PLANNING
& ENVIRONMENT

Caravan and motorhome market plan

Tasmania

February 2025

Acknowledgement of Country

ERA Planning and Environment acknowledges palawa as the Traditional Owners of lutruwita (Tasmania).

They are the original custodians of our land, sky and waters. We respect their unique ability to care for country and deep spiritual connection to it.

We honour and pay our respect to Elders past and present, whose knowledge and wisdom has and will ensure the continuation of culture and traditional practices.

We acknowledge that their sovereignty has never been ceded.

Always was, always will be.

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Cover page image: Matt Stags

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Glossary

Acronym	Definition
CIAA	Caravan Industry Association of Australia
DST	Destination Southern Tasmania
ECT	East Coast Tourism
LGA	Local Government Area
PWS	Tasmania Parks and Wildlife Service
RTO	Regional tourism organisation
RV	recreational vehicle
SOT	Spirit of Tasmania
VNT	Visit Northern Tasmania
WxNW	West by North West

Stanley Cabin and Tourist Park
Source: Tourism Tasmania & Rob Burnett

Gardiner Point
Source: Rob Burnett

Executive summary

This is a plan to respond to the projected growth in visitation to Tasmania arising from increased capacity on the new Spirit of Tasmania (SOT) ships.

It focuses on the caravan and motorhome market segment including the anticipated growth in the motorhome hire market and Tasmanians travelling around the state.

This plan brings together research and data, consultation with industry, government agencies, local councils and other stakeholders. It provides recommendations in relation to destination planning, investment and management actions to respond to this forecast growth in a manner aligned with the 2030 Visitor Economy Strategy.

Recommendations

A range of recommendations are made across accommodation, infrastructure, marketing and policy areas at the state and regional level (see section 5 for more detail). Of these, 13 are identified as high priority based on their level of impact in effectively and sustainably managing this market, including the increase in visitors.

Statewide (high priority)

1. Progress PWS priority infrastructure projects supporting regional dispersal of visitors arriving on the SOT and particularly the caravan and RV market.
2. Incorporate consideration of caravan and motorhome needs into road corridor strategies and align this with funding support for road projects aimed at supporting the visitor economy, specifically those related to the Tasman, Huon and Arthur highways and Devonport to Cradle Mountain corridor.
3. PWS to develop and implement a statewide campground classification, camping fee model, and booking system for all PWS-managed facilities.
4. Continue to progress existing PWS priority projects that will provide for additional accommodation and amenities.

Regional (high priority)

5. Support development of the Campbell Town Tourist Park to connect experiences in the northern and southern regions.
6. Support development of the 'Tarkine Experience Hub' (formerly Dismal Swamp) to meet the needs of the caravan and motorhome market.
7. Progress the creation of a new camping area and facilities at Wynyard (Showground).
8. Prepare a Traffic and Parking Management Plan for Penguin, Bicheno and St Helens; the plan should identify seasonal or pilot interventions to address short-term congestion.
9. Validate the opportunity to create a new camping area at Triabunna (Esplanade East). The site has potential to accommodate 50 spaces with amenities, leveraging off the popularity of Maria Island National Park and supporting dispersal away from Freycinet National Park.
10. Ensure road corridor strategies and associated funding for the Tasman Highway and other east coast roads with high volumes of tourist traffic consider driver safety and awareness and the needs of caravan and motorhome users.
11. Establish public dump points at Scamander and Coles Bay.
12. Progress the Bay of Fires Master Plan.
13. Support progression of negotiations between MONA and TasWater about infrastructure upgrades for the MONA caravan park concept 'MOAB'.

1. Introduction

Project purpose

On behalf of the T21 partnership, Tourism Tasmania has led a research and planning project that responds to the projected capacity of the new Spirit of Tasmania ships and the anticipated increase in interstate caravanning and motorhome visitors to Tasmania. The project also considered the forecast increase in visitation across the state through the hire motorhome market.

This plan is an outcome of that research. It recommends policy and settings for visitation management, and investment priorities for infrastructure and services, that align with the goals of the 2030 Visitor Economy Strategy. In particular, it considers visitor contribution, Tasmanian community values, our environment and the visitor experience.

Project methodology

The preparation of this plan builds on market research done in August 2022. This used available data sources in assessing the demand potential of the caravan and motorhome market and mapping existing infrastructure and services statewide.

A Reference Group was established to provide guidance on project priorities and expertise on regional and departmental matters relevant to the caravan and motorhome market in Tasmania. The Reference Group consists of representatives from Tourism Tasmania, Tasmania Parks and Wildlife Service (PWS), the Department of State Growth (DSG), and the four regional tourism organisations (RTOs), being Destination Southern Tasmania (DST), East Coast Tourism (ECT), Visit Northern Tasmania (VNT), and West by North West (WxNW).

A series of in-depth one-on-one interviews with key stakeholders was undertaken to ascertain place-based pressures, community sentiment, industry trends and priorities for government investment. Interviewees included:

- CEOs of the four RTOs
- Key personnel within state agencies, including Tourism Tasmania, PWS, and DSG
- Local government representatives from councils across Tasmania
- Commercial caravan park operators, digital platform operators, and vehicle hire companies with a presence in Tasmania.

Project stakeholders

4 Regional tourism organisations

4 State agencies

11 Local councils

4 Hire companies

5 Commercial operators

3 Digital platform operators

4 Industry key stakeholders

2. Outlook for growth

Growth and demand

Spirit of Tasmania

The SOT is the key access provider for the caravan and motorhome market coming to Tasmania. The recent shift of its dock from the Port of Melbourne to the Corio Quay in Geelong has improved access for the market, removing the barrier of CBD traffic for those towing larger vehicles.

The new ships will increase total passenger capacity from 1,400 to 1,800 and provide more cabins and seats. The new ships provide for 4098 vehicle lane metres that are flexible in accommodating passenger and freight vehicles, with extra height to fit caravans and motorhomes.

BDA Marketing Planning (BDA) used data from the Tasmania Visitor Survey overlaid with SOT passenger figures from TT-Line to do market research and analysis. Through modelling, BDA projects that the new ships can deliver up to 7,000 additional caravan and motorhome travellers annually due to the new ships alone.

BDA also undertook an awareness and intention exercise and found that significant latent demand exists within the interstate caravan and motorhome market that has strong conversion potential. BDA predicts up to 17,000 additional caravan and motorhome travellers annually, based on the new ships capacity and assuming the conversion of latent demand.

Motorhome hire market

A level of flexibility underpins the motorhome hire market, with providers shifting their fleet between states as peak tourism periods respond to the seasons.

In Tasmania, motorhome hire fleets are at their minimum during winter. To address seasonal demand, larger fleet movements to Tasmania typically begin in October, peak in January, and then return to the mainland by April.

Operators in Tasmania are currently rebuilding their fleets post-Covid. While targeted growth in Tasmania is not a priority for operators, the national growth of fleets will flow on to Tasmania through the seasonal movements described above.

Market performance

Australia

According to the Caravan Industry Association of Australia (CIAA) 2023 'State of the Industry' report, domestic caravans and campers took over 15 million trips during 2022 and spent over $10 billion in the nation's local economies (a 42% increase on 2021)[1]. This made the caravan and camping sector the second-largest provider of holiday accommodation, and the largest in regional areas.

This demand for caravan and camping travel resulted in record-breaking local production, with over 28,000 recreational vehicles being manufactured in Australia in 2022[1]. These record numbers are indicative of two key trends within this market: continued growth in the family demographic who have boosted intrastate travel, and the return of long-haul travel, including 'big laps' of Australia[1].

Tasmania

CIAA's 2023 'State of the Industry' report indicated strong performance from the caravan and camping sector in Tasmania throughout 2022, with the state recording 1.6 million visitor nights across over 400,000 trips. Intrastate caravan and camping travellers accounted for 63% of trips and 47% of nights in Tasmania, comparable with pre-pandemic figures[2].

Throughout 2022 caravan and camping visitors to Tasmania spent an average of $683 per trip (+37% to 2021) and $167 per night (+18% to 2021), with caravan parks recording a total of $61 million in revenue - a 26% increase to 2021[2].

Seasonality impacted occupancy levels during the winter months with powered campsites reaching 20% occupancy in August. Conversely, powered campsites achieved the highest monthly occupancy rate in the country throughout February at 84%. Cabins contributed to 77% of total caravan park revenue, while powered and unpowered sites contributed the remaining 23%[2].

In terms of per capita rates, Tasmanians have the highest rate of campervan, motorhome, and caravan registrations at 25,415 registrations (or 44.41 vehicles per 1,000 residents). This is a 4% increase from January 2021, and held a 3% market share, up 1 percentage point from the previous year.[3]

Market trends and profile

The caravan and motorhome market is diverse, has embraced technology, and is discerning in terms of what a destination can offer. Market uplift during Covid-related border closures has created a more informed, engaged and sophisticated market, driven by a number of established and emerging market trends. These are explored in Appendix A, and include the following:

Accommodation

The market values having a diverse range of accommodation options to access throughout their trip. This includes off-grid and remote stays, places that are pet-friendly, and those that provide activities suited to young families as well as seasonal facilities that caters to inclement weather.

Infrastructure

Caravan and motorhome travellers require specific infrastructure and facilities to ensure a safe, comfortable, and enjoyable experience while on the road. These include water supply, amenities, and a safe and navigable road network.

Communications

The caravan and motorhome market is highly engaged, and active in the digital information sharing and social media space. Trip planning and research is a key phase in the visitor journey, as is the ability to stay connected while on the road, even in remote areas.

[1] *CIAA (2023). State of the Industry Report 2023, p.6*
[2] *CIAA (2023). State of the Industry Report 2023, p.46-47*
[3] *CIAA (2023). State of the Industry Report 2023, p.18*


The Gardens, Bay of Fires Conservation Area
Source: Emilie Ristevski

Current supply and capacity

The audit and analysis of existing infrastructure and services for the caravan and motorhome market undertaken in 2022 revealed the following.

West coast and north west:

- The west coast has the largest number of caravan parks compared to other regions and a good spread of powered sites, except around Kentish, Latrobe and Burnie where powered sites are limited.
- Around two-thirds of campgrounds are located in the Circular Head, Waratah Wynyard and West Coast local government areas (LGAs).
- There is good availability of dump points across the region.

Northern Tasmania:

- Most caravan parks are located in the West Tamar and Meander Valley LGAs.
- There are a wide range of campgrounds including some sites suitable for larger vehicles across Dorset, Meander Valley and Northern Midlands LGAs.
- Each LGA has a dump point, and Dorset LGA has two.
- There is limited accommodation provision (caravan parks or campgrounds) in Launceston.

East coast:

- This region has the most limited supply of accommodation options and dump points.

Southern Tasmania:

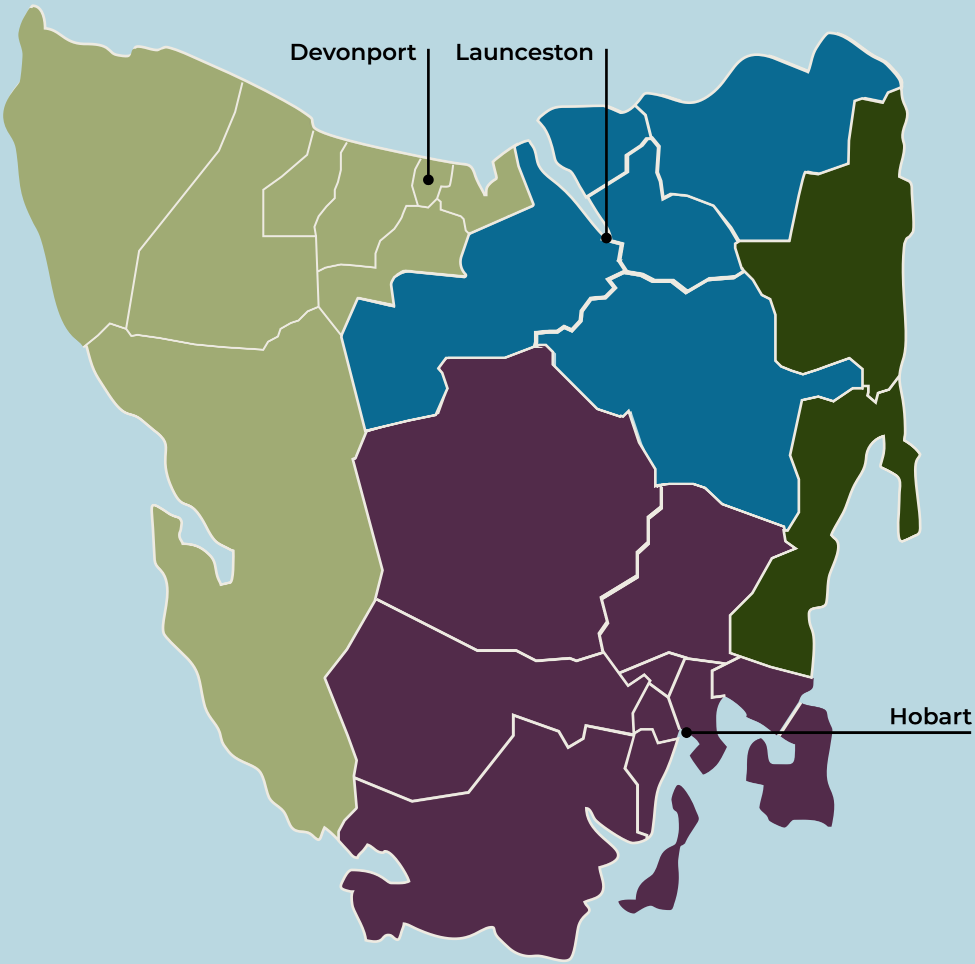
- There are limited accommodation options around Greater Hobart and accommodation gaps in the far south and in areas forming part of the Heartlands drive journey and Western Wilds drive journey.
- There are five LGAs (Brighton, Glenorchy, Hobart, Sorell and Southern Midlands) that have no formal accommodation options for caravans and motorhomes. There are some informal arrangements for self-contained vehicles in isolated locations.
- Hydro Tasmania facilitates a small number of informal campgrounds in the Central Highlands, and some towards the west coast. Some of these sites are located in remote areas, with unsealed road conditions not suitable for larger towing vehicles. It is understood that in the next 18-24 months, Hydro Tasmania will commence a strategic exercise to prepare a holistic visitor experience plan around its assets that also considers accommodation requirements for staff working on infrastructure projects, particularly in the Central Highlands.

State-wide

- Across the state there are over 400 campgrounds with a total capacity of approximately 6,000 sites. Many of these are managed by PWS and are in the Tasmanian reserve estate. There is no complete dataset as to how many of these sites can accommodate caravans and motorhomes, although it is expected the majority will not be suitable for large vehicles. It is important to note that many PWS campgrounds are tent camping only, and it is important that any upgrades to prepare for additional caravan and motorhome visitation does not displace traditional tent and car campers.

Note: *King Island and Flinders Island did not form part of the audit on the basis that caravans and motorhomes are not a significant visitation type.*

Supply and capacity snapshot (as at 2022)



RTO	Caravan parks	Campgrounds	Public toilets	Public dump points
West coast and north west	29 · 879 powered · 382 unpowered	125 *(1,590 sites)*	232	24
Northern Tasmania	14 · 502 powered · 324 unpowered	95 *(1,035 sites)*	215	7
East Coast	10 · 376 powered · 94 unpowered	72 *(1,392 sites)*	86	6
Southern Tasmania	17 · 510 powered · 235 unpowered	142 *(1,844 sites)*	357	24

Total caravan parks   Powered sites   Unpowered sites

3. Policy and planning

Competitive neutrality policy

Tasmania has adopted a policy statement titled **National Competition Policy: Applying Competitive Neutrality Principles to public camping in Tasmania**. The policy statement assists public entities, most typically local councils, to apply the National Competition Policy competitive neutrality principles when providing public facilities for overnight camping.

This process seeks to ensure fair competition between private sector businesses and government-operated camping facilities in the state and aims to create a level playing field for all stakeholders involved in the provision of camping and accommodation. Key components and provisions of the policy include:

- Public camping 'business activities' that may be subject to the competitive neutrality principles include public toilets, car parking, caravan and motorhome parking, dump points, rest stops, public parks and recreation grounds, incidental overnight parking and the promotion of public camping.
- State and local government-operated camping facilities are required to set their fees and charges at a level that reflects the full cost of providing those services. This means that government facilities may not offer camping at artificially low prices that would undercut private competitors.
- State and local government-operated and private camping facilities are expected to adhere to consistent quality and safety standards to ensure a level of service and safety for all campers.
- All camping facilities, whether publicly or privately operated are expected to comply with applicable taxation and regulatory requirements, ensuring there are no preferential tax arrangements for government-operated facilities.
- The policy promotes transparency in the operation of publicly-owned camping facilities. This includes publishing fee schedules, budgets, and other relevant financial information to demonstrate compliance with the competitive neutrality principles.
- Periodic reviews and assessments are recommended to ensure ongoing compliance with the competitive neutrality principles and to make any necessary adjustments to fees, charges, and operations.

A number of local councils have been subject to review under the policy, some of whom have reduced the provision of facilities in their region and in other cases, have chosen to remove themselves from market involvement.

Cranbrook Estate
Source: Jasper Da Seymour

Four wheel driving at Marrawah
Source: Sean Scott

Road infrastructure

Planning for road infrastructure is generally led by population growth and settlement patterns. Smaller volumes, such as those expected to be provided through the new Spirit ships, won't impact large scale planning for main roads across the state.

In saying that, pinch points already exist on some road corridors and these could be exacerbated by increased numbers of caravans and motorhomes. For example, junctions in popular visitation areas, overtaking lanes and laybys in areas where visitors typically go (for example the Great Eastern Drive and turnoffs to cellar doors). There continue to be opportunities to connect planning between DSG, PWS and councils to ensure continuity and consistency of access for the tourism market.

DSG is developing a number of corridor plans that identify improvement opportunities for the major state-owned roads. These identified improvements benefit, in part, the state's tourism market, including the caravan and motorhome market. Current projects can be viewed at **www.transport.tas.gov.au/roadworks/current_projects**

Freedom camping

'Freedom camping' or simply 'free camping' refers to the practice of camping in areas that are not subject to overnight fees. Often this is in natural settings such as coastal reserves or conservation areas. It may occur in designated areas or informally.

Popular freedom camping sites in Tasmania include coastal road verges, Bay of Fires, Cockle Creek and parts of the west coast. These can particularly appeal to visitors seeking an immersive outdoor experience. However, free camping also comes with certain challenges including:

- Environmental impacts
- Overcrowding or ghost camping
- Safety concerns
- Negative community sentiment.

4. Findings

Forecast visitation increases from the caravan and motorhome market will bring both opportunities and challenges. The research and engagement undertaken for this plan makes the following findings in relation to these.

Strategic planning

- The priority is to influence where visitors go around the state and to encourage visitors to arrive in the shoulder season. The east coast is overcapacity in peak periods – with both visitors and locals – while the west coast wants to grow its share of visitors. The nature of caravan and motorhome travel is likely to limit the number of caravan and motorhome visitors in the winter season.
- Visitors in this market segment can be directly influenced. Caravan and motorhome visitors generally plan trips well in advance due to availability constraints on the ships and hire vehicle availability. This provides an opportunity to communicate well in advance of their trip through the booking and entry process, for example at Devonport and airports. The presence of digital platforms such as Hipcamp and WikiCamps also indicate a high degree of information sharing and planning.
- Sharing forecast growth in the visitor economy with DSG, and specifically for larger vehicle markets like caravans and motorhomes, will mean that future demand can be taken into account as part of strategic projects and road infrastructure prioritisation such as the road corridor strategies.
- Higher visitor numbers mean caravans and motorhomes are having a more visible impact in some places – the Bay of Fires, Coles Bay and Freycinet National Park, the Tasman Peninsula and Bruny Island. The growth of this market (both visitors and Tasmanians), particularly during peak season, is also causing more pressure on local resources and environments.
- There is opportunity for DSG, PWS and local councils to provide a consistent level of accessibility and experience for the caravan and motorhome market.

Accommodation and infrastructure gaps

- Of all regions, the east coast has the least supply of suitable accommodation for caravans and motorhomes, limited amenities and constrained road infrastructure. In other areas there are spatial gaps in accommodation and infrastructure provision, particularly in the far north west, Greater Hobart, the far south and Central Highlands. There are some public and private funded projects in planning and development approval stages that are strategically located to address these gaps. However, in the far south and Central Highlands, further analysis is required.
- Hydro Tasmania will be embarking on its own strategic planning project around the caravan and motorhome market in the future, but has no concrete plans to increase the size of its informal campgrounds.
- In very popular areas with generous stay limits (e.g. 4 weeks), free camping is further limiting accommodation supply due to lack of site turnover.
- There is a need to invest in well-located dump points to support the caravan and motorhome market. There is also a need to provide adequate signage along key touring routes alerting drivers to existing dump point locations.
- Existing signage and communications do not adequately guide the market on whether certain routes are safe and/or suitable for caravans and motorhomes, for example:
  - Digital mapping platforms such as Google Maps do not provide market specific route suggestions, or provide route alternatives based on vehicle type.
  - Signage is required on routes with unsuitable conditions to advise caravan and motorhome drivers to not proceed. An effective example that should be considered for implementation elsewhere is located in Mt Field National Park towards the access to Lake Dobson.

Reliance on public sector infrastructure and facilities

- The market relies heavily on provision of facilities and services by PWS and local councils, and both need additional and strategic investment to meet the forecast growth of travel by visitors and locals.
- A consistent, statewide camping fee model and booking system would support additional investment and capacity management by PWS and local councils*.
- Commercial caravan parks are mostly focused on providing cabin and glamping accommodation, which is more commercially attractive, and they are not intending to invest further in accommodation for caravans and motorhomes.

Competing demands

- A worker accommodation shortage is impacting the supply of caravan park accommodation for visitors; this is evident in Hobart, Launceston, the Huon Valley and the west coast.
- The competitive neutrality policy is not well understood and has presented challenges for some councils, while others have been able to work within it.
- There are currently some congestion issues at the Devonport SOT check-in when vehicles arrive well before vehicle marshalling and boarding officially opens. Real-time communication by TT-Line and the port redevelopment can address these issues.

** Initial market sounding has been completed and the business case for the online booking system is currently being finalised. A first stage expression of interest process opened in 2024, with the technical design and procurement phase to occur in 2025.*

Spin fishing at Dolphin Sands
Source: Samuel Shelley

5. The plan

The project has culminated in a suite of recommendations which have been identified across accommodation, infrastructure, marketing and policy areas. Recommendations have further been refined to apply at the state and regional level and have been prioritised based on their level of impact in effectively and sustainably managing this market, including the projected visitor uplift.

Statewide recommendations

Level of priority ● High priority ● Medium priority ● Low priority

Type	Opportunity	Priority
Infrastructure	Provide funding support to PWS to increase signage at campgrounds directing caravan and motorhomes to appropriate dump point locations.	Medium
Infrastructure	PWS to progress priority campground infrastructure projects to support caravan and motorhome visitors. Priority locations include: • Fortescue Bay – Banksia and Mill Creek campgrounds • Narawntapu National Park campground (as per west coast priorities) • South Bruny campsites • Lime Bay campground Support the upgrade of priority amenities to support the increase in tourism visitation. Priority upgrades include: • Cape Wickham walk experience toilet replacement • Liffey Falls walk experience toilet replacement • Burns Bay (Akaroa) campground toilet replacement • Chain of Lagoons campground toilet replacement • Cosy Corner (Bay of Fires) campground toilet replacement • Dora Point (Binalong Bay) campground toilet replacement • Mayfield campground toilet upgrade • New toilet system at Saltworks Historic Site • Cockle Creek electrical works to support caretaker accommodation associated with campground and visitor centre.	High
Infrastructure	Continue to incorporate consideration of caravan and motorhome needs into road corridor strategies and associated funding for road projects aimed at supporting the visitor economy. Specifically those related to the Tasman, Huon, Lyell and Arthur highways and the Devonport to Cradle Mountain corridor.	High
Infrastructure	Undertake a mapping exercise to inform a market-specific signage and communication strategy for routes and locations not suitable for caravan and motorhome access. This may extend to digital mapping platforms and physical signage.	Medium

Type	Opportunity	Priority
Accommodation	PWS to develop and implement a state-wide campground classification and booking system for all PWS-managed facilities.*	
Accommodation	Hydro Tasmania to undertake strategic planning on the caravan and motorhome market and relationship to their staffing requirements, assets and landholdings.	
Accommodation	Continue to progress existing PWS priority projects that will provide for additional accommodation and amenities.	
Policy	Review competitive neutrality policy and provide clearer guidance to councils on provision of public campgrounds, infrastructure and amenities.	
Marketing	Use the Discover Tasmania website and app, with information targeted to the caravan and motorhome market, as a push/nudge marketing strategy to drive regional dispersal and connectivity within and between regions. This can include use as a trip planning tool and traveller touchpoint, with itineraries.	

** Initial market sounding has been completed and the business case for the online booking system is currently being finalised. A first stage expression of interest process opened in 2024, with the technical design and procurement phase to occur in 2025.*

Hartz Mountain National Park
Source: Samuel Shelley

Northern Tasmania

Northern Tasmania has good accommodation and infrastructure provision, and the community is supportive of this type of visitation. The region comprises a range of attractions and activities well-aligned with the market such as natural areas, heritage sites, golf courses and cellar doors. The recent development of world-class mountain biking facilities in Derby and the Blue Tier has resulted in increasing popularity among adventure-based travellers. However, road infrastructure between Launceston and Derby is narrow with limited overtaking or pull-over opportunities.

The region also has a diversity of accommodation options around the Tamar Valley. There are some constraints on journeys connecting through to the east coast in peak periods and to the Midlands. Northern Midlands Council has prepared a master plan for a new tourist park at Campbell Town, which is currently in the business case stage of analysis.

Supporting infrastructure such as dump points, public toilets and showers are consistently provided in the main townships. There is, however, a potential undersupply of dump points in the West Tamar and Launceston areas. Derby is highly popular with caravans and motorhomes but has no dump point due to capacity issues in its local wastewater system. There are also concerns with failures of onsite wastewater systems and illegal dumping currently in operation there.

The far north east also has some localised capacity issues. Tomahawk, Waterhouse Conservation Area and Mount William National Park are increasing in popularity due to capacity issues in the Bay of Fires area, and this popularity will contribute to pressures on essential infrastructure required by this market.

Waterhouse is seen by the local market as a substitute for the Bay of Fires, as both allow dogs and provide coastal camping opportunities. Current accommodation options in this area are basic with limited onsite amenities, requiring fully self-contained vehicles. Navigation to the area is not well signed and has lower standard road infrastructure and access. With appropriate infrastructure, the area could be a suitable alternative to the Bay of Fires.

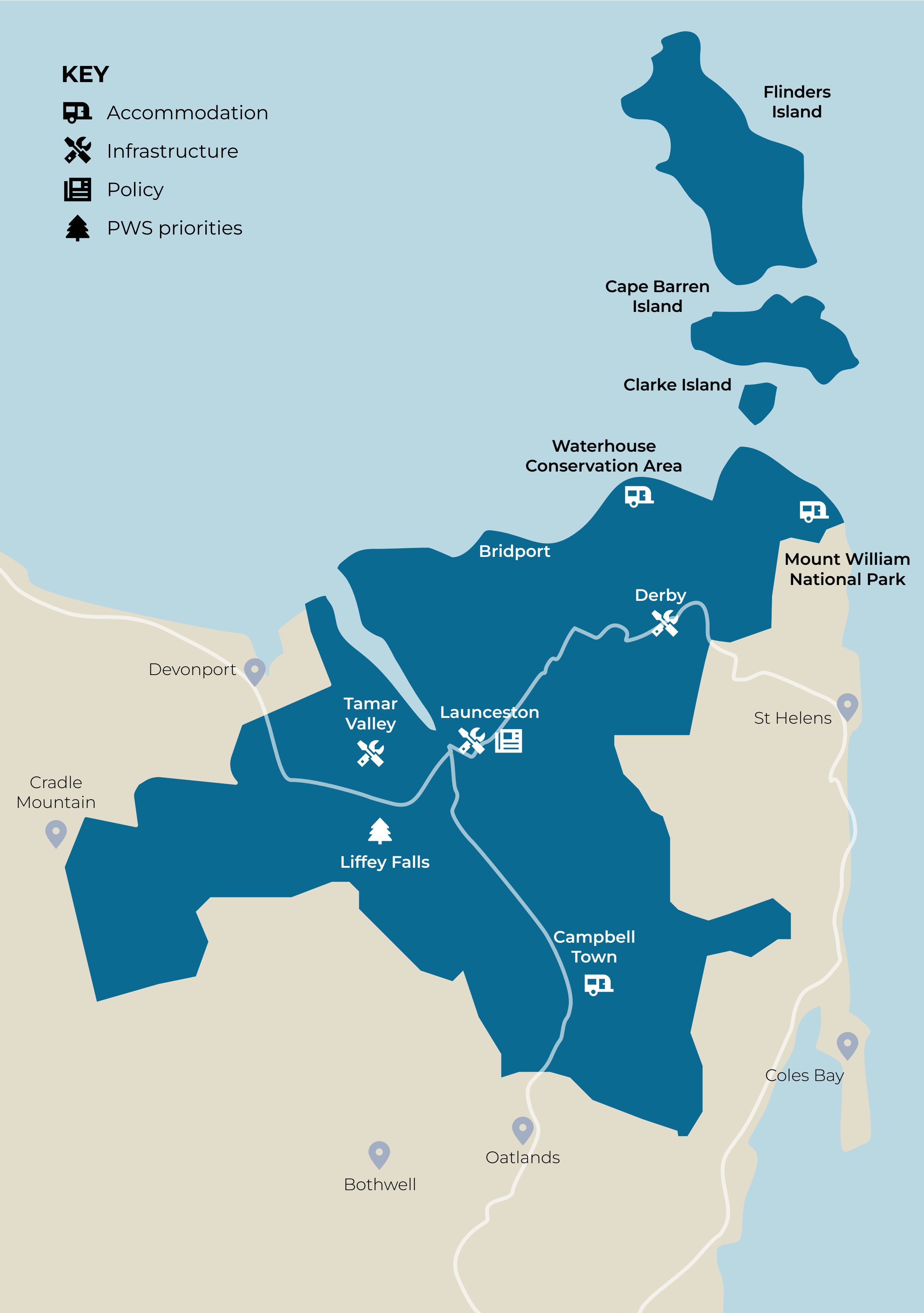
While overall the region is well positioned to accommodate the projected increase in visitation, strategic coordination is needed to provide for this market to lengthen the average duration of stay and to improve the visitor experience, especially the early trip experience for those coming off the SOT. This approach requires collaboration between the seven LGAs, and additional advocacy is required with the City of Launceston as the CBD lacks safe and effective access for this market.

Regional priorities

Type	Opportunity	Priority
Accommodation	Investigate the upgrade and formalisation of campgrounds in Waterhouse Conservation Area and Mount William National Park, along with provision of suitable amenities and directional signage to assist with overflow of demand from Bay of Fires.	●
Accommodation	Support development of the Campbell Town Tourist Park to connect experiences in the northern and southern regions.	●
Infrastructure	Provide public dump points in Launceston and the Tamar Valley.	●
Infrastructure	Identify a suitable location for, and fund a dump point in Derby, subject to onsite wastewater investigations.	●
Policy	Actively plan for visitation by this market in Launceston, including the provision of suitable parking close to the CBD.	●

Level of priority ● High priority ● Medium priority ● Low priority

Regional priorities map



West coast and north west

The west coast and north west regions present significant potential to leverage increased visitation. There is a desire from the RTO and local councils to own this sector of the tourism market and embrace what it provides for the region. The region itself offers wild landscapes, isolated spaces and a rich heritage, which speak to the values of the market.

Importantly, all councils are keen to enhance the growth opportunity the market provides, and many have been actively planning for additional accommodation and infrastructure.

The more remote parts of these regions do, however, lack an 'anchor' destination and the level of market appeal present elsewhere in the state, which acts as a disincentive for visitors to go beyond Cradle Mountain. Additionally, the region's remoteness, while a drawcard for some, can create uncertainty and hesitation for others. This is exacerbated by perceptions around weather and road conditions as well as distance from other 'iconic' Tasmanian destinations.

Roads in the region have a reputation of being challenging, and in some areas, unsuitable for caravans. Stakeholders reported visitors regularly being directed by Google Maps onto unsuitable roads. Stakeholders also raised concerns about the lack of a suitable road link for caravans and motorhomes from Arthur River to Corinna (Western Explorer), as well as capacity constraints on the Pieman River barge.

The region has some significant projects on the horizon that will increase attraction to all visitors. These include the Next Iconic Walk, the development of the 'Tarkine Experience Hub' (formerly Dismal Swamp), a heritage strategy for the west coast currently in development, and a PWS priority project to upgrade facilities at Arthur River.

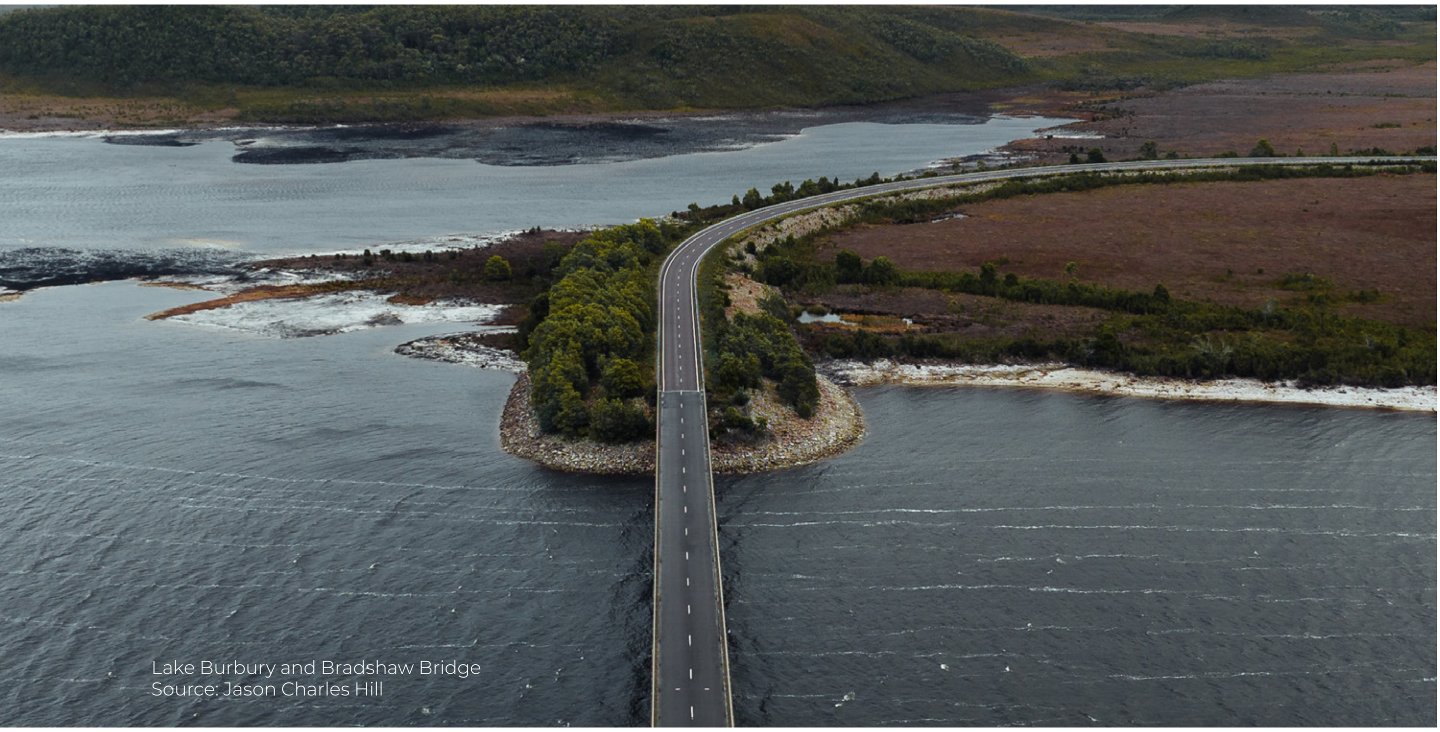
Campsites in the region have often emerged in an organic or informal manner, which delivers varied outcomes in terms of visitor experience and environmental impacts. The region also has limited provision of commercial caravan parks, while sites managed by PWS have limited accessibility for larger towing vehicles. User conflict exists, particularly in Queenstown where sites have been converted to provide workers accommodation for major construction and infrastructure projects, leaving limited options for travellers. This is likely to continue across the region, as there are many large-scale construction projects in the pipeline.

There are also localised issues, including traffic congestion around Penguin in peak periods, which was identified in the stakeholder process. With the predicted uplift from the new ships, there is a potential accommodation shortage in the Narawntapu National Park, particularly where accessible from the Port Sorell area.

Regional priorities

Type	Opportunity	Priority
Accommodation	Support development of the 'Tarkine Experience Hub' (formerly Dismal Swamp) to meet the needs of the caravan and motorhome market.	High
Accommodation	Progress the creation of a new camping area and facilities at Wynyard (Showground).	High
Accommodation	Upgrade existing camping facilities in Forest, Irishtown and Stanley. These sites have the potential to accommodate additional capacity subject to expanded facilities (toilets and other amenities) to broaden their appeal.	Medium
Accommodation	Identify campground upgrades and improvements in Narawntapu National Park to accommodate the camping and motorhome market, given the park's proximity to the SOT arrival and departure point.	Low
Infrastructure	Review the business case analysis for sealing the Western Explorer Highway, with consideration of projected uplift in visitation from the new SOT ships.	Low
Infrastructure	Investigate what would be required to increase accessibility for larger vehicles at Table Cape Lookout and Lighthouse, Nelson Falls, Franklin River Trail, and Montezuma Falls.	Medium
Infrastructure	Prepare a Traffic and Parking Management Plan for Penguin; the plan should identify seasonal or pilot interventions to address short term congestion.	High
Infrastructure	Upgrade dump points in the region including at Arthur River, Smithton.	Medium

Level of priority High priority Medium priority Low priority



Lake Burbury and Bradshaw Bridge
Source: Jason Charles Hill

Regional priorities map

The Nut chairlift, Stanley
Source: Lusy Productions

East coast

The east coast is home to iconic visitor attractions that feature strongly on itineraries in this market, with the likes of Freycinet National Park and Bay of Fires deemed 'unmissable' to many caravan and motorhome travellers. In the summer months, this has resulted in a range of capacity pressures in the region, from accommodation to roads and key infrastructure.

The east coast relies heavily on PWS campsites as the region has the fewest commercial caravan parks in the state. Additional pressures have arisen due to accommodation closers or capacity reductions in Swansea and Bicheno. The increase in popularity of Maria Island as a visitor experience has placed pressure on Triabunna's public amenities and its capacity to accommodate caravans and motorhomes overnight.

This dichotomy of high visitation and low infrastructure creates pressures in local communities, and between intrastate and interstate visitors who are vying for the same facilities and attractions. Managing a region that is already at, and at times over, capacity is a major challenge for operators and authorities. This is particularly noticeable in the Bay of Fires region where the sense of local 'ownership' over campsites is very strong. The capacity issues here extend into environmental management and anti-social behaviour concerns that arise from an area being in such high esteem and demand by travellers and locals alike.

Road infrastructure is one key to the effective management of this region. A number of road studies and upgrades have been completed in recent years with a more strategic regional approach to investment now underway that has a tourism focus on routes including the 'Great Eastern Drive'. Town centres that offer services and accommodation experience congestion and user conflict. This is particularly the case at Bicheno and St Helens.

Dump points are generally well provided in the main townships, with some gaps in areas like Scamander and Coles Bay. A consideration for this region is not only the spatial provision of such facilities, but the capacity and access availability in the face of projected growth.

Regional priorities

Type	Opportunity	Priority
Accommodation	Validate the opportunity to create a new camping area at Triabunna (Esplanade East). The site has potential to accommodate 50 spaces with amenities, leveraging off the popularity of Maria Island National Park and supporting dispersal away from Freycinet National Park.	High
Accommodation	Upgrade camping facilities at Fingal to support the connections between the east coast and northern Tasmania.	Low
Infrastructure	Ensure road corridor strategies and associated funding for the Tasman Highway and other east coast roads with high volumes of tourist traffic continue to consider driver safety and awareness and the needs of caravan and motorhome users.	High
Infrastructure	Upgrade public toilets at Triabunna given the increasing popularity of Maria Island for camping and motorhome visitors.	Medium
Infrastructure	Establish public dump points at Scamander and Coles Bay.	High
Infrastructure	Prepare a Traffic and Parking Management Plan for Bicheno and St Helens; the plan should identify seasonal or pilot interventions to address short term congestion.	High
Policy	Progress the Bay of Fires Master Plan.	High

Level of priority High priority Medium priority Low priority

Regional priorities map

Southern Tasmania

Southern Tasmania delivers high market appeal, with anchor attractions including MONA, Bruny Island, the Port Arthur Historic Site, and Hobart's strong city offering. Much of the region features highly on the itineraries of caravan and motorhome travellers; however, dispersal to the far south has been less than desired, despite its strong alignment with the market.

The region is well catered for in terms of dump points, with the exception of the far south where infrastructure and facilities tend to be scarce beyond Geeveston. Similarly in the far south, accommodation is limited to informal, small-scale campgrounds or reserve estate sites in more remote areas of the region outside Huonville and Adventure Bay. Bruny Island does have carrying capacity limitations which require further investigation and day tripping from Huonville to the far south is challenging due to the distance. Overall, however, supporting increased dispersal into the far south is desirable and will have positive, local benefits.

PWS sites in Cockle Creek are highly popular among Tasmanians and tourists in the summer months; however, issues arise with capacity, anti-social behaviour and a lack of facilities. Expansion of Cockle Creek capacity is constrained due to world heritage values and the extent of private land.

The road corridor beyond Southport is largely unsealed and, at times, difficult to traverse. This will be further exacerbated upon the opening of 'Transformer', an attraction that will drive visitation to the area, including the caravan and motorhome market. Currently, there are no plans or funding in place for upgrading the road network south of Southport which may become an infrastructure concern in terms of managing growth and improving dispersal to the far south.

While Greater Hobart has commercial caravan parks, they are often considered too far out to be practical. This is further emphasised by a lack of appropriate parking in the CBD for longer or towing vehicles. The gap in this market was being addressed through the MONA caravan park concept 'MOAB', which is still to resolve issues with TasWater associated with its adjacent facility.

The Tasman Peninsula has very popular commercial caravan parks that are booked out well in advance. Demand arises due to both local and visitor use. While the Port Arthur Historic Site draws significant visitation, there are opportunities for increased dispersal by visitors around the peninsula to locations including Eaglehawk Neck, Tasman Arch, Coal Mines Historic Site, and the attractive range of hiking trails and beaches.

There are limited accommodation opportunities between Hobart and Launceston, although this is largely being addressed through the work of the Northern Midlands Council with the Campbell Town Tourist Park.

With the closure of Tarraleah to visitors, limited other private facilities and limitations for larger vehicles at Lake St Clair, there is a need to consider further accommodation options in the Central Highlands as a logical location for connecting through to the west coast.

Regional priorities

Type	Opportunity	Priority
Accommodation	Identify a location for a new campground facility in the far south sufficient to accommodate likely uplift in visitors due to SOT, upgrades to Hastings Caves visitor experience and Transformer development. Potential sites may exist on land owned and managed by PWS or Sustainable Timbers Tasmania.	Medium
Accommodation	Identify a location for a new campground facility in the upper Derwent Valley/ Central Highlands area supporting visitor dispersal through to the west coast.	Low
Accommodation	Support progression of negotiations between MONA and TasWater about infrastructure upgrades for the MONA caravan park concept 'MOAB'.	High
Infrastructure	Undertake a study to identify suitable road improvements to accommodate caravans and motorhomes accessing the far south. The existing Huon Highway Corridor Strategy extends to Southport and the Australian and Tasmanian governments have committed funding to upgrades.	Medium
Infrastructure	Provide additional public dump points at Dover/Southport and on the Tasman Peninsula.	Medium

Level of priority High priority Medium priority Low priority

Tessellated Pavement
Source: Stu Gibson

Regional priorities map

Port Arthur Historic Site
Source: Tourism Tasmania & Rob Burnett

Appendix A: Market trends and profile

Market trends

Infrastructure and facilities

Caravan and motorhome travellers require specific infrastructure and facilities to ensure a safe, comfortable, and enjoyable experience while on the road. The needs of these travellers can vary based on their preferences, vehicle type and the visitor experience they are seeking in Tasmania. The infrastructure and facilities available can vary greatly between locations and visitor preferences, whether they seek a basic, rustic experience or a more comfortable and high-amenity stay. Key infrastructure and facilities are described below.

Toilets & showers	Clean and well-maintained toilet blocks or restrooms with flushing toilets and hot water showers are expected in paid sites. Public toilets and shower facilities also provide a key service for the caravan and motorhome market. While the spatial provision of public toilet across the state is good, maintenance and upgrades create a resource and financial burden for local councils and there are some sub-standard facilities.
Road network	The safety and quality of the Tasmanian road network is an important consideration and can be an inhibitor of visitation and dispersal by this market. Key road corridors used by this market, lack adequate overtaking lanes and pull-over bays suitable for long vehicles. Tasmanian roads also have a reputation for being steep, windy, poorly marked and dimly lit, creating hesitation and to some degree, fear, among this market.
Water supply	Access to safe and clean drinking water and convenient locations for filling up water tanks are needed for self-contained caravans and motorhomes. Free and public access to water is governed by the extent of TasWater infrastructure and willingness of councils to retain tap heads in different locations. More remote regions have limited water supply, particularly that which is suitable for drinking.
Dump points	Dump point facilities for emptying self-contained vehicle waste tanks are critical. The provision of dump points across the state varies due the extent of TasWater infrastructure, which is required for connected systems. The presence of more expensive and resource intensive 'pump out' systems are limited in Tasmania. Additionally, free and publicly accessible dump points are restricted by competitive neutrality principles. Safe and efficient dump points should be co-located with cleaning taps and hoses, provide sufficient circulation space for larger vehicles, and be located so as not to affect the flow of road networks.
Wi-fi & connectivity	Wi-fi access to the internet and reliable mobile phone reception, including in remote areas, are important for safe and informed travel. Tasmania's more remote areas lack adequate and reliable coverage which can result in safety issues, and a lack of communication between travellers and accommodation or service providers. Additionally, some high traffic locations, such as Port Arthur, experience network overload during peak periods which can Impact the visitor experience.

Accommodation

The caravan and motorhome market is diverse, has embraced technology, and is discerning in terms of accommodation quality, accessibility and overall offering. Market uplift during Covid-related border closures has created a more informed, engaged and sophisticated market, driven by a number of established and emerging accommodation trends.

Diversity	For broad market appeal, a diversity of accommodation types (refer to Appendix B) must be made available, to cater for a range of needs and budget and improve the visitor experience.
Seasonal facilities	Despite Tasmania's climate, commercial caravan parks around the state offer limited facilities to cater to winter and inclement weather, discouraging visitors from arriving out of peak season. Indoor recreation activities, heated pools and partnerships with local tour/activity operators are core components of a broader seasonal offering.
Off-grid and remote	Increasingly, the manufacture of caravans, motorhomes and market accessories has focused on enabling longer term and more reliable opportunities for off-grid travel. This permits visitors to seek out more remote experiences, allowing them to disconnect and immerse themselves in nature. This trend aligns with travellers prioritising stays in national parks and reserves, rather than established or formalised caravan parks and campgrounds.
Pet friendly	Caravan parks and campgrounds are increasingly catering to pet owners by offering pet-friendly accommodation, designated pet areas, and activities for pets within a site. Given pets are permitted on the Spirit of Tasmania, this trend is likely to continue.
Agritourism	Leveraging the Agritourism Toolkit and Tasmania's unrivalled epicurean offering, caravan and motorhome accommodation associated with agritourism business can deliver regional dispersal, gentle increases in supply and cross-industry partnership opportunities. Programs such as **France Passion** can provide inspiration, while **Hipcamp** provides a suitable digital booking platform.
Family friendly	The caravan and motorhome market has diversified beyond the stereotypical 'grey nomad' demographic. Campgrounds have recognised this shift and are increasingly catering to families by providing amenities like playgrounds and organised family-oriented activities. Engagement with park operators has indicated that the level of provision and quality of such amenities is lacking in Tasmania compared to commercial parks on the mainland.
Accessibility	Caravan parks are working to improve accessibility for people with disabilities and making caravan and motorhome experiences more inclusive and accommodating to a broader range of visitors. The level to which Tasmanian operators are integrating such accessibility is currently under researched.

Communications

As previously noted, the caravan and motorhome market is highly engaged, and active in the digital information sharing and social media space. . The rise of 'vanlife' as a travel lifestyle prevalent across social media platforms has created an information-hungry, social media savvy market that values peer recommendations and up-to-date logistical information. Communicating with this market can be highlighted across a number of touchpoints, including:

Trip planning and research

During the research and itinerary building phase of a trip, which can be extensive, travellers often use apps and social media to research accommodation, get recommendations, and read reviews from other campers.

Smartphone apps such as WikiCamps and market and location-based Facebook groups are considered the campers' bible when planning, and while on the road. Hashtags and geotags are also used to gather information on destinations, gear recommendations, and safety tips.

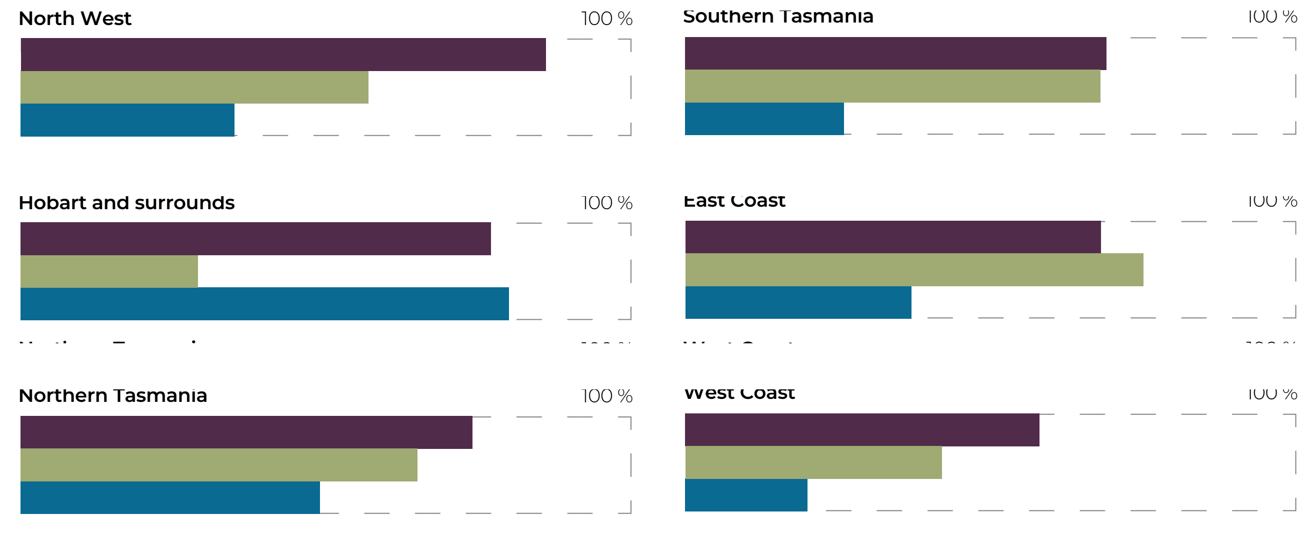
Safety updates and alerts

In remote areas, mobile connectivity can be limited, meaning travellers often use social media to post safety updates or alerts about changing weather conditions, road closures, or other potential hazards to help fellow campers stay informed and safe.

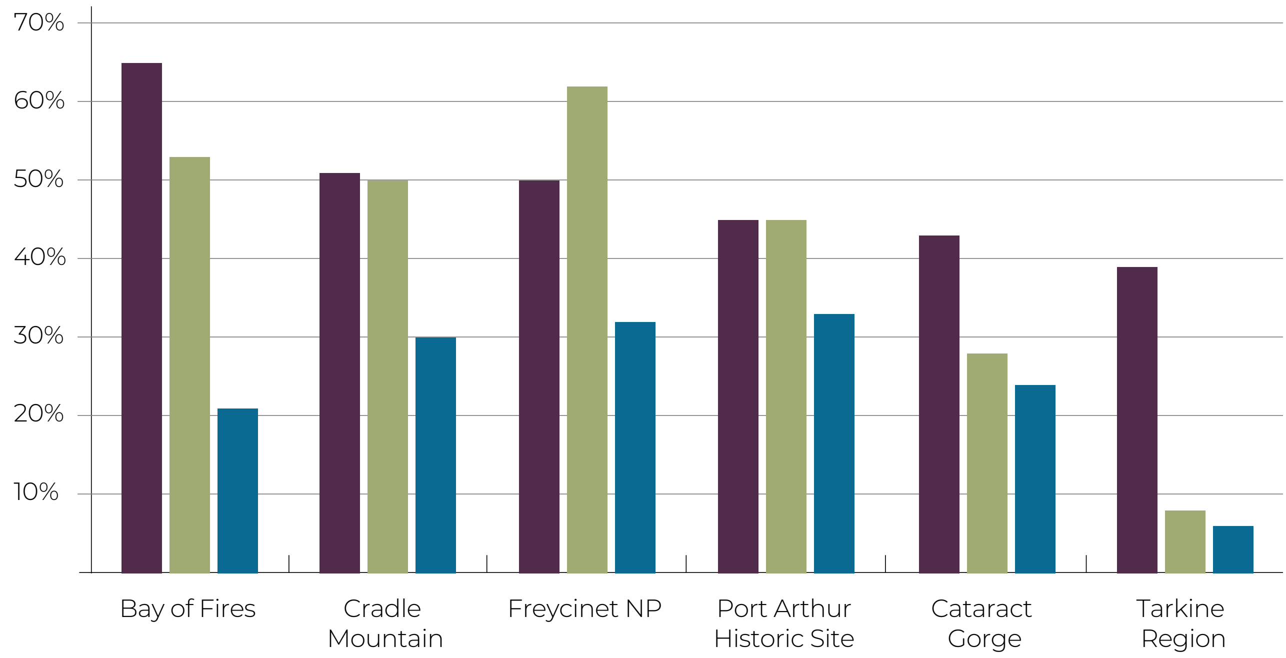
Market profile

Analysis of the caravan and motorhome market by BDA provides the following insights.

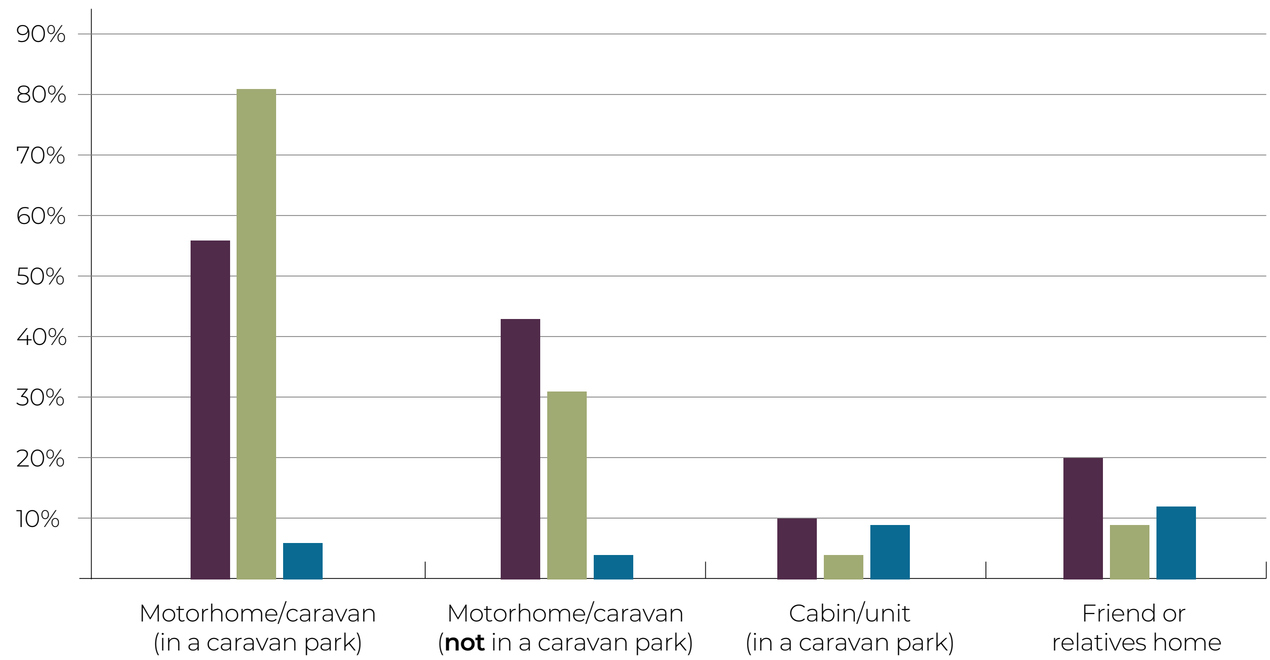
Regions stayed (% of overnight visitors)



Attractions visited (% of overnight visitors)



Type of accommodation (% of overnight visitors)



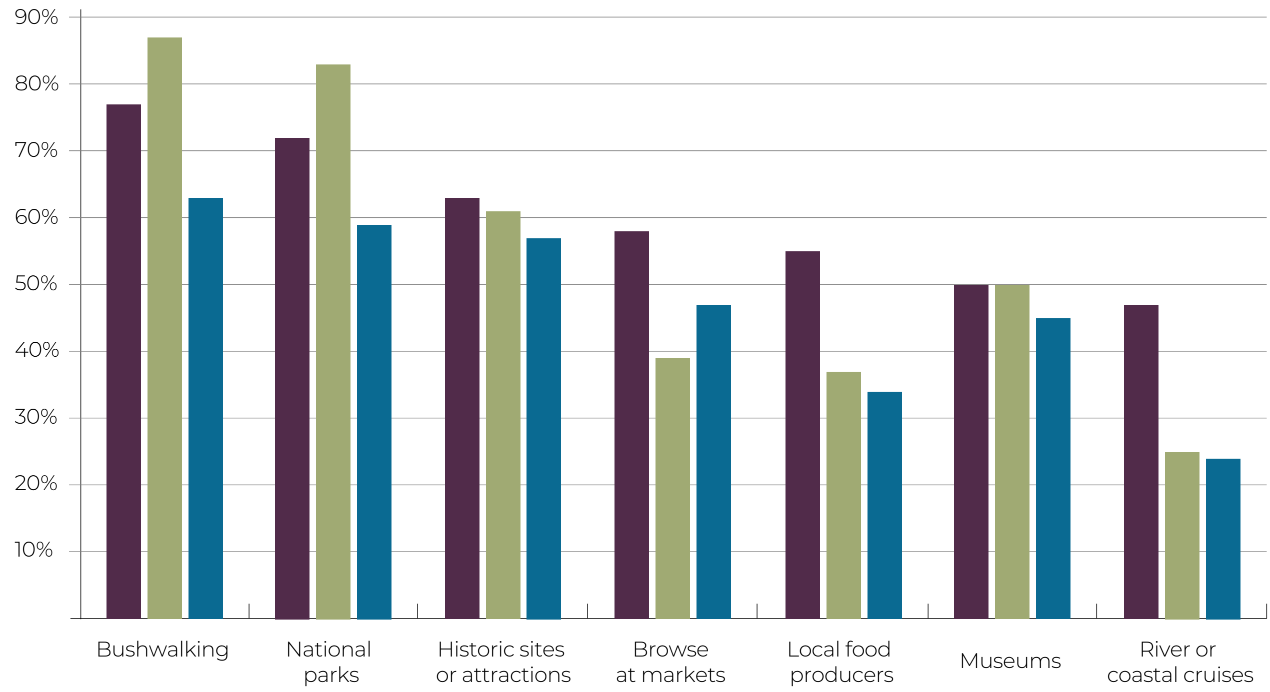
KEY

SOT visitors to Tasmania travelling with their own caravan or motorhome

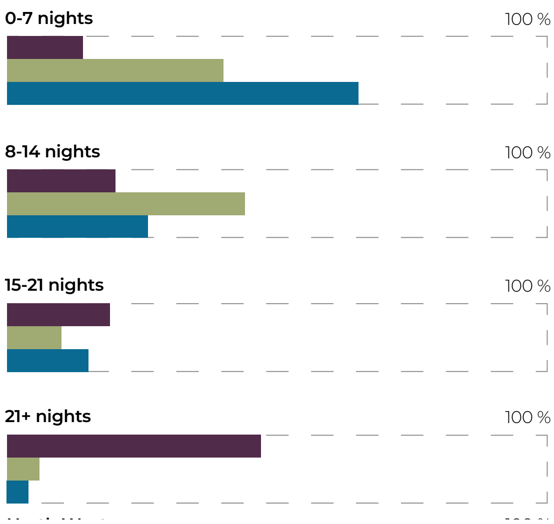
Visitors to Tasmania renting a caravan / motorhome

Overnight holiday visitors to Tasmania

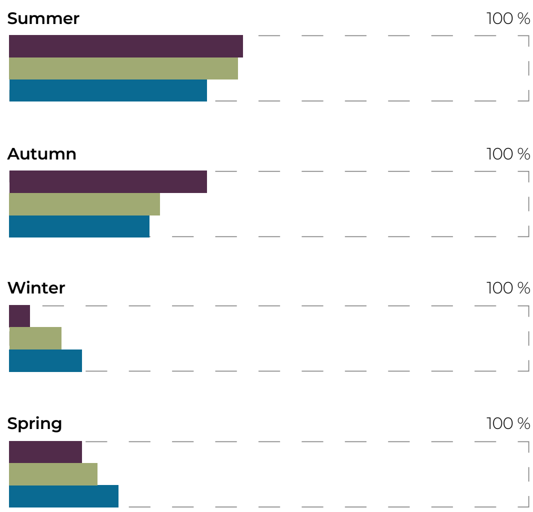
Activities undertaken (% of overnight visitors)



Nights spent in Tasmania (% of overnight visitors)



Season visited Tasmania (% of overnight visitors)



KEY

SOT visitors to Tasmania travelling with their own caravan or motorhome

Visitors to Tasmania renting a caravan / motorhome

Overnight holiday visitors to Tasmania

Gardiner Point, Edge of the World
Source: Tourism Tasmania & Rob Burnett

Appendix B: Market typologies

Accommodation typologies

Typology	Description	Ownership
Roadside rest area	Designated truck stop or vehicle rest area, typically along highway shoulder or lay by. No facilities, though public toilets may be available in some locations.	Government
RV rest area	Designated small-scale parking for self-contained vehicles, often with a maximum stay of 48-72 hours. Sites are typically located near town centres and are managed by council rangers or community organisations. Facilities typically include rubbish bins, a dump point and options for water/electricity hook-up.	Community / Government
Pub stay	Licensed hotels offering formed parking for self-contained vehicles within their land boundary, often in return for a small fee or meals/ drinks purchased from the hotel. Facilities typically include options for water/electricity hook-up and may also include basic amenities.	Commercial
Bush camp	Designated informal area within a national park or other reserve / conservation area. Some bush camps contain facilities such as toilets, shelter, seating and firepits, while some contain no facilities at all.	Government
Farm stay/ Hipcamp	Campgrounds co-located on private land comprising agricultural or rural uses. Facilities vary greatly from site to site.	Private
Showground	Designated area within a showground, recreation ground or similarly utilised public space. Availability and capacity may fluctuate due to events associated with the primary use (e.g. Show day, sporting matches). Facilities typically include rubbish bins, toilets, showers and options for water/electricity hook-up. Some sites may include a co-located dump point.	Community / Government
Campground	Basic area suitable for all vehicle types. Formal site arrangements and formed campsites. Facilities typically include a camp kitchen, bins, toilets, showers, dump point and options for water/electricity hook-up.	Community / Government
Caravan park	Commercial area suitable for all vehicle types. Formal site arrangements and formed campsites. All facilities included as per campgrounds. Typically, parks include additional recreation features such as children's areas, laundry, swimming pools. Parks also often feature cabin accommodation.	Commercial

Vehicle typologies

Typology	Description
Hike-in tent camping	Transportable tent used when hiking; no vehicle.
Car and tent camping	Standard vehicle; tent pitched beside. May include roof-top tents, standalone tents and swags.
Campervan (non self-contained)	Recreational vehicles of a small to medium scale. Typically includes sleeping and cooking facilities but unlikely to include a toilet and/or shower. May have means of generating electricity (e.g. battery system or solar panels), but do not have direct electrical inputs.
Motorhome (self-contained)	Recreational vehicles of a medium to large scale. Typically includes cooking and sleeping facilities, toilet and shower, and capacity to fully contain all waste (rubbish, greywater, black water). Generally has a full electricity system.
Caravan	Vehicle with towing capacity and a hitched caravan. The caravan typically includes cooking and sleeping facilities, toilet and shower, and capacity to fully contain all waste (rubbish, greywater, black water). Generally has a full electricity system.

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