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PREFACE

The material contained within this report is the combined data from studies undertaken with 21 caravan and tourist parks throughout New South Wales, Queensland, South Australia and Western Australia. Prior to the preparation of this document, each of the participating caravan and tourist parks received an individual site report and personal feedback from a member of the research team. In addition to the individual reports, managers also received national ‘benchmark’ data which allowed them to compare their site with all others participating in the study.

To maintain confidentiality, the data presented within this report reflects the combined results of all sites.

ACKNOWLEDGEMENTS

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The authors would like to express their thanks to our industry partners who helped fund and substantially facilitate this project. In particular we would like to acknowledge Norton Whitmont, President of the New South Wales Caravan and Camping Industry Association (CCIA) and Barry Bailey, Executive Officer of the CCIA, who provided feedback on the project from the outset. Their efforts were fundamental to bringing the industry on board and securing funding. The Executive Officer of the Australian Caravan and Camping Industry Association (ACCIA) and the South Australian Tourism Commission also assisted the project with industry funds.

Thank you also to the managers, staff and customers of the 21 caravan and tourist parks in New South Wales, Queensland, South Australian and Western Australia who gave their time and energy to the project.

Finally, the principal researchers would like to recognise their respective research assistants who did a great deal of the behind the scenes work which helped make our task that much easier – in particular, Sue Mikiliwicz and Frances van Ruth at the University of South Australia and David Archer at the University of Technology, Sydney.
SUMMARY

Introduction

There are an estimated 3,000 caravan and tourist parks throughout Australia. The operations vary in scale, complexity and level of provision, much like other sectors of the accommodation industry. They range from small-scale operations of 20-25 sites in regional areas providing power ‘hook-ups’ and ablution blocks for overnight or multi-day travellers. At the other end of the scale, along coastal New South Wales and Queensland there are large resort-style operations with caravan sites (with and without attached ensuites), chalets, villas, and beach houses. Many of these sites have recreation rooms, barbecues, resort-style pools, restaurants, tennis courts and mini-golf courses.

While the expansion and upgrading of caravan and tourist park infrastructure has been ongoing, there is limited publicly available information on their relative performance, for example on levels of customer satisfaction. Also, given the competitive nature of the industry, there is relatively little shared information on management processes or overall operational performance.

From the consumer’s perspective, the rating or ‘star’ system, as with other forms of accommodation, provides some indication of expected levels of operational infrastructure. However, rating schemes are typically input measures and are not concerned with site management or the satisfaction of customers with the service provided. Indeed, customer service quality outputs are of little consequence under such a system.

Objectives of Study

Given the small-business and family managed nature of these enterprises, many caravan and tourist park operators do not have access to management expertise or possess the financial resources necessary to engage in management or administrative development of these processes. These resource limitations are further exacerbated by their location – they are usually isolated from both capital city-based expertise and best practice operations of comparable businesses operating in similar markets.

Taken together, these two aspects, visitor service quality and management performance information, are two areas where there is a clearly identified industry need. Given this need, the objectives of the study were to provide the foundation for the development of:

• An industry-led set of national benchmarks for operational management of caravan and tourist park sites;
• A set of national visitor service quality benchmarks;
• A set of national protocols for ongoing performance management; and
• A decentralised knowledge management process whereby the practices, protocols and benefits of the project will be dispersed throughout rural and regional Australia.

The achievement of these objectives provides a basis for improving the quality of service provision to caravan and tourist park customers and the management performance of caravan and tourist park operations.

Methodology

The project methodology was modelled on an approach used previously by the Centre for Environmental and Recreation Management (CERM PI®) at the University of South Australia.

Given the objectives of the study, two types of data collection questionnaires were developed; one for operational management and one for visitor service quality. To develop these questionnaires and the strategies to implement them, a three-stage research process was undertaken.

The first stage was the development of key operational and visitor service quality indicators. With the operational management indicators, interview and discussion sessions were conducted with management and staff at eight caravan and tourist park sites. Existing CERM indicators were used as a basis for these initial meetings. The interviews with managers and their staff were focussed around four key questions:

1. What are your main work responsibilities?
2. Can these responsibilities be organised into categories (e.g. facilities and administration)?
3. As a staff member/manager, how do you know when you are doing a good job?
4. What things do you use to rate or judge the quality of a caravan/tourist park?

Following the development of draft indicators, further meetings were held at selected sites to clarify and refine them. Finally, the indicators were discussed with representatives of the New South Wales Caravan and Camping Industry Association. The indicators were then formally trialled in the next stage of the project.
The visitor service quality indicators were developed through discussions with customers at selected caravan and tourist park sites in South Australia, Victoria and Queensland. The main objective of these sessions was to identify those aspects of service quality that are important to visitors. A series of questions were used to start the discussion; including the following:

1. What do you look for (expect) when you visit a caravan/tourist park?
2. Think of the best caravan/tourist park you have visited. What are the services or facilities that make that one stand out from the rest?
3. What would spoil your visit to a caravan/tourist park?
4. Anything else?

The second stage of the research was field testing the questionnaires at eight test sites – three each in New South Wales and Queensland and two in South Australia. At each site, both the operational management indicators and visitor service quality indicators were trialled. Following this test stage, reports were prepared for each site and an evaluation of the questionnaires undertaken.

Stage 3, the main study, involved further data collection from the eight pilot sites along with an additional 13 sites throughout New South Wales, Queensland, South Australia and Western Australia. In this larger sample, an attempt was made to gather data from three specific geographic locations; urban, coastal and inland. In total, 2,126 visitor service quality responses were collected in the main study.

Key Findings

The key findings of the research are documented in the following three sections.

Visitor Profiles

- More than half the respondents (56%) were surveyed in Queensland. Of those surveyed, the largest single age group were the 50-59 year olds (21%). Indeed the group spanning 40-64 years accounted for more than half (54%) the total visitors to caravan and tourist parks.
- Visitors typically stayed with other members of their family (90%) on a coastal site (74%) during spring and summer (65%).
- The majority (69%) were there for either an extended holiday or a holiday of less than two weeks.
- While caravans were still the most popular form of accommodation (45%), there was considerable growth in the use of cabins (35%). The high yield nature of these sites is likely to lead to further development of cabins at most caravan and tourist parks. To what extent this type of accommodation will change the traditional mix of users remains unclear.
- Location was the reason most often given for choosing a particular site (23%), followed by the park’s membership of a well-known group (22%).
- Many visitors (45%) were committed to this form of accommodation, having used caravan parks 10 or more times prior to the current visit.

Visitor Service Quality

- Service quality was measured by responses to the Visitor Service Quality Questionnaire. The questionnaire identified 13 visitor service quality attributes and required participants to rank on a 1 (‘disagree’) to 6 (‘agree’) scale their expectations and performance on each.
- In general terms, there were high levels of satisfaction with the service performance of caravan and tourist park sites. The particular strengths were park cleanliness, park maintenance, quality of accommodation, staff efficiency and staff friendliness. Those areas requiring monitoring or action were safety and security and value for money.
- In addition to these attributes, other indicators of service quality were identified in the area of visitor relations. These indicators were broad outcome responses by visitors, including levels of satisfaction, recommendation to others and intention to revisit.
- In terms of visitor satisfaction, a significant majority (90%) were either satisfied or very satisfied with their visit.
- There were also significant future recommendation levels, with over 85% indicating they would recommend the site to others. Seventy-five percent indicated their intention to revisit the park.
- More than 25% of respondents indicated that they had experienced some form of problem, of which 40% were reported. Just under half of these were resolved.
Operational Management Indicators

- The operational management benchmarks identified to date are in the early stages of their development. However, the various benchmarks do provide some indicative data for managers of caravan and tourist parks.
- Current data will allow managers to examine their relative performance against the identified national benchmarks. It will also enable them to study the internal distribution of income and expenses across their own data.
- Each site was provided with a precise breakdown of their own income and cost ratios for the purposes of direct comparison with the benchmark data.
- Operational data should not be viewed in isolation from the visitor service quality responses. Park managers will need to analyse both their individual data sets in order to determine the relationships and interrelationships between visitor service quality and operational management performance. For example, are the costs of staff training offset by better visitor service quality scores on staff indicators, which may lead to higher levels of recommendation and repeat visitation?

Future Action

- Recommendation 1: That the study sample size is increased to create a more robust and reliable data set. Given the important management implications attached to both visitor service quality and operational management benchmarks, there is a need to draw on a larger sample of caravan and tourist park sites across Australia. It is anticipated that a further 20 sites could be added to the existing participating groups. An expanded data set would provide more detailed information and allow for clearer segmentation of the various markets and issues identified with the current study.
- Recommendation 2: That a national database and monitoring system for service quality and operational management be established. This database will be available via subscription and will enable caravan and tourist park operators from throughout Australia to monitor their performance against national benchmarks.
- Recommendation 3: That a website be developed to provide access to the national database information. The website would likely be located on sites of selected industry partners to ensure ease of access for all potential users.
- Recommendation 4: That a national protocol for the collection of visitor and management data be developed. This recommendation is closely linked to recommendation three. The protocol would be developed through further consultation with industry and be managed via a central collection and processing institute (such as CERM).
- Recommendation 5: That the development of benchmarking protocols be expanded to include other accommodation sectors. To date, caravan and tourist parks have been seen as somewhat of a fringe group within the accommodation sector. However, the protocols developed within the current project could be applied to similar small businesses in the sector, e.g. bed and breakfast establishments or small hotel/motels. This would be a separate project to the proposed expansion of the current study noted above.
- Recommendation 6: That this report be made available to relevant industry partners for attachment to their respective websites.
Chapter 1

INTRODUCTION

Background to the Industry

There are an estimated 3,000 caravan and tourist parks throughout Australia. Of these, there are nearly 900 in New South Wales alone. The operations vary in scale, complexity and level of provision, much like other sectors of the accommodation industry. They range from small-scale operations of 20-25 sites in regional areas providing power ‘hook-ups’ and ablution blocks for overnight or multi-day travellers. At the other end of the scale, along coastal New South Wales and Queensland there are a plethora of large resort-style operations with caravan sites (with and without attached ensuites), chalets, villas and beach houses. Many of these sites have recreation rooms, barbecues, resort-style pools, restaurants, tennis courts and mini-golf courses. Specialised recreation staff may also be employed to work with children and adults over busy holiday periods.

The vast majority of these parks are located outside the major cities and are often the chief source form of accommodation available in relatively isolated regional areas. Results from the Domestic Tourism Monitor (Bureau of Tourism Research 1998) note that 31% of all holiday nights in tourist accommodation in regional Australia were spent caravanning or camping. Further, the Tourism Research Australia (2005) estimated that the caravanning and camping sector accounted for over 32 million domestic visitor nights. At the international level, over one million nights were spent in campervans and the majority of these would have been spent in a caravan park or camping ground.

In economic terms, the Bureau of Tourism Research (1998) identified the importance of this sector of the tourism industry to regional Australia when it stated that the caravan and camping industry is worth in excess of $1.5 billion annually to the Australian economy and directly employs more than 15,000 people.

A number of sites are also members of caravan and tourist park groups such as Top Tourist and Big 4. These groups have developed using a similar rationale to that of major independently owned hotel and motel chains. The largest of these, Big 4, operates throughout Australia and has 156 members.

Industry Need

While the expansion and upgrading of caravan and tourist park infrastructure has been ongoing, there is limited publicly available information on their relative performance, for example on levels of service quality or customer satisfaction. Also, given the competitive and somewhat dispersed nature of the industry, there is little shared information on management processes or overall operational performance.

From the consumer’s perspective, the rating or star system, as with other forms of accommodation, provides some indication of expected levels of operational infrastructure. However, rating schemes are typically input measures and not concerned with site management or the satisfaction of customers with the service provided. Indeed, customer service quality outputs are of little consequence under such a system.

Given the small business and family-managed nature of these enterprises, many operators do not have access to management expertise or possess the financial resources necessary to engage in management or administrative development of these processes. The resource limitations are further exacerbated by their location – they are isolated from both capital city-based expertise and the best practice operations of comparable businesses operating in similar markets.

Taken together, these two aspects, customer service quality information and management performance information, are two aspects where there is a clearly identified industry need. This study developed as a response to address these needs.

Project Objectives

A number of approaches to address the identified needs were possible. Indeed, each of them considered independently could spawn a range of studies. However, in developing our approach we were cognisant of the need to work closely with industry and at a level where they perceived direct benefits. According to Whitmont and Bailey (2002, pers. comm.), caravan and tourist park operators are typically resistant to change and conservative in their approaches to business. Thus, any proposals for change had to be both directly beneficial and framed within a context of a collaborative partnership. Such a collaborative process requires the industry and researchers to develop a methodology and methods that are seen to be mutually beneficial.
Given this reasoning, it was determined that benchmarking would be a useful approach to measure both service quality outcomes and operational performance. These benchmarks were to be determined through a collaborative process with the caravan and tourist park industry and would examine both customer and management outcomes. The ultimate aim was the development of best practice measures available to all the industry. With these considerations in mind, the objectives for the study were established. These objectives were to provide the foundation for the development of:

- An industry led set of national benchmarks for operational management of caravan and tourist park sites;
- A set of national service quality benchmarks;
- A set of national protocols for ongoing performance management; and
- A decentralised knowledge management process whereby the practices, protocols and benefits of the project will be dispersed throughout rural and regional Australia.

Taken together, the development of customer service and operational benchmarks potentially provides the basis for improving the quality of service provision to caravan and tourist park customers, improving management performance, and leading to the sustainability of their businesses.

**Report Outline**

Chapter 2 provides a brief review of the literature pertaining to the notion of benchmarking and its potential for application to the caravan and tourist park industry. Chapter 3 outlines the methods and methodology used in the project. Chapter 4 presents the results of the study and Chapter 5 analyses and discusses these data. Chapter 6 provides an overview of the study and recommendations for further research.
Chapter 2

REVIEW OF LITERATURE

Introduction

This section is based primarily on the work of key collaborators in this project, Bell and Crilley (2002a & b). The notion of benchmarking as a business tool has its origins in the relatively straightforward idea of comparing an organisation’s performance with that of a successful competitor and, further, to use the information gathered to increase competitive advantage through the adoption and monitoring of best practice. Importantly, benchmarking is not a static concept but rather part of the process of continuous improvement. Thus, performance gaps (between recognised benchmarks) and current levels of performance are identified and then strategic business practices are introduced to close the performance gap (Barber 2001; Bendell, Boulter & Goodstadt 1998; Elmuti & Kathawala 1997).

Dorsch and Yasin (1998) provide an extensive overview of the literature of the application of benchmarking in the services, manufacturing and public sectors. Bendell, Boulter and Goodstadt (1998, pp.82-84) suggest that the approach to benchmarking can be conceptualised around four key areas: internal benchmarking, functional benchmarking, generic benchmarking, and competitor benchmarking.

Internal benchmarking is concerned with the measurement of organisational processes over time. Thus it seeks to compare present with past performance on identified indicators. Internal benchmarking has the advantage of enabling an organisation to examine change over time based on improved internal processes. Its major disadvantage is its potential lack of relevance to industry best practice.

Functional benchmarking is based on an examination of best practices in non-competitor organisations or related industry sectors. While functional benchmarking may lead to innovative or novel approaches, its lack of direct comparability at a functional level is a potential disadvantage.

Generic benchmarking is similar to functional benchmarking but is broader in scope in that it compares business processes that cut across a variety of functions in different industries. Its capacity to compare processes and outcomes with direct competitors is a significant limitation.

Competitor benchmarking is concerned with the gathering of data which has direct industry relevance, often from competitors. This is potentially a valuable source of information but notions of confidentiality and the potential for loss of competitive advantage often weaken its implementation.

While Bendell, Boulter and Goodstadt (1998) conceptualise benchmarking around the four key areas, in practice organisations are likely to use some combination of each. ‘However, effective benchmarking needs to extend the process to the identification of gaps in performance and the implementation of improvement strategies’ (Bell & Crilley 2002a, p.85).

Benchmarking in Tourism

In tourism, the hospitality sector has been the principal proponent of benchmarking, particularly in the area of hotel operations. Phillips and Appiah-Adu (1998), in their study of benchmarking in the United Kingdom, argued that the most successful hotel groups in the future will be those who use benchmarking as a strategy for continuous improvement. At the same time they were critical of those organisations that focused on benchmarking purely in terms of financial management.

In the United States, Morey and Ditman (1995) examined the efficiency of general managers as a method for establishing benchmarks. Other studies, for example Min and Min (1997) proposed a range of different processes and approaches to benchmarking. Bell and Crilley (2002a) in drawing these studies together noted that ‘while some standardisation of reporting systems and sharing of information appears to have taken place across industry groups such as hotel franchise chains, the pooling of longitudinal data to establish continuous review benchmarks for the specific sector is not evident in the hospitality literature’ (p.86).

In the broader tourism area there have been studies of destination benchmarking (Kozac & Rimmington 1998); visitor attractions (Gilling 1999); and corporate travel management (Bell & Morey 1995.) Hudson’s (1997) study of tour operators in northern Australia; Davidson’s (2000) work on higher education tourism courses; and a self-assessment report of performance in the meetings industry (Meetings Industry Association Australia 2007) are examples within the Australian context. The establishment of the national tourism satellite account (Australian Bureau of Statistics 2006) is an illustration of a macro approach to the development of ‘benchmark’ tourism indicators.
In respect of caravan and tourist parks specifically, there have been some attempts to establish standards as performance benchmarks in Australia, for example by AAA Tourism. However, standards are typically concerned with facilities (much like a rating system) and do not take into account the interactions of visitor service quality and management performance.

Commercial research organisations have also become involved in benchmarking studies of the financial performance of the caravan park sector. For example, the Entrepreneur Business Centre (EBC) conducts ongoing benchmarking studies of caravan park operations in Australia. The EBC collects data on key performance indicators, including a range of income measures and operating costs, turnover, and occupancy rates. However, the methodology and data generated are considered commercial-in-confidence and consequently unavailable for consideration in the context of the present study.

A study commissioned by the Sustainable Tourism Cooperative Research Centre on the benchmarking of small hotels may provide some further insight for the project but these data are not accessible at the time of writing (Sears 2005, pers. comm.)

The value of the individual work notwithstanding:

In relation to the concept of benchmarking as a process of continuous improvement, most studies do not address the longer-term strategic issues; more often presenting one-off studies of business performance or industry developments at a particular point in time. This weakness of excluding the longer-term strategic issues was reinforced in the Bergin, Jago and Deery (2000) analysis of benchmarking in the hospitality industry, and Dorsch and Yasin’s (1998) review of benchmarking in the public sector. (Bell & Crilley 2002a, pp.86-87)

In the context of this study and the weaknesses identified above, the work of the Centre for Environmental and Recreation Management (CERM) at the University of South Australia is apposite. The work of CERM is underpinned by the notions of Total Quality Management which, in part, advocates the involvement of all stakeholders in the strategic decision-making of a business. Utilising these principles, CERM has been conducting collaborative research projects across various sectors of the leisure industry, including golf courses, aquatic centres, leisure centres and residential outdoor education centres, since the early 1990s.

The CERM approach involves stakeholders (management, customers and employees) in the process of developing key operational management indicators and customer service quality attributes. Operational management indicators include: finance; facilities; human resources; marketing; utilities; and services. Standard criteria (typically the median of given scores) are then able to be compared with like firms on similar operational indicators. Over time these indicators become benchmarks by which all participating organisations can compare their performance against others.

Similarly, customer service quality indicators are developed in consultation with customers as to what they see as the essential dimensions of customer service quality. These include attributes such as cleanliness, maintenance, staff interactions and value for money. Customers are then required to record both their expectations of the identified attribute (in essence its importance to them) and then to note the extent to which performance on the characteristic has been achieved by the organisation. The difference between expectation and performance identifies service ‘gaps’ – either positive or negative. Currently, over 200 organisations participate in the CERM PI benchmarking program (Crilley 2001, pers. comm.).

Conclusion

While it is recognised that benchmarking has the capacity to both monitor and improve performance within the tourism industry, its application has been limited primarily to the hospitality sector. Even with such application, the approach tends to be one-off audits rather than ongoing programs of intra-sector comparison and quality improvement.

Conversely, the CERM approach addresses the limitations of some existing programs while at the same time providing a framework for longer term strategic planning with specific sectoral applications. Bell and Crilley (2002a) argue that the CERM approach is cost effective and provides sustainable benefits to all parties concerned. While the tourism industry has not been specifically targeted in the past, the caravan industry was seen as a sector with substantial potential for the application of the CERM PI framework.
Chapter 3

METHODOLOGY

Introduction

The overriding ‘template’ for the project was modelled on the approach used by CERM at the University of South Australia. CERM has been using a range of research methodologies for similar projects in sport and leisure services since its inception in 1990.

Given the objectives of the study, two discrete yet interrelated processes of instrument development and data collection were required – the development of operational management indicators and the development of service quality attributes and related implementation protocols for each. The overriding rationale was to develop a series of research protocols and indicators in a grounded manner to ensure they were both relevant and meaningful to the managers of caravan and tourist parks. Three research phases were implemented. The work involved in each of these phases and their outcomes are noted in the following sections.

Phase 1: Instrument development

For the purposes of each phase, project team members located and liaised independently with caravan and tourist park management and staff.

In respect of operational management indicators, instrument development sessions were conducted with management and staff at eight different pilot sites. Existing CERM PI indicators were used as the basis for the initial discussions. Focus groups were held with managers and staff and were organised around four key questions:

1. What are your main work responsibilities?
2. Can these responsibilities be organised into categories (for example, facilities and administration)?
3. As a staff member/manager, how do you know when you are doing a good job?
4. What things do you use to rate or judge the quality of a caravan/tourist park?

Following the development of draft indicators, further meetings were held at selected sites to clarify and refine the indicator descriptors. Finally, the indicators were discussed with representatives of the Caravan and Camping Industry Association (New South Wales). The indicators were then formally trialled in Phase 2 of the project.

The visitor service quality indicators were developed through customer/visitor focus group sessions. Seventeen sessions were held at selected caravan and tourist park sites in South Australia, Victoria and Queensland. The main objective of these sessions was to identify key aspects of service quality that were important to visitors. Multiple sessions were conducted at some sites to ensure that visitors from a range of categories (e.g. different age groups) were given the opportunity to provide input. Visitors were either issued with a written invitation to attend the sessions upon arrival at the park or verbally invited by project staff once they were in the park.

Each focus group session was conducted according to a set protocol (Appendix A) and was facilitated by a university researcher who introduced the project and the purpose of the session. A series of open-ended questions were used to conduct the sessions:

1. What do you look for (expect) when you visit a caravan/tourist park?
2. Think of the best caravan/tourist park you have visited. What are the services or facilities that make that one stand out from the rest?
3. What would spoil your visit to a caravan/tourist park?
4. Anything else?

As the group was asked a question, their individual responses were recorded on cards or a whiteboard to enable the group to review all responses before progressing to the next question. The responses were shared in a non-threatening manner without judgement or evaluation. The review process provided an opportunity for clarification of key points and a broader level of discussion to be entered into. At the conclusion of the session, cards were collected and collated by the researcher.

Qualitative data from the visitor service quality focus groups were processed using the NUD*IST qualitative analysis program and were summarised according to common themes and categories. Taken together, the focus
group results, discussions with industry collaborators and input from the three university-based research units were used to develop instruments and protocols in preparation for Phase 2.

**Phase 2: Pilot study**

Phase 2 involved field testing the instruments and protocols (Appendix B) at eight pilot sites – three each in New South Wales and Queensland and two in South Australia. At each site, both the operational management indicators and visitor service quality indicators were implemented. However, no raw operational data were collected at this stage. The purpose was for each site to examine the manner in which the data could be collected depending upon their existing data sources and recording mechanisms.

Following the pilot, Interim Reports (Appendix C – abridged report) were prepared for each site and an evaluation of the instrumentation and delivery undertaken. Each research team then visited their respective sites to discuss the outcomes documented in the Interim Report and to clarify and assist with any data collection/management issues being experienced.

**Phase 3: Main study**

Following Phase 2, the structure and content of both the visitor service quality instrument (Appendix D) and operational management template (Appendix E) were finalised. The main study involved further data collection from the eight pilot sites along with an additional 12 sites throughout New South Wales, Queensland, South Australia and Western Australia. In this larger sample, an attempt was made to gather data from three specific geographic locations; urban, coastal and inland. These were defined as follows:

- **Urban sites** – sites located on the fringe of capital cities which serviced tourist needs (as distinct from people using the caravan site as a ‘residence’).
- **Coastal sites** – sites located adjacent to the coast. This was the largest group surveyed as they make up the significant majority of caravan and tourist park sites in Australia.
- **Inland sites** – sites located away from the city and coast. Many of these are located on transit routes and usually in close proximity to a major inland town.

From the 21 caravan and tourist parks participating in the study, a total 2,126 visitor service quality responses were collected from 17 sites and operational management indicators from 18 sites.

**Summary**

The project involved three phases of data collection – instrument development, pilot study and main study. The approach was developed in collaboration with key stakeholders to ensure both the integrity of the process and their ongoing support. Chapter 4 provides an overview of the visitors to caravan and tourist parks.
Chapter 4

CARAVAN AND TOURIST PARK VISITOR PROFILES

Introduction

The data presented below reflect the consolidated results from all sites participating in the main study. The chapter provides an overview of the visitors to caravan and tourist park sites and reports on their overall patterns of use.

Disaggregated data for each site has been reported through individual reports. Data for each state have also been reported at state and national industry meetings (Bell 2004; Mikilewicz 2004; Hayllar & Crilley 2004).

Profile of Respondents

The following data are aggregated from all respondents who completed the visitor service quality questionnaire during 2003/4 in South Australia, Queensland, Western Australia and New South Wales. In total, 2126 responses were received.

Sample by State

The percentage of respondents by state is indicated in Figure 1. Queensland provided more than half the respondents for the study.

Gender

Fifty-four percent of respondents were female.

Age

Respondents in the 40-64 years age band accounted for the majority of park visitors, with 50-59 year olds being the largest single group (see Figure 2).
Group Type
More than 90% of respondents were staying with a member of their family. This response reinforces the image of caravan and tourist parks as family-oriented venues. Indeed, many sites have an established history of large extended family groups staying with them during Christmas holiday periods.

Overview of Respondents
The typical caravan and tourist park user in this study is likely to stay in a coastal park for an extended stay during the spring and summer months. Further, they will stay with at least one other family member and be aged between 50-59 years. In this study they are also likely to be staying in Queensland.

Site Responses
This section examines a range of responses to the overall experience of using a caravan and tourist park.

Location
As noted in the methodology, sites were grouped according to location – metropolitan, coastal and inland. The distribution of these in the sample is noted in Figure 3. Consistent with overall park developments and use, more than two-thirds of responses were from coastal sites.
Reason for choosing park

Two factors stand out as the most important reasons for choosing a particular caravan and tourist park site – location and being a member a well-known park group (see Figure 4). However, it is unclear whether this is related to the specific location of the park itself or the destination overall. Arguably it is more a destination choice in the first instance after which specific park factors come into play.

The membership factor is particularly interesting given the relatively low ranking of accreditation, and to a lesser extent, the star rating on site choice. It is likely that consumers view park-group membership as an implicit quality standard. These data have significant marketing implications for individual operators and the industry overall.

![Figure 4: Reason for choosing park (%)](image)

Type of accommodation

The type of accommodation used at each site reflects ongoing trends in the development of caravan and tourist parks. Caravan/campervan sites still make up more than 40% of overall site use. However, cabins with superior facilities, in particular ensuite bathrooms, account for more than 35% of visitors (see Figure 5). It is likely that ‘high yield’ cabins will continue to be developed by operators given the comparative return on investment for each individual cabin site. Indeed, data presented in Chapter 5 provides some evidence of these potential returns.

![Figure 5: Accommodation (%)](image)
**Purpose of visit**

Two-thirds of visitors were in the park for a holiday of less than two weeks or part of an extended holiday or lifestyle visit. The overnight stay visit is likely indicative of transit type parks in regional areas or short stays in metropolitan sites rather than more destination-focused venues along the coast (see Figure 6).

![Figure 6: Purpose of visit](image)

**Number of other parks visited**

Nearly half the visitors (46%) were regular caravan and tourist park users, having previously visited 10 or more sites (see Figure 7). This pattern may be indicative of the age group within the sample and/or the significant number who were on an extended lifestyle holiday as noted in Figure 6 above.

![Figure 7: Number of other parks visited](image)

**Period of Stay**

As would be expected, the majority of visitors used the parks during the late spring and summer months (see Figure 8).

![Figure 8: Month of stay](image)
Summary

In respect of the overall sample, more than half the respondents were surveyed in Queensland. The gender split slightly favoured females and the largest single group of users was aged 50-59 years. The vast majority of visitors (90%) stayed with another member of their family – the image of caravan and tourist park sites as places for families is clearly reinforced by the data.

Coastal sites, which make up the largest number of caravan and tourist parks in Australia, accounted for 74% of the total sample. While a number of reasons for choosing a particular site were given by the visitors, location was the most important, followed by the site being a member of a well-known group. The latter has particular importance for the marketing of individual caravan and tourist park sites.

One illustration of the changing nature of caravan and tourist parks is the type of accommodation used by visitors. Where once the mobile caravan and onsite van were the dominant forms of accommodation, and where visitors walked to a communal ablutions block, self-contained cabins now provide more than one-third of the accommodation used by visitors.

As expected, spring and summer are the peak user times. Holidays of less than two weeks or extended holidays account for more than two-thirds of visitors. Visitors also tend to be ‘regulars’ – nearly half the respondents had visited 10 or more sites.

Chapter 5 focuses on the outcomes of the visitor experience (visitor service quality) and examines the operational performance of the sites.
Chapter 5

VISITOR SERVICE QUALITY AND OPERATIONAL PERFORMANCE INDICATORS

Introduction

This chapter focuses on the major objectives of the study. Firstly, it reports on the outcomes of the visitor service quality data and notes the strengths and areas for improvement identified by caravan and tourist park site users. Secondly, it examines the operational management performance of the sites in the study and generates some preliminary benchmarks.

Visitor Service Quality

Section A of the visitor service quality questionnaire (Appendix D) asked respondents to rate both their level of expectation and the level of performance achieved in relation to aspects of service quality. The scale used for this section ranged from 1 (‘disagree’) to 6 (‘very strongly agree’).

In the context of this study, the expectation (E) mean calculated from the data refers to the extent to which visitors believe a particular service attribute or level of quality should be provided/expected at a caravan and tourist park. A high mean may represent the impact of the visitors’ previous caravan and tourist park experience or their more general views on expectations of customer service quality. Alternatively, a low mean on expectations may indicate the visitor has limited interest or need for this service attribute or has lower service quality expectations generally.

The performance (P) mean measures how a service attribute or an aspect of service quality is perceived to be performing. A high mean for performance may indicate an attribute of service quality perceived by visitors to be well delivered. A low performance mean may identify a potential problem requiring correction. Alternatively, it may be due to the unique circumstance of a particular site which is understood and accepted by management.

These two means are used to calculate the ‘visitor service quality gap’ (VSQ gap) for each attribute – that is, the extent to which performance does not meet expectation. Thus:

\[
\text{Performance mean (P) – Expectations mean (E)} = \text{VSQ gap}
\]

Where performance exceeds customer expectations, the VSQ gap may also be positive. As a corollary, a positive performance gap, or indeed a match between expectation and performance, leads to high levels of customer satisfaction.

The performance of caravan and tourist parks on each of the service quality attributes contained within the questionnaire is noted in Table 1. Further, the national VSQ gap (either positive or negative) is identified.
### Table 1: Visitor service quality 2003/04

<table>
<thead>
<tr>
<th>VSQ Attributes</th>
<th>Expectation (E)</th>
<th>Performance (P)</th>
<th>VSQ Gap National Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Safety and security</td>
<td>4.6</td>
<td>4.4</td>
<td>-0.2</td>
</tr>
<tr>
<td>2. Park cleanliness</td>
<td>4.9</td>
<td>4.9</td>
<td>0.0</td>
</tr>
<tr>
<td>3. Park maintenance</td>
<td>4.7</td>
<td>4.9</td>
<td>0.2</td>
</tr>
<tr>
<td>4. Range of recreational facilities</td>
<td>4.6</td>
<td>4.7</td>
<td>0.1</td>
</tr>
<tr>
<td>5. Accommodation comfort (cabins, on-site vans etc.)</td>
<td>4.7</td>
<td>4.9</td>
<td>0.2</td>
</tr>
<tr>
<td>6. Site layout</td>
<td>4.6</td>
<td>4.7</td>
<td>0.1</td>
</tr>
<tr>
<td>7. Staff efficiency</td>
<td>4.7</td>
<td>5.0</td>
<td>0.3</td>
</tr>
<tr>
<td>8. Staff friendliness</td>
<td>4.8</td>
<td>5.0</td>
<td>0.2</td>
</tr>
<tr>
<td>9. Staff knowledge of local attractions &amp; facilities services</td>
<td>4.6</td>
<td>4.7</td>
<td>0.1</td>
</tr>
<tr>
<td>10. Staff put in extra effort to help</td>
<td>4.5</td>
<td>4.6</td>
<td>0.1</td>
</tr>
<tr>
<td>11. Management of park</td>
<td>4.6</td>
<td>4.7</td>
<td>0.1</td>
</tr>
<tr>
<td>12. Suitable secondary services</td>
<td>4.4</td>
<td>4.4</td>
<td>0.0</td>
</tr>
<tr>
<td>13. Value for money</td>
<td>4.6</td>
<td>4.5</td>
<td>-0.1</td>
</tr>
</tbody>
</table>

**Key***

- **Strengths**: Attributes with high expectations ratings, high performance ratings and small negative or positive VSQ gaps.
- **Monitoring**: Attributes that could benefit from monitoring in the future.
- **Areas for development**: Attributes with high expectations ratings, comparatively low performance ratings and large VSQ gaps (particularly when compared to the national figures).

*Given the exploratory nature of this study and its goal of building benchmarks, no attempt has been made to statistically calculate the differences between the VSQ gaps. Rather, the research team, based on prior CERM PI ® experience, determined that a VSQ gap of + or − 0.2 would be considered as a strength or an area for development. Further testing of these assumptions will take place with more robust data as a result of an increased sample size and diversity of operations as the project develops.
Visitor Service Quality: National Strengths

In reviewing the data outlined in Table 1, it is clear that the caravan and tourist park industry is performing well in broad terms in meeting the visitor service quality expectations of its customers. In particular the following strengths are noted in Table 2.

<table>
<thead>
<tr>
<th>Service Quality Attribute</th>
<th>Visitor Expectation</th>
<th>Site Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Park cleanliness</td>
<td>4.9</td>
<td>4.9</td>
</tr>
<tr>
<td>Park maintenance</td>
<td>4.7</td>
<td>4.9</td>
</tr>
<tr>
<td>Accommodation comfort</td>
<td>4.7</td>
<td>4.9</td>
</tr>
<tr>
<td>Staff efficiency</td>
<td>4.7</td>
<td>5.0</td>
</tr>
<tr>
<td>Staff friendliness</td>
<td>4.8</td>
<td>5.0</td>
</tr>
</tbody>
</table>

In each case, the service quality performance outcomes identified also have some of the highest levels of expectation. While further investigation with visitors to discriminate between the relative importance of visitor service quality attributes would be necessary to draw definitive conclusions, arguably the above attributes are also fundamental to overall visitor satisfaction. To this extent, caravan and tourist parks would appear to be appropriately targeting their maintenance efforts, providing quality accommodation and developing positive staff/visitor relations. The effectiveness of the staff in dealing with customers is a point of particular note.

Visitor Service Quality: Areas for Monitoring and Development

Two particular issues, safety and security and value for money, stood out as requiring further consideration or action by park managers.

<table>
<thead>
<tr>
<th>Service Quality Attribute</th>
<th>Visitor Expectation</th>
<th>Site Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and security</td>
<td>4.6</td>
<td>4.4</td>
</tr>
<tr>
<td>Value for money</td>
<td>4.6</td>
<td>4.5</td>
</tr>
</tbody>
</table>

Safety and security did not have the highest expectation but clearly visitors have some apprehension about the performance of the parks on this attribute. Further research is needed to gain insight into the particular aspects that are of concern to visitors. For example, are visitors concerned with the theft of their belongings, personal safety or traffic movements around the site and the potential for endangering young children?

Value for money presents a particular challenge to park managers. Historically, caravan and tourist parks developed as venues that provided well-located, readily available and affordable accommodation for families or budget-conscious singles. In earlier times, there were relatively lower expectations about the level of service and quality of facilities provided. Such expectations were also matched by park tariffs. However, with the diversity and growth of facilities and services provided by parks, the prices of all forms of accommodation have risen. In the context of this study, these prices may have outstripped service and facility provision. Again, further research is needed to tease out this service quality attribute.

It should be noted that an analysis of individual parks on each of these attributes has been reported by the principal researchers to the caravan and tourist park site participating in the study.
Visitor Relations
A further series of measures was incorporated into the data that was also indicative of visitor service quality. These indicators are broad ‘outcome’ responses by visitors: levels of satisfaction; recommendation to others; intention to revisit the park; and problems experienced and resolved.

Level of Satisfaction
There were generally high levels of satisfaction from park users. Nearly 90% were satisfied or very satisfied with their visit. These data compare favourably with other sectors of the accommodation industry.

Recommendation to Others
Recommendation levels are a positive indicator of customer satisfaction. Over 85% of visitors indicated they would recommend the caravan and tourist park site to others. The marketing impact of recommendation levels should not be underestimated. As noted in Figure 4, more than 10% of visitors found out about the park they were using through word-of-mouth.

Intention to Revisit
More than 75% of visitors indicated their intention to revisit the park. It is unclear from the data whether those who have indicated they would not return is a consequence of a poor service quality outcome or simply a holiday choice decision.

Problems Experienced, Reported and Solved
Over 25% of visitors responding to this question experienced some problem during their visit (see Figure 9).

The extent to which problems are resolved when reported is an important service quality indicator. If action is not taken, visitors may feel that their requests are not being taken seriously by the manager or that management is unsympathetic to meeting customer service expectations. The nature of the problems experienced is not clear from the data and requires further investigation. For example, some problems may not be able to be resolved in a timely manner and others beyond the control of management. However, of the 25% of visitors who experienced problems, over 40% of these were reported to management. Of those reported, just under half were resolved.
Value for Money

While more than 80% of visitors agreed, strongly agreed, or very strongly agreed that the caravan and tourist park provided good value for money, there are some inconsistencies in the data (see Figure 10). The visitor service quality attributes outlined in Table 1 suggest that value for money is a problem with at least some parks. Further investigation of this variable is required.

Operational Management Indicators

Data for this part of the project were collected using the operational management questionnaire (Appendix E). As noted previously, the instrument was developed through a collaborative process with the individual parks in the pilot study and through consultations with industry representatives. Following completion of the main study, all data across the 21 sites were combined. The median was adopted as the ‘benchmark score’ in preference to the mean. By using the median in the calculations the distorting influence of very small or very large figures typically associated with calculating the mean are minimised. This decision was also based on the previous benchmarking experience of CERM.

Nineteen indicators of operational management were developed for this project. The indicators were replicated for each site to enable individual operators to compare their data to national benchmarks. The data reported below reflect the national benchmark calculated from the returns of each sample site. Given the sample size, these benchmarks should be considered provisional at this time. Appendix F contains the calculations used to establish these figures. The indicators, and the national benchmark associated with each indicator, are noted in Table 4.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>National Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>INCOME SHARE</td>
<td></td>
</tr>
<tr>
<td>Cabins</td>
<td>49%</td>
</tr>
<tr>
<td>Powered Sites (no ensuite)</td>
<td>25%</td>
</tr>
<tr>
<td>Ensuite (powered) Sites</td>
<td>6%</td>
</tr>
<tr>
<td>Unpowered Sites</td>
<td>1%</td>
</tr>
<tr>
<td>Secondary Spend</td>
<td>7%</td>
</tr>
</tbody>
</table>
COST SHARE

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleaning</td>
<td>12%</td>
</tr>
<tr>
<td>Maintenance (routine)</td>
<td>10%</td>
</tr>
<tr>
<td>Energy (gas, electricity)</td>
<td>8%</td>
</tr>
<tr>
<td>Water</td>
<td>2%</td>
</tr>
<tr>
<td>Marketing</td>
<td>7%</td>
</tr>
<tr>
<td>Labour</td>
<td>44%</td>
</tr>
</tbody>
</table>

OTHER by unit cost/income

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labour cost to gross revenue</td>
<td>32%</td>
</tr>
<tr>
<td>*Operational expense recovery</td>
<td>N/A</td>
</tr>
<tr>
<td>Site occupancy</td>
<td>37%</td>
</tr>
<tr>
<td>Cabin cleaning and maintenance costs</td>
<td>$11.13</td>
</tr>
<tr>
<td>Secondary services per visitor night</td>
<td>$0.99</td>
</tr>
<tr>
<td>Secondary services by sites occupied</td>
<td>$2.44</td>
</tr>
<tr>
<td>Labour cost per visitor night</td>
<td>$5.44</td>
</tr>
<tr>
<td>Labour cost per site occupied</td>
<td>$12.07</td>
</tr>
</tbody>
</table>

*The data for this variable have not been incorporated into the final consolidated report at the request of key stakeholders. However, these data have been reported, in confidence, to each site within their individual reports. For the sake of completeness it has been noted in the table to acknowledge that it has been considered.

Discussion – Operational Management Indicators

In respect of income, the importance of ‘new’ accommodation types is highlighted in the data. The income from cabins, in their various forms, accounts for nearly half the total revenue and provides 10% more income than all other sources combined.

Anecdotal evidence suggests that the potential yield from cabins is driving caravan and tourist park operators towards their development at the cost to other sites. Given the returns, such a move makes economic sense. However, it is unclear whether the demand for cabins is being driven by new customers to caravan and tourist parks or existing customers changing their accommodation preferences. Further research is needed to investigate these changing demand patterns.

A further economic consideration regarding costs concerns the labour/income tradeoffs of increasing the number of cabins. Cabins require more ongoing maintenance and attract additional cleaning costs when compared to ‘traditional’ forms of site usage. Keeping labour costs in check given their percentage of cost share is therefore fundamental to the relative profitability of site operations.

The impact of secondary spend income is also noteworthy. The goods and services associated with secondary spend (for example food, drink, gas, bike hire) provide the same income as ensuite sites and un-powered sites combined. The income/expense equation in respect of these two is difficult to calculate from the data and would, in any case, have site-specific characteristics.

Site occupancy rates are generally lower than other accommodation sectors. Hotels for example typically have break even occupancy rates of greater than 55%. However, these rates may be very much related to both seasonality and the relative capacity of the individual site. For example, sites may be under-occupied in winter and autumn (excess capacity) and have excess demand for sites in spring and summer (under capacity). A better understanding of this variable can only be answered at the individual site level.

Marketing expenditures are also relatively low which may be directly correlated to the excess capacity scenario noted above. Again, site-specific data would need to be examined on this variable.
Summary
This chapter has outlined the visitor service quality outcomes for 17 sites involved in the project. Further, it has identified preliminary national benchmarks for visitor service quality. The visitor service quality strengths were identified as park cleanliness, park maintenance, quality of accommodation, staff efficiency and staff friendliness. Those areas requiring monitoring or action were safety and security and value for money. The latter attribute in particular requires further investigation given some of the conflicting evidence embedded within the data.

The operational management indicators provide a snapshot only of the income and costs associated with managing a modern caravan or tourist park site. While the benchmarks developed provide a point of comparison for site managers, at this stage they should be considered as indicative only given the relatively small national sample. However, caravan and tourist park managers could start to benchmark their operations against these data to establish at least some points of comparison.

Chapter 6 provides an overview of the study and makes some recommendations for further research and consideration.
Chapter 6

SUMMARY AND RECOMMENDATIONS

Introduction

The project involved three phases: instrument development; pilot study; and main study. The main study was conducted with a total of 21 caravan and tourist parks in Queensland, New South Wales, South Australia and Western Australia. Three broad data sets emerged from the investigation: a profile of visitors; visitor service quality attributes and the performance of the selected sites on those attributes; and operational management indicator benchmarks and the performance of sites when measured against these benchmarks.

This final chapter summarises the results from these data sets and concludes with some implications for caravan and tourist park management and recommendations for further research.

Visitor Profiles

More than half the respondents (56%) were surveyed in Queensland. Of those surveyed, the largest single age group were the 50-59 year olds (21%). Indeed the group spanning 40-64 years accounted for more than half (54%) the total visitors to caravan and tourist parks.

Visitors typically stay with other members of their family (90%) on a coastal site (74%) during spring and summer (65%). The majority (69%) are there for either an extended holiday or holiday of less than two weeks.

While caravans are still the most popular form of accommodation (45%), there has been considerable growth in the use of cabins (35%). The high yield nature of these sites is likely to lead to further development of cabins at most caravan and tourist parks. To what extent this type of accommodation will change the traditional mix of users remains unclear.

Location is the reason most often given for choosing a particular site (23%) followed by the park’s membership of a well-known group (22%). Whatever the reasons for choosing the particular site, many visitors (45%) are committed to this form of accommodation, having used caravan parks 10 or more times prior to the current visit.

Visitor Service Quality

Service quality was measured by responses to the visitor service quality questionnaire. The questionnaire identified 13 visitor service quality attributes and required participants to rank on a 1 (‘disagree’) to 6 (‘agree’) scale their expectations and performance on each.

In general terms there were high levels of satisfaction with the service performance of caravan and tourist park sites. The particular strengths were park cleanliness, park maintenance, quality of accommodation, staff efficiency and staff friendliness. Those areas requiring monitoring or action were safety and security and value for money.

In addition to these attributes, other indicators of service quality were identified in the area of visitor relations. These indicators are broad ‘outcome’ responses by visitors including levels of satisfaction, recommendation to others and intention to revisit. In terms of visitor satisfaction, a significant majority (90%) were either satisfied or very satisfied with their visit. There were also significant recommendation levels, with over 85% indicating they would recommend the site to others. Seventy five percent indicated their intention to revisit the park. The final visitor relations indicator is concerned with the responsiveness of staff to problems reported by visitors. More than 25% of respondents indicated that they had experienced some form of problem, of which 40% were reported. Just under half of these were resolved.

Operational Management Indicators

The operational management benchmarks identified to date are in the early stages of development. However, the various benchmarks do provide some indicative data for managers of caravan and tourist parks. From their perspective, the current data will allow them to examine their relative performance against the identified national benchmarks. It will also enable them to study the internal distribution of income and expenses across their own data. While not reported here due to issues of privacy, each site has been provided with a precise breakdown of their own income and cost ratios for the purposes of direct comparison with the benchmark data.
It should also be noted that the operational data should not be viewed in isolation from the visitor service quality responses. Park managers will need to analyse data sets to determine the relationships and interrelationships between visitor service quality and operational management performance. For example, are the costs of staff training offset by better visitor service quality scores on staff indicators, which may lead to higher levels of recommendation and repeat visitation?

Summary of Benchmarks

As indicated, at this exploratory stage of the project, the visitor service quality and operational management benchmarks should be viewed as tentative and suggestive only. The relatively small sample and the limited range of operations reviewed are methodological signals for caution. These limitations notwithstanding, they are nevertheless a basis on which to build subsequent work. National benchmarks for visitor service quality (Table 5) and operational management indicators (see Table 4) are noted.

**Table 5: Visitor service quality – national benchmarks – visitor service quality medians**

<table>
<thead>
<tr>
<th>Visitor Service Quality Attributes</th>
<th>Visitor Service Quality Gap* National Benchmark (Median)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Safety and Security</td>
<td>-0.2</td>
</tr>
<tr>
<td>2. Park cleanliness</td>
<td>0.0</td>
</tr>
<tr>
<td>3. Park maintenance</td>
<td>0.2</td>
</tr>
<tr>
<td>4. Range of recreational facilities</td>
<td>0.1</td>
</tr>
<tr>
<td>5. Accommodation comfort (cabins, on-site vans etc.)</td>
<td>0.2</td>
</tr>
<tr>
<td>6. Site layout</td>
<td>0.1</td>
</tr>
<tr>
<td>7. Staff efficiency</td>
<td>0.3</td>
</tr>
<tr>
<td>8. Staff friendliness</td>
<td>0.2</td>
</tr>
<tr>
<td>9. Staff knowledge of local attractions &amp; facilities services</td>
<td>0.1</td>
</tr>
<tr>
<td>10. Staff put in extra effort to help</td>
<td>0.1</td>
</tr>
<tr>
<td>11. Management of park</td>
<td>0.1</td>
</tr>
<tr>
<td>12. Suitable secondary services</td>
<td>0.0</td>
</tr>
<tr>
<td>13. Value for money</td>
<td>-0.1</td>
</tr>
</tbody>
</table>

*The national benchmark is the identified distance between customer performance rating (P) minus customer expectation rating (E): the VSQ Gap. See page 12 for a more complete explanation.

Recommendations

In drawing the data together and making recommendations from it, there needs to be recognition of the overall small sample size. To this end a number of recommendations specifically relate to the need for further development of the study and the implications of such developments.

**Recommendation 1:** *That the study sample size be increased to create a more robust and reliable data set.* Given the important management implications attached to both visitor service quality and operational management benchmarks, there is a need to draw on a larger sample of caravan and tourist park sites across Australia. It is anticipated that a further 20 sites could be added to the existing participating groups. An expanded
data set would provide more detailed information and allow for clearer segmentation of the various markets and issues identified with the current study.

Recommendation 2: That a national database and monitoring system for service quality and operational management be established. This database will be available via subscription and will enable caravan and tourist park operators from throughout Australia to monitor their performance against national benchmarks.

Recommendation 3: That a website be developed to provide access to the national database information. The website would likely be located on sites of selected industry partners to ensure ease of access for all potential users.

Recommendation 4: That a national protocol for the collection of visitor and management data be developed. This recommendation is closely linked to recommendation three. The protocol would be developed through further consultation with industry and be managed via a central collection and processing institute (such as CERM).

Recommendation 5: That the development of benchmarking protocols be expanded to include other accommodation sectors. To date, caravan and tourist parks have been seen as somewhat of a fringe group within the accommodation sector. However, the protocols developed within the current project could be applied to similar small businesses in the sector, e.g. bed and breakfast establishments or small hotel/motels. This would be a separate project to the proposed expansion of the current study noted above.

Recommendation 6: That this report be made available to relevant industry partners for attachment to their respective websites.
APPENDIX A: PROTOCOL FOR CONDUCTING FOCUS GROUP SESSIONS

UNIVERSITY OF SOUTH AUSTRALIA
The Centre for Environmental and Recreation Management

SESSIONS

Background Information
Since the late 1900s, focus groups have been very effective as market research tools and have been used extensively in evaluating qualitative aspects of products or services (e.g. the taste of a new soft drink to consumers). As a result, they have been useful in providing information which might not have otherwise been found through other methods. Focus groups are quite different from a group interview or a series of interviews, in that they are an entity in their own right, with the discussions raised having the ability to vary considerably from one focus group to the next. This feature involves unique dynamics and interactions between specific groups (Patton 2002).

Fontana and Frey (2004) summed up the advantages of the focus group style of qualitative methodology as being relatively inexpensive and flexible, stimulating participants to respond to the questions, while providing a rich base of data to examine on completion. As Patton (2002) asserts, the group interaction of the focus group process can often deliver more and richer information than individual interviews with the same participants. Moreover, qualitative focus groups seek a saturation of information about a particular sample, which may then be transferred to understand and possibly generalise about another or larger group. This factor makes focus groups particularly attractive and useful, enabling a diverse response from a larger group in a relatively short time-frame. However, focus groups do need effective organisation and adequate timing to properly prepare, contact and follow-up.

In keeping with Total Quality Management principles advocating a customer focus and employee involvement, CERM PIP@ projects have generally insisted upon the inclusion of customers, differing levels of managers and staff in the development process. The methodology of conducting focus group discussions with customers and personnel has yielded a unique body of information while supporting TQM principles. For example, the original customer service quality attributes for the sports and leisure centre project were obtained from customers via a series of focus group sessions throughout Australia. In the 1999 development of operational management performance indicators for outdoor centres (residential), managers and staff were the first ‘port of call’ for information and the focus group was considered the most appropriate research method.

Before the Focus Group Sessions
Involving and recruiting people for focus groups can be a useful mechanism in generating interest and creating a healthy awareness of a research project. Before commencing the session the moderator may need to consider:

- Promoting the project to caravan and tourist park management and staff. This could be as simple as asking the site manager to mention the project at the next staff meeting. Generally, this type of action allows staff to feel that they have some ownership in the project and will encourage them to actively participate during their focus group session (refer staff PowerPoint slides issued January 2003).

- Discuss with management and staff the most appropriate way to recruit customers to participate in the ‘customer’ focus group session (refer PowerPoint slides issued January 2003) and the key market segments that are applicable to that site. Issue an invitation to visitors to the site according to the recommended recruitment method – advise visitors of the reason for the session, the venue, date and time of the session and if there is an incentive to attend (e.g. drinks and nibbles at the conclusion of the session).

- Reserve an area onsite for the session to be conducted. Organise pens/permanent markers, sufficient (100 plus) cardboard system cards (15cm x 10cm) and a whiteboard or pin-board. The latter are used to review all responses to a particular question in the session; ‘Blu Tack’ will be required for a whiteboard and pins for a
pin-board. Organise suitable tables and chairs in a horse-shoe shape so that visitors are facing a projection screen’

• Organise refreshments to be served at the conclusion of the session’

• Determine who will be the moderator for the session and if an assistant is required and available. The latter can take notes etc. during the session.

The Focus Group Session

The overall objective of the focus group sessions for this project is to elicit information from managers, staff and customers on the development of operational management (staff) and service quality (customers) performance indicators for the caravan and tourist park industry.

The number of participants targeted for each focus group session will generally be between 8-15 people aged over 15. Ideally the session will contain a representative demographic mix of participants, however, in reality this project will need to rely upon a sample of convenience for these sessions. During the session:

• It may be useful for the assistant to ‘profile’ (e.g. gender, approx. age, market segment) the respondents using observation and to make a note of this profile.

• The moderator should invite the participants to sit at a table and chair facing the projection screen and provide each with a supply of system cards and pens/markers.

• Cardboard name plates can also placed at each seat and table around the room, enabling participants to write their names if they so desire – this enables the moderator to address the participant by their first name if questions arise during the session.

• The moderator should begin the session by explaining to participants the background and intent of the research and the format of the focus group session.

• The moderator begins the ‘active’ part of the session by projecting the first question onto a whiteboard (or screen) and asking participants to respond by writing one short statement or idea per system card.

• Beyond points of clarification, little or no discussion should be held during this process. The cards should be collected by the assistant and placed on a flat, vertical surface at the front of the group for all to see. The use of cards in this manner tells the ‘story’ of participants’ responses, hence the reason that this approach is called a ‘storyboard’. Respondents are given time to add new ideas or provide clarification after which time the cards are taken off the board and the next question introduced.

The Role of the Moderator

In addition to the points mentioned above the moderator’s role is to:

• Progressively introduce the participants to a series of open-ended questions which typically begin broadly and gradually become more specific.

• Ensure participants have sufficient time to write their responses to each question on system cards and that time is allocated to review, discuss and clarify responses to each question.

• Ensure the assistant takes notes during the whole session – use the respondent’s cards to add notes to clarify the responses and to aid interpretation later on.

• Conduct the session in a comfortable, non-threatening social environment and keep the group focused on the topic.

• Minimise the impact of ‘power differentials’ or ‘group think’ during the session and encourage the generation of new ideas whilst valuing the participants’ right to keep some issues confidential.

• Ensure the assistant collects and bundles the system cards for each question and includes any other notes that may relate to that question. At the end of the session the assistant should have one bundle of cards for each question which can then be sent to CERM PI for data entry and analysis. Note: Universities wishing to process their own data should type responses verbatim into a word document under the heading of the question that was asked, this document should be emailed to CERM PI for subsequent data coding and analysis.
Benchmarking Caravan and Tourist Park Operations

Protocol for conducting the Visitor Service Quality (VSQ) Survey

Visitors (aged 12 years and over) at Australian Caravan and Tourist Parks

The CERM PI Visitor Service Quality (VSQ) questionnaires have been developed as part of the CERM PI® Performance Indicators Project.

The CERM PI VSQ questionnaire collects information about the expectations that visitors have of certain aspects of service quality and how well their ‘expectations’ are being met by a facility or service provider. It has been structured so that further analysis can provide progressively more detail about a visitor base and their specific perceptions and needs.

The VSQ survey can serve as an integral part of a visitor service quality assurance program by being repeated each year and can provide the basis for visitor service quality tracking.

This protocol outlines the minimum standards for conducting the CERM PI VSQ survey.

Understanding Copyright & the Registered Trademark

The CERM PI® VSQ questionnaire is copyright to the CERM PI Performance Indicators Project and must not be used without written permission from CERM PI. Use of any information published or prepared by the CERM PI team must be referenced according to our trademark requirements i.e. ‘CERM PI® performance indicators are used in this report’.
VSQ Protocol

**The questionnaire**
The questionnaire was designed for easy completion and focuses on visitor service quality issues. University research staff will provide each site with multiple pre-printed copies of the questionnaire, letter and reply-paid envelope in a ‘survey package’ prior to the commencement of the survey. Should you require additional questionnaires during the survey period please contact your state representative:

- New South Wales – David Archer, University of Technology, Sydney (02) 9514 5145
- Queensland – Barry Bell, Griffith University (07) 3875 5615
- South Australia – Sue Mikilewicz at CERM PI® on (08) 8302 3344

**The sample of visitors**
The number of visitors included in the survey, as well as the method by which they are selected, is crucial to the success of the survey. In general, the larger the sample the more accurate the results will be. However, a well-chosen small sample can provide more accurate results than a poorly chosen large one and can also save time and money. CERM currently recommends a sample of 200-300 visitors per site.

Given that this project is in its infancy it is likely that the sample obtained from each site will be one of convenience. It is preferred, however, that all major visitor groupings are represented in the final sample. For example, visitors from the key market segments identified for this project (where relevant to the site involved) should be selected to be part of the overall sample.

*Note: Market segments for the purpose of the national project are: Family Holiday, Sun Chasers, Sport/events, DINKS, Grey Nomads.*

**Minimum sampling standards (refer also sample schedule)**
- One survey package per visitor (aged 12+) should be given the questionnaire upon their arrival at the park or at any other time during their stay that is deemed appropriate by the park’s survey coordinator. It is preferred that the questionnaire is completed close to the end of a visitor’s stay (visitors can take the survey package away with them and return it via the University of South Australia/CERM PI reply-paid envelope);
- All visitors from a range of different categories (i.e. different market segments, ages, gender, days of the week/months, camping types) should be invited to participate in the survey to ensure that there is a good cross-section of respondents;
- Participation in the survey is voluntary – visitors can refuse to be surveyed;
- Visitors must only be included in the survey once;
- The sampling should be conducted over all of the months allocated to the trial; and
- As a general guide a final sample of between 200 to 300 visitors is usually required.

**Conducting the survey**
Distribution and collection of the questionnaires is an important phase.
- Keep in mind that some visitors may respond better to a verbal explanation of how the questionnaire is to be completed (e.g. the difference between ‘expectations’ and ‘performance’ in section A).
- Every attempt should be made to ensure confidentiality of responses from visitors. A ‘closed’ (i.e. sealed) box or equivalent to receive completed questionnaires should be made available, and its location in the reception area promoted to visitors. Alternatively, visitors can use the reply-paid envelope to mail their questionnaire to UniSA/CERM PI direct.
- Some sites have found it useful to set aside an area (complete with tables, chairs and writing materials) where visitors can complete the questionnaire immediately before their departure.
- Don’t forget that caravan and tent users should be included in the survey; why not try approaching them to complete a questionnaire on one of your routine trips around the park.
- Visitors offering verbal feedback about the park should be encouraged to write their comments in the section C of the questionnaire.
- Visitors’ participation must always be voluntary.
After the Survey

- Post the completed CSQ questionnaires to CERM PI, University of South Australia, Mawson Lakes Boulevard, Mawson Lakes, SA, 5095, Attn: Sue Mikilewicz, Project Administrator. Note: CERM PI will provide each site with an Express Post bag for the return of the questionnaires.
- Promote the results of the CERM PI report to your staff. Staff can be encouraged by positive comments, problem areas can be discussed and future actions or strategies planned.
- Promote the results of the CERM PI report to your visitors; for example, use a range of promotional tools such as newsletters or posters. Acknowledge concerns that may have been raised in the survey and communicate future strategies, for example, minor repairs to buildings.

Analysis of Results

- In the first instance CERM PI provides:
  - A visitor profile based on frequencies of all items in the CERM PI® VSQ questionnaire;
  - A comparison of visitors’ expectations with their perception of service performance; and
  - Visitor levels of recommendation and problem resolutions.
- Further analysis might involve segmentation of the sample or cross-classification to identify major service quality problems or strengths (e.g. which group of visitors was most satisfied with the cleanliness of amenities).
- Written responses from section C will be summarised and linked to VSQ attributes if appropriate. Written responses often provide more micro level information to managers.

Tips for Caravan and Tourist Park Staff Involved with the Visitor Service Quality (VSQ) Survey

Before the Survey

- Consider promoting the survey to all staff a week or two before it is due to begin. Become familiar with the questionnaire and clarify any questions with the survey coordinator before commencing. Generally, this type of action before the survey encourages a higher response rate and good quality data as staff can offer informed advice to respondents should they be asked a question.
- Have a ready supply of pens and questionnaires and a box at the reception counter for visitors to put the completed surveys in (use the sheets supplied with your survey packages to label the box accordingly).
- You may like to reserve an area near reception for visitors to sit at if they want to complete the questionnaire at departure time.
- Contact the survey coordinator in your state (refer page 2 of protocol) to determine appropriate data collection strategies and to clarify any concerns.

During the Survey

- Timing is everything!!! Select an appropriate place and time to survey visitors. Suggested strategies include:
  o Survey visitors by leaving the questionnaire in their cabin;
  o Ask visitors to complete the questionnaire on the day of departure (e.g. provide tables and chairs near reception or put the questionnaire on a clipboard that can be easily handed to the visitor);
  o Approach visitors during routine checks of the park;
  o Ask groups of visitors who may have congregated around a particular area of the park, e.g. swimming pool or café;
  o Allow visitors the option to take the questionnaire away with them upon departure (they can use the reply-paid envelope in the survey package to UniSA/CERM PI direct).
- Include visitors from a range of different categories (e.g. different market segments, age groups, gender, days of the week, months) to ensure that a good cross-section are included in the final sample.
- Provide extra copies of the questionnaire for ‘groups’ – don’t forget that the questionnaire should be completed individually (i.e. not as a group or husband/wife response).
- Participation in the survey is voluntary – visitors can refuse to be surveyed.
• Visitors must only be included in the survey once.
• Should you see that visitors are experiencing problems completing the questionnaire (e.g. they are looking puzzled or are taking longer than expected), diplomatically offer your assistance.
• Visitors offering verbal feedback about the park should be encouraged to write their comments in section C of the questionnaire.

After the Survey
• Post the completed CSQ questionnaires to CERM PI, University of South Australia, Mawson Lakes Boulevard, Mawson Lakes, SA, 5095, Attn: Sue Mikilewicz, Project Administrator. Note: CERM PI will provide each site with an Express Post bag for the return of the questionnaires collected on-site.
• Promote the results of the CERM PI report to your staff. Staff can be encouraged by positive comments, problem areas can be discussed and future actions or strategies planned.
APPENDIX C: VISITOR SERVICE QUALITY QUESTIONNAIRE

What makes for great service at a Caravan or Tourist Park?

Dear Visitor,

The caravan and tourist park industry is always interested in providing the best holiday experiences for its visitors. As part of this goal, you are invited to help assess the service quality of XYZ Caravan Park.

The enclosed questionnaire should only take around 10 minutes to complete and your answers will be anonymous and confidential (no names are required on the questionnaire).

Please complete the questionnaire ‘individually’ rather than as a joint response; additional questionnaires are available from the park office. Once you have completed the questionnaire please place it in the envelope provided and return it to the sealed box in the park’s reception building. Alternatively, you may use the reply-paid envelope to mail the questionnaire directly to the researchers.

The survey is being conducted through the Centre for Environmental and Recreation Management, University of South Australia, who will combine all survey responses into a report that will be given to the management of this park to help them improve their service provision (no individual responses will be given to management). Information gathered in this research is part of a wider national study to assist the industry to improve its services and facilities.

Thank you in anticipation of your support, we trust you will have an enjoyable stay at XYZ Caravan Park.

The Research Team
University of Technology, Sydney
Griffith University, and
University of South Australia (CERM PI Performance Indicators Project)
Phone (08) 8302 3344

The project’s title is ‘Benchmarking Caravan and Tourist Park Operations’ and is a Cooperative Research Centre for Sustainable Tourism research project, conducted by Bruce Hayllar and David Archer (University of Technology, Sydney), Barry Bell (Griffith University) and Gary Crilley, Barry Couzner and Sue Mikilewicz (University of South Australia).
SECTION A: Your ratings of service quality at XYZ Caravan Park

For each statement please rate your **expectations** as a visitor to this park and then **performing** in relation to that same statement.

Please fill in **one** circle that best shows your level of agreement for each expectation and performance statement.

**Note:** For ‘Performance’, circle “Don’t Know” if the statement refers to an aspect of service that you have not experienced.

**Explanation and Example**

In the first example (below) you may have a moderate expectation that caravan and tourist parks provide adequate lighting and your experience in this park has shown that it has performed better than your expectation. Your response may look like the following in Example 1.

In the second example, you may have a stronger expectation that caravan and tourist parks provide suitable play areas for children but your experience in this park may have shown that it has not performed to your expectation in relation to this matter. Your response may look like the following in Example 2.

<table>
<thead>
<tr>
<th>Example</th>
<th>Expectation</th>
<th>Performance</th>
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<tr>
<td>1</td>
<td>The park has adequate lighting</td>
<td>![Circle Selections]</td>
</tr>
<tr>
<td>2</td>
<td>The park has suitable play areas for children</td>
<td>![Circle Selections]</td>
</tr>
</tbody>
</table>

| 1. The park is safe and secure for visitors, and their belongings | **Expectation** |
| 2. The park’s amenities are clean (e.g. showers, toilets, laundry) | **Expectation** |
| 3. The park’s grounds and buildings are well maintained | **Expectation** |
| 4. The park has a good range of recreational facilities (e.g. BBQ areas, pool, playground) | **Expectation** |
| 5. The park’s accommodation is comfortable and well maintained (e.g. cabins, onsite vans) | **Expectation** |
| 6. The park’s sites are well laid out (e.g. access, space) | **Expectation** |
| 7. The park’s staff are efficient (e.g. handling bookings, preparing accounts, providing relevant information about the park) | **Expectation** |
| 8. The park’s staff are friendly | **Expectation** |
| 9. Staff have a good knowledge of local attractions, facilities and services | **Expectation** |
| 10. The park’s staff put in extra effort to help me | **Expectation** |
| 11. The park is well managed (e.g. visitor noise or behaviour, traffic controlled) | **Expectation** |
| 12. The park provides suitable secondary services (e.g. kiosk/shop, tourist information) | **Expectation** |
| 13. The park’s facilities and services represent good value for money | **Expectation** |
SECTION B

We would like to know some details about you and your current visit to this park.
Please tick one box only for each question and provide information where requested.

1. Is your visit to this park part of a…? (Note: tick one box that best describes the nature of your visit)
   1 ☐ Holiday less than two weeks in duration (e.g. annual leave or weekend)
   2 ☐ Extended holiday/lifestyle holiday (i.e. two weeks or more)
   3 ☐ Special event (e.g. festival, conference, sporting, religious)
   4 ☐ Organised tour
   5 ☐ Overnight stay only (or ‘just passing through’)
   6 ☐ Other ____________________________________________ (Please list)

2. What accommodation did you use during your stay?
   1 ☐ Cabin with ensuite/bathroom
   2 ☐ Caravan/tent site with detached ensuite
   3 ☐ Tent site (unpowered)
   4 ☐ Caravan site/Campervan site
   5 ☐ Tent site (powered)
   6 ☐ Other __________ (Please list)

3. Was this your first visit to this park? 1 ☐ Yes 2 ☐ No

4. In the last two years how many caravan or tourist parks have you stayed in?
   1 ☐ One to three
   2 ☐ Four to six
   3 ☐ Seven to nine
   4 ☐ 10 or more

5. What is your home postcode? 
   International visitors, please state country of residence ____________________________

6. How many nights did you spend at this park? _____________________________ (number of nights)

7. On this visit, what month and year did you attend the park? ___ /___ (e.g. 09/03 for September 2003)

8. Which age group applies to you?
   1 ☐ 12-19
   2 ☐ 13-29
   3 ☐ 30-39
   4 ☐ 40-49
   5 ☐ 50-59
   6 ☐ 60-64
   7 ☐ 65-69
   8 ☐ 70-74
   9 ☐ 75 years and above

9. Are you…?
   1 ☐ Male
   2 ☐ Female (please complete the questionnaire individually)

10. Did you visit this park mainly…?
    1 ☐ alone
    2 ☐ with a spouse, partner or family member(s)
    3 ☐ with friend(s)
    4 ☐ with a group
    5 ☐ Other __________ (Please list)

11. From the list below, please indicate (by placing the appropriate numbers in the boxes below) your top 3 reasons in order of preference for choosing to stay at this park?
    1 = Member of well-known park group
    2 = Previous visit to park
    3 = Park guide book; please list publication __________________
    4 = ‘Word of mouth’/recommended by others
    5 = Star Rating
    6 = Accredited park
    7 = Location
    8 = Other ________ (please list)
SECTION C

Please tick one box for each question and provide information where requested.

1. To what extent would you recommend this park to others?

- [ ] Strongly Not Recommend
- [ ] Not Recommend
- [ ] Undecided
- [ ] Recommend
- [ ] Strongly Recommend

2. Do you intend to visit this park again?

- [ ] Definitely Not
- [ ] Probably Not
- [ ] Undecided
- [ ] Yes, Probably
- [ ] Yes Definitely

3. Have you experienced any problem(s) with any facility or service provided by this park? (E.g. something you may not have rated positively in section A)

1. [ ] Yes (Please list the problem(s) then answer question 4)
2. [ ] No (Please go to question 6)

4. Did you report the problem(s) to staff at the park?

1. [ ] Yes (Please complete question 5)
2. [ ] No (Please go to question 6)

5. Was the problem(s) resolved to your satisfaction?

1. [ ] Yes 2. [ ] No 3. [ ] Don’t know

6. What aspects of the park did you particularly enjoy?

7. Overall, how satisfied are you as a visitor to this park?

- [ ] Very Dissatisfied
- [ ] Neither Satisfied nor Dissatisfied
- [ ] Very Satisfied

8. Any Other Comments…

Thank you for participating in the survey.
APPENDIX D: OPERATIONAL MANAGEMENT QUESTIONNAIRE

CARAVAN AND TOURIST PARK
CERM PI® Operational Management Questionnaire

Name of Caravan/Tourist Park:
Location Address:
Owner of Park:
Management Agent:

| Name of person completing questionnaire: ________________________________ |
| Position/Title: ______________________________________________________ |
| Telephone: ( ) ______________________ Facsimile: ( ) ______________________ |
| Email: ___________________________ Website: ______________________ |

This instrument has been developed in conjunction with industry representatives and with the assistance of on-site management and staff who attended focus groups conducted by University researchers during March to May 2003. Additional input from industry representatives during June to September 2003 has also been considered in the instrument’s development.

NOTES REGARDING CONFIDENTIALITY AND DATA HANDLING

- All data is collected, stored and analysed according to established University protocols.
- Confidentiality of data is guaranteed. Results are limited to owners and are only released publicly when non-identifying sets can be assured.

Should you have any concerns in submitting information to this project please discuss them with your state representative:

New South Wales  David Archer & Bruce Hayllar
University of Technology, Sydney
PO BOX 222 Lindfield New South Wales 2070
Phone 02 9514 5145 Fax 02 9514 5195
Email: david.archer@uts.edu.au

Queensland  Barry Bell
Griffith University (Mt Gravatt Campus)
Nathan QLD 4111
Phone 07 3875 5615 Fax 07 3875 5661
Email: b.bell@griffith.edu.au

SA/WA  Sue Mikilewicz
University of South Australia
Mawson Lakes Campus
Mawson Lakes Blvd
Mawson Lakes SA 5095
Phone 08 8302 3344 Fax 08 8302 5255
Email: sue.mikilewicz@unisa.edu.au
CARAVAN AND TOURIST PARKS
Operational Management Questionnaire

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INSTRUCTIONS FOR COMPLETING THE OPERATIONAL MANAGEMENT QUESTIONNAIRE

1. Please use 12-month figures from the financial year 01 July 2002 to 30 June 2003.

2. Please exclude GST – this should not be included in operational expenditure or revenue or any other figures provided in this questionnaire.

3. Please exclude income and expenditure related to ‘permanent’, ‘annual’ sites or stored caravans/trailers.

4. Where an estimate of the figure has been made please indicate ‘estimate’ in the box provided and an explanation as to why an exact measure could not be provided.

5. Note that this instrument represents the first draft of questions to collect data for the set of indicators outlined in Appendix A of this questionnaire – your responses and comments to this trial will enable the instrument to be improved prior to wider use by the industry.

6. Space has been provided in each page for you to type or write in your comments for each item. Please return your electronic file to the Project Administrator at sue.mikilewicz@unisa.edu.au or post a hard copy of your responses to your state representative (see above).
1. Description of Your Caravan/Tourist Park

Is your park located in a □ Capital City (e.g. Brisbane, Adelaide or part thereof)
□ Provincial City (e.g. XYZ, Townsville)
□ Rural Town (e.g. Kadina, Kiama)

Is your park situated on the coastline of Australia? □ Yes □ No

Please provide numbers for each category below (if not applicable please indicate by n/a). For the purposes of this study exclude any ‘permanent’, ‘annual’ sites or stored caravans/trailers.

Number of tourist cabins______________________________
Number of on-site caravans made available for tourist use______________________________
Number of powered sites with ensuite______________________________
Number of powered sites without ensuite______________________________
Number of unpowered sites______________________________
Number of ‘other’ sites (e.g. bunkhouse or backpacker accommodation ‘dorms’)
Note where the park has a facility such as a ‘bunkhouse’ or similar each room in the facility should be counted as one site hence a four bedroom bunkhouse, for example, would be recorded as four sites.

Notes
This information will be useful to begin the process of ‘grouping’ similar parks into categories that could assist the benchmarking process. The number of sites will also be used to determine the park’s site capacity.

Your Comments

2.(a) Visitor Nights

What was the total number of paying visitors counted on each night they stayed at your caravan/tourist park during the full year?

This is the number of people paying to stay overnight counted on each night they stayed at your caravan/tourist park during the full year (i.e. 365 days), not your best week multiplied by 52 or best month multiplied by 12.

Total Visitor Nights: __________________

Notes
Paying visitors are counted on each night they stayed at the caravan/tourist park.

Your Comments
2.(b) Sites Occupied

What was the total number of nights each site was occupied during the 12-month period?

<table>
<thead>
<tr>
<th>Total Sites Occupied:</th>
</tr>
</thead>
</table>

**Notes:** Sites available to tourists only and include powered, unpowered, cabins, caravan and tents. Where the park has a facility such as a ‘bunkhouse’ or similar each room in the facility should be counted as one site hence a four bedroom bunkhouse, for example, would be recorded as four sites.

- **Exclude:** As per instructions on page 2 ‘permanents’ and ‘annuals’.

Your Comments

2.(c) Cabin Nights Occupied

What was the total number of nights each cabin was occupied during the 12-month period?

<table>
<thead>
<tr>
<th>Total Cabin Nights:</th>
</tr>
</thead>
</table>

**Notes:** Cabins available to tourists only

- **Exclude:** As per instructions on page 2 ‘permanents’ and ‘annuals’.

Your Comments

3. Secondary Services Takings

What was the sum of the year’s takings by secondary services such as kiosk, vending machines, amusement machines, washing machine fees, the sale of merchandise, recycling, coin operated BBQs etc, **regardless of whether or not** these services were operated by you or a lessee/supplier?

| Secondary Services Takings: $ |
3. (a) Alternative Takings Option

Facilities and Services Takings

What was the sum of the year’s takings by on-site facilities and services such as vending machines, amusement machines, washing machine, BBQ fees etc, regardless of whether or not these facilities were provided by you or a lessee/supplier?

Facilities and Services Takings: $___________________

Notes:

Include: Takings by your laundry machines, vending machines, amusement machines, BBQ’s, public telephone will largely, if not entirely, make up this figure.

Exclude: For the purpose of this question exclude secondary takings from kiosk, café or food or fuel outlets operated, or leased out, by your park.

Please note, where a vending machines (or similar) are rented, this sum is the gross amount/s taken by the lessee/hirer, not your lease/hire fee or share of proceeds.

Your Comments

3. (b) Site Takings

What was your total income from each type of site for the 12-month period?

This figure is the revenue derived from your each site category for the financial year ended 30th June 2003.

Cabin Takings: $___________
Caravan Site Takings: $_________
Powered (no ensuite) Site Takings: $_______
Powered (with ensuite) Site Takings: $_______
Unpowered Site Takings: $_________

Notes:

Include: This is the total gross amount spent during the year by all persons visiting your park after they paid for their accommodation. It is the total of your visitors’ secondary or discretionary spend, including any people who visit your park from any other area. Takings by your kiosk, vending machines, amusement machines, BBQs, the sale of any merchandise, recycling proceeds etc will largely, if not entirely, make up this figure.

Exclude:

Please note, where a kiosk or vending machines (or similar) are rented, this sum is the gross amount/s taken by the lessee/hirer, not your lease/hire fee or share of proceeds.

Your Comments
3.(c) Total Operational Income

What was your total income for the year?
This figure is the ‘turnover’ or the total amount received from all sources (refer exclusions below) before the deduction of any expenses whatsoever.

Total Operational Income:
$____________

Notes:
Include:
- All income from all tourist accommodation areas e.g. cabins, powered and unpowered sites
- Your share of receipts and/or your hire fee for any hired vending, amusement or other machines
- Interest earned

Exclude:
- Income received/collected for ‘annual’ sites, ‘permanent’ sites or annual storage of vans
- Capital grant funds or loans for capital improvements
- Income from kiosk/café or fuel operations (or similar) – note that there is a large degree of variation across sites in relation to this issue so for the purpose of this study all secondary takings should be excluded
- Tour sales commissions and other related income

Your Comments

4. Costs

4.(a) Labour Cost

What was your total labour cost for the year?

Labour Cost:
$____________
Notes:

Include:
- Total labour costs (i.e. salary and wages, PLUS on-costs (refer note below*)) for all aspects of the park (e.g. domestic labour, contract management, casual staff) irrespective of who manages/owns the park.
- The cost of any significant supervision or management support (e.g. planning, liaison, marketing, purchasing, administration, secretarial or book-keeping services) presently being provided by the owner or an agency (that if the park were to operate independently, would require the employment of additional full-time, part-time or casual staff).

*On-costs
On-costs include payroll tax, fringe benefits tax, annual leave, long service leave, sick leave, superannuation, workers compensation insurance, salary continuance insurance, supply of a motor vehicle (or portion thereof), staff training and any other like costs incurred as a result of employment.

Your Comments

4.(b) Energy Cost

What was the total energy (e.g. electricity/gas/oil/solar) costs for your park last year?

Energy Cost:

$___________

Notes:
Care should be taken to ensure that all energy bills coincide with the year under review.

Include:
Any energy costs that may be incurred and paid directly by lessees of the park.

Exclude:
Any water utility costs (as these are included in 4(c) ‘Water Cost’)

Your Comments

4 (c) Water Cost

What was the total cost of all mains water used by your park during the year?

Water Cost:

$___________
4.(d) Cleaning Costs

What was the total cost of all routine cleaning for your park during the year?

Cleaning Costs: $_________________

Include:
- Cost of mains water used by the park.
- Cost of watering and irrigating grass and garden beds.
- Water used for all amenities (e.g. toilets/shower/pools/cabins).

Exclude:
- Any water treatment/storage or water maintenance costs (these should be included in 4(e) ‘routine maintenance cost’).
- Sewerage costs.
- Costs associated with non-mains water supplies (e.g. rainwater tank maintenance).

Your Comments

4.(e) Routine Maintenance Costs

What was the total cost of all routine maintenance for your park during the year?

Routine Maintenance Costs: $_________________

Include:
- The total cost of all routine cleaning labour, on-costs* (refer note in 4a), materials and contract work.
- Cleaning associated with the whole park e.g. cabins, ensuite sites, amenity blocks, common areas.

Exclude:
- Cleaning of swimming pools or spas (see 4e ‘Routine Maintenance Costs’ below).

Your Comments
4.(f) Cabin Cleaning and Maintenance Costs

What was the total cost of routine cleaning and maintenance for all cabins at your site during the year?

Cabin Cleaning and Maintenance Costs:
$_________________

Include:
- The cost of routine repairs and maintenance labour (e.g. fixing broken locks, replacing a tap washer, garden maintenance), on-costs, materials and contract work.
- Cost of any water treatment/storage and/or maintenance of water or irrigation systems.
- Cleaning of swimming pools or spas.

Exclude:
- Capital refurbishment, replacements or improvements, or any provisions for these items, e.g. amenities block refurbishment every three or so years.
- Repair or maintenance expenses of motor vehicles.

Your Comments

4.(g) Promotion & Market Research Costs

What was the total cost of any promotion and market research for your park for the year?

Promotion & Market Research Cost:
$____________

Include:
- Expenses associated with cleaning and maintenance of cabins to maintain normal business operations (e.g. cleaners, contract work such as plumber, general maintenance, materials associated with all works).
- Linen hiring and laundry costs.

Exclude:
- Capital refurbishment, replacements or improvements, or any provisions for these items.

Your Comments
Include:
• The amount spent on advertising, fliers, displays, signs, entertainment, give-aways, special staff assignments, free tickets, direct marketing etc., during the year.
• Costs for any of the above items which may have been allocated to account codes such as printing and stationery, petty cash, telephone, postage etc.
• The cost of staff members’ time where they have been assigned to promotional campaigns or market research for extended periods.
• The cost associated with providing ‘discounts’ or ‘special offers’ to visitors.

Your Comments

4.(h) Total Operational Expenditure

What was the total expenditure for the year? This is the sum of all costs related to the day-to-day operations of the park for the year incurred by you and any costs that may be incurred and paid directly by lessees of the park.

Total expenditure is the amount you deduct from your Total Income (see question 3(c)) to determine your operating surplus or (deficit) for the year. Please note the following inclusions/exclusions.

Total Operational Expenditure:
$_______________

Include
• Accounting, auditing and payroll services.
• Supervision, telephone, copying and secretarial assistance.
• Salaries, wages, training and development, on-costs and fringe benefits.
• Contract, security staff and support services (e.g. external trades persons).
• Advertising, marketing and promotions.
• Insurance, rates and taxes.
• Energy, utilities, cleaning, repairs, routine maintenance and water costs.
• Travel, motor vehicle, accommodation, minor plant, furniture.

Exclude (for the purpose of this study):
• Loan servicing (principal and interest) and any lease fee or rent paid to the owner.
• The cost of goods sold if you directly operate a kiosk, cafe, etc.
• Provisions for equipment replacement, building refurbishment, or major replacement items (e.g. capital work costs).
• Depreciation of buildings or equipment.

Your Comments
5. Optional Section

The following requests for information have been suggested by some industry collaborators. The researchers have included these questions under this optional section to gauge the response from individual sites. In some cases you may find the questions irrelevant to your site; in this case they can be missed. Keep in mind that reporting from this questionnaire will be dependant upon each site completing as many questions as possible. A comments box has also been provided in this section to enable respondents to explain their calculations. If you are unable to provide information as requested please tell us why in the comments box. Note that in some instances your computerised booking system may be a useful reference.

5.(a) Water Consumption

What was the total number of Kilolitres (KL) of water used by your park during the year?

<table>
<thead>
<tr>
<th>Water Consumption</th>
<th>KL</th>
</tr>
</thead>
</table>

**Include:**
- Water from mains supply only.

**Exclude:**
- Water supplied from any other source e.g. rainwater.

Your Comments

5.(b) Energy Consumption

What was the total number of Kilowatts (kW) of electricity used by your park during the year?

<table>
<thead>
<tr>
<th>Energy Consumption</th>
<th>kW</th>
</tr>
</thead>
</table>

**Include:**
- Electricity from mains supply only.

**Exclude:**
- Electricity supplied from any other source.
- Any other power generation.

Your Comments
5.(c) Number of Departures

What was the total number of departures recorded by your park during the year?

Number of Departures

Note: This figure would gauge the total number of visitor groups using your park during the year.

Your Comments

5.(d) Number of Repeat Visitors

What was the total number of repeat visitors recorded by your park during the year?

Number of Repeat Visitors

Your Comments

5.(e) Repeat Business Income

What was your repeat business income for the year?
This figure is the amount received from repeat visitors only.

Repeat Business Income:

$____________

Include:
All repeat business income from all tourist accommodation areas e.g. cabins, powered and unpowered sites.

Exclude:
• Income received/collected for ‘annual’ sites, ‘permanent’ sites or annual storage of vans.
• Income from kiosk/café or fuel operations (or similar).

Your Comments
5.(f) Total Regulatory Costs

What was the total cost of any regulatory costs for your park for the year?

Total Regulatory Costs:
$______________

Include:
• License fees, registration fees, insurances etc.
• Please provide explanation of inclusions in comments section below.

Your Comments

5.(g) Average Total Assets

What was the worth of the average assets ‘employed’ by the park during the period?

Average Total Assets:
$______________

Note: To some degree this figure may have to be estimated but for many sites it would include buildings, machinery, plant and equipment. Your end of year Balance Sheet may be a useful reference in responding to this question. Please provide explanation of inclusions in comments section below.

Your Comments

5.(h) Tour Sales

What was the sum of the year’s takings from tour sales services regardless of whether or not these services were operated by you or a lessee/supplier? Please see inclusions below

Tour Sales Income:
$______________

Include:
• Income from the sale of tours directly conducted by your park.
• Tour sales commission received by your park from an external supplier.

Your Comments
5.(i) Sewerage Cost

What was the total cost of sewerage treatment by your park during the year?

<table>
<thead>
<tr>
<th>Sewerage Cost:</th>
</tr>
</thead>
<tbody>
<tr>
<td>$____________</td>
</tr>
</tbody>
</table>

**Include:**
- Cost of sewerage disposal to common or mains effluent.
- Cost of on-site sewerage treatment (e.g. septic).
- Regular maintenance of sewerage treatment machinery or equipment.

**Your Comments**
APPENDIX E: OPERATIONAL MANAGEMENT PERFORMANCE INDICATORS

Operational Management Performance Indicators – Some suggestions for Caravan and Tourist Parks

Please note that the following table of performance indicators are examples only at this stage of the project and their inclusion and calculation may be altered as a result of industry feedback. In the trial of indicators, the project team would provide the industry with a guidelines booklet containing definitions for the raw figures required (i.e. industry clients would not be required to calculate the indicator). Please do not hesitate to suggest an alternative/additional indicator or calculation.

<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>CALCULATION (based upon Focus Group results and suggestions as at May to June 2003)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense recovery</td>
<td>Gross revenue/gross expenditure x 100</td>
</tr>
<tr>
<td>Site occupancy (cabin, powered / unpowered campsite, caravan sites)</td>
<td>[Sites occupied/(capacity x 365 days)] x 100</td>
</tr>
<tr>
<td>Secondary services income share</td>
<td>Secondary services takings/gross income x 100</td>
</tr>
<tr>
<td><strong>Alternative calculation</strong></td>
<td></td>
</tr>
<tr>
<td>Secondary services per visitor night</td>
<td>Secondary services takings/total visitor nights</td>
</tr>
<tr>
<td>Cabin income share</td>
<td>(Cabin takings/gross income) x 100</td>
</tr>
<tr>
<td>Powered site (no ensuite) income share</td>
<td>(Powered site takings/gross income) x 100</td>
</tr>
<tr>
<td>Ensuite (powered) site income share</td>
<td>(Ensute site takings/gross income) x 100</td>
</tr>
<tr>
<td>Un-powered site income share</td>
<td>(Un-powered site takings/gross income) x 100</td>
</tr>
<tr>
<td>Cleaning cost share</td>
<td>(Cleaning costs/gross expenditure) x 100</td>
</tr>
<tr>
<td>Maintenance (routine) cost share</td>
<td>(Routine maintenance cost share/gross expenditure) x 100</td>
</tr>
<tr>
<td>Note: does not include major maintenance or capital works</td>
<td></td>
</tr>
<tr>
<td>Cabin cleaning costs</td>
<td>Cabin cleaning costs/total cabin nights occupied</td>
</tr>
<tr>
<td>Energy (e.g. gas, electricity) cost share</td>
<td>(Energy costs/gross expenditure) x 100</td>
</tr>
<tr>
<td>Water cost share</td>
<td>(Water costs/gross expenditure) x 100</td>
</tr>
<tr>
<td>Promontional (marketing) cost share</td>
<td>(Promotional costs/gross expenditure) x 100</td>
</tr>
<tr>
<td>Labour cost share</td>
<td>(Labour costs/gross expenditure) x 100</td>
</tr>
<tr>
<td><strong>Alternative labour indicators</strong></td>
<td></td>
</tr>
<tr>
<td>Labour cost to gross revenue</td>
<td>(Labour costs/gross revenue) x 100</td>
</tr>
<tr>
<td>Labour cost per visitor night</td>
<td>Labour costs/total visitor nights</td>
</tr>
</tbody>
</table>
Other suggestions – no allowance in collection instrument as at June 2003

<table>
<thead>
<tr>
<th>Calculation Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alternative calculation to water cost share</strong></td>
<td>Water consumption per visitor night = Water kL per annum used by park/total visitor nights</td>
</tr>
<tr>
<td><strong>Alternative calculation to energy cost share</strong></td>
<td>Energy consumption per visitor night = Electricity kW per annum used by park/total visitor nights</td>
</tr>
<tr>
<td>Cabin clean and cabin maintenance revenue share</td>
<td>[(Cabin cleaning cost + Cabin maintenance costs)/Total cabin income] x 100</td>
</tr>
<tr>
<td><strong>Alternative calculation</strong> Cabin income share</td>
<td>(Cabin takings/Net income) x 100</td>
</tr>
<tr>
<td>Cleaning costs per number of departures</td>
<td>Cleaning costs/number of departures</td>
</tr>
<tr>
<td>Repeat visitor rate</td>
<td>Repeat visitor numbers/total number of visits per annum <strong>Note:</strong> the VSQ questionnaire includes a question on ‘first visit to park’ so we will obtain some idea of ‘repeat visitors’ from the results of this question.</td>
</tr>
<tr>
<td>Repeat business revenue</td>
<td>(Repeat business revenue/gross revenue) x 100</td>
</tr>
<tr>
<td>Regulatory cost share (e.g. licenses, registrations, annual fees, insurances)</td>
<td>(Total regulatory costs/gross expenditure) x 100</td>
</tr>
<tr>
<td>Asset turnover ratio</td>
<td>(Gross revenue/ Average total assets) x 100 <strong>Note:</strong> this ratio measures the effectiveness with which all assets have been employed by assessing the number of sales dollars generated for each dollar of average assets employed during the period</td>
</tr>
<tr>
<td>Rate of return on total assets</td>
<td>(Operating profit before tax/) x 100 <strong>Note:</strong> It is general accounting practice to use pre-tax profit figures and to average total assets from the current and previous financial years.</td>
</tr>
<tr>
<td>Site occupancy indicator split between:</td>
<td></td>
</tr>
<tr>
<td>Cabin occupancy</td>
<td></td>
</tr>
<tr>
<td>All other site occupancy (i.e. excluding cabin)</td>
<td></td>
</tr>
<tr>
<td>Promotional (marketing) income share</td>
<td>(Promotional costs/gross revenue) x 100</td>
</tr>
</tbody>
</table>
REFERENCES


AUTHORS

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The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program. STCRC is the world’s leading scientific institution delivering research to support the sustainability of travel and tourism - one of the world’s largest and fastest growing industries.

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