes, including those that are focused along the Hervey Bay Esplanade at Pialba, Scarness, Torquay and Urangan, are consolidated and provide for a range of well-designed and high-quality visitor accommodation, tourist services and public spaces to meet the various needs and budgets of tourists and visitors to the Fraser Coast.
- c) In environmentally sensitive areas and high scenic amenity areas, nature-based and eco-friendly tourist infrastructure and facilities are established where they demonstrate integration with the natural and cultural values of the site and context and setting.
- d) Visitor accommodation and tourist attractions and facilities are located in areas that contribute to the wide range of tourism experiences on offer throughout the region including urban, coastal and hinterland locations.
- e) Nature-based and eco-based tourist activities are sensitively located and carried out to ensure the natural values that underpin the regional tourism product are sustained.
- f) Rural and agri-tourism experiences build upon the 'clean and green' identity of the region and do not prejudice the ongoing productive use of rural land.

## **Section 3.4.2.1 (Diverse Business and Industry) also states:**

Development on the Fraser Coast supports and promotes the continued growth of diverse and strong business and industry sectors, including forestry, rural enterprises and production, extractive industries, manufacturing and industry, tourism, health and education related uses, aviation related uses, marine based industry, construction and government related services.

## **Fraser Coast Regional Council Local Law No. 1 (Administration), 2011, and Subordinate Local Law No. 1 (Administration), 2011**

Local and Subordinate Local Law No. 1 note caravan parks as prescribed activities. The operation of caravan parks means to operate, on a commercial basis, a place for parking and residing in caravans, including a place that provides also for complementary accommodation.



Schedule 12 Operation of Caravan Parks in Subordinate Local Law No.1 provides comprehensive guidance, covering:-

- Documents and materials that must accompany applications for approval
- Additional criteria for the granting of approval
- Conditions that will ordinarily be imposed on approvals
- Term of approval
- Term of renewal of approval

#### **Fraser Coast Regional Council Subordinate Local Law No. 4 (Local Government Controlled Areas, Facilities and Roads) 2011**

Purpose of this law:-

To supplement *Local Law No. 4 (Local Government Controlled Areas, Facilities and Roads) 2011* in order to protect the health and safety of person using local government controlled land, facilities, infrastructure and roads and preserve features of the natural and built environment and other aspects of the amenity of local government controlled land, facilities, infrastructure and roads.

#### **Provisions:**

- a) The regulation of access to local government controlled areas; and
- b) The prohibition or restriction of particular activities in local government controlled areas or roads; and
- c) The applicable minimum standards where owners are required to fence land adjoining a road.

#### **Prohibited activities in parks and reserves include:**

- a) Failing to comply with an authorised person's direction to remove an object that, in the opinion of the authorised person, may endanger the safety of others or cause damage to the park or reserve
- b) Failing to comply with an authorised person's direction to cease an activity that, in the opinion of the authorised person, is likely to injure, endanger or unduly obstruct another person
- c) Acting in a manner that may cause offence of negatively affect the enjoyment of the park or reserve by other persons
- d) Failing to comply with an authorised person's direction to stop or reduce the volume of noise emanating from the playing of a musical device including a radio, stereo or musical instrument

#### **Camping or sleeping overnight is a restricted activity permitted only:**

- a) In a tourist park which has all requisite development approvals; or
- b) Where a sign indicates that camping or sleeping overnight is allowed; or
- c) Where the place is located on the Queensland Heritage Trails Network; or
- d) Where authorised by an authorized person.

#### **Amendments to Local Laws**

Council has established a progressive policy framework that seeks to support the development and management of parks and sites that meet demand from visitors who seek commercial and non-commercial/low options. Meeting demand from both of these market sectors is essential if economic benefits for the whole of the region are to be maximised. Council has, in-part, become engaged in provision of low cost RV and caravan parks as the commercial market has not been in a position in every case to provide facilities which meet with demand from this distinct visitor market who do not use commercial sites.

Amendments were made to the Local Laws in 2016 which, in line with emerging Queensland Government guidance, removed a significant proportion of the prescriptive service provision requirements for caravan and RV park provision (e.g. number of toilets etc.), providing greater flexibility for all operators. Council has also reduced Local Law and infrastructure fees for low cost RV site provision <https://www.frasercoast.qld.gov.au/council-fees-charges> as part of its commitment to supporting growth in the visitor economy. However, a priority is also to ensure that the fees and charges regime supports businesses in all sectors of the caravan and RV sector, and supports the aim of growing the value of the visitor economy as a whole.

# Effective Site Management and Development as a driver of Stakeholder and Customer Satisfaction

It is recommended that, where supported by customer demand, Fraser Coast Regional Council seeks to embed cost recovery principles where it currently invests in camping and RV site provision. This approach is based on the need:-

- To support Council in offsetting capital and operational costs; and
- Supporting the principle of competitive neutrality in the context of commercial providers already in the marketplace.

There is a toolbox of cost-recovery tools available to Council to support cost-recovery. Different tools should be used where appropriate to the site;

- Honesty Box
- Voucher from VIC or other suitable location
- Dedicated Council Officer, or authorised delegate, collection
- Community Partnership

## **Honesty Box**

An honesty box on site is the least resource intensive method of collecting fees from site users; but inherently relies on the honesty of visitors and poses a risk for theft if not regularly collected by Council.

## **Voucher**

Site users can collect and pay for a site use voucher from the Visitor Information Centre, or another local service provider (post office, council office, local hotel etc). With regard to the VIC, this also creates footfall - providing the opportunity to provide other information to visitors. While this option is generally limited to during daylight or business hours, visitors can procure the vouchers for the preceding evening the next day, if they arrive outside of business hours.

## **Dedicated Council Officer (or authorised delegate)**

Council can take a hands-on approach to site management and cost recovery by direct collection of fees. While this is a labour intensive option, this has the advantage of Council directly being across the situation on the ground. It is an option to consider at busier sites.

## **Community Partnership**

A contract or service level agreement with local community groups, where a camp host collects fees, empties the honesty box, and keeps note of the condition of the site.

This option works well where a local progress association or community group is established in a community, and is formed as a legal entity. An option to consider in this type of arrangement is revenue sharing or ring fencing of revenue raised for local community investment.

Council already has clear tendering and procurement mechanisms in place for outsourcing relating to commercial management of sites. It is recommended that:-

Council's tendering and procurement arrangements for outsourcing management of sites should be in accordance with its Procurement Policy and the *Local Government Act 2009* and regulations.

While tendering and procurement processes are promoted openly, as part of its communication with existing commercial operators, Council may wish to consider including direct notification to this group of stakeholders.

If a commercial outsourcing model is used, it is suggested that the approval conditions for the selected site promote a strict adherence to the amenities defined for the selected camping option (supported by revisions to definitions in local law).

If a community group is successful during the tender process and a community partnership results, the site will remain as a non-commercial entity.

Partnership options for low-cost campgrounds include:-

#### **Community Partnerships & Council Owned Campgrounds**

Council working with community groups to manage Council owned campgrounds collecting a nominal fee. Outsourcing site governance and fee collection to community groups will reduce costs to Council and increase community ownership of the site, enabling re-investment of the fees directly into the community.

#### **Campground Management Option: Not For Profit Community Partnerships**

A site classified as a Council Campground can be managed by a community group collecting a nominal fee for cost recovery as determined through a tender process. These sites should offer, at minimum, the “basic” facilities defined as the agreed upon local minimum standard, as guided by the Toolkit.

#### **Campground Management Option: Commercially Outsourced**

A basic site classified as a Commercial Campground can charge a fee and be managed by an entity selected through a tender process. These sites should offer common amenities such as water and toilets as well as one emergency power outlet.

#### **Commercial/Outsourced Campgrounds**

All sites categorised as Commercial/Outsourced Campgrounds need to be put to market through a tender process.

# Legal & Policy Framework

Amendments to the planning scheme and Local Laws have already gone a long way towards ensuring that Council's policy framework supports a competitive caravan and RV sector (commercial and non-commercial providers) which contributes towards a healthy Fraser Coast visitor economy. However there are a small number of areas where Council may wish to give consideration to additional amendments, in-keeping with responding to evolving market circumstances:-

## **Incentivising Provision of Low Cost sites for Self-Contains Caravans and RVs**

As part of providing a balanced support regime for commercial and non commercial providers and incentivising site development that meets with market demand, provision of low cost camping options within existing commercial operations could be encouraged. A consideration for Council is incentivising this type of provision by offering a rebate to existing commercial providers prescribed fees and charges.

## **Providing for Appropriate Levels of Facility Provision in Low Cost Sites for Self-Contained Vehicles**

Local Law 4 and amended Local Law 1 currently provide an effective regulatory basis for providing for new, and managing existing camp sites. Council has shown a commitment to providing for an appropriate balance of facilitating good quality caravan and camp site provision alongside a fair and equitable competitive environment. As demonstrated in the market review, a challenge is providing for self-contained RVs who do not wish to use commercial sites – by definition these visitors are travelling in self-contained vehicles and require safe and secure locations for short stays, with minimal levels of other amenities. Building on the content contained in Local Laws 1 and 4, an amendment to Subordinate Local Law 1 could be considered, in future rounds of local law amendment processes, which provides for establishment of sites with these lower levels of facility and amenity provision.

Related to the previous point, in order to protect the interests and viability of private commercial operators in the region, and to protect competitive neutrality, it is recommended that the agreed locally acceptable minimum levels of facility provision for low cost sites or those aimed at self-contained RV visitors are also complemented with a ceiling, or locally acceptable maximum facility provision. The aim in Council or a community partner providing these sites is to provide an appropriately located low cost/basic option that ensures that economic value from visitors who use non-commercial sites is captured.





## **Register of Camping Locations**

It is recommended that the development of a Register of Camping Sites operated by Council be created and published on Council's and Fraser Coast Tourism & Event's websites.

## **Definitions**

While the Fraser Coast Planning Scheme has been updated with tourism definitions which fully align with the Queensland Planning Regulation, the Government's Camping Options Toolkits recognises that there are also a series of industry and visitor recognised designations and descriptions for caravan and RV sites. Where appropriate, these definitions could be considered for inclusion in relevant Local Laws, during future rounds of local law amendment processes (see figure 21 for examples).

Figure 21: Hierarchy of Governance: Fraser Coast Region Camping Options Spectrum

 CAMPING OPTION	 LENGTH OF STAY	 FEATURES	 COST	 GOVERNANCE
<b>FATIGUE MANAGEMENT</b>	20 hours	<ul style="list-style-type: none"> <li>• Signage</li> </ul>	Free	<ul style="list-style-type: none"> <li>• Local Laws</li> <li>• State Legislation</li> </ul>
<b>BUSH CAMP</b>	Define locally acceptable stay (to be defined by FCTE, FCRC)	<ul style="list-style-type: none"> <li>• Signage</li> <li>• Water</li> <li>• Outside of residential areas</li> </ul>	Free	<ul style="list-style-type: none"> <li>• Local Laws</li> <li>• Planning Scheme</li> </ul>
<b>NON-COMMERCIAL BASIC CAMPGROUND</b>	Define locally acceptable stay (to be defined by FCTE, FCRC)	<ul style="list-style-type: none"> <li>• Signage</li> <li>• Water</li> <li>• Bins</li> </ul>	Nominal Fee	<ul style="list-style-type: none"> <li>• Local Laws</li> <li>• Planning Scheme</li> </ul>
<b>COMMERCIAL / OUTSOURCED BASIC CAMPGROUND</b>	Define locally acceptable stay (to be defined by FCTE, FCRC)	<ul style="list-style-type: none"> <li>• Signage</li> <li>• Water</li> <li>• Bins</li> <li>• Toilets</li> <li>• Emergency Power Point</li> </ul>	As Per the Operator, within a cost-recovery scope	<ul style="list-style-type: none"> <li>• Local Laws</li> <li>• Planning Scheme</li> <li>• Expression of Interest</li> <li>• Annual Review</li> </ul>
<b>COMMERCIAL CARAVAN PARK</b>	As Per the Operator	As Per the Operator	As Per the Operator	<ul style="list-style-type: none"> <li>• Local Laws</li> <li>• Planning Scheme</li> <li>• State Legislation</li> </ul>

# Stakeholder Perspectives

## Need for options:-

Providing options for different types of camping/ RV visitors was recognised as a contentious issue, however all stakeholder groups acknowledged the existence of many visitor segments with various preferences. Issues included:

- Concerns were raised that if a spectrum of camping options within the region was not provided, visitors would begin to bypass the region;
- Stakeholders are seeking clearer policies and decision-making process in regards to free or low costs sites, particularly in relation to competitive neutrality within the high-visitation areas of Hervey Bay and Maryborough. It was also acknowledged by all stakeholder groups that free or low-cost sites were important for outlying areas, but it was perhaps not appropriate to provide facilities in competition with commercial operators in high- visitation areas.

Members of the community, caravanning and related service industries, and Fraser Coast Regional Council participated in a stakeholder consultation program, the results of which have been instrumental in informing development of the Draft Strategy.

Full details of Stakeholder Perspectives are attached in the Appendices. Key issues raised are outlined below:-

### Implications for the Strategy

Provision of low cost site provision in hinterland locations in particular, is essential if the economic benefits of tourism are to be captured.

## Facilities and Signage:-

Commentary on the level and quality of facilities and signage was common across all stakeholder groups, albeit with differing perspectives:-

- A number of stakeholders considered that there was a lack of facilities at free sites for travellers which are not self-contained, while others raised the concept of the “slippery slope”; in terms of the point at which, facility provision begins to compete against commercial operators;
- Bins and toilets were considered to be a minimum for some stakeholders;
- Accessibility of facilities such as dump points was questioned. The dump point at Hervey Bay was considered to be in a position which would affect guest amenity, while the locking of the Maryborough dump point was considered inconvenient to travellers; and
- Signage was nominated across most stakeholder groups as an issue. As the Fraser Coast region is promoted as the RV capital of Australia, wayfinding signage and RV Friendly signage was considered to be insufficient.

### Implications for the Strategy

Despite the desire to provide the best facilities possible, clarity is required in terms of the facilities required to service the RV market i.e. self-contained visitors. ‘Facility-creep’ has the potential to infringe on competitive neutrality principles.

## Economic Opportunity:-

Free or low costs sites were largely considered to be a fantastic opportunity for outlying areas which do not experience the visitation levels of Hervey Bay and Maryborough.

Stakeholders considered that there is economic opportunity at every level; local residents could benefit from opening private lands to free or low cost campers (AirBnb or camping), while on a larger scale, seeking collaborative partnerships with RV residential developments was seen as an opportunity for marketing and promotion.

Others highlighted an opportunity which lies within the services in the Fraser Coast region which could be leveraged to create an RV education centre – one-stop-shop where caravan owners can be educated as well as seek mechanical upgrades.

Some stakeholders also acknowledged that a number of commercial parks do not have adequate space to accommodate large RV’s. Similarly, some commercial parks have permanent tenants in place which act as deterrents to potential visitors.

### **Implications for the Strategy**

Despite the strongly polarised views regarding free or low cost camping, there is recognition across all stakeholder groups that a spectrum of camping options is required to meet the needs of the market and secure economic benefits for the region.

### **Enforcement and Operational Aspects:-**

Delivery of enforcement policies which are fair and consistent was considered to be a recurring issue across all stakeholder groups. The challenges were seen to be: application of a consistent approach to enforcement; communication of regulations to consumers; and development of policy which achieves an appropriate balance of consumer-friendliness and rigour in ensuring that regulations are adhered to.

### **Implications for the Strategy**

A need to establish a revised set of enforcement guidelines and protocols.

### **Visitor Experience:-**

All stakeholders are aware of the importance of providing high quality visitor experiences. This includes the location of some of the free and low cost sites, and related to policing. Stakeholders questioned the quality of some free or low cost sites - they believed that the purpose of these sites is to encourage visitor spend, which cannot be achieved if the sites are not within walking distance to shops. In relation to enforcement, there was also potential to negatively impact visitor experience at these sites through poor sanitation and poor behaviour of non-self-contained vehicle visitors.

### **Implications for the Strategy**

Future policy and delivery should seek to deliver an appropriate balance of service provision for visitors, but not resulting in unnecessary facility creep/ cost burden for Council.

### **Competitive Neutrality:-**

Stakeholder feedback across all stakeholder groups that Council should not be intervening in the market in a manner that undermines the viability of commercial operators. Provision of free/low cost sites, and enforcement action allows visitors to use the sites intended for fully self contained vehicles were considerations in this regard.

### **Implications for the Strategy**

Competitive neutrality should be an underpinning principle for the Strategy.

# Recommendations

The current Fraser Coast Camping Options Study is a comparatively recent document (2015), with many of its recommendations remaining entirely valid. Market circumstances have evolved to a degree, however the Queensland Government’s guidance to LGAs has remained consistent with 2015.

The following policy and operational recommendations are intended to seek a balance between various stakeholder issues while re- applying the advice outlined in the Queensland Camping Options Toolkit.

Figure15: Recommendations Summary

Recommendation	Scope
<p><b>Positioning and Marketing the Region as a Premier RV, Caravan and Camping Destination</b></p>	<p>Guided by a caravan and camping marketing action plan, develop and deliver a marketing program which raises awareness of the region’s caravan and camping options, and drives new businesses.</p>
	<p>Promote engagement and packaging opportunities for the region’s caravan and camping businesses, focusing on shoulder and off-season opportunities to drive new business.</p>
	<p>Review marketing platforms and collateral with the purpose of growing market awareness of the region’s camping options and positioning as a premier RV and camping destination, including;</p>
	<p>Investigating the potential to create a new engaging and accessible tourism industry-led RV website/portal;</p>
	<p>As a short term action, review Council’s caravan and camping website page with a view towards including all commercial and non-commercial camping options;</p>
	<p>As a short term action, investigate the feasibility of establishing a dedicated caravan and camping landing page on FCTE’s consumer website;</p>
	<p>Identify options to further integrate camping options where appropriate into itineraries and journeys as part of FCTE’s marketing program and the Discover Fraser Coast project;</p>
	<p>Continue to identify partnership opportunities such as those with Australia’s Nature Coast to promote touring options.</p>
	<p>Review signage at all camping locations as part of a strategic wayfinding plan.</p>
	<p>Maintain and build positive relationships with sector trade bodies via a proactive program of networking and engagement.</p>
<p>Instigate a proactive PR and social media program to engage directly with caravan and RV user groups.</p>	
<p>Instigation of a program which build towards 100% participation on commercial and non commercial camp sites on Australian Tourism Data Warehouse (ATDW) – an essential step in building consumer awareness.</p>	
<p>Investigate the opportunity for cooperative campaigns with industry players such as Jayco, Jucy, Apollo, Britz Maui etc.</p>	



Recommendation	Scope
<b>Business Development which grows overall destination competitiveness</b>	Instigate a region-wide RV and camping evaluation program designed to provide customer insight on facilities and experiences (commercial and non-commercial sites).
	Share benchmarking results from the evaluation program, and available new sector intelligence with businesses and industry partners to support business and experience development and investment.
	Prepare annual briefings for caravan and camping businesses to build awareness of up to date sector intelligence and product/experience information for all of the Fraser Coast region.
	Review communications with sector businesses to build awareness of experiences, products and events which will drive business opportunities.
	Investigate opportunities for the Region to host sector conferences and events, growing its reputation as a premier RV and camping destination.
<b>Infrastructure Investment and Management which creates an RV and Caravan and Camping Friendly Environment</b>	As a means of growing awareness of the region's towns and destinations in target markets, seek RV-friendly designations for towns where opportunities are available, accompanied by investment in new infrastructure where required.
	In consultation with local RV businesses, establish Maryborough as a RV education and maintenance hub – taking advantage of the strategic location on the Bruce Highway and the existing cluster of automotive maintenance, manufacturing and small tourism businesses.
	Investigate options to create designated long vehicle parking spaces throughout the region (including Hervey Bay Esplanade) with supporting signposting and website-based information.
	Review signage requirements at commercial and non commercial sites.
	Assess the priority for improved infrastructure at council managed sites in line with the policy framework contained in Subordinate Law No.1. and implement accordingly.
<b>Establishing a transparent policy framework as the basis for decision-making</b>	<p><b>Incentives for Commercial Operators to offer low cost camping options</b></p> <p>As part of providing a balanced support regime for commercial and non-commercial providers and incentivizing sites that meet with market demand, provision of low cost camping options within existing commercial operations should be encouraged. A consideration for Council is incentivizing this type of provision by offering a rebate to existing commercial providers on prescribed fees and charges.</p>
	<p><b>Providing for Appropriate Levels of Facility Provision in Low Cost Sites for Self- Contained Vehicles</b></p> <p>In the drafting and making amendments to its local laws, Council has shown a commitment to providing for an appropriate balance of facilitating good quality caravan and camp site provision alongside a fair and equitable competitive environment. As demonstrated in the market review, a challenge is providing for self-contained RVs who do not wish to use commercial sites – by definition these visitors are travelling in self-contained vehicles and require safe and secure locations for short stays, with minimal levels of other amenities. Building on the content contained in Local Laws 1 and 4, an amendment to Subordinate Local Law 1 could be undertaken as part of future local law amendment processes, which provides additional clarity for sites with these lower levels of facility and amenity provision. With regard to ensuring a balance between good quality site provision and ensuring competitive neutrality, consider adding a clause to the Local Law which provides for a maximum level of facility provision as well as specifying a minimum for these categories of sites.</p>

Recommendation	Scope
Establishing a transparent policy framework as the basis for decision-making (Contd)	<p><b>Register of Camping Locations</b> Development of a Register of Camping Sites operated by Council to be published on Council's and Fraser Coast Tourism &amp; Events websites.</p>
	<p><b>Definitions</b> While the Fraser Coast Planning Scheme has been updated with tourism definitions which fully align with the Queensland Planning Regulation, the Government's Camping Options Toolkits recognises that there are also a series of industry and visitor recognised designations and descriptions for caravan and RV sites. Where appropriate, these definitions should be reflected as appropriate in relevant Local Laws within the context of formal planning development definitions, as part of future local law amendments.</p>
	<p><b>Site Designations</b> Implement a formal review of site designations for FCRC managed camping and RV sites, in line with Queensland Government best practice guidance.</p>
Effective Site Management and Development as a driver of Stakeholder and Customer Satisfaction	<p><b>Low Cost Site Provision</b> This report finds that as a whole, the current number of low and no cost sites is appropriate for the short to medium term (2022). With specific regard to the Hervey Bay VIC location, this site has been identified as not being fit for purpose, with a new and more appropriate site being necessary. Needs Assessments should be taken annually to review the performance and demand for non-commercial sites within the Fraser Coast Region. Formal site needs analysis should be conducted when considering any new site, or reviewing existing site provision (template attached in Appendices).</p>
	<p><b>Embedding Cost Recovery Principles</b> Fraser Coast Regional Council should explore options to embed cost recovery principles into low cost and commercial sites where feasible, reflecting this framework in Council Local Laws as appropriate.</p>
	<p><b>Enforcement Practice and Protocols</b> Review processes and protocols to guide consistent application of enforcement actions, balancing the need for a customer-friendly approach with appropriate enforcement action.</p>
	<p><b>Dump Points</b> If required, new dump points should not be installed away from existing pump-out locations, and should always be connected to the sewer to offset ongoing maintenance costs. Outside of sewer areas, there is a presumption against dump point provision unless a suitable bespoke solution can be established.</p>
	<p><b>Site Plans</b> Site Plans for Council Managed sites (new and existing) should be developed and publicised to allow consistency in non-commercial free/low-cost sites across the local government area.</p>
	<p><b>Emergency Management Plans</b> Emergency Management Plans for Council Managed sites should be developed and implemented for free and low cost site as required.</p>
	<p><b>Tendering Documentation</b> Council's tendering processes should be undertaken in accordance with its Procurement Policy and the <i>Local Government Act 2009</i> and Regulations.</p>
	<p><b>"Leave No Trace" Policy</b> A "Leave No Trace" Policy should be designed to support environmental stewardship and align with codes of conduct promoted by the CMCA.</p>

Recommendation	Scope
<b>Effective Site Management and Development as a driver of Stakeholder and Customer Satisfaction (Contd)</b>	<b>Site Operating Hours</b> Conduct a review of site operating hours for Council-managed sites on an annual basis, in line with customer feedback and community input.
	<b>Site Fees</b> Conduct a review of site fees for Council-managed sites on an annual basis, in line with customer feedback and commercial site fees and charges.
	<b>Design and Management Guide</b> To ensure consistency in the design and management of campgrounds. It is recommended that Council prepare a guide which includes case studies/examples to assist proponents, and Council's Planning department, in better assessing proposed sites, designing Council managed sites and managing contracts with third party providers.
	<b>Monitoring of Council's Management and Enforcement.</b> Successfully growing the number of caravan, camping and RV visitors by definition will generate a growing management workload for council officers. Monitoring of workload should be established as part of the performance monitoring/KPI framework for the strategy.
<b>Building awareness of the benefits of the RV and Caravan and Camping sectors</b>	Proactively disseminate information on the value of the sector on an annual basis, including number of businesses, value of visitor expenditure, supply chain businesses, as a means of growing awareness and understanding of the sector's value.

# Site Definitions, Categorisation & Infrastructure Recommendations

Figure 16: Suggested designation and infrastructure requirement for Council owned/managed sites

SITE	PROPOSED DESIGNATION	INFRASTRUCTURE NEEDED	EXISTING AND NEARBY FACILITIES/COMMUNITY BENEFIT
Teebar Sports Ground	Basic non-commercial camping	Signage required leading to and at the site.	Toilets, showers, unformed parking.
Lake Lenthall	Basic non-commercial camping	No additional infrastructure required.	Bins, toilets, cold showers, BBQ's
Rosendale Park	Bush camping	Additional signage leading to the site should be considered. No additional infrastructure required.	Shelters, unformed parking, wet area licence in place, generators permitted, camp fires permitted.
Petrie Park	Basic non-commercial camping	Additional signage leading to the site should be considered. No additional infrastructure required.	Shelters, toilets, unformed parking, wet area licence in place, generators permitted, camp fires permitted.
Tiaro Memorial Park	Basic non-commercial camping	Additional signage on the Bruce Highway both north and south bound should be considered. Install bollards, monitor site and review designation if use increases.	Bins, toilets, showers, BBQ's shelters, unformed parking, wet area licence in place, generators permitted.  Situated in the town of Tiaro – providing walking access to numerous local businesses including cafés, butchers, grocery stores, pub and bottle store, etc.
Hervey Bay Visitor Information Centre	Stop and shop	Bollards to manage capacity, restrict non-RV/self-contained vehicle access	Dump point.  Hervey Bay Information Centre open 7 days, featuring free W-Fi, free coffee/tea station and toilets.
Alan & June Brown Car Park	Stop and shop	Bollards to manage capacity, restrict non-RV/self-contained vehicle access	Close access to the Maryborough Visitor Information Centre, close proximity to toilets and numerous shops and local businesses within the Maryborough CBD.

SITE	PROPOSED DESIGNATION	INFRASTRUCTURE NEEDED	EXISTING AND NEARBY FACILITIES/COMMUNITY BENEFIT
Burrum District Community Centre	Stop and shop	Bollards to manage capacity, restrict non-RV/self-contained vehicle access	Leash free dog walking area, close proximity to toilets and numerous shops and local businesses such as cafés, grocery stores and pub/restaurants.
Maryborough Showgrounds and Equestrian Park	Commercial	Additional signage on the Bruce Highway both north and south bound should be considered. Additional signage required at site.	Toilets and showers, picnic areas, shelters, power, water access, 2 x dump points. 5km drive to the Maryborough CBD.
Pialba Caravan Park	Commercial	No additional infrastructure required	Dump point, Free BBQ's, toilets and showers, camp kitchens, laundry facilities, boat ramp nearby, picnic areas, tour desk, disabled facilities, TV Room, Wi- fi.  Cafés, restaurants and the Wetside Water Park all within a short walking distance to the park.
Torquay Caravan Park	Commercial	No additional infrastructure required	Dump point, Free BBQ's, toilets and showers, camp kitchen, laundry facilities, boat ramp nearby, picnic areas, tour desk, disabled facilities, Wi-fi.  Significant number of cafés, restaurants and other local businesses within a short walking distance.
Scarness Beachfront Tourist Park	Commercial	No additional infrastructure required	Dump point, Free BBQ's, toilets and showers, camp kitchens, laundry facilities, boat ramp nearby, picnic areas, tour desk, disabled facilities, TV Room, Wi- fi.  Significant number of cafés, restaurants and other local businesses within a short walking distance.
Burrum Heads Caravan Park	Commercial	No additional infrastructure required	Dump point, Free BBQ's, toilets and showers, camp kitchen, laundry facilities, boat ramp nearby, picnic areas, tour desk, disabled facilities.  A number of nearby shops and local businesses including cafés and restaurants.





**Fraser Coast Regional Council**  
**Recreational Vehicle Strategy**  
*Appendices*



March 2019

# Contents

<b>Action Plans.....</b>	<b>3</b>
<b>Stakeholder Perspectives.....</b>	<b>12</b>
<b>Market Review.....</b>	<b>16</b>
<b>Site Audit.....</b>	<b>20</b>
<b>Best Practice Basis for Site Management.....</b>	<b>28</b>
<b>Managed Overflow Policy.....</b>	<b>31</b>
<b>Fraser Coast RV Strategy 2015, Recommendations Review.....</b>	<b>33</b>
<b>Site Assessment Template.....</b>	<b>34</b>
<b>Case Study Best Practice Examples.....</b>	<b>35</b>



# Action Plan – Marketing & Communication

Effective promotion of Fraser Coast Regional Council’s Camping Options is critical to the success in attracting and retaining RV visitors to the region. The provision of complete and accurate site information will help visitors plan their journey.

Figure 1: Action Plan for Marketing & Communication Recommendations

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
Guided by a caravan and camping marketing action plan, develop and deliver a marketing program which raises awareness of the region’s caravan and camping options, and drives new businesses.	FCRC, FCTE	2019
Promote engagement and packaging opportunities for the region’s caravan and camping businesses, focusing on shoulder and off-season opportunities to drive new business.	FCRC, FCTE	Ongoing
Review marketing platforms and collateral with the purpose of growing market awareness of the region’s camping options and positioning as a premier RV and camping destination, including; <ul style="list-style-type: none"> <li>• Creation of a new engaging and accessible tourism industry- led RV website/portal</li> <li>• In the short term, review Council’s caravan and camping website page with a view towards including all commercial and non-commercial camping options</li> <li>• Identify options to further integrate camping options where appropriate into itineraries and journeys as part of FCTE’s marketing program</li> <li>• Continue to identify partnership opportunities such as those with Australia’s Nature Coast to promote touring options.</li> </ul>	FCTE, FCRC	2019
Review signage at all camping locations as part of a strategic wayfinding plan.	FCRC	2019
Maintain and build positive relationships with sector trade bodies via a proactive program of networking and engagement.	FCRC, FCTE	Ongoing
Instigate a proactive PR and social media program to engage directly with caravan and RV user groups.	FCRC, FCTE	Ongoing
Instigation of a program which build towards 100% participation on commercial and non-commercial camp sites on Australian Tourism Data Warehouse (ATDW) – an essential step in building consumer awareness.	FCRC, FCTE	Ongoing
Investigate the opportunity for cooperative campaigns with industry players such as Jayco, Jucy, Apollo, Britz Maui etc.	FCRC, FCTE	Ongoing

# Action Plan – Business Development which Grows overall Destination Competitiveness

Tourism is a fast-moving sector of the economy, where market expectations and customers’ adoption of new technologies require businesses and public sector stakeholder to evolve quickly. If Fraser Coast is to establish itself as premier RV and caravan/camping destination it, businesses and partners need to be aware of, and respond to changes in visitor demand.

Figure 2: Action Plan for Business Development Recommendations

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
Instigate a region-wide RV and camping evaluation program designed to provide customer insight on facilities and experiences (commercial and non-commercial sites).	FCRC, FCTE	2019, and then Ongoing
Share benchmarking results from the evaluation program, and available new sector intelligence with businesses and industry partners to support business and experience development and investment.	FCRC, FCTE	Ongoing
Prepare annual briefings for caravan and camping businesses to build awareness of up to date sector intelligence and product/experience information for all of the Fraser Coast region.	FCRC, FCTE	Ongoing
Review communications with sector businesses to build awareness of experiences, products and events which will drive business opportunities.	FCRC, FCTE	Ongoing
Investigate opportunities for the region to host sector conferences and events, growing its reputation as a premier RV and camping destination.	FCRC, FCTE	Ongoing

# Action Plan - Infrastructure Investment and Management which creates an RV and Caravan and Camping Friendly Environment

Responding directly to visitor demand and market expectations, targeted investment in new infrastructure can play an important role in building the appeal of Fraser Coast as a premier RV and caravan/camping destination.

With regard to low cost or free sites, consideration needs to be given to a range of factors regarding infrastructure investment, including:-

- Meeting market and customer demand and expectations
- The opportunity to recover Council's investment costs
- Competitive neutrality – not investing to a level that results in competition with commercial providers

Figure 3: Action Plan for Infrastructure and Investment Recommendations

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
As a means of growing awareness of the region's towns and destinations in target markets, seek RV-friendly designations for towns where opportunities are available, accompanied by investment in new infrastructure where required.	FCRC	Ongoing
In consultation with local RV businesses, establish Maryborough as a RV education and maintenance hub – taking advantage of the strategic location on the Bruce Highway and the existing cluster of automotive maintenance, manufacturing and small tourism businesses.	FCRC, local businesses	2019
Investigate options to create designated long vehicle parking spaces throughout the region (including Hervey Bay Esplanade) with supporting signposting and website-based information.	FCRC	Ongoing
Review signage requirements at commercial and non commercial sites.	FCRC	2019

# Action Plan – Establishing a Transparent Policy Framework

Consistent application of policy is key to providing a clear approach to RV site management across the Fraser Coast. Council is already adopting a best practice approach in many areas of RV/camping policy and practice. As such, recommendations focus on tightening up policy, practice and communication with stakeholders in a number of areas.

## 1. Providing Site Definitions and Categorisation

It is recommended that Council adhere to suggestions within the Camping Options Toolkit regarding site categorisation and associated levels of amenity provision. Providing guidance on a minimum level of facility provision for each designation should also be considered.

In order to address the concerns of stakeholders and to safeguard competitive neutrality in the event of outsourced management, it is recommended that the locally acceptable minimum standards of facility provision is accompanied by a ceiling which outlines the maximum level of facility provision for each site categorisation. This should be below the level of facility provision of facilities offered by commercial operators.

## 2. Incentivising Commercial Operators to Offer Low Cost Camping Options

As part of providing a balanced support regime for commercial and non commercial providers and incentivising sites that meets with market demand, encouragement of low cost camping options within existing commercial operations should be encouraged. A consideration for Council is incentivising this type of provision by offering a rebate to existing commercial providers on local laws and infrastructure fees and charges

## 3. Formalising the Management Approach in Local Laws

It is recommended that Council formalise these definitions and requirements within the planning scheme and Local Laws, where appropriate. This will ensure transparency in decision making and provide clarity in amenity provision, while protecting commercial operators.

## 4. A Presumption Towards Low Cost Provision

It recommended that Council distinguishes between “free” and “low cost” site provision within relevant policy, aligning with site designation and amenity provision. The principle of embedding cost recovery should be adopted as a pillar of Council’s approach to site and park management. Cost-recovery processes for sites with limited amenity should strike a balance between remaining affordable/ providing good value for visitors, and assisting Council in recouping its investment in site provision and operations.

## 5. Consistent Application of Fair and Reasonable Enforcement Mechanisms

It is recommended that enforcement processes are established which achieve a fair and equitable balance between being customer-friendly and ensuring sites are used appropriately.

There are number of camping options outlined in the Queensland camping options toolkit which are not adequately defined in Fraser Coast Regional Council’s legal and policy framework at present:-

### Rest Areas / Fatigue Management Sites

Rest Areas are sites designed for fatigue management and should follow the best practice guidelines provided by the State with minimal facilities for travellers to take a break from the road to get some rest. These sites are located adjacent to a main road and should have a maximum stay of 20 hours. Signage at the site identifying the location as a rest stop is the only necessary feature for this category.

### Bush Camps

A site classified as a Bush Camp is generally located in a rural area away from any main travel routes. They have minimal features and serve to provide a safe place to enjoy a wilderness setting. These sites should be a minimum distance of 15km from the nearest Caravan Park. Bush Camps are free of charge and should provide access to water. Water can be either potable or simple rain water, so long as it is appropriately signed.

Bush Camp sites are intended for longer stays, depending on the needs of the user. Each site should be clearly signed the locally acceptable time limit.

**Basic Campgrounds**

A campground is a site designed to provide a ‘National Park’ style camping experience with basic facilities for travellers seeking an overnight stay (up to the locally acceptable maximum). They offer more facilities than a Bush Camp and can be located closer to commercial caravan parks (where need has been established), but offer fewer facilities than a commercial caravan park. Fees can be charged and sites can be managed by Council or a third party on behalf of Council.

**Campground Management Option: Not For Profit Community Partnerships**

A site classified as a Council Campground can operate either free of charge or be managed by a community group collecting a nominal fee for cost recovery as determined through a tender process. These sites should offer, at minimum, the “basic” facilities defined as the agreed upon local minimum standard, as guided by the Planner’s Guide to Caravanning, Camping and RVs.

**Campground Management Option: Commercially Outsourced**

A basic site classified as a Commercial Campground can charge a fee and are managed by an entity selected through a tender process. These sites should offer common amenities such as water and toilets as well as one emergency power outlet.

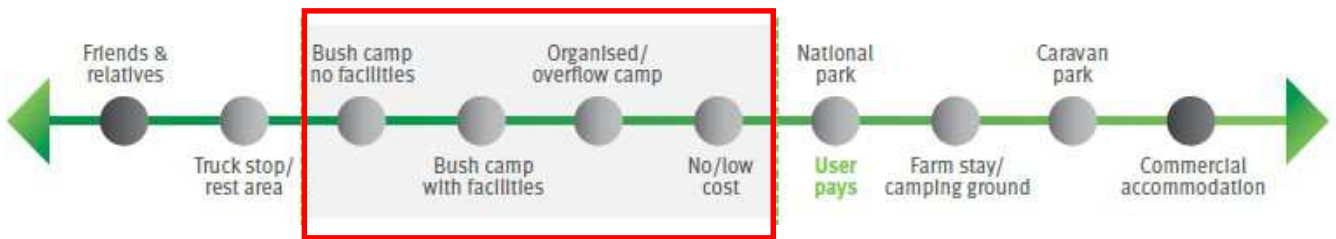


Figure 4: Spectrum of Camping Options

Figure 5: Action Plan for Governance & Management Recommendations

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
<p><b>Incentivising Commercial Operators to Offer Low Cost Camping Options</b></p> <p>As part of providing a balanced support regime for commercial and non commercial providers and incentivising sites that meets with market demand, encouragement of low cost camping options within existing commercial operations should be encouraged. A consideration for Council is incentivising this type of provision by offering a rebate to existing commercial providers on local laws and infrastructure fees and charges.</p>	<p>FCRC</p>	<p>December 2019</p>
<p><b>Register of Camping Sites</b></p> <p>Development of a Register of Camping Sites operated by Council should be published on Council's and Fraser Coast Tourism &amp; Events Websites.</p>	<p>FCRC, FCTE</p>	<p>December 2019</p>

# Action Plan - Effective Site Management and Development as a driver of Stakeholder and Customer Satisfaction

In regard to management of sites across Fraser Coast Region should also consider the following management options:-

Figure 6: Action Plan for Site Management

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
<p><b>Providing for Appropriate Levels of Facility Provision in Low Cost Sites for Self-Contained Vehicles</b>            In the drafting and making amendments to its local laws, Council has shown a commitment to providing for an appropriate balance of facilitating good quality caravan and camp site provision alongside a fair and equitable competitive environment. As demonstrated in the market review, a challenge is providing for self-contained RVs who do not wish to use commercial sites – by definition these visitors are travelling in self-contained vehicles and require safe and secure locations for short stays, with minimal levels of other amenities. Building on the content contained in Local Laws 1 and 4, an amendment to Subordinate Local Law 1, could be considered, which provides additional clarity for sites with these lower levels of facility and amenity provision. With regard to ensuring a balance between good quality site provision and ensuring competitive neutrality, consider adding a clause to the Local Law which provides for a maximum level of facility provision as well as specifying a minimum for these category of sites</p>	FCRC	Incorporate into Local Law Review – timing to be confirmed
<p><b>Definitions</b>            While the Fraser Coast Planning Scheme has been updated with tourism definitions which fully align with the Queensland Planning Regulation, the Government's Camping Options Toolkits recognises that that there are also a series of industry and visitor recognised designations and descriptions for caravan and RV sites. Where appropriate, these definitions should be reflected as appropriate in relevant Local Laws (see figure 21 for examples), within the context of formal planning development definitions.</p>	FCRC	Incorporate into Local Law Review – timing to be confirmed
<p><b>Site Designations</b>            Implement a formal review of site designations for FCRC managed camping and RV sites, in line with Queensland Government best practice guidance.</p>	FCRC	December 2019

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
<p><b>Assessment of Need for New Low Cost Sites</b> Assessment of Need for New Low Cost Sites: Will be undertaken utilising the Template Form for Site Assessment as included in Appendix F.</p>	FCRC	December 2019
<p><b>Enforcement Practice and Protocols</b> Establish a new set of policy, processes and protocols to guide consistent application of enforcement actions, balancing the need for a customer-friendly approach with appropriate enforcement action.</p>	FCRC	December 2019
<p><b>Dump Points</b> If required, new dump points should not be installed away from existing pump-out locations, and should always be connected to the sewer to offset ongoing maintenance costs. Outside of sewer areas, there is a presumption against dump point provision unless a suitable bespoke solution can be established.</p>	FCRC	Ongoing
<p><b>Site Plans</b> Site Plans for Council Managed sites (new and existing) should be developed and publicised to allow consistency in non-commercial/ free/low-cost sites across the local government area.</p>	FCRC	Ongoing
<p><b>Emergency Management Plans</b> Emergency Management Plans for Council managed sites should be developed and implemented for free and low cost site as required.</p>	FCRC	Ongoing
<p><b>Needs Assessments</b> Needs Assessments should be taken annually to review the performance and demand for non-commercial sites within the Fraser Coast Region. Formal site needs analyses should be conducted when considering any new site, or reviewing existing site provision.</p>	FCRC	Ongoing
<p><b>Tendering Documentation</b> Council's tendering and procurement processes for outsourcing management of sites should be in accordance with the Local Government Act 2009 and regulations.</p>	FCRC	Ongoing
<p><b>"Leave No Trace" Policy</b> A "Leave No Trace" Policy should be designed to support environmental stewardship and align with codes of conduct promoted by the CMCA.</p>	FCRC	Ongoing
<p><b>Site Operating Hours</b> Conduct a review of site operating hours for Council-managed sites on an annual basis, in line with customer feedback and community input.</p>	FCRC	Ongoing
<p><b>Site Fees</b> Conduct a review of site fees for Council-managed sites on an annual basis, in line with customer feedback and commercial site fees and charges.</p>	FCRC	Ongoing

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
<p><b>Low Cost Site Provision</b></p> <p>Needs Assessments should be taken annually to review the performance and demand for non-commercial sites within the Fraser Coast Region. Formal site needs analyses should be conducted when considering any new site, or reviewing existing site provision (appendix E).</p>	FCRC	Ongoing
<p><b>Embedding Cost Recovery Principles</b></p> <p>Fraser Coast Regional Council to explore options to embed cost recovery principles into low cost and commercial sites where feasible.</p>	FCRC	Ongoing
<p><b>Design and Management Guide</b></p> <p>To ensure consistency in the design and management of campgrounds. It is recommended that Council prepare a guide which includes case studies/ examples to assist proponents, and Council's Planning department, in better assessing proposed sites, designing Council managed sites and managing contracts with third party providers.</p>	FCRC	2019
<p><b>Monitoring Council's Management and Enforcement Program</b></p> <p>Successfully growing the number of caravan, camping and RV visitors by definition will generate a growing management workload for council officers. Monitoring of workload should be established as part of the performance monitoring/KPI framework for the strategy.</p>	FCRC	2019



# Action Plan - Building awareness of the benefits of the RV and Caravan and Camping sectors

An important element in ensuring satisfied industry, community and public sector stakeholders is a clear understand of the benefits of the RV and caravan/camping sectors to the local economy.

Figure 7: Action Plan for Awareness Building

ACTION ITEM	RESPONSIBILITY	COMPLETION BY
Share results of the site evaluation program with stakeholder groups	FCRC	Ongoing
Proactively disseminate information on the value of the sector on an annual basis, including number of businesses, value of visitor expenditure, supply chain businesses, as a means of growing awareness and understanding of the sector's value.	FCRC	Ongoing

# Stakeholder Group Perspectives

## Workshop 1: Community Groups

Overall, the attendees to this workshop demonstrated strong support for either free or low-cost RV sites. They understand the economic benefits that these sites are able to generate and also provided verbal and written evidence of strong levels of visitor expenditure from sites within Maryborough, specifically the Allan and June Brown Carpark and the Doon Villa RV site.

Some of the key issues/topics raised and discussed included the following:

### **Facilities/Signage:**

- Lack of facilities (particularly toilets) at free sites to cater for travellers/vehicles that are not fully self-contained. A lack of facilities at key locations, particularly the Hervey Bay VIC is resulting in large amounts of rubbish and waste found in close proximity to buildings which is having a detrimental impact on the overall visitor experience;
- Signage throughout the region promoting the destination as an RV friendly region is lacking and needs to be addressed. This was raised in relation to the branding of the region as the RV capital of Australia – if this is the aim, wayfinding signage should be easier to find and more informative.
- Hervey Bay RV site has a dump point which is located right next to where RVs are expected to park – this is not appealing. This was raised as a recurring issue.

### **Economic Opportunity:**

- Free/low cost RV sites provide a fantastic opportunity for outlying Fraser Coast communities that do not experience the visitation levels of Hervey Bay and Maryborough. Sites in these destinations should be explored to encourage visitor spend in these communities;
- Would Council consider a policy whereby local residents (particularly in smaller towns) can accommodate for self-contained RV's on private property? May be a way for residents to generate additional income;
- Any policies introduced need to consider local community needs and the region's economic development plan;
- Why aren't we working with local RV residential developments such as Latitude 25 and the Maryborough RV park to promote the destination as the RV capital of Australia? These developments are investing a combined \$300 million into the Fraser Coast;
- We could create a hub for maintenance, repairs etc;
- Could Glenwood be considered as a site? Conveniently placed on the Bruce Highway at the most southern tip of the Fraser Coast;
- What is Council planning with the sportsgrounds that are due to be vacated when the sport precinct is up and running? Could these be used as RV sites?
- Bauple was raised as a town which previously benefited from low cost RV tourism – and which has experienced economic decline since the closure of the site.

### **Need for range of options:**

- Some commercial parks do not have adequate space to accommodate for large RV's. Similarly, some commercial parks have permanent tenants in place which can act as a deterrent to potential visitors;
- Community groups understand that commercial park operators are not in favour of 'free' sites – however it needs to be communicated to them that there are a number of market segments within the RV, caravanning and camping segment – i.e. there are a large portion of travellers (particularly younger families) that prefer the security and facilities provided by commercial parks, as opposed to free sites;
- Is there a scope for a policy to be introduced by Council around how decisions (such as free vs low cost) are made? Seems like in the past decisions have been made purely based on listening to the vocal minority;
- Should Hervey Bay focus purely on commercial caravan and RV options, and not offer free sites? Free/low cost options may be better suited to smaller Fraser Coast communities;
- Towns or council should investigate RV Friendly status

### ***Policing and Operational Aspects:***

- Policing/compliance is a key issue. Either policing is not existent which can lead to cleanliness issues (impacting the visitor experience), or policing and signage is too harsh and not welcoming (impacting the visitor experience). Need to find a positive balance;
- If 'free' is changed to 'low cost', what policy or processes can be introduced to control/ensure the collection of revenue? Can there be a policy introduced to allow for volunteers/caretakers to reside on site?
- Why don't we use an online method to allow guests to Council free sites to obtain permits (permits are required from either the Maryborough or Hervey Bay VIC for those staying in either the Allan and June Brown Carpark or Hervey Bay VIC site)?

### ***Visitor Experience:***

- A consistency of the 'experience' provided at Council sites is very important (currently lacking) – Council needs to create 'places'
- Free sites need to be within walking distance to either shops/facilities or public transport. This is not the case for the Hervey Bay VIC site.

## **WORKSHOP 2: COMMERCIAL PARK OPERATORS**

This group was opposed to any free sites being offered throughout the Fraser Coast. They were however not opposed to Council providing 'low cost' options within the region – particularly in outlying areas as they understand the economic benefit these sites can provide to small towns and their businesses. They are however opposed to Council low cost sites being made available in both Hervey Bay and Maryborough.

### ***Competitive Neutrality:***

It needs to be a level playing field. Commercial parks feel that they just can't compete with Council owned free/low cost sites as fees, charges and rates do not impact these council sites;

- Why should Council be intervening in a commercial market?
- If Council persists in intervening, the fees and related costs of doing business incurred by commercial operators need to be fair;
- Sites should NOT be free. Operators are content for even a nominal fee (\$10?) to be charged;
- Customer feedback is overwhelmingly positive for the majority of commercial parks – why are Council intervening in the marketplace?
- The example of Gympie was quoted – the region had 7 commercial park operators. Council introduced free sites and now there is only one commercial park left.

### ***Visitor Experience:***

Then importance of consistency, and maintaining a positive experience at sites was again raised. Some free sites actually give guests negative experiences.

### ***The need for a range of options:***

Reinforced the fact that there are many segments within the overall RV/caravanning/camping segment – felt that the 35 – 55 year age group was the biggest segment. Suggested that regardless of what Council decides policy wise, they must not alienate certain segments.

### ***Facilities/Signage:***

There needs to be more facilities provided for guests who choose to stay at free/low cost sites. At the very least bins and toilets should be provided.

### ***Policing and Operational Aspects:***

Policing again is a major issue at free sites – Hervey Bay VIC is a prime example. Meant for fully self-contained vehicles but it attracts a significant number of vehicles that do not have any facilities on board.

Free camp at Maryborough is being used by non-self-contained vehicles who have access to facilities for \$10/night instead of using commercial parks for the same facilities – this is not being policed, and is undercutting local operators.

### **Marketing and Promotion:**

Seems to be a lack of marketing and promotion on the caravanning/RV/camping credentials of the Fraser Coast. This segment provides a great opportunity to smaller townships and the wider Great Sandy Strait.

Can we investigate the opportunity of cooperative campaigns with players such as Jayco, Jucy, Apollo, Britz Maui?

### **WORKSHOP 3: INDUSTRY SUPPLIERS**

Very small group who suggested that their main issue was the lack of policing and compliance at key sites, particularly the Hervey Bay VIC. One of these businesses is located next door to the Hervey Bay VIC.

Key issues/topics raised and discussed included the following:

#### **Marketing/Promotion:**

There is a fantastic opportunity for the region to position itself as the RV capital of Australia, not just from a stay perspective, but also from a maintenance, equipment and education perspective.

There seems to be a lack of promotional opportunities for services/suppliers for these segments. Can Council/FCTE work on something to rectify this?

#### **Economic Opportunity:**

- The Fraser Coast, particularly Hervey Bay has a significant number of services for this segment which are affordable in comparison to other towns/cities. Anecdotal evidence of customer travelling to Hervey Bay from Mt Isa and Brisbane specifically to get modifications/installs made to RV's, caravans etc;
- Opportunity to create an RV education centre, a one stop shop where caravan owners can have their vehicles assessed, modified if needed and they can also be taught to tow and reverse caravans correctly (A significant number of accidents happen due to inexperienced drivers or incorrect tow loads);
- Maryborough is perfectly positioned for a centre of this nature – on the Bruce Highway and half way between Brisbane and Rockhampton;
- How do we leverage the investment being made by developments such as Latitude 25 and the Maryborough RV Park?

#### **The need for a range of options:**

If the region does not offer some free sites we will be bypassed by bigger RVs.

#### **Policing/Operational Aspects:**

Policing remains a key issue at free/low cost sites. There is also a lack of facilities at these sites. Hervey Bay VIC site has no toilets or shade.

### **WORKSHOP 4: COUNCILLORS**

Key issues/topics raised and discussed included the following:

#### **Economic Opportunity:**

- The Doon Villa model (Council works with the Doon Villa Football club to offer low cost RV sites) works well. There is perhaps an opportunity for Council to partner with no for profit organisations such as sporting clubs so they can reinvest into subsidising community costs such as sport club registration fees;
- Can residents offer private land to RV travellers that assist in generating additional income?
- It's a shame that the Stop and Shop initiative was ceased as it provided real data;
- We need to encourage visitors to stay longer and relocate to the region as residents;
- We need to leverage the investment being made by large players in this segment such as Latitude 25 and the Maryborough RV Park;

#### **Visitor Experience:**

We need to offer value to free/low cost sites by introducing experiences to these sites;

#### **The Need for a Range of Options:**

A large portion of the market prefer 'off the beaten track' overnight stay options. They don't want to stay in commercial parks (particularly those with permanent tenants) and this segment needs to be accommodated;

**Facilities/Signage:**

Why are the dump points at the Hervey Bay VIC locked?

**Being Sensitive to Local Needs:**

Some outlying communities might not want RV sites (such as Munna Creek). Further consultation would be necessary before installing any sites in outlying communities;

**Other:**

The Draft strategy should go to industry for further feedback before it is finalised.

**WORKSHOP 5: COUNCIL AND FRASER COAST TOURISM AND EVENTS STAFF**

Key issues/topics raised and discussed included the following:

**Enforcement/Operational Aspects:**

60 day no return period at low cost sites such as Doon Villa is an issue. Why can't they return sooner if they want to?

Caretakers and volunteers to manage free or low-cost sites – is there scope for this type of model?

There needs to be more governance and a better policing/compliance system in place for free/low cost sites;

Doon Villa is already making a lot of requests to council to change permit conditions – asking for caretakers, extended stays etc. These expectations also need to be managed.

**Economic Opportunity:**

Can private land be offered to RV/caravan travellers? It could be the Air BnB of RVs! Low cost is maybe a better option than free?

**Facilities/Signage:**

The Hervey Bay VIC dump point needed to be locked because people were placing objects such as shoes in the system;

Big RVs have a big impact on facilities and assets, including roads;

The Maryborough showgrounds do offer some facilities/services in terms of tyre and vehicle assessments, lessons etc. Could be built on and communicated better;

Expectations need to be managed in terms of facilities. Facilities added to free sites now will likely result in increased demands further down the track, costing Council (and the rate payers) money;

**Data Collection:**

What portion of RVs/caravans are fully self-contained? Is there a way to find this out?

What model can we look at to assist in collecting raw data? If we didn't offer free sites and offered low cost instead, would a large portion of RV travellers really bypass the region?

# MARKET REVIEW

## Characteristics of Fraser Coast's Overall Visitor Market



The largest proportion of visitors are the 55+ age group (35%), followed by the 25-29 age group (12%)



Estimated spend per night: \$118 (domestic visitors)



52% of visitors are Visiting Friends and Family



33% of visitors are travelling as an adult couple



Camping and caravan visitors are exclusively on Holiday



Approximately 200,000 camping visitors annually

## Changing Demographics Among RV and Caravanning Markets

### Baby Boomers

Queensland is experiencing a generational shift in its visitors (see Figure 10). The Baby Boomers (born 1946-1964) are taking up the place of the War Babies (1924-1945) as the predominant touring market.

Emerging are the Generation X family market (1965-1984) and the Millennials (1985-2004) in the youth market.

The market that have travelled north in the winter since the early 1990's is changing. The Baby Boomers have become the predominate market 'touring' in Queensland and they have a different travel pattern. Taking shorter more frequent trips, these Baby Boomers or 'light grey' nomads are using a greater mix of accommodation types on each trip. Different to the traditional 'grey nomads' ('War Babies'), these light grey nomads have previous experience in international travel and tend to be more financially fit than their predecessors. They are seeking adventure and are more about visiting than staying a long time in one place. The ABS predicts that by 2050 the number of Australians aged 55 years and over will more than double. Moreover, there will be a proportionate increase in demand for tourism product. This presents a tremendous opportunity for Queensland.

### Families

Research by KPMG indicates that while the 55+ segment will continue to grow, for commercial camping providers the key market will be families.

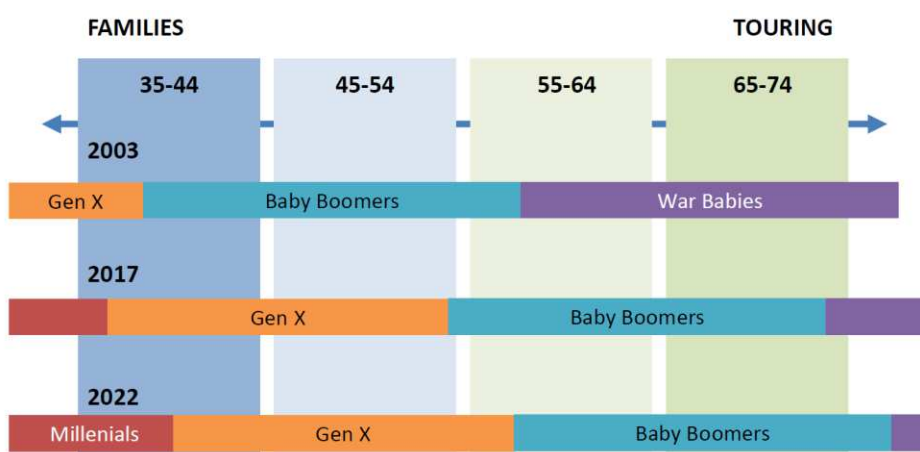
### The Generation X (1965 – 1984)

Gen x families are fastest growing segment, and this segment is predicted to grow by 46% from 2012 to 2050. Less experienced in 'family camping' than the previous generation they are increasingly using camper trailers and looking for cost-effective accommodation options as well as some creature comforts.

### Youth Market

According to Tourism Australia, the youth segment is made up of people aged 18–30 years, now referred to as 'Millennials'. Born in the era of the home computer (1985 – 2004) they are fast emerging as the largest travel segment globally. Looking for authentic experiences, Millennials are exploring the mix of Queensland's landscapes including islands and beaches, while enjoying the laidback lifestyle and nature-based adventures. In addition to our domestic Millennials, Australia attracts global Millennials. In 2017, about 840,700 international travellers aged 15–29 years visited Queensland, making it the third most popular Australian destination for this group after New South Wales and Victoria.

Figure 10: Generational change in camping visitors (EarthCheck Consulting, 2017)



The RV market has been experiencing strong growth. According to the Caravan Industry Association of Australia ([www.caravanindustry.com.au](http://www.caravanindustry.com.au)):-

- **85%** of the Australian population has **had a caravanning or camping experience** at least once in their lifetime and **88%** of campers say it something that **every child should experience**;
- **73%** of people purchasing caravans and motorhomes cited the **desire to see more of Australia** as sparking their original interest in caravanning and camping;
- There were **647,319** caravans and motorhomes registered in 2017(a **16% increase** from 2014), 26% of which were in QLD, 23% in NSW and 25% in Victoria
- There were **22,381 units manufactured in Australia** in 2014 (a **5% increase** on 2014 production);
- Over **70%** of the RVs purchased in Australia were **made in Australia**. The wholesale value of Australian manufactured RVs is **\$940 million** annually;
- **Caravans (or towable products) make up 89%** of registered RVs in Australia and **Motorhomes (or motorised products) make up the remaining 11%** (where RV represents all types of RVs);
- **74%** of all RV vehicles registered are **between 1,500 and 5,000 kilograms**;
- **43%** of recent RV purchases were made by people looking to use their caravanning and camping product **5-10 times per year**;
- **57 million nights** were spent caravanning and camping in 2017;

Caravanning and camping visitors spend approximately **\$8.6 billion** when travelling in Australia;-

- The Australian caravanning and camping industry makes an annual contribution to the Australian economy of **\$20.4 billion**;
- **For every \$100** of revenue received by a caravan park **\$138 of direct economic benefit** flows through the local economy;
- International caravanning and camping visitors in 2011 spent on average **\$7,507 per trip** and an average of **71 visitor nights**;
- The caravanning and camping sector in Australia employs over **21,000 direct employees**;
- There are **170,000 powered and unpowered sites** available nightly in Australia; The sector makes up **10% of all visitor nights** in Australia;
- **91%** of caravanning and camping activity is undertaken by Australian **domestic travellers**;
- **90%** of all visitor nights in the sector are spent in **regional Australia**, making the sector a large economic contributor to regional Australia;
- Primary market is **35-49 year olds** accounting for approximately **47%** of all travel in the sector; The secondary market is the **55-70 years age** group, making up approximately **44%**;

Over the last decade, the technology adopted in the manufacturing of caravans and RVs has expanded to accommodate a growing number of campers seeking levels of sophistication and comfort.

Caravan and RV manufacturers have adapted to the market designing units which are classed as 'self-contained', The CMCA defines self-contained as "a recreational vehicle specifically built for the purpose that along with built in sink, on-board cooking and sleeping facilities, carries a supply of fresh water and can retain 'all grey and black waste water'" (CMCA 2017). Key to the new designs is a growth in unit length. For example, industry statistics for 2016 reflect some 37% of caravans are manufactured at 6 metres in length or more (CIAA 2016), with 19% of Pop-Tops manufactured with 6 metre length or more. Caravans and RVs of 7, 8, and 9 metres in length are now available, offering the largest array of amenities, for those with the relevant licence. These trends have significant implications for pitch size as well as overall site orientation.



Water use is another service for which technology and innovation has received attention in new caravan and RV designs. From drinking water stored on-board to the management of both grey water and black water, water management needs are changing. Growing popularity of amenities such as washing machines are leading to an increasing requirement for disposal of grey and blackwater

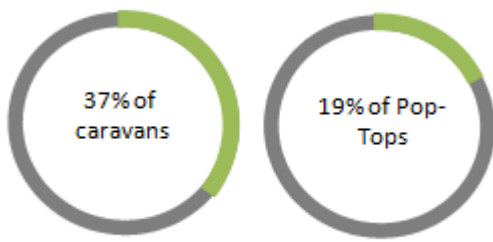


Figure 11: Length of RVs

- Are available in 6m lengths or greater;
- Caravans and RVs of 7, 8, 9m in length are now available, offering the largest array of amenities for those with the relevant licence.

# Site Audit

Figure 12: Council Camping Sites

Site	Location	Cost	Is there a commercial park within 5km?	Nearest Caravan Park	Nearest Commercial sites with unpowered sites?	Commercial cost below \$25	Dump Point	Pets
Teebar Sports Ground	Teebar, Teebar Hall Road	FREE	No	53km (Wallace Motel and Caravan)	Yes	Yes (\$24)	No	Yes
Bauple Drive	Bauple, Bauple Drive – opposite the Bauple Musuem	FREE	No	15.6km (Gundy Pub and Caravan Park)	Yes	Yes	No	Yes, on a lead.
Lake Lenthall	Duckinwilla	PEAK: \$12.50 per person per night (\$50 per family)  OFF PEAK: \$10.50 per	No	27km (Wallace Motel and Caravan park)	Yes	Yes (\$24)	No	No
Rosendale Park	Bauple	FREE	No	15.6km (Gundy Pub and Caravan)	Yes	Yes	No	Yes, on a lead.
Petrie Park	Tiaro	FREE	No	15.9km (Gundy Pub and Caravan)	Yes	Yes	No	Yes, on a lead.
Tiaro Memorial Park	Tiaro	FREE	No	13.8km (Gundy Pub and Caravan)	Yes	Yes	No	Yes, on a lead.

Figure 13 Council-Owned RV Sites

Site	Where?	Cost	Commercial Park within 5km?	Nearest Caravan Park	Commercial park have unpowered sites?	Commercial costs of less than \$25?	Dump Point?	Pets
Hervey Bay Visitor Information Centre	Hervey Bay, 227 Maryborough /Hervey Bay Road	FREE	No	5.3km (Discovery Parks – Hervey Bay)	No	No	Yes	Yes, on a lead.
Alan & June Brown Car Park	Maryborough, Kent Street	FREE	Yes	1.8km (Wallace Motel and Caravan Park)	Yes	Yes (\$24)	No	Yes, on a lead.
Burrum District Community Centre	Howard, 56 Steley Street	FREE	Yes	2.6km (Burrum River Caravan Park)	Yes	No	No	Yes, on a lead.
Maryborough Showgrounds and Equestrian Park	Maryborough, Bruce Highway, Maryborough West	\$20 per night	No	6.4km (Wallace Motel and Caravan Park)	Yes	Yes (\$24)	Yes (2)	Yes, on a lead.

Figure 14 Council-Owned Parks

Site	Where?	Cost	Commercial Park within 5km?	Nearest Caravan park	Commercial parks have unpowered sites?	Commercial costs of less than \$25	Dump Point?	Pets
Pialba Caravan Park	Hervey Bay	\$34 - \$39 per night (unpowered)	Yes	2.9km (Discovery Parks – Hervey Bay)	No	No	Yes	No
Torquay Caravan Park	Hervey Bay	\$34 - \$39 per night (unpowered)	Yes	600m (The Palms Hervey Bay)	No	No	Yes	No
Scarness Beachfront Tourist Park	Hervey Bay	\$34 - \$39 per night (unpowered) sites.	Yes	800m (Fraser Coast Top Tourist Park)	Yes	No	Yes	No
Burrum Heads Caravan Park	Burrum Heads	\$34 - \$39 per night (unpowered)	Yes	600m (Hillcrest Holiday Park)	No	No	Yes	No

Figure 15: Summary of Current Fraser Coast Regional Council: Non-Commercial Site Locations

SITE	CURRENT TIME LIMIT	NEAREST CARAVAN PARK	PETS ALLOWED?	DUMP POINT?
Teebar Sports Ground	7 days	53km	Yes	No
Bauple Drive	48 hours	15.6km	Yes	No
Lake Lenthall	48 hours	27km	No	No
Rosendale Park	48 hours	15.6km	Yes	No
Petrie Park	48 hours	15.9km	Yes	No
Tiaro Memorial Park	48 hours	13.8km	Yes	No
Hervey Bay Visitor Information Centre	48 hours	5.3km	Yes	Yes
Alex & June Brown Car Park	48 hours	1.8km	Yes	No
Burrum District Community Centre	20 hours	2.6km	Yes	No

Council currently provides a number of options for camping and caravanning travellers which are outlined in Figure 16. These sites currently are not assigned site-type designations such as those outlined in the Camping Options Toolkit.

Figure 16: Summary of Current Fraser Coast Region Council Overnight Non-Commercial Locations

Site	Where	Management Arrangement	Cost
<b>Council camping sites</b>			
Teebar Sports Ground	Teebar	Direct Management	FREE
Bauple Drive	Bauple	Direct Management	FREE
Lake Lenthall	Duckinwilla	Direct Management	PEAK: \$12.50 per person per night (\$50 per family) OFF PEAK: \$10.50 per person per night (\$40 per family)
Rosendale Park	Bauple	Direct Management	FREE
Petrie Park	Tiaro	Direct Management	FREE
Tiaro Memorial Park	Tiaro	Direct Management	FREE
<b>Council RV sites</b>			
Hervey Bay Visitor Information Centre	Hervey Bay	Direct Management	FREE
Alan & June Brown Car Park	Maryborough	Direct Management	FREE
Burrum District Community Centre	Burrum Heads	Direct Management	FREE
Maryborough Showgrounds and Equestrian Park	Maryborough	Direct Management	\$20 per night
<b>Council owned caravan sites</b>			
Pialba Caravan Park	Hervey Bay	Tender - secured management partner	\$34 - \$39 per night (unpowered)
Torquay Caravan Park	Hervey Bay	Tender - secured management partner	\$34 - \$39 per night (unpowered)
Scarness Beachfront Tourist Park	Hervey Bay	Tender - secured management partner	\$34 - \$39 per night (unpowered) sites.
Burrum Heads Caravan Park	Burrum Heads	Tender - secured management partner	\$34 - \$39 per night (unpowered)

Other RV sites (managed by community partner)			
Self Contained RV Park	Maryborough	Tender - secured management partner	\$10 per night

Figure 17: Privately Owned/ Managed Commercial Parks

SITE	TYPES OF SITES AVAILABLE	FACILITIES AVAILABLE	DUMP POINT	PETS ALLOWED	NEARBY OFFSITE FACILITIES
<b>Australian Adventure Park</b> 805 Burrum Heads Rd, Burrum River	10 x Glamping tents 9 x Powered sites 80 x unpowered sites	On site shop, amenities block, swimming dams, catch and release fishing, kayak hire/tours, mountain bike track, archery, abseiling, obstacle course, campfires allowed.	No	Yes	11km from Burrum Heads
<b>Susan River Homestead</b> Lot 56, Noble Rd, Susan River	16 x motel style rooms 20 x powered sites Unlimited unpowered sites	Swimming pool, tennis courts, horse riding, private lake for fishing and boating, media room, tour desk, games room, trampoline and on-site restaurant and bar.	No	Yes	14km from the Maryborough CBD
<b>Cheery Nomad RV Park and Farmstay</b> 113 Lawson St, St Helens	2 x Cabins 16 x powered sites 50 x unpowered sites	Camp kitchen with gas burners, sinks, television, table tennis and dart board, Social area with bar, television and pool table, Amenities block with disabled facilities, hot showers and laundry, Communal fire pit with camp oven cooking, Wood fired oven, and Swimming pool.	Yes	Yes	6km from the Maryborough CBD.
<b>Huntsville Caravan Park</b> 23 Gympie Rd, Maryborough	8 cabins 4 ensuite powered sites 15 powered sites 3 unpowered sites	Amenities, disabled amenities, Free Wi-Fi, sheltered camp kitchen, Picnic tables, seating, bar fridge, running hot and cold water to sink, Swimming Pool, courtesy bus service and Laundry.	Yes	Yes	Short walking distance to shopping complex featuring cafés, takeaway restaurants and grocery store.
<b>Maryborough Caravan Park</b> 209 Gympie Road, Maryborough	9 Cabins 18 Powered sites 10 Unpowered Sites	Camp kitchen, BBQ facilities, swimming pool, games room, laundry, amenities, tour desk.	Yes	Yes	Short walking distance to shopping complex featuring cafés, takeaway restaurants and grocery store.

Figure 17: Privately Owned/ Managed Commercial Parks (Contd)

SITE	TYPES OF SITES AVAILABLE	FACILITIES AVAILABLE	DUMP POINT	PETS ALLOWED	NEARBY OFFSITE FACILITIES
<b>Wallace Motel and Caravan Park</b> <b>22 Ferry Street Maryborough</b>	31 x Cabins 10 x Motel rooms 4 x Ensuites powered sites 57 x powered sites Unlimited unpowered sites	Free Wi-Fi, swimming pool and BBQ area, drive through caravan sites, amenity block, disabled toilets, large camp kitchen, picnic tables, laundry facilities	Yes (x 2)	Yes	Closest caravan park to the city centre, short walk to shopping centre and short walk to Maryborough markets.
<b>Boonooroo Caravan Park</b> <b>18 Oak St, Boonooroo</b>	10 Powered sites Unlimited Unpowered sites	On site shop, BBQ facilities, amenity block.	No	Yes	Walking distance to bowls club and short drive to golf club
<b>Maaroom Caravan Park 32</b> <b>Granville Rd, Maaroom</b>	3 Cabins 40 Powered sites	Double concrete slabs, Fire Pits, onsite shop (Groceries, Bait, Ice), BBQ, Public Phone, Inground Pool, Laundry, tour desk, amenities.	Yes	Yes	Courtesy bus takes guests from the park to the Boonooroo Bowls Club on Friday and Saturday nights. No other facilities/service s within walking distance.
<b>Poona Palms Caravan Park</b> <b>103 Boronia Dr, Poona</b>	10 x Cabins 59 x Powered sites	Shop & Convenience store, Digital Free-to-Air TV transmission to ALL sites, Pool with water slide, Kayak hire, Kids pedal bike hire.	Yes (all sites)	Yes	Maryborough CBD.
<b>Burrum River Caravan Park</b> <b>141 Old Bruce Hwy, Burrum Town</b>	4 Cabins 30 Powered sites 8 Unpowered sites	Camp kitchen and BBQ, amenities, swimming pool, on site dog wash, laundry facilities, fishing pontoon.	Yes	Yes	3.2km from Howard, and 3.8km from Torbanlea.
<b>Hillcrest Holiday Park</b> <b>1 Howard St, Burrum Heads</b>	17 Cabins 40 Powered sites	Amenities Blocks, Swimming Pool, Wading Pool, Playground, LPG Gas available, Laundry/Dryer, Tour desk and BBQ Area.	Yes	Yes	Short walk from a number of cafés, restaurants and other facilities in Burrum Heads.

Figure 17: Privately Owned/ Managed Commercial Parks (Contd)

SITE	TYPES OF SITES AVAILABLE	FACILITIES AVAILABLE	DUMP POINT	PETS ALLOWED	NEARBY OFFSITE FACILITIES
<b>Discovery Parks - Fraser Coast 20 Fraser St, Torquay</b>	30 Cabins 60 Ensuites powered sites 48 Powered sites 3 Unpowered sites	Activity Room, TV room and games room with table tennis and pool table, BBQ, bouncing pillow, Camp kitchen, Family bathroom, Hire equipment, Laundry, Playground, Sports facilities, Swimming pool, Tour Desk and Wi-Fi.	Yes	Yes	Significant number of cafés, restaurants and other local businesses within a short walk's distance.
<b>Big 4 Point Vernon Holiday Park 26 Corser St, Point Vernon</b>	11 Cabins 70 Powered sites	Modern covered camp kitchen and BBQ's, Large Saltwater Swimming Pool, TV room/ Games room equipped with PlayStation 4's, Amenities, Tour desk, laundry.	Yes	Yes	Short distance to Hervey Bay CBD, or other shops, cafés and restaurants.
<b>Discovery Parks - Hervey Bay 295 Boat Dr, Scarness, Hervey Bay</b>	20 Cabins 9 Ensuites powered sites 39 Powered sites	Activity Room, Games Room, Movie Room, BBQ, Camp kitchen, Kiosk/Store, Laundry, Swimming pool, amenities.	Yes	Yes	Close proximity to the Hervey Bay CBD, main street and the Hervey Bay Esplanade.
<b>Fraser Coast Top Tourist Park 21 Denmans Camp Rd, Scarness</b>	14 x Cabins 41 x Powered sites	Therapeutic Health Pool & Spa, Laundry Facilities, Refurbished Clean Amenities, Extra Large games room with Pool table & LCD TV DVD, BBQ & Camp Kitchen featuring Pizza Oven, FREE Wi-Fi, FREE DVD hire, FREE Book Exchange, FREE Tour Booking Service, on-site takeaway and convenience store.	Yes	Yes	Short walking distance to the Hervey Bay Esplanade, featuring a large variety of shops, cafés and restaurants.
<b>Harbour View Caravan Park 1 Jetty St, Urangan</b>	7 Cabins 75 Powered sites 5 Unpowered sites	Camp kitchen with free BBQ and TV, Swimming pool, on-site shop with groceries, ice, souvenirs, LPG and phone, amenities, Laundry and tour desk.	Yes	Yes	Short walk to the Urangan Boat Harbour featuring the Hervey Bay Boat Club, tourism operators and a number of cafés, restaurants and other shops.

Figure 17: Privately Owned/ Managed Commercial Parks (Contd)

SITE	TYPES OF SITES AVAILABLE	FACILITIES AVAILABLE	DUMP POINT	PETS ALLOWED	NEARBY OFFSITE FACILITIES
<b>Hervey Bay Caravan Park 85 Margaret St, Hervey Bay</b>	6 Cabins 57 Powered sites	Amenities, covered BBQ area and kitchen, saltwater swimming pool with children’s wading pool, mini kiosk & library at reception, Wi-Fi, laundry and tour desk.	Yes	Yes	Short walking distance to a Health Club/Sports Centre (squash, gym, tennis & indoor pool). Courtesy bus pickups to the Boat Club & RSL Club are available. Short walk to the Botanic Gardens and nearby shopping centre
<b>Ingenia Holidays Hervey Bay 105 Truro St, Torquay</b>	28 Cabins 60 ensuite Powered sites 35 Powered sites 3 Unpowered sites	Swimming pool, playground, games room, Wi-Fi, BBQ facilities and camp kitchen, on-site kiosk, laundry facilities and tour desk.	Yes	No	Short walk to the Hervey Bay Esplanade, featuring a large number of shops, cafés and restaurants.
<b>Lazy Acres Caravan Park 91 Exeter St, Torquay</b>	10 Cabins 16 Ensuted powered sites 8 Powered sites 2 Unpowered sites	Saltwater swimming pool, BBQ facilities and fully equipped camp kitchen, amenities block, tour desk, playground and laundry.	Yes	Yes	Short walk to the Hervey Bay Esplanade, featuring a large number of shops, cafés and restaurants.
<b>Shelley Beach Caravan Park 61 Ocean St, Torquay</b>	9 Cabins 80 Powered sites	Camp Kitchen and BBQ facilities, swimming pool, amenities, laundry, fish cleaning area.	Yes	No	Short walk to the Hervey Bay Esplanade, featuring a large number of shops, cafés and restaurants.
<b>Sunlodge Oceanfront Tourist Park 26 Mant St, Point Vernon</b>	10 Cabins 12 Ensuted powered sites	Swimming pool, BBQ facilities, laundry, picnic tables, daily lorikeet feeding.	No	Yes	Close proximity to the Hervey Bay CBD, main street and the Hervey Bay Esplanade.



Figure 17: Privately Owned/ Managed Commercial Parks (Contd)

SITE	TYPES OF SITES AVAILABLE	FACILITIES AVAILABLE	DUMP POINT	PETS ALLOWED	NEARBY OFFSITE FACILITIES
<b>The Palms – Hervey Bay</b> <b>67 Truro St, Torquay</b>	12 Cabins 28 Powered sites	Amenities, laundry, dog wash, camp kitchen, swimming pool, Free Wi-Fi and tour desk.	Yes	Yes	Short walk to the Hervey Bay Esplanade, featuring a large number of shops, cafés and restaurants.
<b>Windmill Caravan Park 17</b> <b>Elizabeth St, Urangan</b>	11 Cabins 35 Powered sites	Swimming pool, dog wash, laundry, games room, amenities, camp kitchen, Wi- Fi, on-site kiosk, free movie hire and board games and tour desk.	Yes	Yes	Short walk to the Hervey Bay Esplanade, featuring a large number of shops, cafés and restaurants.
<b>Gundy Pub and Caravan Park</b> <b>Main Street, Gundiah QLD 4655</b>	11 powered sites 50 unpowered sites 6 cabins	On site pub and restaurant, amenities, laundry	No	Yes	On site pub and restaurant
<b>Pier Caravan Park</b>	87 Powered sites	Swimming Pool, BBQ area, camp kitchen, laundry, amenities, games room,	Yes	Yes	Close proximity to the Urangan Pier and a large variety of restaurants, cafes and shops.
<b>Doon Villa Self Contained RV Park,</b> <b>297 Lennox St, Maryborough</b>	Unpowered sites	Toilets, Showers and Water.	Yes	Yes	Attractions of Maryborough nearby
<b>Mary-borough Marina RV Parking,</b> <b>71 Wharf St, Maryborough</b>	Powered sites Unpowered sites	Powered/unpowered sites, marina shops and services	TBC	TBC	Marina environment, Maryborough attraction
<b>Fraser Coast RV Park</b> <b>54 Bengston Road, River Heads</b>	Pitches for self-sufficient vehicles, lodge under construction	camp kitchen, lodge under construction	No	Yes	Access to Fraser Island, coastline and beaches, attractions of Hervey Bay, whale watching, fishing, shops

# Best Practice Basis for Management Options

## Queensland Camping Options Toolkit

The Queensland Camping Options Toolkit provides a best practice guidance framework to consider its RV and camp site management options. The Toolkit was designed by the Queensland Government in response to the Queensland Drive Tourism Strategy 2013-2015 to provide a best practice guideline for local governments and the private sector when developing camping options. The spectrum of camping options (see Figure 18 below) is designed to provide a framework for local governments and communities to adapt to the changing needs of travelers.

The overarching principle driving this document is the goal to increase drive tourism in Queensland through the development and promotion of a wide variety of camping options. The Toolkit sets out the following definitions for local government consideration for use in the categorisation of camping options. These are designed to set a minimum standard for each type to ensure health and safety. These can be altered to suit each local government area, providing that competitive neutrality is maintained. When working with commercial operators to provide options, local government are encouraged to adopt a less prescriptive approach to allow the private sector to meet the needs where market demand is seasonal.

**Please note that the Queensland Government is in the process of updating its best practice caravan and camping guidance, with publication of refreshed documentation expected during 2018.**

Definitions incorporated within the Toolkit include:-

### Camp

Under the *Recreation Areas Management Act 2006*, to “camp” refers to “to pitch, place or erect a tent, caravan or another structure that may be used for camping for the purpose of staying overnight by using the tent, caravan or structure.

### Basic Camping Ground

According to the Toolkit a basic campground should be defined within the local planning scheme to be, at a minimum, located in an area remote from other development (including caravan parks and camping grounds that are licensed), and allows for toilets, water and a dump point; no more than one powered site; and should not include kiosks or communal facilities”. Bathing facilities are not considered suitable.

### Commercial Camping

Commercial camping includes a variety of facilities run by independent operators or by local government where commercial or cost recovering fees are charged. Stay restrictions, fees and facilities available are determined by the owner and local planning regulations.

### Non-commercial camping

Non-commercial camping is camping that occurs on the side of the road, in a national park, on Local Government, State land or on private property (usually unpaid or low-cost fees for cost recovery by not-for-profit entities).

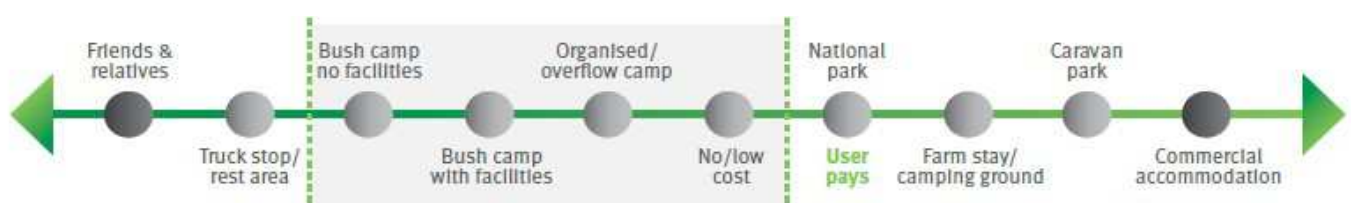


Figure 18: Spectrum of Camping Options

## Self-Contained Vehicle

A self-contained unit is defined in the Fraser Coast Planning Scheme, based on the stipulations included in the Residential Tenancies and Rooming Accommodation Act 2008. However, at present there is not an Australian standard to provide a clear definition of self-contained vehicles. As such, the Guide focuses on behaviour management with passing acknowledgment of related technology. The “self-containment” technology available today has evolved significantly including more vehicles holding fresh water, greywater and/or black water and many vehicles having on-board cooking and sleeping facilities. How those vehicles operate is as much a function of the attitudes of the users as it is a function of on-board technology.

## Recreational Vehicle (RV)

According to the Australian Bureau of Statistics definition which is used in the Guide, an RV is a towable and/or motorised vehicle. Motorised vehicles include motorhomes and campervans, as defined by the Australian Bureau of Statistics, which are self-propelled motor vehicles containing an area primarily used for accommodation. Towable vehicles include caravans, pop-tops, camper trailers, tent trailers, 5<sup>th</sup> wheelers and slide-on campers that provide an area primarily used for accommodation and are a subset of the trailer category. The Toolkit defines a series of best practice foundations for determining camping options, including:

- Open consultation process; and
- Working with existing businesses and existing facilities before considering new sites.

As part of developing camping and caravanning related strategies, it is recommended that local governments should review their local laws in relation to the enforcement of illegal camping, and the provisions for new caravanning and camping developments. This is to ensure that a transparent approach is taken and to seek the support of appropriate enforcement powers and resources. Additionally, the Guide promotes a Needs Analysis to be undertaken as a primary action for regional camping stakeholders, which encompasses:-

- Market needs; and
- Infrastructure needs.

## Full-Cost Disclosure

This is the process in which local governments use the same model of costing a site as if they were a commercial enterprise (including allocation of costs for administration, infrastructure, compliance, workplace health and safety, staffing, rates, electricity and interest) in communicating the real cost of operating a site per night.

## Competitive Neutrality

To ensure competitive neutrality, public sector business activities that are in competition with the private sector should not have competitive advantages or disadvantages simply by virtue of their government ownership or control.

## Additional Tools

In addition to definitions, the Guide advocates tools that Local Governments can use to provide transparency, support road safety and ensure the natural and cultural assets of the state are preserved, these include: **Needs Assessment** (see page 52 for an example of a needs assessment) to assess the costs and benefits of identified camping options; Community **Reference Groups** to engage stakeholders in the process early; and process of **managing overflow camping**.

There are three principal site management options available to Councils under the Guide:

### Overflow Camping Considerations

- For camping arrangements only – no recreational facilities, cabins or self-sufficient temporary accommodation
- Suitable site to be pre-determined
- Trigger mechanism with threshold approved through consultation.

### **Non-Commercial Site Considerations**

- Based on Needs Analysis
- Site selection on lands controlled by local government
- Amenities to be determined by local government
- Cost recovery or permit based system as determined by local government
- Monitored by Council officers.

### **New Low-Cost Commercial Site Considerations**

- Low-or-no-frills options on existing private land
- Basic or minimal facilities offered such as water and dump point
- Low-cost or cost recovery charge.

The operation of sites on a cost-recovery basis may require the outsourcing of operational aspects. Outsourcing options include:-

- Seasonal Camp host
- Seasonally outsourced model whereby a tender is opened to local community or commercial organisations to manage the site for a set period of time
- Year-round outsourced model whereby a tender is opened to local community or commercial organisations to manage the site for a set period of time

These would need to be managed through a standard set of outsourcing guidelines developed by Council.

# Managed Overflow Policy

## Part A

This section relates to the establishment and operation of a recreational vehicles (RV) emergency overflow facility within Fraser Coast Regional Council:-

- For the purposes of this policy, an RV is a vehicle that combines transportation and temporary living quarters for travel, recreation and camping.
- Council may establish an overflow area for RVs only when there are no vacancies for vehicles of this nature available at any caravan park within the relevant town. A camper is permitted to book into the overflow only if it is believed that there are no available spaces in the caravan parks.
- Council may close the overflow area for camping for the purposes of significant community events.
- Primary-use activities at the overflow area will take precedence at all times.
- The maximum stay at any RV overflow camping facility could be a maximum of 7 consecutive days or at the determination of Fraser Coast Regional Council. Authorised camping ground hosts may stay longer than the maximum period.
- Camping by participants at community events may be exempt from some or all of the conditions in this policy as determined by Council from time to time.
- Unless otherwise determined, camping by participants of community events is deemed to be authorised by the Council approval to conduct the event and no further charges shall apply.
- Bona-fide grey nomad program volunteers who are actively involved in a grey nomad project within the community may continue to camp at the overflow area beyond the 7-day limit (only during the time that they are working on that project).
- During the utilisation of the overflow sites, the Council's ranger or authorised delegate is to resolve any unforeseen problems arising except where a camping ground host has been appointed, in which case the camping ground host is responsible for day-to-day supervision and management of the facility. A camping ground host will have delegated authority over the site.
- Fees for camping at overflow facilities shall be determined in accordance with Council's annual schedule of fees and charges.
- The maximum number of vehicles allowed in a RV overflow facility area will be determined based on allocated spacing between vehicles, size of vehicles (whether they have trailers), turning circles, and usable space in the allocated area.
- Dogs and other pets are permitted in this overflow camping area but must be held on a leash and/or under the control of a responsible person at all times.

## Part B

This section relates to the Fraser Coast Regional Council overflow camping grounds:-

- Where there are no vacancies available at all existing caravan parks within Council areas, including approved overflow sites within the licensed caravan parks, Council may authorise the operation of overflow camping grounds at the following locations:
  - (a) Site to be confirmed
- Council does not favour the use of the overflow sites over privately operated caravan parks in the area and will actively promote private parks as an alternative camping option to the overflow sites through:-
  - (a) the relevant Visitor Information Centre
  - (b) signage at the overflow site
  - (c) information provided from phone enquiries to Council's administration office.

- The maximum stay at Council emergency overflow camping facilities is to be 7 consecutive days. Authorised camping ground hosts may stay longer than the maximum period. A camper is permitted to book for up to 7 consecutive days at the overflow only if it is confirmed by Council that there are no available spaces in the caravan parks in the Council area.
- Fees for camping at the above facilities shall be determined in accordance with Council's annual schedule of fees and charges.
- Dogs and other pets are permitted in the above overflow camping areas but must be held on a leash and be under the control of a responsible person at all times.

# Fraser Coast RV Strategy 2015, Recommendations Review

Figure 19: Review of Current Strategy Recommendations and Actions

Recommendations	Still Relevant
Dump Points: Investigate sites within Hervey Bay where public dump points may be installed and seek funding from CMCA for installation	Yes
Undertake an audit of existing sites to identify facility requirements/upgrades to meet the camping options matrix definition and expectation of travellers	Actioned
Review signage to ensure adequate advice of camping options and dump point locations	Ongoing
Council as part of its review of Local Laws and Planning Scheme in conjunction with the Commercial Caravan Park Operators to review the number of public amenities and other facilities required per site	Actioned
That the use of generators be permitted in bush and basic camping areas subject to the following conditions: <ul style="list-style-type: none"> <li>• Use is limited to between the hours of 9am and 8pm</li> <li>• Generators are required to be small low dB generators (up to 2.0kva)</li> <li>• Generators are to be located in an area clear of fuels, dry grass or other combustible objects Users are to ensure that extension cords do not cross access tracks and are rated for external use</li> <li>• Users are to ensure that manufacturer’s guidelines are followed for safe operation of the generator</li> <li>• Users are to ensure that the camper is present whenever the generator is operating</li> </ul> Generators are not permitted on days of local fire ban	To be confirmed
Camp Fires: Opportunities for self-contained safe fires within basic and bush camping areas be provided where possible	To be confirmed
Road Quality: Continue to advocate to the State and Federal Government for upgrades of the Bruce Highway and other significant tourist routes	Ongoing
Caravan Operators to review provision of infrastructure and facilities to meet consumer expectations and camping options	Ongoing
Retaining Petrie Park as a designated Bush Camping site	Actioned
Expanding the existing RV site at Bauple by moving of bollards to provide easier access to the site and extra landscape buffering of the site	To be confirmed
Investigate the provision of an additional RV parking area within the township of Glenwood	To be confirmed
Priority of funds collected from the proposed regional camping permit be utilised 1st Priority - Embellishments for the RV Parking area located within Tiaro Memorial Park, Tiaro	To be confirmed

# Site Assessment Template

## Assessing Proposed Locations

Assessing proposed locations for non-commercial camping options is one of the first steps to be undertaken. The following template can be used to complete an initial site assessment:-

Proposed Location: _____								
Reviewed By:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
(Camping Reference Group)	<input type="checkbox"/>	<input type="checkbox"/>						
Nearest Commercial Park:	_____		Distance from Proposed Site:	_____ km				
Do any of these sites classify as a Basic Campground?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No				
Do these sites charge less than \$20.00?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No				
Infrastructure Currently on Site:	<input type="checkbox"/>	BBQ	<input type="checkbox"/>	Power	<input type="checkbox"/>	Water	<input type="checkbox"/>	Toilets
	<input type="checkbox"/>	Table	<input type="checkbox"/>	Shelter	<input type="checkbox"/>	Bins	<input type="checkbox"/>	None
Proposed Infrastructure for the Site:	<input type="checkbox"/>	BBQ	<input type="checkbox"/>	Power	<input type="checkbox"/>	Water	<input type="checkbox"/>	Toilets
	<input type="checkbox"/>	Table	<input type="checkbox"/>	Shelter	<input type="checkbox"/>	Bins	<input type="checkbox"/>	None
Are there any issues with the site?	_____							
	_____							
	_____							
Proposed Designation:	<input type="checkbox"/>	Bush Camp	<input type="checkbox"/>	Non-commercial/ community Partnership	<input type="checkbox"/>	Basic Campground	<input type="checkbox"/>	Commercial Outsourced
Is there a Need for this Proposed Location?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No				



# Case Study Examples of Good Practice

A wide range of good practice in terms of policy and practice, and in commercial and non-commercial provision exists in the market place. This section of the report provides a series of examples.

## **New facilities which add value and drive overall visitor expenditure: CASE STUDY: Hinchinbrook Shire Council, Chamber of Commerce and the CMCA**

In an effort to build economic activity, the Council recognised the value of the RV and drive market across the region and decided to set up a free six-month, RV trial site in the Tyto Wetlands Precinct – complementing an existing visitor hub/ attraction with a new camping asset.

Existing campground operators expressed their concern about diluting the market, but working with the local Chamber of Commerce, the Council was able to quantify the economic benefits to the area. For example, in a Chamber run survey, 85% of respondents indicated they would not have stopped in the shire had the trial site not been available. Not only bringing additional tourism activity, these visitors brought approximately \$100 per night additional spend to the shire, as confirmed by local retailers, hospitality outlets and service providers. Recognising the potential value from the sector, one local publican has added an overnight stay area in their grounds.

Since the completion of the trial site, a leased site has now been set up by the CMCA. The set up costs were close to \$115,000. The site is open between April and October with July and August the busiest months.

Not only is the new site bringing additional visitors, but it is linked to increased employment in the Shire, as well as providing opportunities for passionate camping volunteers to help man the site. The site is receiving good feedback from local business, and from users.

## **Transparent Processes in Considering Low Cost Camping Provision: CASE STUDY: Yeppoon Showgrounds**

The Yeppoon District Show Society was looking to expand the camping options in Yeppoon through opening up low-cost camping at the Showgrounds.

The concept was considered by Livingstone Shire Council through application of the Local Area Planning guidelines, with the result being an approved proposal for a limited area of the showground for caravan sites.

The Council's conditional approval would have seen a maximum of 15 sites take up almost 7% of the showgrounds with a requirement that a percentage of the approved area would remain available for the regular Saturday Community Markets car park. In this instance, the Show Society however have chosen not to proceed, as the cost of providing a legally compliant low-cost camping ground was too great.

## **Responding to Consumer Needs: CASE STUDY: Harding's Paddock Campground**

Ipswich City Council developed Hardings Paddock Campground, offering eight secluded camping sites as a low-cost camping option with a range of basic facilities. Their facilities include toilets, camp-shower cubicles, kitchen, barbecues, tables and a holding yard for horses. Their key market is families, but they also cater for outdoor recreation enthusiasts such as horse riders, mountain bike riders and bushwalkers.

The campground was planned with a clear understanding of the target audience, delivering good sized sites, unsealed roads and basic camp facilities. Council have since listened to guest feedback and have continued to improve the facilities.

### **Managing Overflow: CASE STUDY: Caravan park overflow facilities, Charters Towers (Qld)**

Charters Towers is a popular caravan, camping and RV stop along the Overlander's Way between Townsville and the NT. During winter, the three caravan parks in town had been experiencing peak demand and the Showgrounds was being managed as an overflow facility. The process was not working for the parties and so a solution had to be found. Using the 2014 Camping Options Toolkit, Charters Towers Regional Council encouraged the caravan parks to collaborate to better manage the process.

The Council now have an agreement in place with the three caravan parks in the town of Charters Towers to manage overflow use of the town Showground during seasonal peaks. When a visitor is booking a camping site, if the park they call is full that Caravan Park calls the other two parks in town and if all parks are full then those visitors can access the Showground.

This outsource model reduces the burden on the Council and ensures the Caravan Parks are managing the process. This system managed over 600 campers in just 2 months, showing its value.

### **Spotting a business opportunity: CASE STUDY: Emerald Tourist Park**

The Emerald Tourist Park are always thinking about the best model for their business. The site owners worked with Central Highlands Regional Council to expand their unpowered sites as part of a 'low-cost' camping option to meet visitor need. This new provision also reduced the need for campers to stay in unmanaged elsewhere in the destination.

### **Consistent enforcement action alongside camping options: CASE STUDY: Cairns Regional Council**

Illegal camping in the Cairns CBD and Esplanade has been a growing trend in the region, raising concerns from residents. Cairns Regional Council has taken action against illegal campers, with \$220 on-the-spot fines issued to those attempting to camp overnight in public places. This crackdown came in full force with over 60 fines being issued in 2 weeks during early morning patrols, with the majority issued on the Esplanade.

However, this firm enforcement action has not been enacted for the purpose of deterring camping visitors – the focus is on curbing a trend that reduces overall destination appeal for visitors and residents.

### **A strategic approach to engaging with camping businesses and stakeholders: CASE STUDY: Toowoomba Regional Council Camping Options**

Toowoomba Regional Council's RV Strategy recommended the formation of Local Camping Reference Groups to be convened when new parks or locations were being considered, as well as infrastructure upgrades to support well managed low-cost and no-cost camping.

One example was Bowenville Reserve which is managed by Council as a no-cost campsite. Offering an ideal low-cost camping option, but with limited management, the site was being degraded by misuse. Council is in discussions with a Community Group to take on management of the site as a low-cost, managed site during the busy tourist season.

**Generating Increased yield from non commercial camping and RV Visitor: CASE STUDY: McKinlay Shire, Council**

McKinlay Shire has taken a proactive approach to offering managed camping options near the township of Julia Creek. To better manage the site, the McKinlay Shire Council put in place initiatives including a camp host program. To lift the economic contribution of campers they were offered free use of bikes to get into town.

The community responded positively to the opportunity to become camp hosts. In return for the time commitment, camp hosts are offered a range of extra benefits such as free use of a council generator and fuel, free once-a-week bush dinner meals, access to a laundry, as well as a fee-free extended stay.

**Collaboration with existing assets: CASE STUDY: Maroochydore and Buddina State School - school- holiday camping**

In response to the high demand for low-cost caravanning, camping and RV accommodation during peak holiday periods Maroochydore and Buddina State Schools have been offering their school ovals and facilities during the busy school holiday periods – the initiative has helped Buddina State School and Maroochydore State School raised funds and help reduce the issue of illegal camping in public spaces in in the exceptional busy school holiday period.

This case study provides an excellent example of local authorities working together to develop a local solution. It should be noted, however, that the use of school grounds as temporary facilities is not considered as an “automatic right” to seasonal overflow use for camping purposes. Their use is at the absolute discretion of the Department of Education and Training, the individual school and school Principal as to whether or not to permit camping on a particular school site.

