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Economic Development
Committee

Campervan & Motorhome Club of Australia Limited

ABN 16 095 568 157

Friday, 28 May 2010

Ms Lyndel Bates
Research Director
Economic Development Committee
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Dear Ms Bates,

Submission to the inquiry into developing Queensland's rural and regional communities through grey nomad tourism

I thank the Chair of the Economic Development Committee, Mr Evan Moorhead MP, for his invitation to submit to the Committee's Inquiry.

Please find attached the Campervan and Motorhome Club of Australia's submission.

The Campervan and Motorhome Club of Australia (CMCA) is the peak representative body for the Recreational Vehicle (RV) tourist market in Australia and would welcome the opportunity to provide evidence to the Inquiry during the public hearing.

If you require any further information, please contact Mr John Osborne, CEO, Campervan and Motorhome Club of Australia Ltd on:

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Yours sincerely,

Diana Worner, N480
Chairman

Campervan & Motorhome Club of Australia Limited
ABN 16 095 568 157

SUBMISSION TO:

The Economic Development Committee's

Inquiry into developing Queensland's rural and regional communities through grey nomad tourism

Ms Lyndel Bates, Research Director

Email: edc@parliament.qld.gov.au

by

Campervan & Motorhome Club of Australia Ltd

May 2010

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1.0 BACKGROUND

The Campervan and Motorhome Club of Australia Limited (CMCA), with over 58,000 Members, is the peak representative body for the Recreational Vehicle (RV) tourist market in Australia. The vast majority of Members fall within the Committee's definition of 'grey nomad'.

Established in 1986, CMCA proactively conducts research, audits infrastructure and engages with a range of stakeholders to increase awareness within the industry of the economic value and needs of the RV tourist market.

CMCA recently joined forces with other Australian RV groups under the banner of 'MoTOURing Australia'. Representing approximately 500,000 domestic RV tourists, MoTOURing Australia was established to create a united and coordinated approach to the many issues that face this sector of the leisure market.

The evolution of the modern RV, and the expectations of its user, has outpaced the capabilities and willingness of the traditional camping industry to satisfy growing demand. The newer generation of RV tourists are seeking an experience that offers freedom of choice along with new options to satisfy their desires.

Grey nomads are looking for a unique experience; something more than the average tourist. They are now seeking a cultural, social and environmental adventure that is unique to regional Australia. It is critical that the demands of those wishing to explore Australia in a modern RV are matched by facilities developed to meet those needs in a responsible and sustainable manner.

2.0 TRENDS IN THE RV INDUSTRY

There are approximately 330,000 campervans, caravans and motorhomes registered across Australia. An estimated 80,000 units are on the road at any given time [1], including thousands that live on the road full time.

Trends in the RV and camping market have changed considerably over the years.

For generations Australians have ventured on camping holidays. Traditionally, a large majority of these campers were in tents or caravans and often travelled to a destination caravan park, set up camp and enjoyed their holiday in a location that they were familiar with and, in many cases, were surrounded by friends and neighbours that had similar holiday patterns. Very few ventured far or into the more remote regions of Australia. Caravan parks were, in the main, developed in the 50s and 60s to meet the demand of this style of holiday.

Of course in those days a caravan (or campervan) was just a place to eat and sleep and shelter from the elements. Luxuries like electricity, water, showers, toilets and laundry facilities were only available at caravan parks, and every town had at least one.

So these travellers moved from caravan park to caravan park and occasionally, when forced to, stopped where there were no facilities available, roughing it for a night with a gas light and a shovel.

The modern RV has little resemblance to those of the 50s and 60s. Vehicles are becoming increasingly self-contained.

The self-contained RV, whether towed or self-propelled, has its own toilet, shower, water tanks, fridge, solar panels and/or generator, and can hold its own waste, allowing RV tourists to 'disappear out bush' for up to a week. Mobile phones, GPS devices, air-conditioning and computers are the other items frequently found on board these vehicles.

Along with this evolution, and substantial road improvements, came an increasing desire by Australians to venture further from home and to explore more of what regional Australia has to offer: going 'around the block' is now a touring must do. Seduced by the many iconic images of Australia being broadcast on television and in other media, there grew a desire to see these many sights and to learn from and enjoy the cultural diversity of the country.

Today's modern RV gives them the comfort and freedom of choice to do so. While the desire to travel has grown, and the modern RV has evolved to make these adventures possible, facilities have not evolved at the same pace to meet this new demand.

When visiting a region, the services they require are a waste water dump point, a potable water tap, somewhere to dispose of their rubbish, and of course, somewhere to stop and shop.

It is this self contained recreational vehicle market that is particularly suited to visiting and spending in regional areas, particularly in off peak periods.

3.0 GREY NOMADS

The RV and camping market is much more likely to visit and spend more money in regional Australia than non RV or camping visitors. In 2007, domestic RV and camping visitors spent 85% of nights in regional Australia compared to only 59% by other domestic visitors[2].

CMCA Members are predominately 55 to 75 years old[3], and spend an average of 163 days travelling throughout Australia in an RV. They cover 14,000km each year, stopping at each location an average of three days[4].

These travellers are often retired with a pension, or are either partly or fully self-funded, and usually possess more disposable income than other tourist segments. They come from all walks of life and travel in all types of recreational vehicles, but they have one thing in common – they enjoy the freedom to stop and enjoy the beauty of the surrounding countryside, travelling where the wind takes them.

There are usually two people in an RV (a couple), but single person vehicles are not uncommon. However, with the camaraderie amongst this group, you're never really alone[3].

RV tourists are a very social group and congregate at those locations they have identified as being desirable. This is where they make new friends, catch up with old friends, pass on information, assist each other with advice and enjoy socialising.

These tourists enjoy nature and animals, with around 30% travelling with pets[3], and for these travellers a road trip is more than a holiday, it's a lifestyle. These tourists are very responsive to friendly local attitudes and tailored products and are likely to make a conscious decision to support businesses and regions which make them feel welcome. They are renowned for repeat visitations. If they have a good experience, they are likely to return. They will also tell fellow travellers about their experiences. The power of the 'grapevine' in this market cannot be underestimated. On the other hand, many will deliberately avoid regions that tend to be perceived as less than friendly towards them.

A survey has recently been commissioned by CMCA on the subject of domestic RV tourists in Queensland. The survey will cover spend habits, time spent on the road, demographics, employment/income status, accommodation and infrastructure. It will be conducted late June/ early July 2010 with the results expected to be available by September 2010. It is a follow-up to a similar survey undertaken in 2003 'The Social & Economic Impact of Rest Areas' by Balfour Consulting (appendix 1).

4.0 ECONOMIC BENEFITS

RV tourism has remained one of the most resilient markets during the recent economic downturn and is expected to increase over coming years, particularly as the 'baby boomer' generation continues to retire.

RV tourists are consistent spenders, who purchase a range of household products and services. They spend an average of $500 per week when on the road[4].

When stopping in a town, 97% make purchases[5]. On average, their major purchases include $235 on motoring needs including fuel and vehicle maintenance, $160 on living expenses such as groceries and medical expenses, and $51 on accommodation costs, (calculated per week)[4].

If they are staying and touring within a region, they are more likely to make purchases on the second, fourth and seventh nights, with the likelihood of purchases increasing if they stay for more than one week[5].

Their estimated spend per vehicle per year, based on an average of 163 days travel, is approximately $10,700 - $11,500 or $66 to $74 per day[4].

It is important to remember that the RV tourist spends his/her money on a wide range of goods and services in a region and not just on camping fees alone. If made welcome in a region, many businesses have an opportunity to benefit from these tourists and the resulting flow on effect of the economic stimulus they offer.

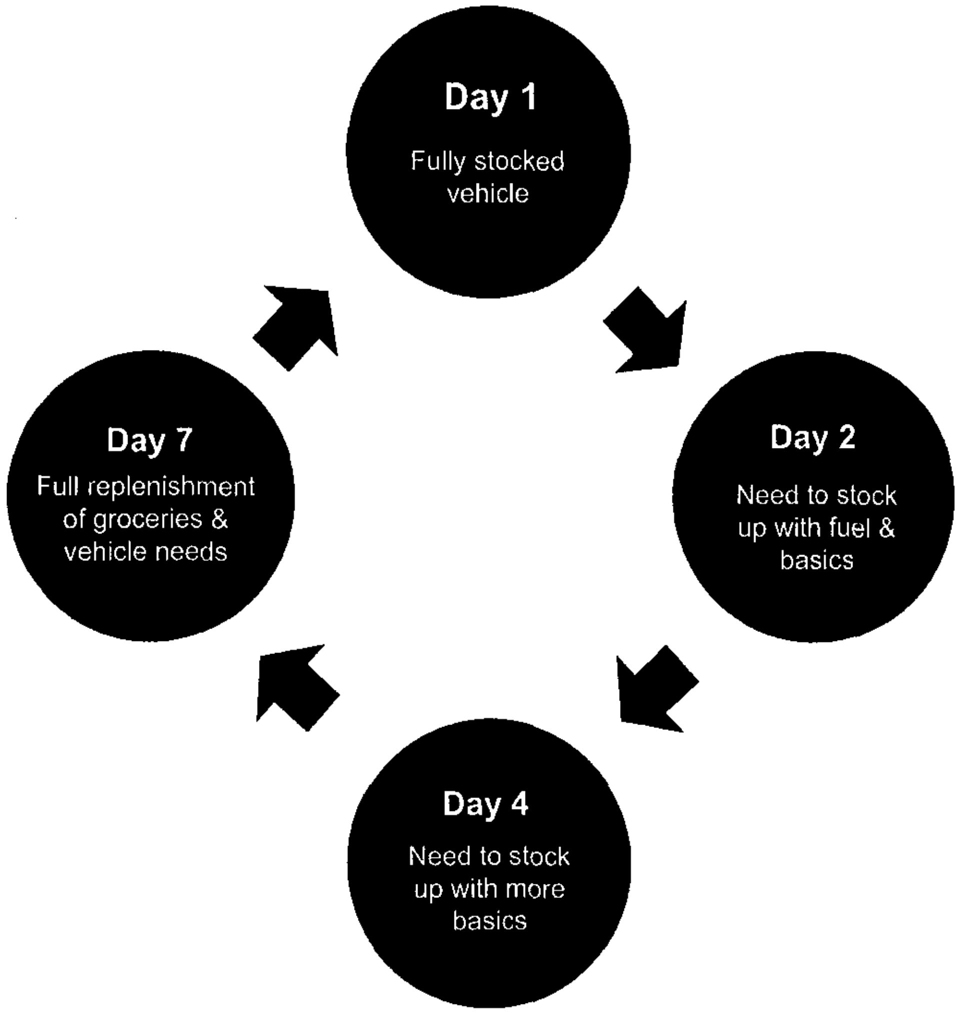
Those regions that make available facilities for 48 hours or more stopovers; and encourage tourists to stay longer, have a far better opportunity of benefiting from an economic injection, than those regions that limit stays to shorter periods. A longer period will increase the chances of a region taking full advantage of the replenishment cycle (see over page).

In tough economic times, every tourist represents an opportunity for regional businesses to tap into an income stream that would not otherwise be available to them.

Income from tourists flows not only directly into the business itself but, in the form of wages and salaries, through numerous other businesses with its flow on effect to the entire community. So either directly or indirectly, tourist dollars can add significantly to the viability of small struggling regional areas.

Given the relatively low costs of infrastructure, very few other initiatives can compare to the return on investment that is possible with RV tourism.

4.1 THE REPLENISHMENT CYCLE



5.0 INFRASTRUCTURE

Both CMCA and the Queensland Government have been active in promoting the location of basic RV facilities to the tourist market. A list of rest areas and public waste water dump points are available on the Department of Main Roads website. CMCA's website includes a list of all dump points, both public and restricted, as well as rest areas, campsites, caravan parks etc.

Queensland has a good record in recognising the worth of tourism and the need for tourism infrastructure, however there are a number of gaps.

5.1 HEALTH FACILITIES

Given the age and medical requirements of grey nomads, access to 24 hour emergency medical care is critical, especially in rural and remote locations. Emergency medical care can include local ambulance service, medical service, emergency department, community nursing etc.

The ability to access pharmaceutical products, such as prescriptions, is also imperative for this tourist market. This access can be through a pharmacy or chemist outlet, or via a postal arrangement.

5.2 ACCOMMODATION

Accommodation for RVs in Queensland is in high demand, particularly during the peak times in winter. Visitors across Australia tend to have the longest stay in Queensland - an average of 7.1 nights compared to the national average of 5.8 nights[6].

CMCA's own surveys tell us that our Members, even those in self-contained RVs, use commercial caravan parks on a regular basis. In fact, one in every 3.5 nights is spent in a commercial establishment[4].

Commercial tourist parks are declining. Between the 1997 and 2009 December Quarters, Queensland lost 63 (12%) caravan parks[7, 8]. Most of these closures happened in coastal areas and capital cities.

The remaining parks are unable to cope with the demand particularly during peak periods, resulting in tourists camping wherever they can find a place to stop. This can have serious consequences for the environment and the community. A greater number of campsites and rest areas with some facilities, such as toilets and showers, are required.

In addition, the trend in caravan parks is now towards servicing higher yield markets, by converting more sites to cabins and providing more services and facilities. Others are accepting increased numbers of long term tenants, particularly in mining areas, reducing the number of short term sites available.

More and more RV tourists are finding that caravan parks do not fulfil their needs. Specifically:

- caravan parks don't suit the budget conscious traveller as they are progressively evolving to capture higher yield visitors – grey nomads do not require jumping pillows, tennis courts, pools, spas etc;
- the caravan park is not needed or desired for the well appointed RV – they have their own travelling 'motel room';
- many parks do not allow pets;
- the self contained recreational vehicle segment is looking for experiences of natural, quiet environments with like minded and outfitted neighbours; and
- many parks are unable to accommodate larger RVs, such as converted coaches.

The needs and preferred experiences of the campervan and motorhome segment of the RV market are evolving in a different direction to the evolving character and services offered by caravan parks. Consequently they are looking for alternatives. It is also possible that other segments of the RV market will follow suit. For example, campers and caravanners who would also prefer more natural, less serviced and crowded experiences. This is further supported by caravan technology making caravans more self contained and less in need of the full range of caravan park services.

However, commercial caravan parks are still an important part of the RV lifestyle. It is imperative that groups, such as the CMCA continue to work with the industry to keep them as a viable component and an important option for touring RVs.

In an effort to help maintain this sector of the industry, a partnership between privately owned commercial parks and the CMCA has been established. This partnership now has over 400 parks Australia wide offering a minimum 10% discount to both CMCA and KEA Campers Australia rental units, and constitutes the largest discount scheme of its type in Australia.

CMCA also encourages commercial establishments to offer sites to cater for the self contained segment of the market that have reduced access to services eg shower and toilet facilities, at a reduced rate.

Without the willingness of the caravan parks to cater for changing demand, it is crucial that other alternatives be explored in a timely manner so as to capture growth in the market, take advantage of the economic benefits it brings with it, and to ensure that subsequent growth is achieved in a manner that is both responsible and environmentally sustainable.

Given the increase in RVs on the road and in the decline in available sites, there needs to be an urgent review of alternatives for this growing market.

An appropriate and adequate mix of camping infrastructure and facilities is critical to maintaining and developing the market. For the self contained RV segment, which are particularly self sufficient, the key camping requirements include:

- level and accessible sites;
- natural surroundings;
- a degree of open space;
- pet friendly;
- safe and secure locations;
- potable water points;
- waste water dump points, and
- costs reflecting the level of services and infrastructure required.

Caravanners and campers are also attracted to these features, but are likely to need more frequent access to a higher level of services, eg power, shower and toilet services.

Currently this network is lacking in three respects:

1. in Queensland, there are not enough areas to accommodate increasing numbers of self-contained RV tourists;
2. Queensland does not offer a consistent diversity in camping products within and across regions (that is a mix of low service provision locations, as well as medium to high service provision locations); and
3. at a state and national level the product network is not coordinated or managed within a consistent framework.

This situation is inhibiting both the growth of the market and the quality of the visitor experience. Negative outcomes include:

- competition and overcrowding of existing sites;
- likely environmental and community impacts and increased costs to local government;
- no visitor management framework;
- animosity between market segments and between the market and suppliers;
- visitors unsatisfied with product quality and the visitor experience, and

- an inconsistent product framework precludes an effective and coordinated marketing and information program.

Strategies to improve the quantity and diversity of available camping sites may include:

- increase the number of rest areas and public areas and parks available for overnight stays (e.g. showgrounds and racecourses), develop a consistent and coordinated policy framework and an appropriate visitor management system;
- increase the awareness of existing caravan park owners to the spectrum of needs across the self-contained RV market;
- provide incentives and support to these operators to diversify their product to match market needs;
- provide incentives for new 'specialised' commercial businesses to invest in the industry, for example:
  - assistance with business feasibility planning
  - industry intelligence to improve investment decisions
  - lower development fees and land taxes for developments aimed at budget markets
  - release of public lands under lease for new sites, and
- review the infrastructure and service network, as well as hot spots and high demand areas.

Opportunities exist to develop town parks, showgrounds, racecourses, state and regional parks and many other scenarios that are well within the reach of most authorities to develop and administer at minimal cost.

CMCA has successfully worked with a number of stakeholders to open existing venues, such as showgrounds and racecourses, to the RV market. However, in some cases where a council has been willing to open a showground for RV tourists to stay, they have been hampered by the issue of competitive neutrality. Although the showground may only be for fully self-contained RVs with no access to any facilities such as toilets, showers or power, the council are forced to charge a fee comparative to those of the local caravan parks.

These locations already have the basic infrastructure and facilities required and are currently used for camping purposes for specific events held at the venue.

Ongoing costs of these facilities, when opened to the RV tourist market, can be offset with the inclusion of local groups on a community project basis.

5.3 WASTE WATER DUMP POINTS

The safe and appropriate disposal of black and grey waste water is a basic requirement for many RVs. CMCA has been involved in the installation of over 200 publicly available dump points across Australia through its own funding as well as grants from KEA Campers Australia and the Queensland Government. This number represents 40% of all public dump points across Australia.

There are currently 152 public dump points in Queensland. The Queensland Government has granted $250,000 over five years to CMCA for the installation of 56 additional dump points throughout the state. Thirty-two dump points have already been installed through this funding. In addition, 40 dump points have been installed through the CMCA/KEA Campers Australia scheme.

As a result, access to a dump point has been significantly improved, however, there are still a number of large geographical areas that do not have access to an appropriate waste disposal site. The current priority areas include:

- Airlie Beach;
- Alpha;
- Blackwater;
- Cairns;
- Camooweal;
- Collinsville;
- Croydon;
- Kynuna;
- Middleton;
- Moonie;
- Moranbah;
- Pentland;
- Sapphire;
- Seaforth; and
- South Brisbane.

6.0 MARKETING RURAL AND REGIONAL COMMUNITIES

The communities, themselves, are the heart and soul of what it is that draws many thousands of RV tourists into regional Australia. And it is those communities throughout regional Australia that will benefit both culturally and economically from the RVs that tour in their region.

Alone, it is difficult for an individual community to succeed in drawing the RV tourist to their region. But as a group, and with the help of organisations such as the CMCA, it is possible to promote all that is good about the many small communities that are the very essence of regional Australia.

With simple and relatively economical schemes, it is possible to promote and encourage tourists into any region that is prepared to take some small steps in ensuring that RV tourists are made welcome. With consistency, it is possible to provide a state wide network of facilities that, once established, becomes an asset that will benefit all participants.

An example of the abovementioned schemes is the RV Friendly Town™ scheme.

6.1 RV FRIENDLY TOWN™ SCHEME

The RV Friendly Town™ scheme is a CMCA initiative aimed at assisting regional areas to attract RV tourists as they journey throughout this wonderful country. There are currently 107 RV Friendly Towns across Australia, including 38 in Queensland.

This simple, low cost scheme benefits regional economies without the need to budget for large infrastructure costs, and is based on using, in most cases, facilities that are already available but often under utilised.

An RV Friendly Town™ is one that has met a set of guidelines to ensure they provide a certain range of amenities, and a certain level of services for these tourists. When they enter a town displaying the RV Friendly Town™ sign, they know they will be welcome, certain services will be provided for them that may not always be available in other centres, and they will have access to a safe place to stay overnight and for a longer period.

The CMCA promotes the RV Friendly Towns by dedicating one page to the town on the Club's website, publishing a one-off article on the town in its monthly magazine, The Wanderer, and listing the town in each addition of the magazine. The same entry that appears on the website also appears in The Wanderer's Mate, a publication produced by the CMCA, which is a comprehensive listing of all campsites, dump points, RV Friendly Towns and CMCA Friendly Caravan Parks.

Before a town can be appointed to the scheme it needs to meet a set of criteria that the CMCA has established.

There are two other categories within the RV Friendly Town™ scheme: RV Friendly Location™ and RV Friendly Destination™. The RV Friendly Location™ category is for those smaller rural towns that cannot meet the RV Friendly Town™ criteria relating to the pharmacy and 24 hour medical services. These services are provided in an adjacent town.

An RV Friendly Destination™ is a 'one-off' place of interest such as a museum, homestead or country pub that provides a camp site for recreational vehicles for overnight or longer stays. They may also provide other facilities such as showers, toilets, groceries and other supplies.

Following are testimonials from rural and regional areas regarding the positive impact becoming 'RV Friendly' has had on the community:

The Cradle Coast Region of Tasmania, whilst rich in nature based produce and experiences, receives the lowest number of visitor numbers of any region of Tasmania. But as a region it remains proactive in its attempts to capture those markets that make a difference, people who stay in the region for more than a day or two and people who take time to experience and enjoy all that the region has to offer. This alignment to a target market is no more evident than the regions commitment to the Caravan and Motorhome market, the region embracing the Recreational Vehicle Friendly program with enthusiasm. To date 13 separate towns have achieved RV Friendly status with a further 3 pending. Currently there are 21 RV Friendly Towns in Tasmania, 62% of those in the Cradle Coast region. The region recognises the economic and social benefits this market brings to the region and collectively they are doing all in their power to attract a greater share of this market sector.

Ian Waller, Regional Tourism Development Manager, Cradle Coast Authority

Bingara has been an RV Friendly Town™ since 2008. Since this time we have noticed a large visitation increase by RV tourists and welcome them to Bingara "Gem on the Gwydir".

One of the advantages of being an RV Friendly Town™ is having the CMCA supply a free dump point. Council have also installed another dump point for RV's to use. Our dump points are located in Junction Street and at the Bingara Showground. Word of mouth is a priceless communication tool and we have found that the RV tourists support and recommend towns to other visitors that support them – if they feel welcome they will stay longer benefiting our community and helping our businesses prosper.

Travel safely and we look forward to meeting you next time you are in Bingara.

David Rose, Deputy Mayor, Gwydir Shire Council

7.0 UTILISING SKILLS OF GREY NOMADS

There is a valuable pool of professional and trade skills within the RV tourist market that can be a great resource for industries and employers suffering ongoing labour and skills shortages, particularly in rural and regional areas.

They are an experienced workforce segment willing to engage in a range of flexible employment arrangements both paid and voluntary and suited to the type of employment typically offered in the tourism sector.

CMCA previously made a submission to the Senate Inquiry into Workforce Challenges in the Australian Tourism Sector in August 2006. Little has changed in this time.

The unique travelling profile and the nature of work sought by this market are well aligned with the needs of the tourism industry and the type of work opportunities the sector may be able to provide. For example:

- being mostly retired and in essence on 'holiday' while travelling, they are specifically interested in opportunities for casual, seasonal and/or part time employment opportunities (rather than full time) and these are the kind of employment opportunities most readily available in the tourism industry;
- they have a demonstrated interest in spending time in rural and remote areas of the country which are the areas in which the industry suffers most from a skills and labour shortage;
- they are open to employment opportunities offering lifestyle benefits more than high pay and career opportunities;
- they are interested in contributing to community development and open to engaging in voluntary work, which also opens up opportunities for the industry to utilise them:
- in mentoring or training roles to help develop the local workforce; and/or
- to fill in supervisory roles to allow tourism operators to further develop their skills through participating in training programs they would otherwise be unable to attend because of work commitments and costs.

There are a number of potential benefits for the RV tourist market of being able to access temporary voluntary and/or paid work, including:

- being able to supplement incomes while travelling, particularly in light of rising fuel prices,
- making longer trips away from home more feasible, and
- contributing to community development in remote or other areas lacking unskilled and skilled workers, trainers and/or volunteers.

Since the 2006 Senate Inquiry, CMCA has established a section on its website dedicated to employment on the road, including paid and volunteer work. It includes links to established organisations that offer paid and unpaid work around the country as well as one-off vacancies.

In addition, CMCA's online forum has a dedicated area where Members can discuss employment options and there is a section within the advertisers 'marketplace' dedicated to work opportunities and house minding.

8.0 CONCLUSION

Grey nomads spend a greater amount of time and money in rural and regional areas of Australia than other domestic tourists. With approximately 330,000 campervans, caravans and motorhomes registered across Australia, and an estimated 80,000 units on the road at any given time [1], including thousands that live on the road full time, this tourist market is a valuable resource.

The heart and soul of the rural and regional communities is what draws many RV tourists into these areas. They are looking for a cultural, social and environmental adventure that is unique to regional Australia. They have a wide variety of skills, the interest and the time to undertake paid and/or voluntary work.

These tourists require basic services including somewhere to stay, shop, obtain potable water and dispose of waste water and garbage. Given the age of this group, health facilities, including emergency care and access to pharmaceuticals are important.

Queensland has a good reputation for recognising the importance of tourism and providing infrastructure to meet the demand, however, there are areas where basic infrastructure is inadequate. A coordinated approach would provide the best results.

The availability of accommodation, particularly in peak times, cannot meet the demand. Opening alternative accommodation options requires urgent attention. Any attempt to provide any new options whilst at the same time protecting the freedom of choice needs be done in an environmentally responsible and sustainable manner that is in the interest of all concerned.

Funding from the Queensland Government for the installation of waste water dump points has greatly improved access to these sites, however, there are still large geographical areas that have no access.

There are many ways that rural and regional Australia can entice this market to their region. Together, rural and regional Queensland, along with groups like CMCA can help one another.

The Campervan and Motorhome Club of Australia Limited would welcome the opportunity to give evidence at the Inquiry's hearing, including results from the upcoming survey on domestic RV tourists in Queensland.

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Index

1. Executive Summary 3

2. The Brief 6

3. Methodology 7

4. Who are the Campervan and Motorhome Travellers? 8

5. Communications 12

6. Previous Stay and Future Destination 14

7. Length of Trip 16

8. Length of Stay 18

8.1. Nights in Rest Areas 18

8.2. Nights in Caravan Parks and Rest Areas 20

9. Spending Patterns 23

9.1. At Last Major Town Visited 23

9.2. At Current Rest Area 26

9.3. Spending Overall 28

9.4. Spending on Individual Items 31

10. Residents and Businesses 33

10.1. Residents 33

10.2. Businesses 34

11. Conclusions and Recommendations 37

11.1. Conclusions 37

11.2. Recommendations 39

12. Appendix I - Anecdotal Feedback 40
13. Appendix II - All Charts 43
14. Appendix III - All Tables 57
15. Appendix IV - Verbatim Responses 60
16. Appendix V – Questionnaires 65
16.1. Rest Area Survey 2003 65
16.2. Business Survey – 2003 70
16.3. Residents Survey 71

1. Executive Summary

Of the campervan and motorhome travellers who use rest areas, 78% are retirees, of whom 45% are pensioners, 16% are pensioners with private income and 17% are self funded retirees. Of the other 22%, fewer than 5 % are self-employed, 9% are wage/salary earners on holiday and fewer than 9% are currently not employed. The last two categories probably include many of the international tourists travelling in motorhomes or campervans who made up 10% of the total by usual place of residence.

The average amount of time spent on the road is 157 days and most were halfway through their journey by the time they reached North Queensland having spent on average 76 days on the road. Of the total, 7% indicated they lived on the road full-time.

Campervan and motorhome people can be very flexible as to where they choose to stop. When asked to name the last major town they stopped in the 53% said Townsville, 10% said Cairns, 6% said Ayr and some nominated destinations as far away as Weipa, Darwin, Emerald, Rockhampton and Clermont. However, for a majority the last location they stayed at was either within Thuringowa (37%) or within Townsville (17%). While nearly all had made their previous stop in the area between Mackay and Cairns, some had come north via the inland route with their previous stop being at Charters Towers, Ravenswood and Clermont. Others had stopped as far away as Port Douglas, St Lawrence and Mt Malloy.

Of the total respondents, responses indicated 28% were travelling south and 72% travelling north.

Of the total, 97% made purchases in the last major town they stopped in and the average estimated value of those purchases was $360.00. On average, the items they spent money included:

Fuel, vehicle repairs, vehicle parts, tyres	$108.00
Groceries and vegetables	$89.00
Tourist attractions and services	$34.00
Dining and takeaways	$23.00
Beer/wine/spirits	$25.00

Campervan and motorhome travellers who stay in free rest areas also use caravan parks on average of one night in a caravan park for every 2.7 nights they stay in a rest area.

On average 78% of campervan and motorhome travellers made purchases in the nearby vicinity when staying in a rest area and a spent on average $75.00.

Word of mouth is their major method of communication with 54% indicating that is how they found out about the rest are in which they were staying at. Other sources used were books and magazines (purchased) by 28% and free tourist publications by 14%.

Of people travelling 63% were aged between 56 and 75 years, 4% were over 75 years and only 18% were 45 years or under. 71% of vehicles had two people travelling in them while 24% had one person travelling.

Length of stay in the Townsville/Thuringowa area showed that 50% stayed in the area for 4 nights or less while the 35% stayed for a week or more.

At the last major town they stopped in, 95% visited a shopping centre, the city centre or both.

While travelling, 67% spend between $300 to $600 a week, while 23% spent $300 a week or less.

During the previous two weeks 32% purchased an individual item valued at more than $200. In the main these purchases related to their vehicles but also included tourism services, food and supplies, dining out and camping accessories

Businesses adjacent to rest areas can significantly increase their trade, particularly their weekday trade, if they make an effort to target the people using these areas. For example, the Rollingstone Hotel estimates that 80% of its weekday meal trade comes from campervan, caravan and motorhome people, mainly using the nearby rest areas.

As retirees, many campervan and motorhome people are looking at lifestyle changes and see the northern beaches of Thuringowa as a real estate opportunity and are therefore a target market of the new Real Estate office, Sun Real Estate, at Balgal Beach.

The Mystic Sands Country Club sees the motorhome and campervan market as an opportunity that already delivers 20% usage of the bowling greens between May and October and 5% usage of the golf course.

Overall, a substantial majority of residents interviewed (over 80%) were supportive of or at least neutral to the rest areas and the way the Council manages them. Negative feedback came from people with specific issues or concerns, such as vehicles parked on the Esplanade at Balgal Beach or noise from generators at Toomulla Beach. Those residents in favour of the rest areas appreciated economic benefits the travellers brought and appreciated their company and their input into the local community.

2. The Brief

The Campervan and Motorhome Club of Australia (CMCA) retained Balfour Consulting to undertake research into the travel patterns and economic impact of campervan and motorhome travellers on the Bruce Highway in the area between Townsville and Cairns, who stay at free rest areas. This included finding out their place of usual residence, the amount of time they had spent travelling and the estimated amount of time they would take for their entire journey, their average weekly spend, their spend during stops in major towns, their spend during stops at rest areas, their use of rest areas versus their use of caravan parks and demographic information relating to age and income sources.

Balfour Consulting was also required to provide an understanding of the impact the use of rest areas had on the immediate local community covering both residents and business owners. This included collecting qualitative information on perceptions and attitudes of residents towards the users of rest areas (this applied to all users including campervan and motorhomes, caravans and a camper and covers tourists as well as users from within the region). It also covered collecting qualitative and where possible quantitative data from businesses in the immediate vicinity of the rest areas.

3. Methodology

A questionnaire of a total of 23 multiple-choice, numeric and open-ended (Verbatim) questions was developed for completion by campervan and motorhome travellers at the five identified sites managed by Thuringowa City Council, north of Townsville. These questionnaires were administered during the peak of the tourist season in June and July. Researchers visited these five sites (three times a week at both weekdays and weekends) in the late afternoon to distribute and collect questionnaires until a minimum of 200 had been collected. The researchers were also instructed to engage in conversation with the interviewees whenever possible, after they had completed filling out their questionnaire, to gain anecdotal information on any issues or problems they had experienced in the course of their journey with this information also being recorded.

A short questionnaire was developed to collect qualitative data from residents and businesses in the areas immediately adjacent to the rest areas or, in the case of businesses, where the impact of rest area users could be differentiated from other usual trade.

Desktop research was also undertaken to identify any other relevant reports or research documents which present information that could be relevant to this research project.

Interviewing business operators around the rest areas in Thuringowa was difficult because the issue of the use of rest areas had obviously become politicised and some information supplied could not be considered reliable.

4. Who are the Campervan and Motorhome Travellers?

Motorhome and campervan travellers broke down into two main groups being retirees who were travelling as part of their retirement lifestyle and holidaymakers/tourists who were either employed and on leave, or who had quit their job in order to make an extended journey.

Chart 12: Employment/income status of the people in vehicle.

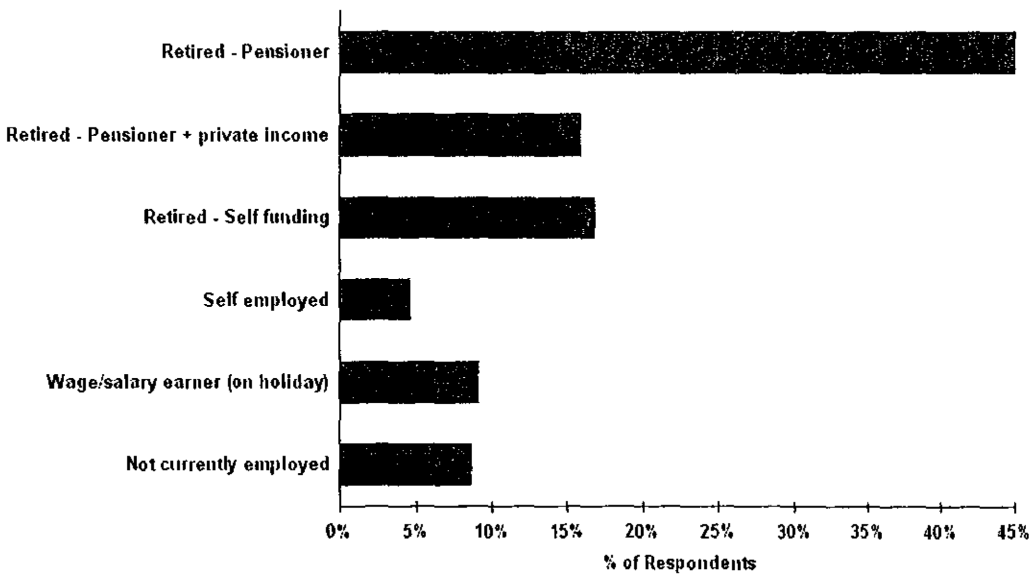


Chart 12 shows that retirees on a pension are by far the largest group (45% of total) of campervan and motorhome travellers using rest areas. Self funding retirees (17% of total) and retirees on a pension plus private income (16% of total) are the next two largest groups. Wage/salary earners on holiday (9% of total) and those not currently employed (9% of total) are significant small groups and the smallest group is those self-employed (5% of total)

All motorhome and campervan travellers interviewed were asked what they usual place of residence was. Of the 198 responses (see Table 10, Appendix IV) received the breakdown is as follows:

Australian Capital Territory	1
South Australia	10
Victoria	22
Tasmania	18
Western Australia	5
New South Wales	49
Northern Territory	1
Queensland	57
United Kingdom	8
New Zealand	4
Other international	8
Full-time on road	15
TOTAL	198

Motorhome and campervan travellers to North Queensland come from every State and Territory in Australia with the largest number being travellers from within Queensland (the majority from the southeast corner) 49 coming from New South Wales (the majority from regional New South Wales), and 22 coming from Victoria (majority from regional Victoria. A disproportionate number, 18 came from Tasmania (half from Hobart and Launceston) while 20 were international visitors, mainly from the United Kingdom and New Zealand but also from Canada, the Netherlands, Sweden, Switzerland, Ireland and Germany.

Chart 9: Number of people travelling in vehicle.

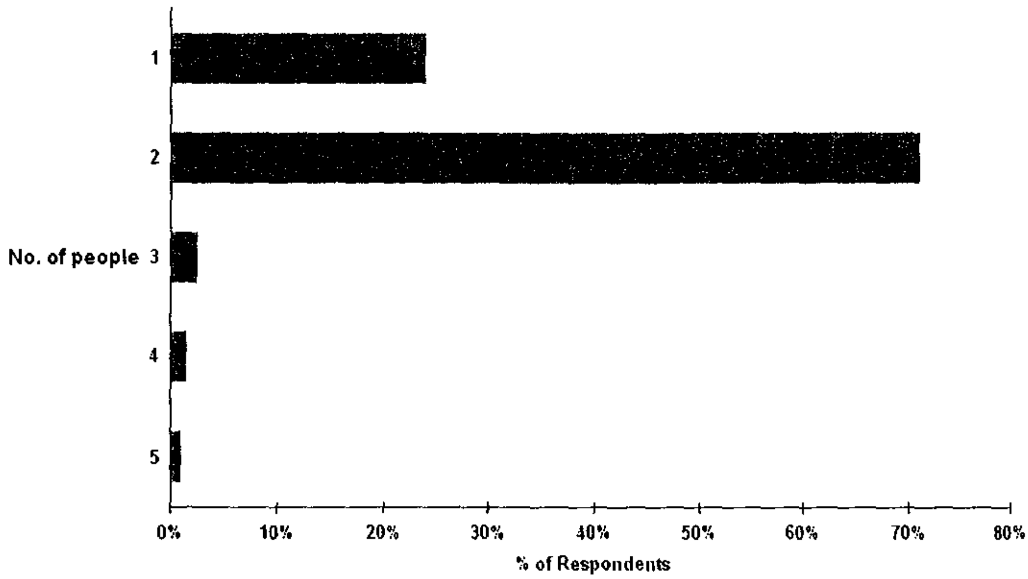


Chart 9 shows that over 70% of the vehicles travelled with two people on board. Interestingly, 24% of motorhomes and campervans travelling North Queensland contained only one person. Vehicles containing three people or more were not of significant numbers.

Chart 10: Gender

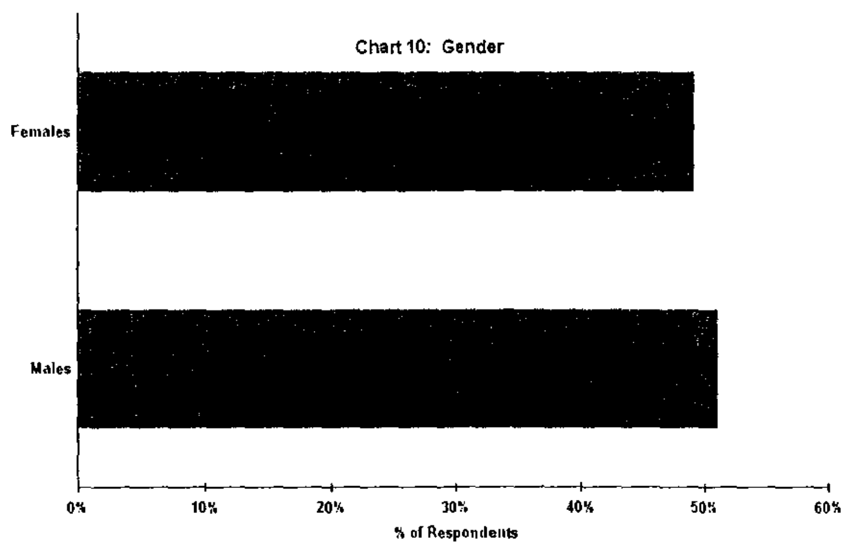


Chart 10 is significant in that it shows the gender ratio remains quite even though 24% of vehicles contain only one person. This means that either some vehicles with two people contain two females or that some vehicles containing one person were driven by a female.

Table 8: Age and gender of the people travelling.

	Total		Total
Females	**182** **49%**	**Males**	**189** **51%**
Less than 25 years	12 3%	Less than 25	11 3%
26 - 35 years	12 3%	26 - 35 years	12 3%
36 - 45 years	2 3%	36 - 45 years	11 3%
46 - 55 years	31 8%	46 - 55 years	22 6%
56 - 65 years	76 20%	56 - 65 years	66 18%
66 - 75 years	33 9%	66 - 75 years	58 16%
More than 75 years	6 2%	More than 75 years	9 2%

Table 8 shows that 67% of people travelling in motorhomes and campervan staying in rest areas are aged 56 years or older while only 9% are under 45 years.

This clearly shows that retirees are the dominant demographic group of motorhome and campervan travellers but that within that group there are at least three socioeconomic segments based on time of income and that it may be possible to break that group down on the basis of psychographics covering vehicle preferences, purchase preferences and overnight stay location preferences.

5. Communications

When they pull up at a rest area or into a caravan park, the majority of motorhome and campervan travellers take time for "happy hour" when they can have a beer or something stronger and chat to their new neighbours. It is the essence of how they communicate

Chart 13: Information source for current location.

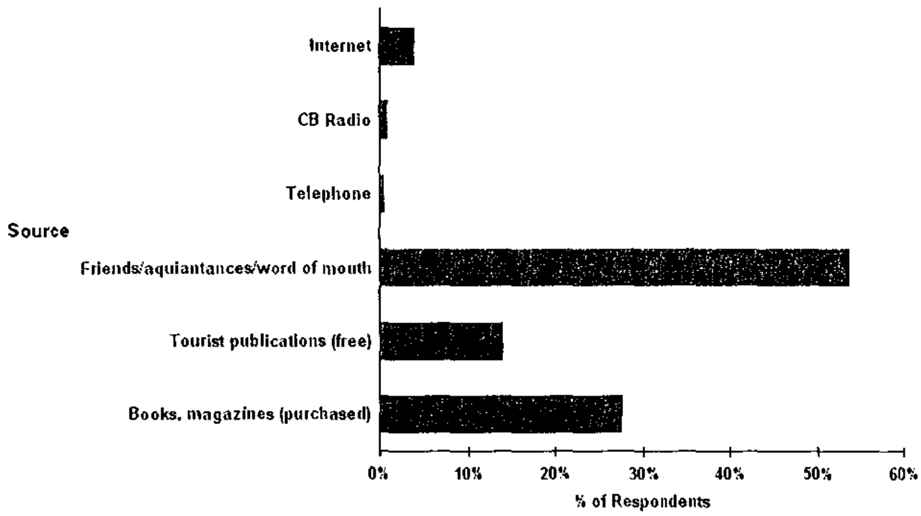
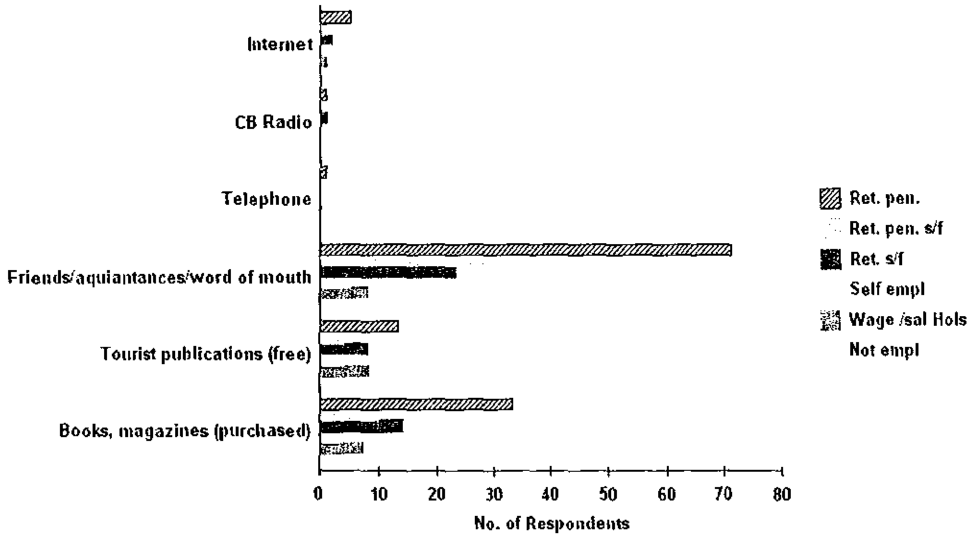


Chart 13 clearly shows that word-of-mouth is the strongest communication medium for campervan and motorhome travellers to get information on rest areas. This is followed by the use of books and magazines they had purchased and free tourist publications. The use of CB Radios or logging onto the Internet do not rate as significant sources for information on rest areas or the best locations to park their vehicles.

Chart 20 (next page) must be considered in terms of Chart 12 (Page 8) which shows retirees on pensions only made up 45% of total respondents against 17% for self-funded retirees and 16% for retirees with pension and private income. Chart 20 (next page) shows that proportionately, self-funded retirees and retirees with pension and private income used word-of-mouth more than retirees on pension. Retirees in general also make significant use of books and magazines they have purchased for information on rest areas and places they can park their vehicles.

Chart 20: Source of infomation by source of income (Can choose more than 1 answer).



The importance of friends and acquaintances, and word of mouth in general, as the major source of information should not be underestimated. This is often information that goes unchallenged and can be embellished or exaggerated with the telling. Information on caravan parks that are not considered "friendly", local government areas that are not considered "welcoming", the best places to buy, the good and the bad of tourist experiences are all discussed over drinks during stopovers. One bad experience in one location gets passed on to dozens of other travellers, whether that experience was an anomaly, or the norm. Anyone dealing with this market needs to be aware of being consistent in quality and service, to take positive advantage of this informal communication network.

6. Previous Stay and Future Destination

All respondents were asked where they had made their last overnight stop, where they intended to stay overnight after leaving their current location and the last major town they visited. This gave information on the directional flow of campervan and motorhome travellers during the June/July peak, and also an indication of the distance they were prepared to travel between overnight stays.

The last location they stayed at in terms of North, South, inland, within Townsville, within Thuringowa was as follows (see Table 9, Appendix IV):

North	34
South	42
Inland	7
Within Thuringowa	80
Within Townsville	41

This indicates that the majority of motorhome and campervan travellers' interview (59%) are stopping in the Townsville/Thuringowa region and staying in multiple locations within that region. This is confirmed by Chart 5 (Appendix II), which shows that 75% of motorhome and campervan travellers stay in the Townsville/Thuringowa region for three nights or longer.

Over 85% of the motorhome and campervan travellers had made their last overnight stop at locations within three hours of their current location, though some were prepared to travel journeys of up to five hours to reach a preferred destination.
When asked which location would be their next overnight stop, after leaving their current location, the answers were as follows (see Table 12 Appendix IV):

North	82
South	22
Inland	7
Within Thuringowa	45
Within Townsville	27
Don't Know	18

This showed that almost 9% of motorhome and campervan travellers were not travelling to a set itinerary and did not know what then next destination would be. The names of the destinations (see Table 12, Appendix IV) show that most will travel three hours or less to reach their next destination.

When asked to name the last major town they stopped in, the information received gave the clearest indication of directional travel on the basis of whether that town was North, South or inland from the Thuringowa rest areas. Responses are as follows (see Chart 11, Appendix IV).

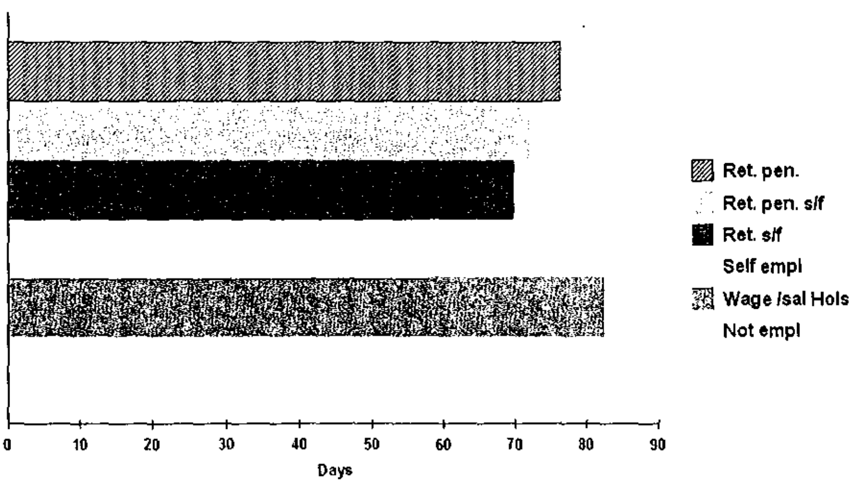
South	140
North	57
Inland	6

What this suggests is that when the tropical dry season is at its peak in June/July, 72% of motorhome and campervan travellers are either travelling north or have travelled as far north as they intend on the Queensland coast while 28% are travelling south. Of those travelling south some are travelling in rental vehicles and could have started their journey from Cairns, others have already travelled as far north as they intended and are heading back south.

7. Length of Trip

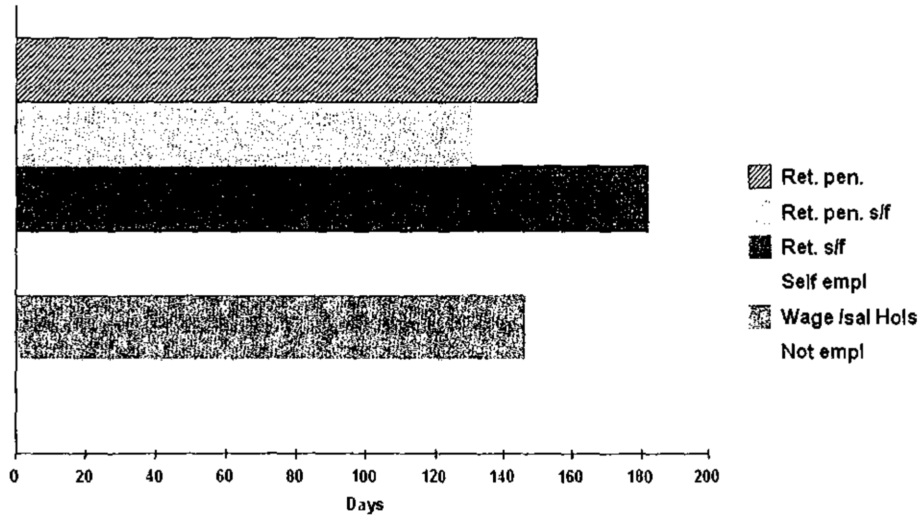
The average time spent travelling before reaching the rest areas in Thuringowa was 76 days and the average overall length of a trip is 157 days (Note that those who indicated they were on the road permanently were allocated 365 days and this may skew results, particularly for those listed "Not Currently Employed").

Chart 22: Days already travelled on this trip by source of income.



As shown in Chart 22, those retirees whose incomes come entirely from the pension spend more time reaching Thuringowa than retirees with a pension and private income, or retirees who are entirely self-funding. The self-employed people spent the least amount of time on the road (58 days) and the other two groups of "Wage/Salary Earners" and "Not Currently Employed" take the longest time, more than 80 days but those travellers permanently on the road may skew this.

Chart 23: Intended time of travel on current trip.



As shown on Chart 23, self-funding retirees intend to undertake a considerably longer trip than either retirees with a pension and self funding all retirees with pension only. It is possible that self funding retirees as a group spend the most time on their trip considering the probability that a substantial number of the those permanently on the road are categorised as "Not Currently Employed".

8. Length of Stay

8.1. Nights in Rest Areas

Chart 2: Nights spent at previous stop

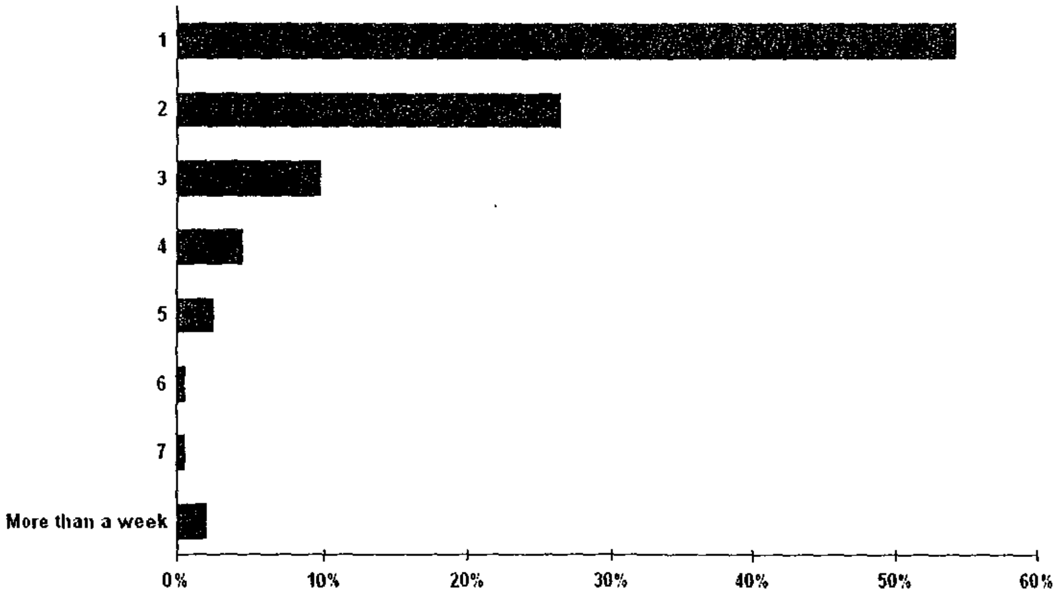


Chart 2 shows that 90% of respondents stayed no more than 3 nights at their last location and only 8% stayed four nights or more.

Chart 5 (below) shows that once they have reached the Townsville/Thuringowa region only 35% stayed for three nights or less with 45% staying one week or longer. This indicates the quality, location and variety of rest areas in Thuringowa is an attraction that prolongs stay in the region.

Chart 5: Nights spent in the Townsville region.

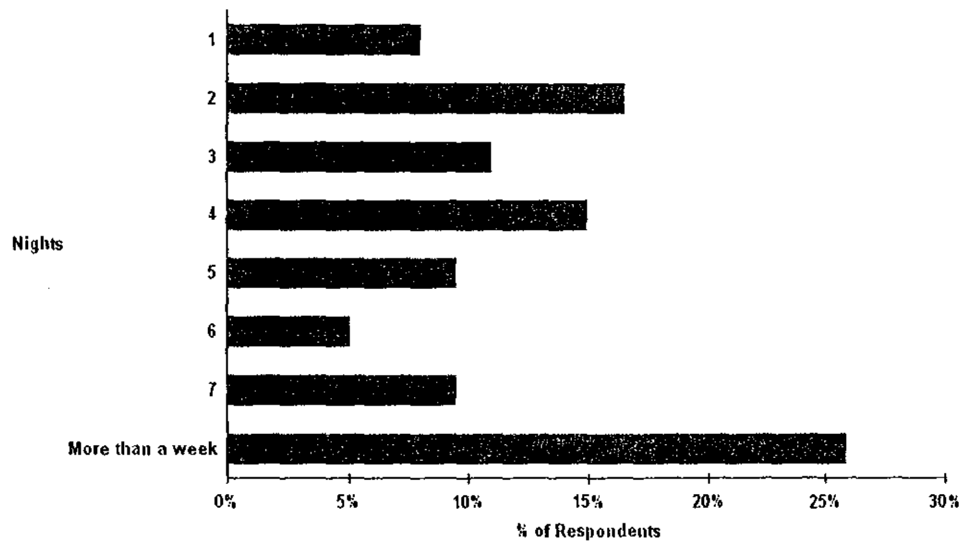


Chart 5 supports anecdotal feedback that the rest areas operated by Thuringowa City Council are generally regarded as offering good facilities and that Thuringowa is one of the better places to stop in Queensland.

Chart 17: Number of nights in the Townsville region by source of income.

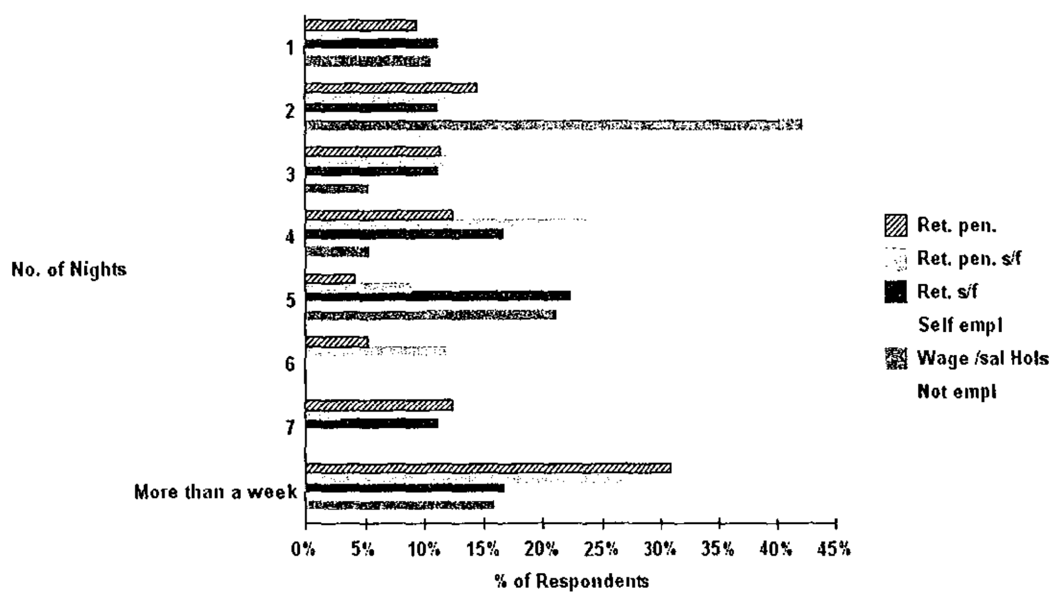


Chart 17 shows that the Wage/Salary Earners on Holidays spend the least amount of time in the Townsville/Thuringowa region with more than 40% staying only two nights. While 40% of those Self Employed stay only 2 nights, 40% of that group is also prepared to stay one week or longer. Those retirees with pension only or with pension and private income are most likely to spend one week or more in the Townsville/Thuringowa region while self-funded retirees are more likely to stay five nights or less.

8.2. Nights in Caravan Parks and Rest Areas

Rest areas are important to motorhome and campervan travellers as rest areas save them from having to pay for what they see as unnecessary facilities as well as allowing them to enjoy the informality and "freedom" these areas offer.

Chart 1: Nights have spent in a caravan park and nights spent in a rest area or camping area.

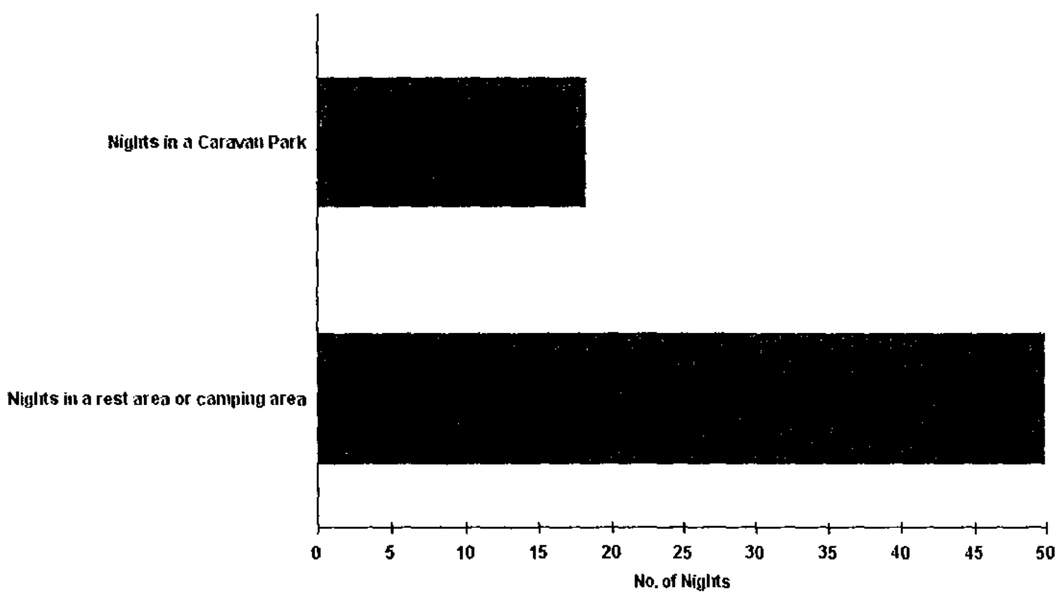


Chart 1 shows that on average for every 50 nights a motorhome or campervan spends in a rest area, they spend 18 nights in a caravan park. This is a ratio of 1:2.7 for nights in a caravan park to nights in a rest or camping area.

Chart 19: Number of nights in a caravan park and number of nights in a rest area or camping area by source of income.

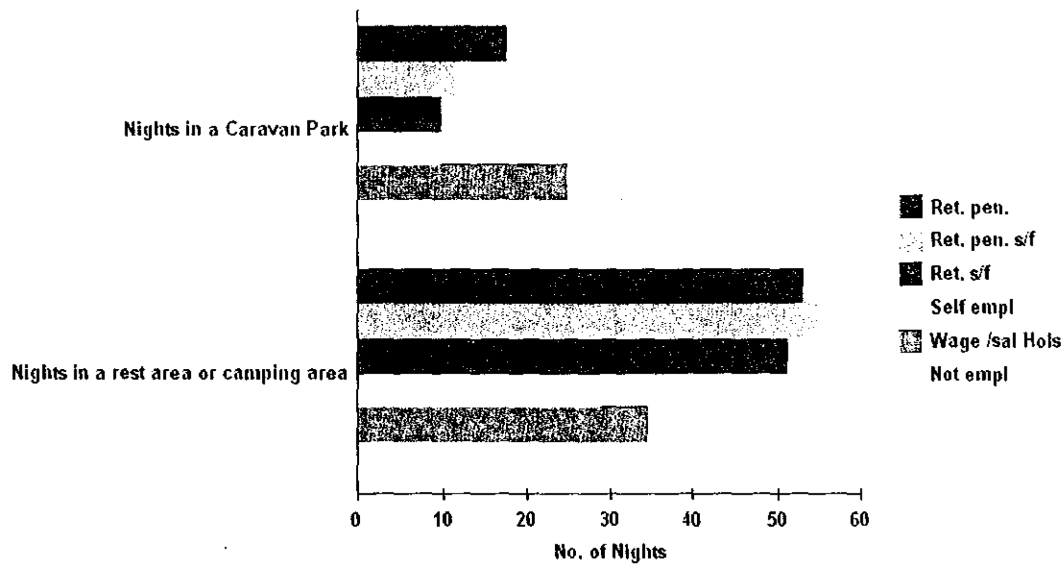


Chart 19 shows that the income group "Not Currently Employed" is twice as likely to use a caravan park rather than a rest or camping area and income group "Wage/Salary Earners on Holidays" is marginally more likely to stay in a rest area rather than a caravan park. The biggest users of rest areas are retirees with pension and private income, and self-funded retirees. These two groups spend more than 5 nights in a rest area or camping area for every night they spend in a caravan park. Retirees living on the pension only spend 3 nights in a rest or camping area for everyone night in a caravan park and self-employed spend 2.8 nights in a rest or camping area for every night in a caravan park.

While 30% of retirees living on a pension spend on average less than $300 per week (see Chart 18 Appendix II) and 36% spend between $300 and $400 per week, giving them the lowest weekly spend of all income groups surveyed, they are not the highest users of rest areas and camping areas. The highest users of rest areas and camping areas are retirees on a pension and private income, of which 18% spend less than $300 per week and 45% spend between $300 and $400 per week. The second highest users of rest areas and camping areas are self-funded retirees of whom, over 30% spend between $400 and $500 per week and 9% spend between $500 and $600 per week.

This data shows that ability to pay for a caravan park is not necessarily an influencing factor in the decision to stay a rest area or camping areas. Many motor home and campervan travellers choose to stay in these are areas out of preference, rather than financial necessity.

9. Spending Patterns

9.1. At Last Major Town Visited

A major objective of the research was to establish the economic impact might home and campervan travellers had on the towns in which they stopped.

Table 3: Did you make any purchases in the last major town you stopped in?

	Total
Base	205
Yes	198 97%
No	7 3%

Table 3 shows that nearly all motorhomes and campervans surveyed (97%) made purchases at the last major town they stopped in. The research also shows that average value of purchases made was $360 (Table 4 Appendix III).

Chart 3: Cost of items purchased at last major town.

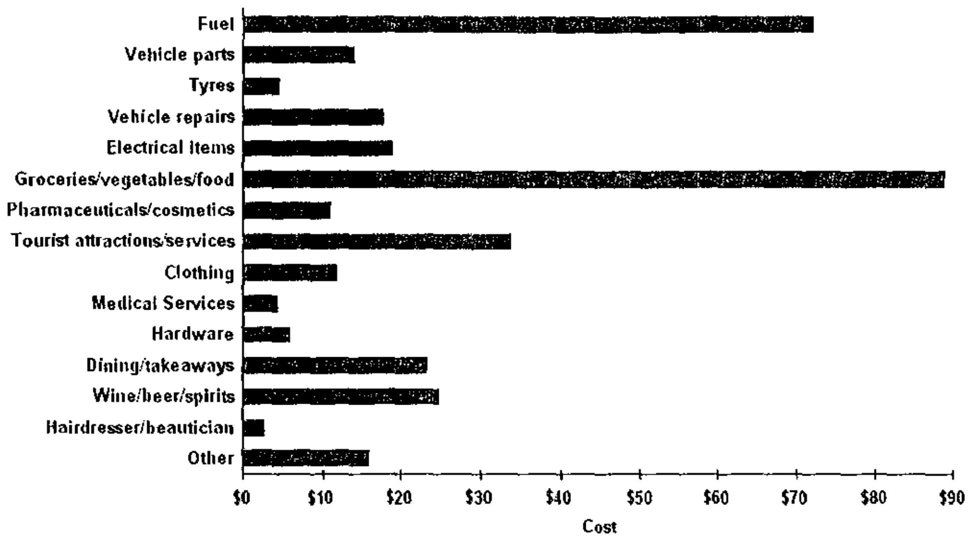


Chart 3 shows a breakdown of the items purchased and the amount spent on those items showing groceries/vegetable/food and fuel as the two largest purchase items with other vehicle needs also important. Tourist attractions/services are the third-highest spend.

Table 11, (Appendix IV) shows that in many cases the last major town stopped at did not involve an overnight stop (compared to Table 9 Appendix IV), and that the value of campervan and motorhome travellers to businesses in the major towns of the Queensland coast and inland can amount to hundreds of thousands of dollars per town. A major town is defined as anywhere from Ingham or Mareeba to Townsville.

Chart 4: Visitation to a shopping centre or the city retail centre at the last major town visited.

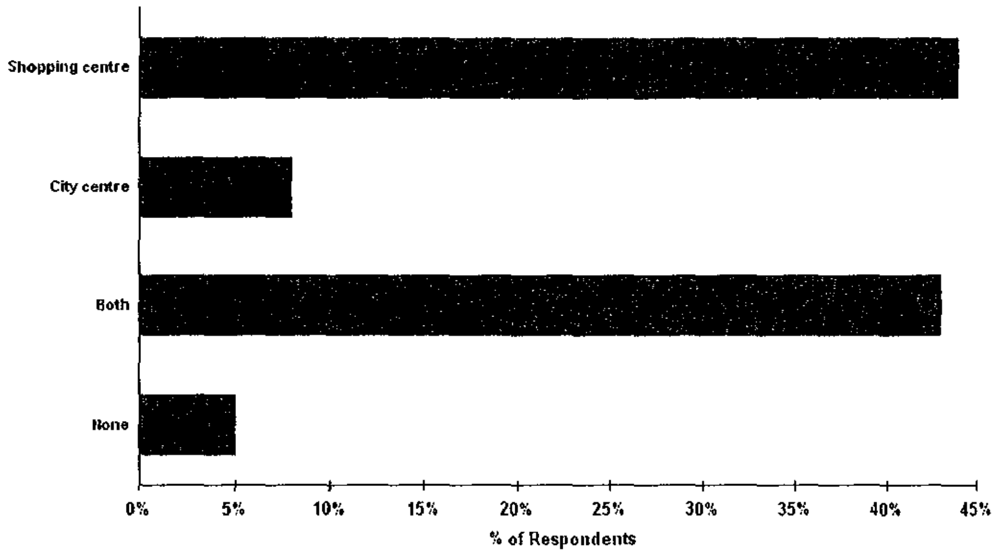


Chart 4 shows that 44% of motorhome and campervan travellers went to a shopping centre at the last major town they visited and 43% went to both a shopping centre and the city retail centre.

Chart 13: Visits to a shopping centre or the city retail centre by source of income.

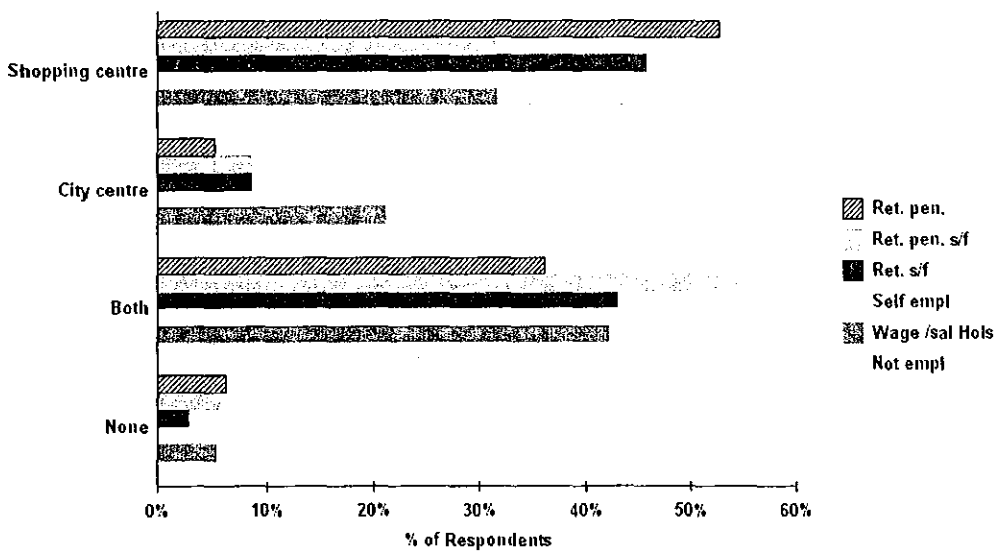


Chart 13 shows that retirees on a pension, self-funded retirees and those "Not Currently Employed" are most likely to visit a shopping centre at the last major town they visited while retirees on a pension with self funding and self-employed were most likely to visit both the shopping centre and the city retail centre. Wage and salary earners on holidays were the group most likely to visit the city retail centre only.

While the income groups to display some preferences, they all overwhelmingly seek to visit a shopping centre, or both a shopping centre and the city centre, in the last major town they visited. For some of the towns mentioned as the last major town visited (Table 9, Appendix IV), the city centre and the shopping centre are within the same area.

9.2. At Current Rest Area

Table 5: Have/will you make any purchases while staying in this location?

	Total
	205
Yes	160 78%
No	45 22%

Table 4 shows that 78% of motorhome and campervan travellers staying at a rest area made purchases with business in the immediate vicinity. The research also shows the average value of these purchases was $75.00 (Table 6, Appendix III).

Chart 7: Amount spent while staying at current location.

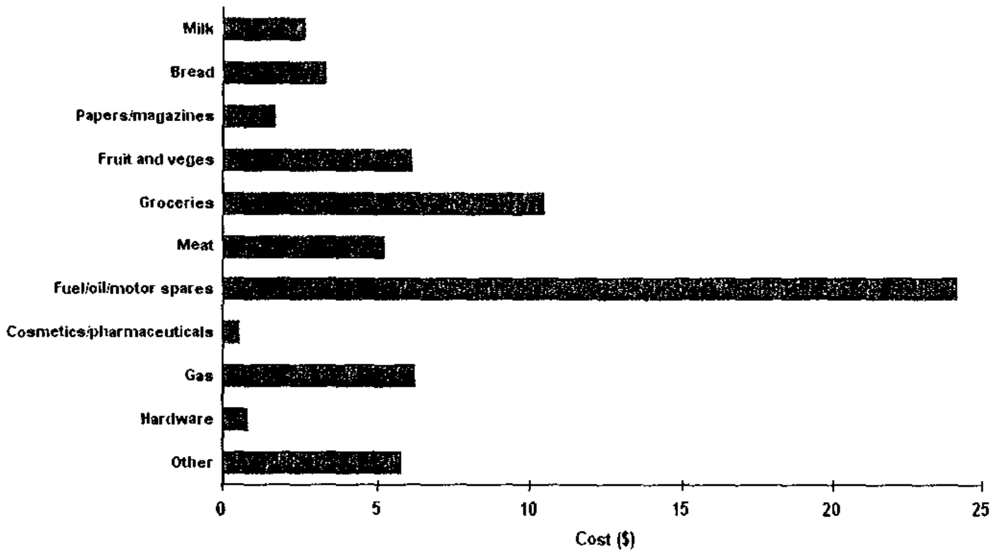


Chart 7 shows that food items are the major area of purchase when staying at a rest area or camping ground followed by vehicle needs being fuel/oil/motor spares.

Chart 25: Estimated spend while staying at in a rest area by source of income.

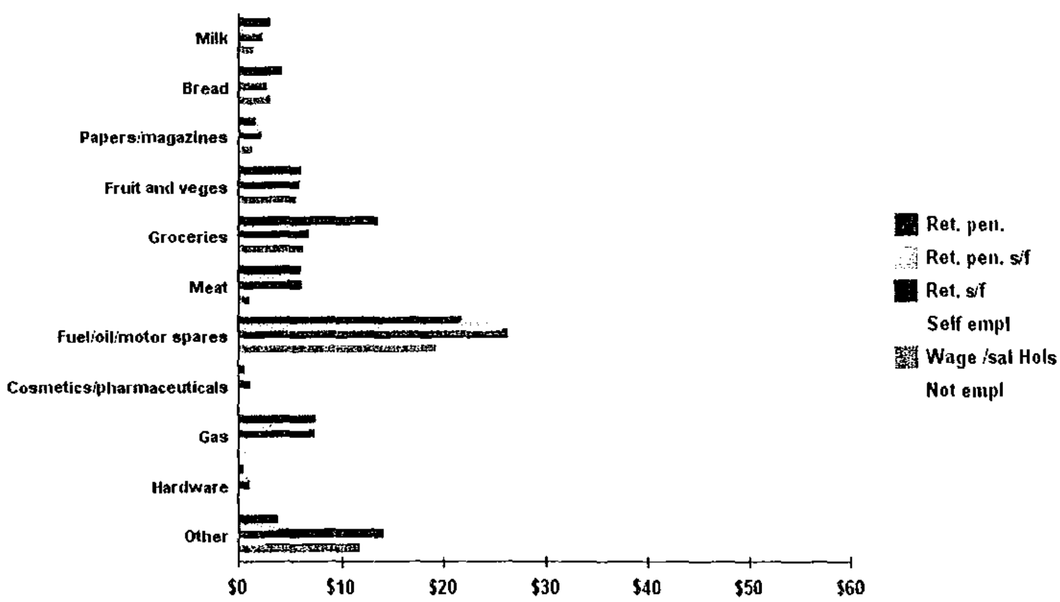


Chart 25 shows that those from the "Self Employed" income source spend more and rest areas and the other groups and that spending buying the other groups does not show any particular pattern or dominance. What this means is that any motorhome or campervan travellers staying at a rest area have the propensity to purchase from local shops.

Chart 16: Nights spent in Townsville region by purchases at location

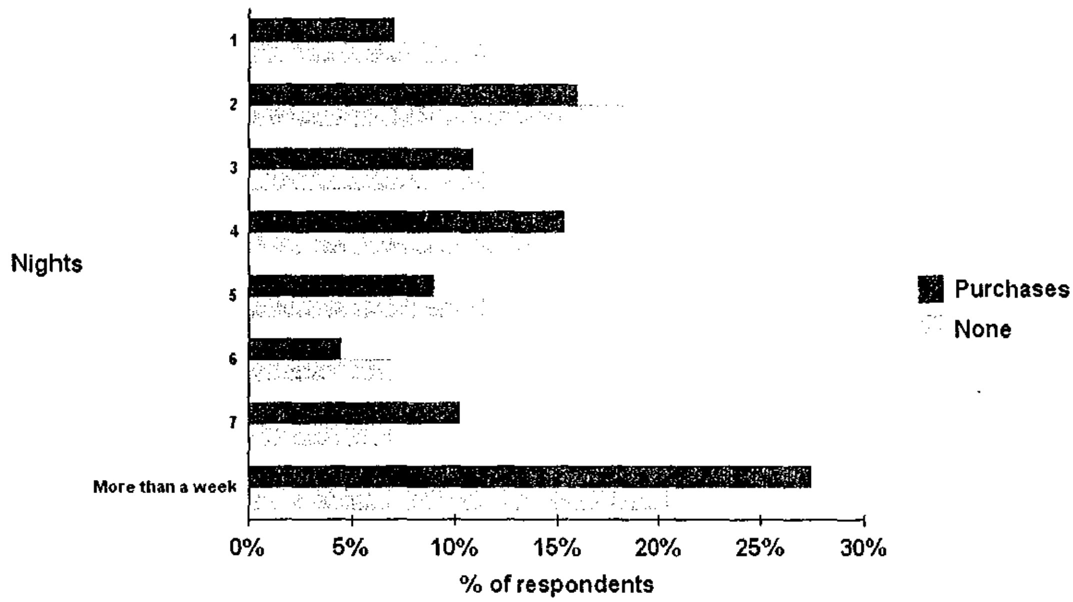


Chart 16 shows that travellers who stay in the Townsville/Thuringowa region for one week or more, are more likely to make purchases in the immediate vicinity of location they are staying than those who stay 2 nights or less. This result will be influenced by location, as 2 of the 5 rest areas surveyed did not have a shop within easy walking distance.

9.3. Spending Overall

Because they travel to a budget it was relatively easy to get accurate information from motorhome and campervan travellers in relation to how much they spend and the areas in which they spend it.

Chart 8: Estimated average weekly spend.

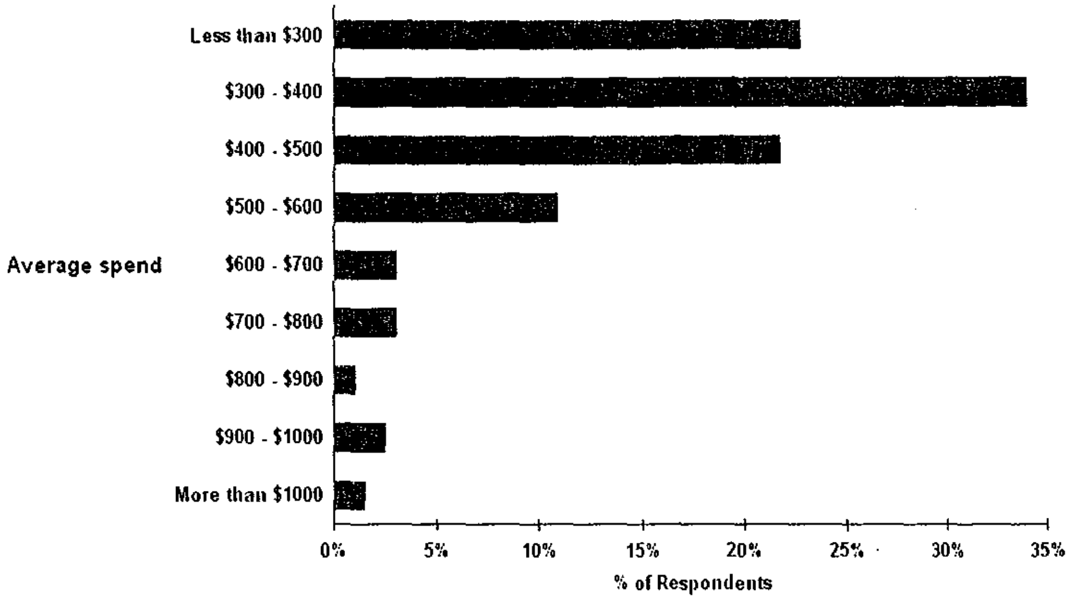


Chart 8 shows that the majority of motorhome and campervan travellers (57%) spend on average $400 or less per week. 22% spend between $400 and $500, 11% spend between $500 and $600 per week and 10% spend $600 or more.

It is important to keep in mind that an average weekly spend of $350 against an average length of trip of 157 days (22.4 weeks) gives a total average spend on the journey of $7,840.00 for two people, or $3920 each . This makes motorhome and campervan travellers a very high spending segment of the overall tourist market, particularly in comparison to the fly/stay market.

Chart 18: Estimated average weekly spend by source of income

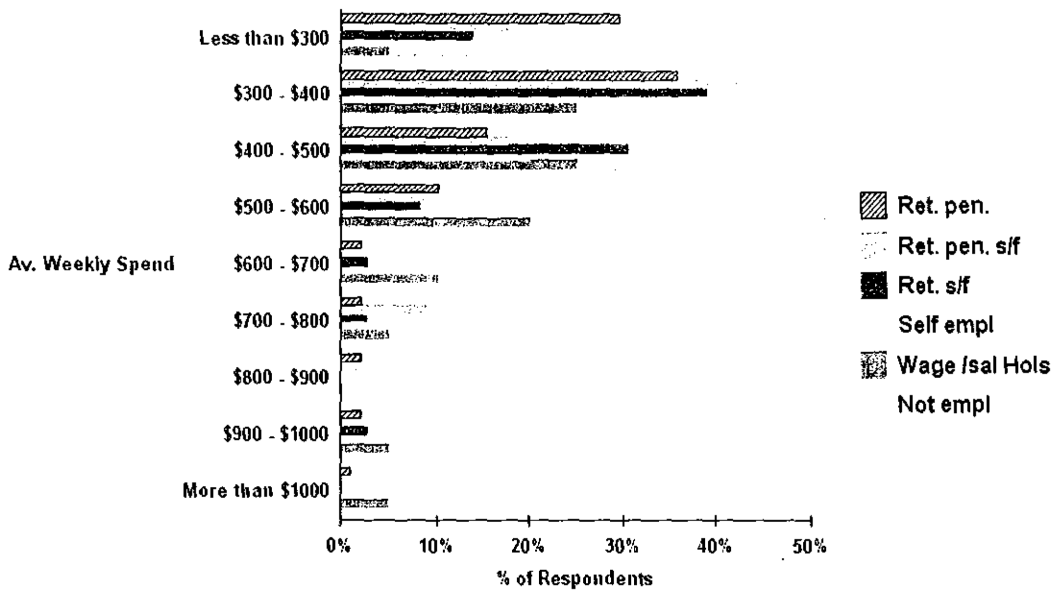


Chart 18 shows that retirees on pension only are lowest spenders with 30 % spending less than $300 per week and 36% spending between $300 and $400 per week. Of retirees on a pension with private income, 44% spend between $300 and $400 per week.

Of self-funded retirees, 39% spend between $300 and $400 while 31% spend between $400 and $500per week. It should be noted that this group travels for an average 26 weeks and, based on an estimated average spend of $400 per week, the total average spend per trip for this group is approximately $10,000. This makes self-funded retirees travelling in motorhomes and campervans a highly lucrative market for Queensland.

The self-employed and wage/salary earners on holiday are also significant spenders with 30% of self-employed and 20% of wage/salary earners on holiday spending between $500 and $600. These two groups represent 15% of the total motorhome and campervan traveller market.

9.4. Spending on Individual Items

Motorhome and campervan travellers were specifically asked about recent purchases in excess of $200 to ascertain what particular items they were likely to spend a larger amount of money on.

Table 7: Did your spend over the last 2 weeks or, if travelling less than 2 weeks since your trip started, include any individual items costing more than $200?

	Total
	204
Yes	65 32%
No	139 68%

Table 5 shows that just under one third of all respondents (32%) had made a purchase of an item worth more than $200 in the past two weeks.

Chart 21: Made purchase of individual item over $200 in last 2 weeks by source of income.

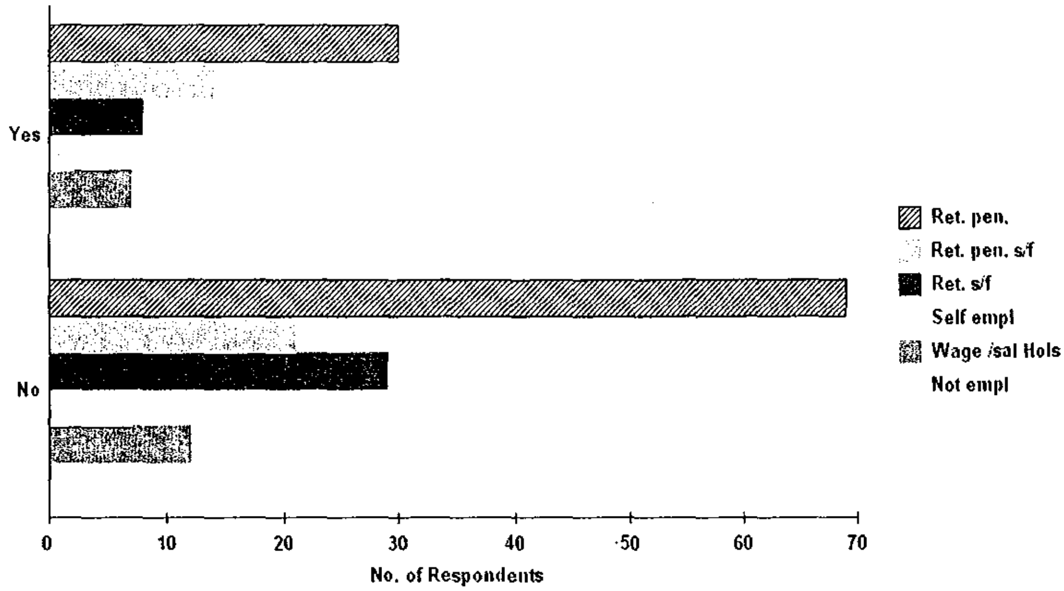


Chart 21 shows purchases of individual items valued at more than $200 and made in the previous two weeks. The Chart shows actual number of responses which when translated into percentages indicates that 30% of retirees on a pension only, and 30% self-funded retirees purchase items worth more than $200 each, while over 40% of retirees with pension and private income made such purchases. These purchases represent a sizeable amount of overall weekly spend, particularly for the retirees on pensions and the retirees on pensions and private income.

Of purchases made by motorhome and campervan travellers for items costing more than $200, 75 % were related to the maintenance and operation of their vehicles and 16% were for tourist related activities. The remainder included items such as a camera, film, a motor scooter, groceries, pushbike, cosmetics and musical instruments (see Table 13, Appendix IV).

10. Residents and Businesses

10.1. Residents

A total of 27 residents and Rollingstone, Balgal Beach, Toomulla Beach and Saunders Beach were interviewed, and every effort was made to interview those residents living closest to the rest areas.

Positive or neutral feedback came from 22 residents with the main concerns being the use of generators and effective policing of the 48 hour stopover requirement. Other comments relating to length of stopover mainly favoured current limits and some indicated they thought a nominal charge should be levied for use of toilets. Most residents felt the visitors added to the social environment by providing interesting company and new friends and input to the local economy.

Some residents had concerns regarding the ability of the facilities at the rest areas to cope with demand and would like the council make improvements as needed. Residents with a positive view of the use of rest areas believe the council does a good job in managing these areas.

Negative feedback towards the rest areas came from five residents with three residents stated categorically that the rest area should be closed. One person indicated that the rest area did not have a direct impact on themselves or their family but believed those people using the rest area should be shifted to a caravan park. Two other residents at Toomulla Beach indicated concerns about the lack of facilities such as a shop or post office to support the travellers using the rest area, concerns regarding noise and lighting fires and were particularly concerned about use of generators. While these two residents both lived some distance (200 metres) from the rest area, two other residents living almost next to the rest area gave positive feedback though they would also prefer no generators and no open fires. The two residents living closest to the rest area at Toomulla Beach indicated their biggest problem was long weekends, when people from within the region camped at the rest area, mainly in tents.

Two residents at Balgal Beach expressed concerns about the amount of traffic the rest area attracted and noise generated by people staying there. One resident complained of motorhomes and campervan being parked on the esplanade in front of her property. These residents also claimed that people stopping in the rest area only spend a small amount of money at the shop and made it difficult for people to park their boats when using boat ramp. However, two residents who lived closer to the rest area did not consider noise from the rest area to be an issue.

Overall, while a few residents have particular issues with the operation of the rest areas, the majority are mainly positive to the current use of the rest areas, supportive of the way the council manages the rest areas and did not see any major change is necessary.

10.2. Businesses

Overall, businesses offering day-to-day products such as groceries, meals, drinks, gas, you'll and the like (see Chart 6, Appendix II), that are within easy walking distance of the rest areas, gained substantial benefit.

The shop at Balgal Beach claimed that the seven casual staff employed were as a direct consequence of business from the rest area. The owner claimed that without the rest area the business would no longer be able to employ staff and would not be an attractive proposition to operate. He indicated he would sell the business should the rest area close.

The shop at Rollingstone indicated recent changes to the rest area, that limited number of nights and reduce the overall size, had cost $80,000 in revenue. This was mainly due to reduction in usage by regional residents at long weekends and had resulted in reduction of staffing levels by one full-time and one casual employee. While unable to indicate the exact value of the rest area to his business he was strongly of the belief that closure of the rest area or further reduction in its size would directly impact on the viability of his business and his ability to maintain his current staff level of one full-time employee.

The hotel at Rollingstone indicated that 80% of its weekday meal trade came from people staying at the rest areas. It also increased the viability of the business through additional bar and takeaway drink sales. Closure of the rest area would mean a loss of at least 30 to 40 hours per week for the two casual staff.

The newly opened Real Estate business at Balgal Beach could not offer figures but had received ongoing interest from people staying at the rest area and considering purchasing property at either Balgal Beach or other beaches in the area. He indicated he had made sales to these visitors.

The new lessee of Mystic Sands Country Club indicated that motorhome and campervan travellers staying at the rest areas made up 20% of the users of his lawn bowls facilities between May and October. He saw considerable potential in this market and intended to target it in 2004.

The BP station at Rollingstone claimed to have no problem with the rest areas, but stated he got little business from people staying there and that he worked closely with the nearby caravan park.

The shop at Bluewater claimed to receive no more than $50 per week from people staying at the rest area, which was a sharp contrast to shops and Rollingstone and Balgal Beach. This shop is less than 200 metres across the highway from the rest area, within easy walking distance. While claiming he had no problems with the rest area, the owner was very negative towards the rest area and the people that used it, as well as towards the Council for grading the entranceway to the rest area while not provide the same service to the area in front of his property. The information provided in this interview may not be reliable

The shop at Saunders Beach had no issue with the rest areas but indicated he believed the people staying in the rest area had very little impact on his business, as he was located some distance away.

The service station at Yabulu was spoken to and while they indicated they got considerable custom from motorhome and campervan travellers, they were unable to determine whether or not these people were staying at rest areas in the region.

11. Conclusions and Recommendations

11.1. Conclusions

This research clearly shows that motorhomes and campervan travellers, who stay in rest areas, represent a legitimate and financially worthwhile segment of the self drive tourist market.

Motorhomes and campervan travellers are predominantly retirees and as such want to get the best possible value for their holiday dollar spent. They have similarities to the backpacker market in so much as they want to maximise their experiences and minimise what they perceive as "low value" expenditure.

They are not under time pressures in the way package or fly drive tourist are and consequently they can take their time to pick and choose and enjoy those places that suit their needs and lifestyle, while avoiding those that do not. They normally travel up to three hours to find a new location but will travel longer if it is considered necessary.

Most residents in communities adjacent to rest areas consider these areas have a positive or at least a neutral impact on their lives, with many appreciating the opportunity to meet new people and make new friends. As always, the irresponsible behaviour on minority of motorhomes and campervan travellers has impacted on a few local residents and helped develop negative perceptions.

Informal communication by word-of-mouth is their preferred means of getting information on the best options and opportunities available while they travel.

While their day-to-day expenditure is lower than many other segments of the overall domestic and international tourist markets, the fact that they spend considerably more time on holiday (average of 157 days) results in the overall spend that is quite high (estimated at between $4000 and $5,000 per person)

They represent an ideal market for regional local government in Queensland to target, as their infrastructure needs a minimal in relation to the revenue they can generate.

If rest areas are located adjacent to small communities with minimal infrastructure (e.g. a shop, a hotel and a service station) these businesses can gain substantial economic benefit, which will flow on the residents in the area through addition employment opportunities. Careful planning and astute marketing could see many more businesses in and around rest areas gain benefit from these travellers.

Regional towns can gain considerable benefit from campervan and motorhome travellers if they take time to understand the needs and requirements of this market and put in place the infrastructure needed to meet those needs and requirements.

Motorhomes and campervan travellers who stay in rest areas also use caravan parks with the level of usage related to source of income and possibly place of residence. Anecdotal feedback strongly suggests that most of these travellers will not be forced into using caravan parks and will avoid caravan parks that do not need their needs and requirements.

If caravan parks are astute in their marketing they will win a share of the average 42 nights each motorhome and campervan spends in a caravan park on the course of their journey (at $20 per night, 42 nights equates to approximately 10% of these travellers total spend). With the right facilities and the right approach they can also gain a share of the $75 spent by 75% of motorhomes and caravan travellers when they stop overnight at a particular location.

If caravan park owners harass motorhome and campervan travellers while they stay in rest areas to force them into using caravan parks, anecdotal feedback suggests the result will be that through the informal, word-of-mouth network, most motorhome and campervan travellers will make every effort to avoid the caravan park/s involved. If councils close rest areas to force motorhome and campervan travellers to use caravan parks, the likely result will be that the city or shire will be also be avoided by these travellers as much as possible.

11.2. Recommendations

1. That CMCA uses these findings to undertake dialogue with local government, local business groups and other interested parties to show the possible economic benefits a constructive approach to the management of rest areas could bring.

2. That the CMCA presents these findings to Tourism Queensland (TQ) as independent research providing some insight into the potential of the motorhome and campervan market that uses free rest areas, offers the State.

3. That the CMCA works with TQ to initiate a more in-depth study of this emerging market which will provide more sophisticated segmentation of the market, based on both demographic and psychographic analysis. Such a study should quantify changes in the market, particularly the growth in usage of large motorhomes, and the impact these changes will have within the overall tourism industry in Queensland. It should also identify what changes, if any, would be needed to current infrastructure to maximise the value of this market for Queensland and to particularly regional Queensland. It should also indicate how regional Queensland can best capitalise on what is potentially be a significant revenue source, particularly for smaller country towns with limited infrastructure that would otherwise struggle to attract regular tourist activity.

4. That the CMCA use these findings to engage with the caravan parks representative body and the state and national level to help caravan park owners better understand the changing nature of the motorhome and campervan market and the opportunities it offers.

12. Appendix I - Anecdotal Feedback

This anecdotal feedback from the motorhome and campervan travellers was recorded by the canvassers, from conversations undertaken when they were collecting completed questionnaires.

Feedback suggests that overall, motorhome and campervan travellers are not against caravan parks or paying to park their vehicles in an appropriate and comfortable location and they indicated today are happy to pay fees (usually up to $10) to stay in camping grounds at national parks. However, they are selective as to which caravan parks they use and object to paying for services they don't need or paying extra just because a caravan park is not properly set up for their vehicle.

They feel that many caravan parks do not cater specifically for their needs and if they do not require power they are often put with the campers, rather than in their own area. When they are treated well by a caravan park some are prepared to stay for up to two weeks.

Some travellers indicated they had membership/concession passes with major caravan park chains and use these as required and as convenient.

An example of caravan parks not catering for the needs of motorhome and campervan travellers is that while 24% of those interviewed were travelling on their own, they were usually required to pay the same fee as a couple to stay in a caravan park and use the facilities. What particularly annoyed them was that if there was a third person in a vehicle, that third person usually paid a smaller fee (e.g. $5 when the single person in a vehicle paid $20).

Other stories are of caravan parks charging larger motorhomes double, for two parking bays, of vehicles not being able to gain physical access to a caravan park due to the size of the vehicle and the style of the entranceway, roadways, trees etc. Also of campervans and motorhomes that did not require a designated powered and watered site being crammed up together in order to get more into the area.

Many motorhome and campervan travellers travel with their pets, which is a very significant factor in limiting the number and type of caravan parks they could stay in.

Word of mouth is the major means by which motorhome and campervan travellers communicate. This can often result in fact becoming myth and negative stories regarding particular caravan parks or local government areas becoming exaggerated and embellished with the telling.

When the Thuringowa City Council recently undertook work on the Rollingstone rest area and moved on those people using the area at the time, these people were not happy and consequently it took over a week for the numbers using the rest area to build backup with a consequent impact on local businesses.

Some caravan travellers expressed negative perceptions of motorhome and campervan travellers who they blamed for the closure or reduction of rest areas and changes in law which forces the caravan travellers to use caravan parks more often and therefore incur more costs.

Motorhome and campervan travellers all travel to a budget and are very conscious of what they spend. This made it easy to get getting detailed breakdowns of spending activities in relation to where they were staying and the previous major town they had stopped at. Rest areas are important for them because it stretches the budget further, allows them to travel further and longer. The money not spent in caravan parks is spent on purchases for their vehicles and for their day-to-day needs and activities. Many make a conscious effort to support businesses adjacent to the rest areas they stop at, providing those businesses display the same positive attitude to them.

Money is not the only reason they enjoy staying in rest areas and lifestyle is an important factor. They feel they are experiencing "real Australia" and feel it is an act of freedom and part of "being on the road" to use the rest areas rather than caravan parks.

One thing that is absolutely clear is that they will not be forced into caravan parks and will bypass or not even visit areas that try to dictate to them. Queensland is not perceived as a friendly place for motorhome or campervan travellers as many areas have undertaken changes that make them feel unwelcome and they are very sensitive to this. A number of towns including Bowen and Ayr were named as unfriendly and as a consequence they made a conscious effort not to spend money in those places.

Some people stated that they had shopped in Thuringowa as opposed to Townsville because they were aware that Thuringowa provided the rest areas and they felt that they should in turn support Thuringowa businesses.

The nature of the motor home and campervan market is changing with changes in technology allowing for the development of vehicles with much higher levels of self-sufficiency. More large motorhomes are on the road, driven by city -based "baby boomers" wanting to take the ultimate road trip and see the real Australia but also wanting to do it in the style and comfort to which they are accustomed. Modern technology means these vehicles do not need to hook up to electricity or water, only need services to dump waste water and can be totally self sustained for up to a week at a time.

Queensland is perceived as becoming increasingly hostile towards motorhome and campervan travellers seeking to stay in rest areas and far North Queensland was perceived as particularly unfriendly and unsupportive of these travellers. These negative attitudes were perceived as being driven by both State and local government bodies.

13. Appendix II - All Charts

Chart 1: Nights have spent in a caravan park and nights spent in a rest area or camping area.

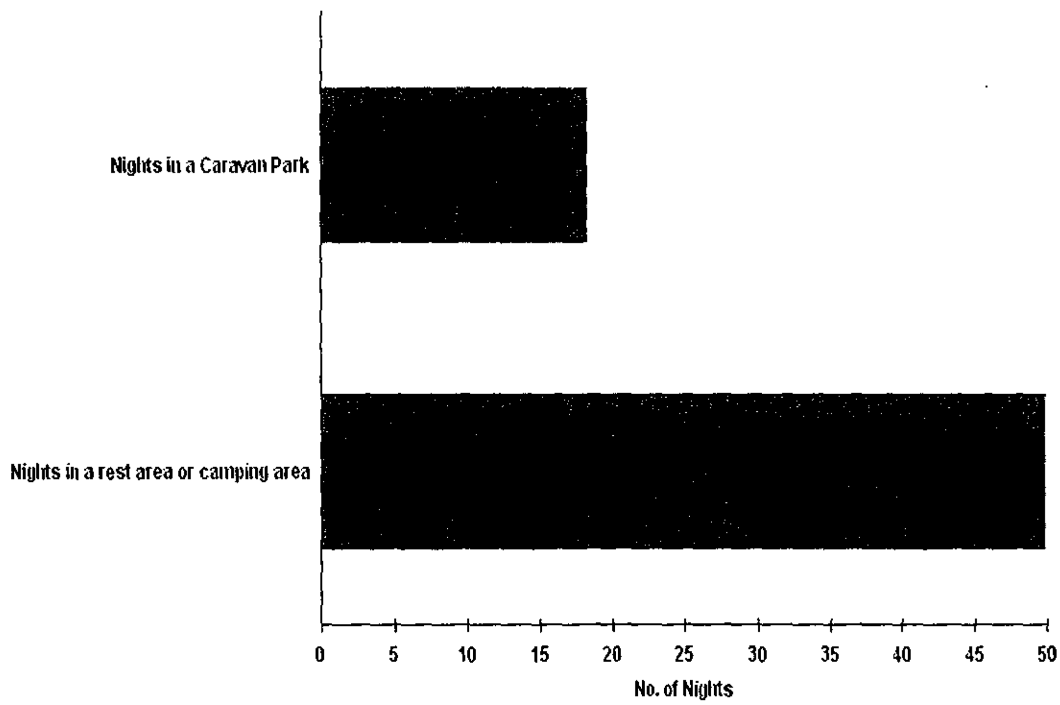


Chart 2: Nights spent at previous stop

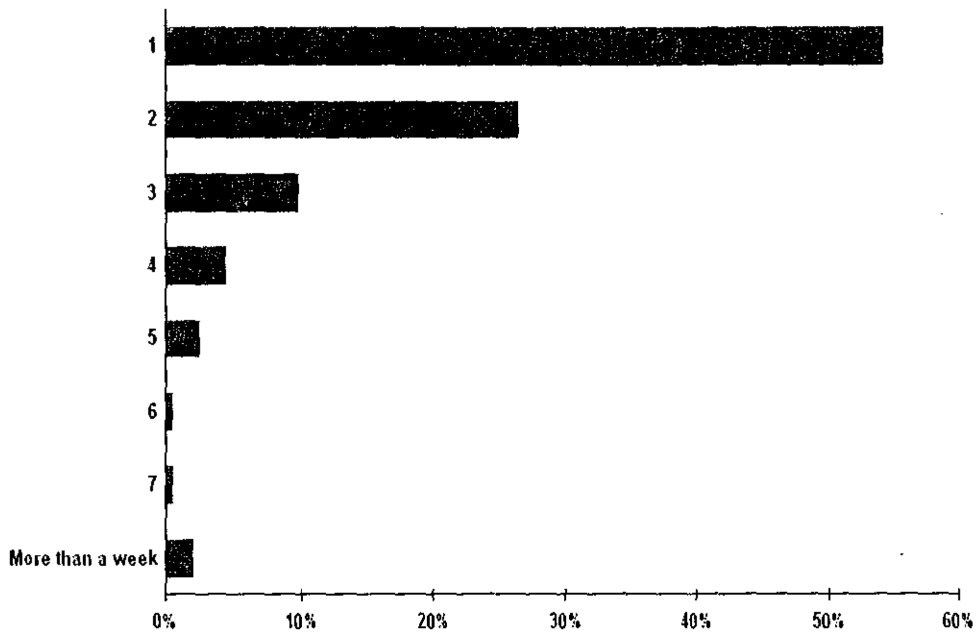


Chart 3: Cost of items purchased at last major town.

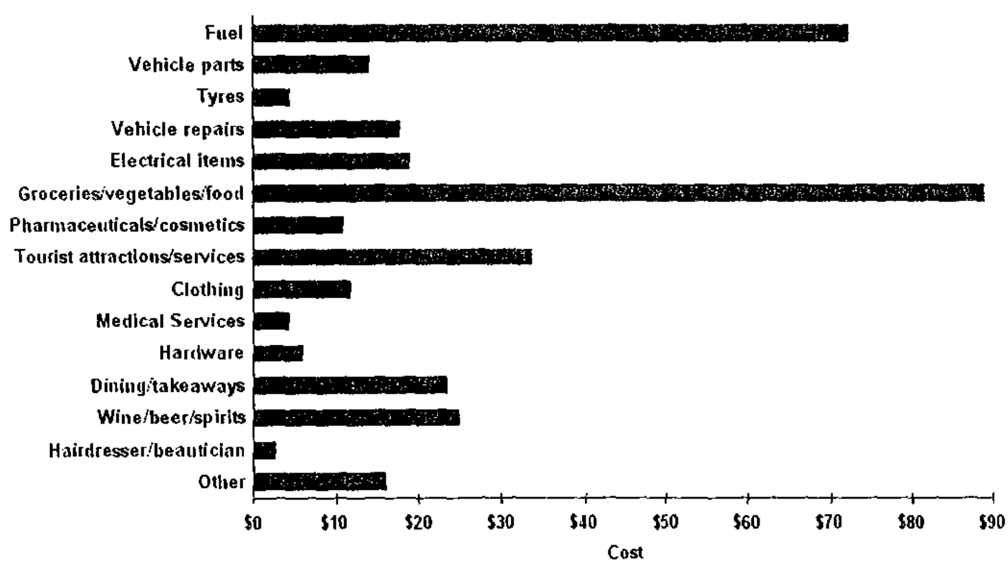


Chart 4: Visitation to a shopping centre or the city retail centre at the last major town visited.

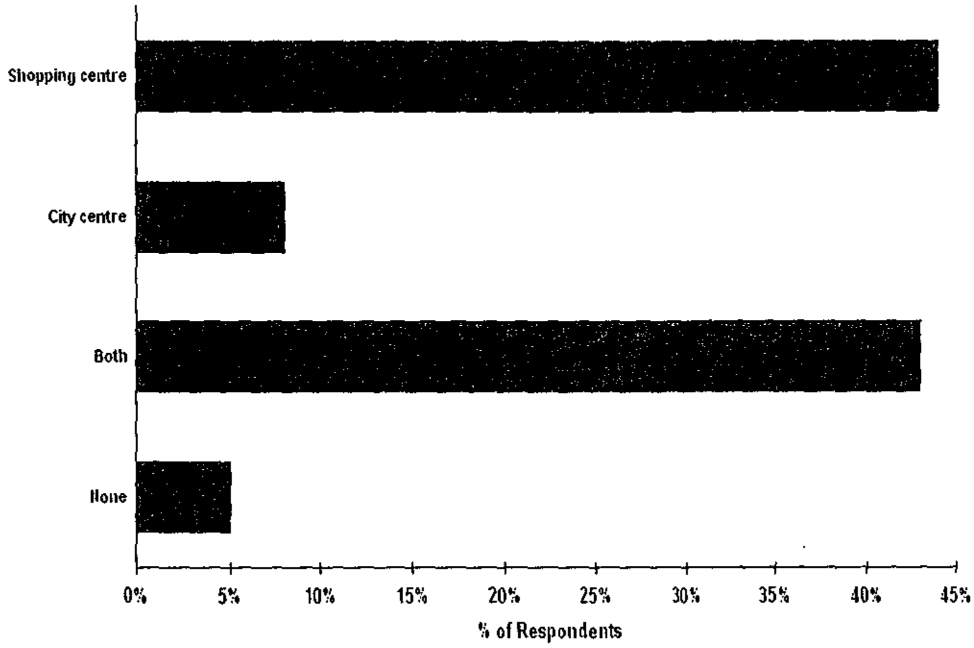


Chart 5: Nights spent in the Townsville region.

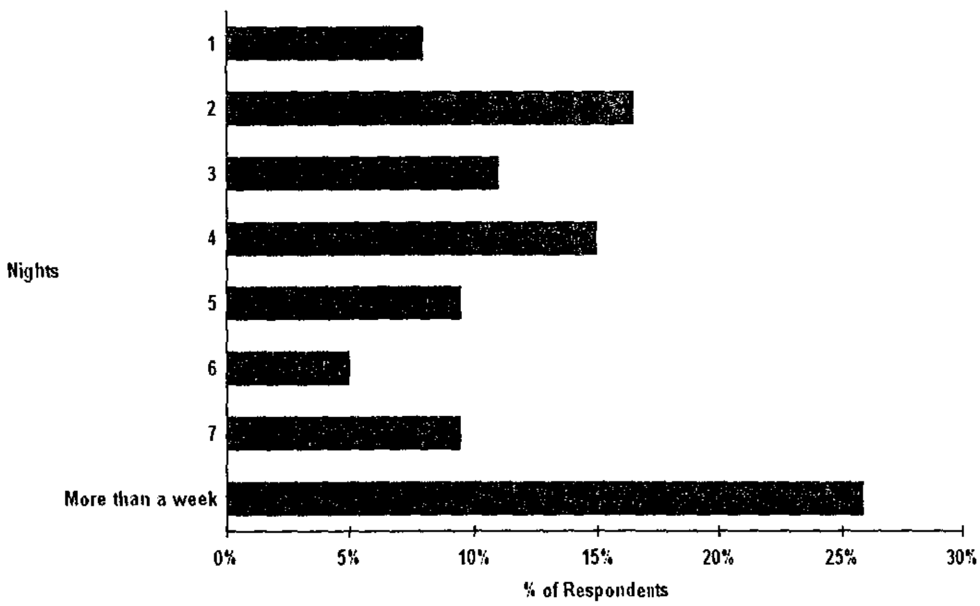


Chart 6: Information source forcurrent location (More than 1 answer choice)

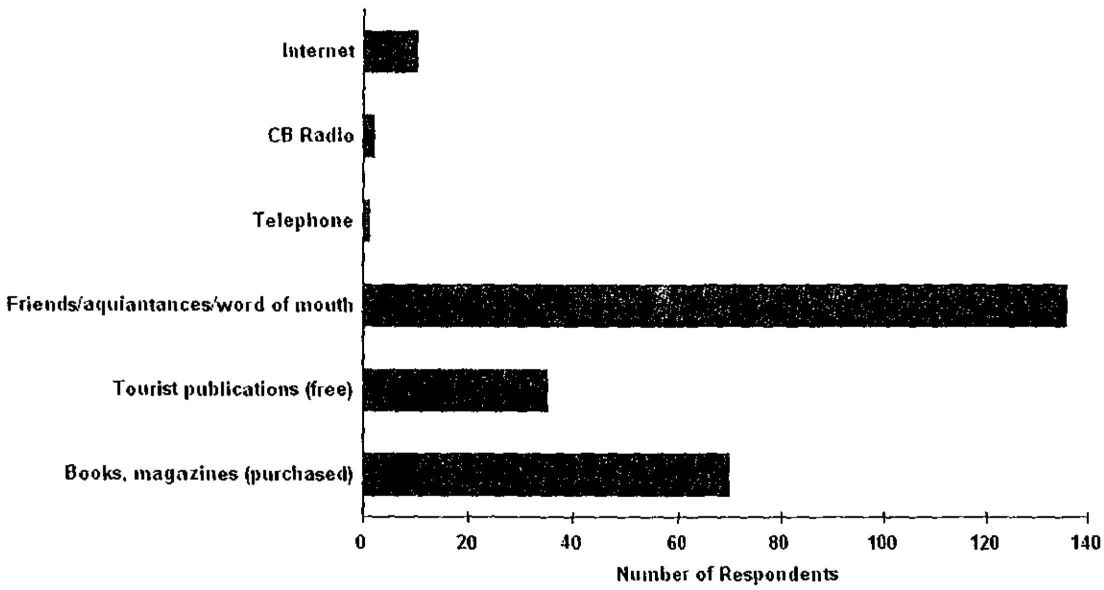


Chart 7: Amount spent while staying at current location.

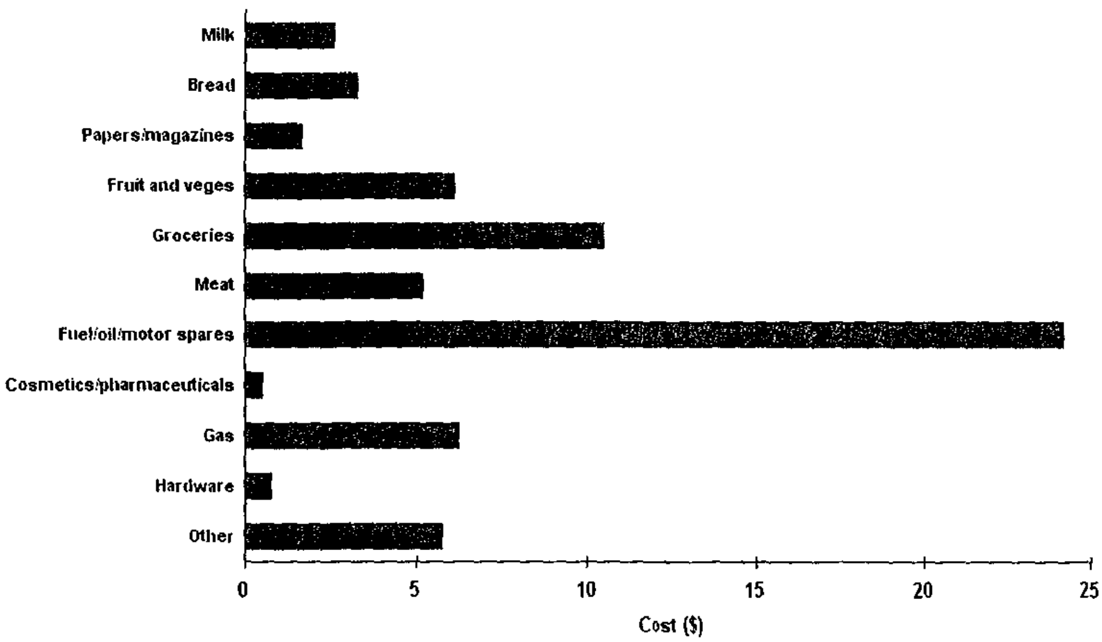


Chart 8: Estimated average weekly spend.

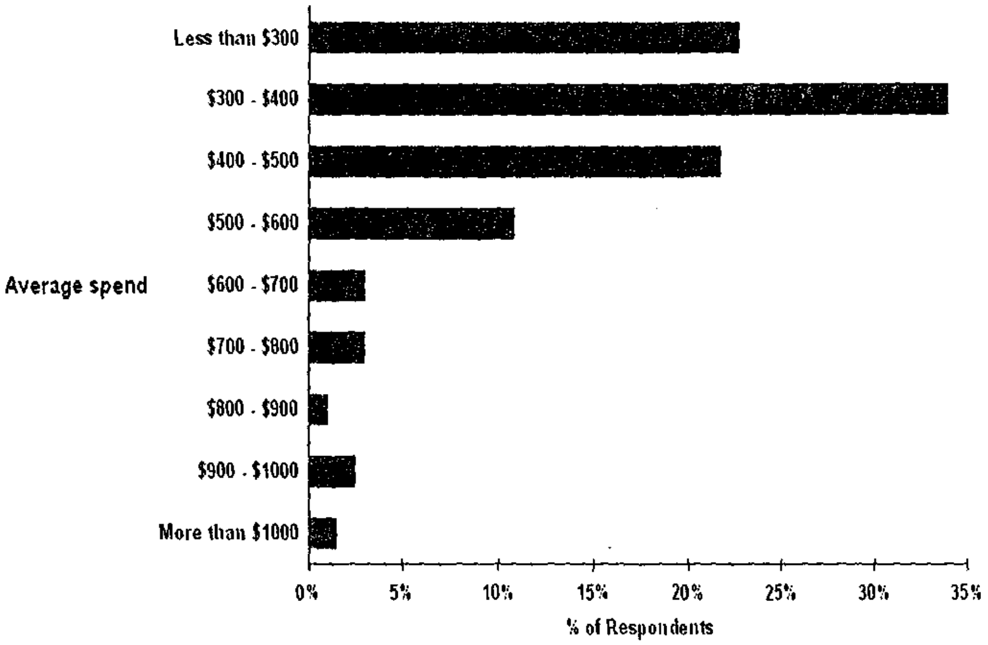
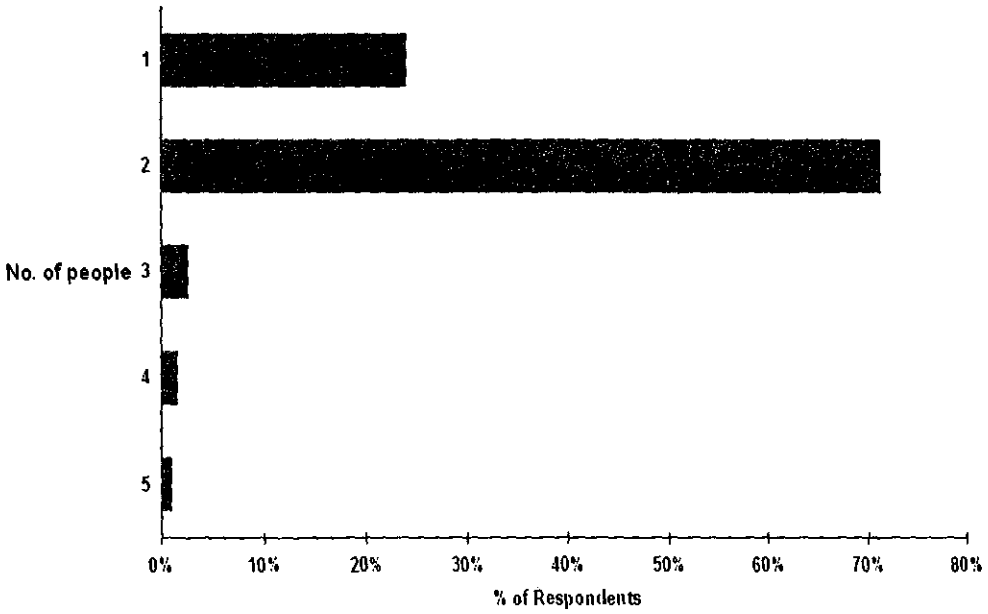


Chart 9: Number of people travelling in vehicle.



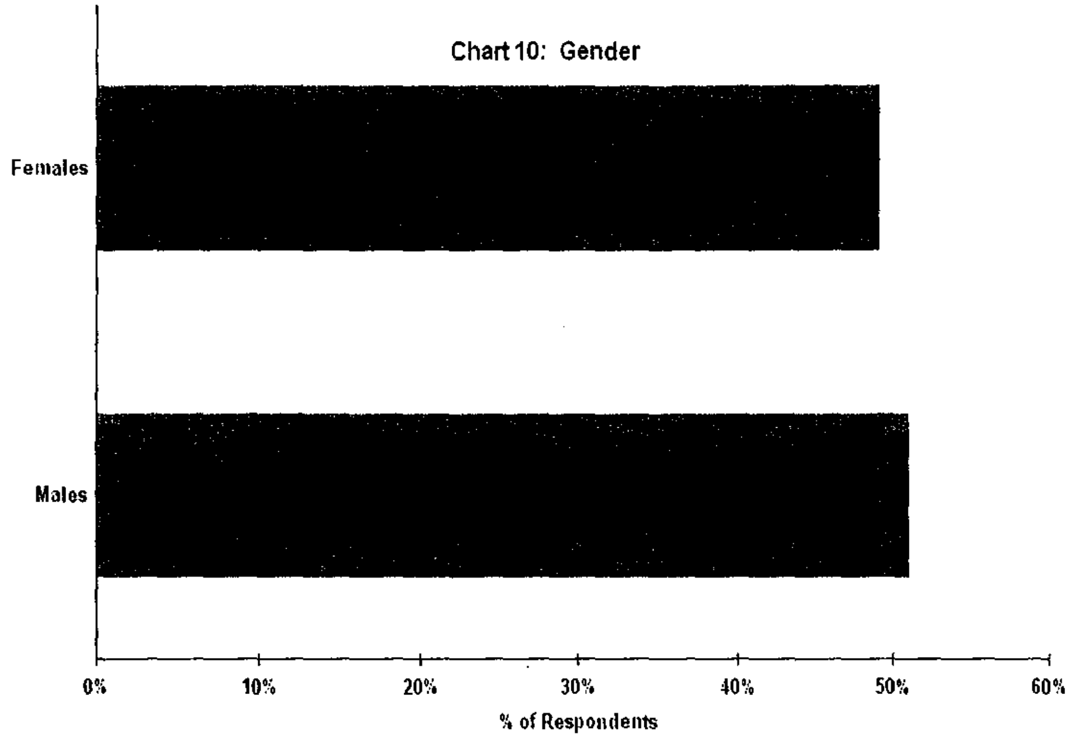


Chart 11: Length of current trip by number of people in vehicle.

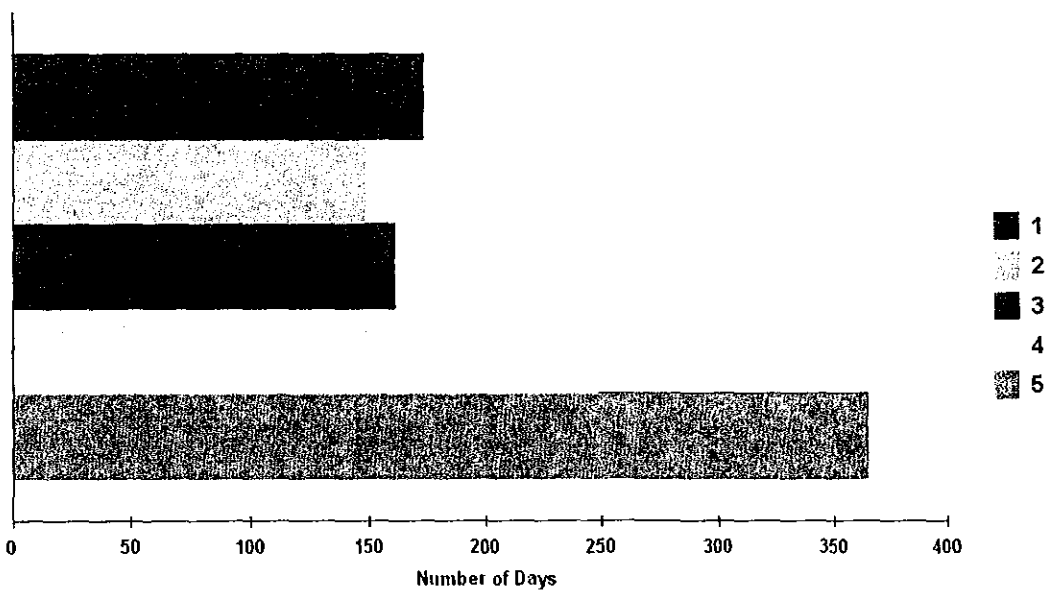


Chart 12: Employment/income status of the people in vehicle.

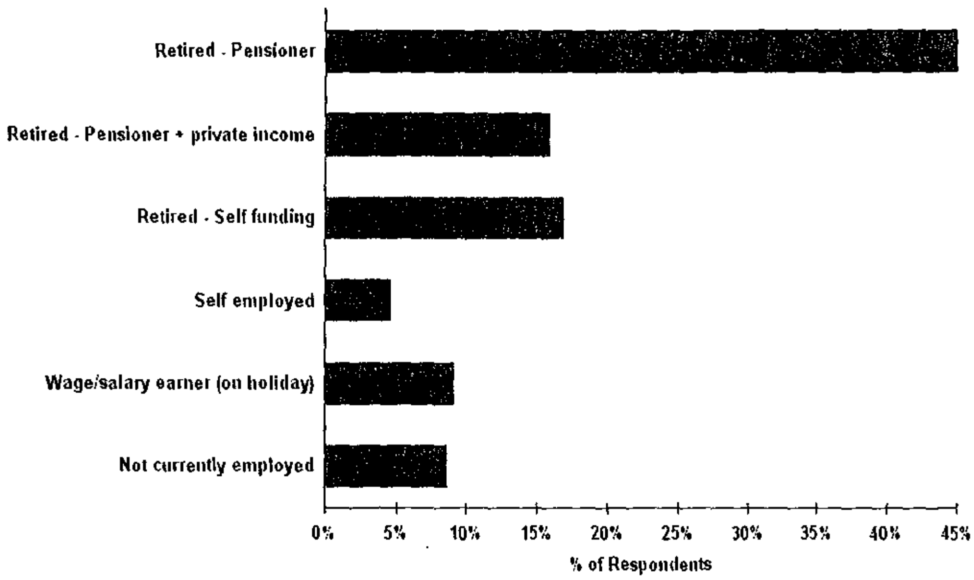


Chart 13: Visits to a shopping centre or the city retail centre by source of income.

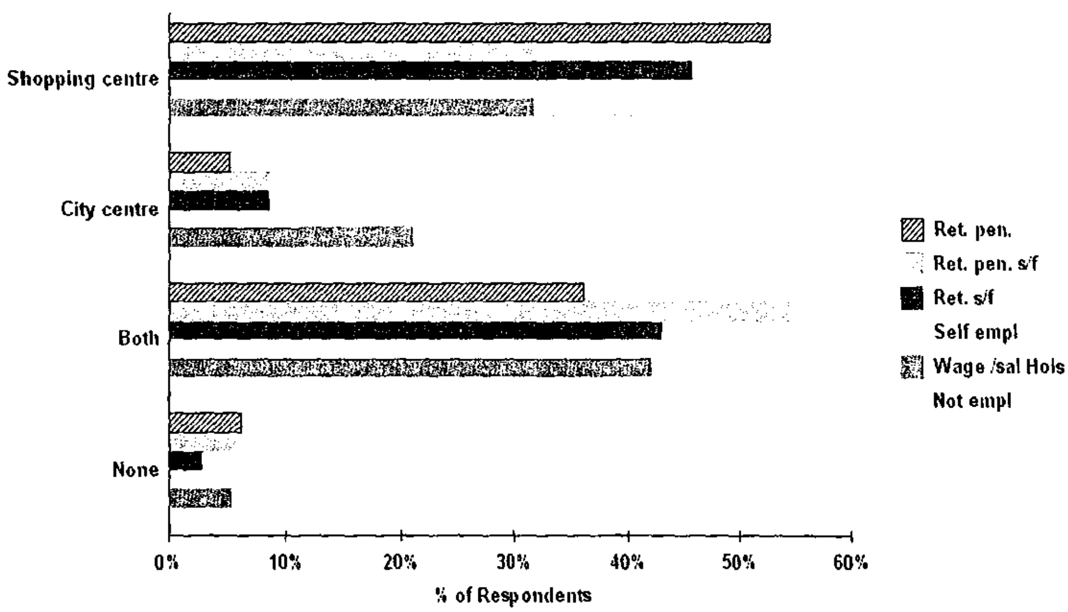


Chart 14: Total estimated value of purchases in the last major town by source of income.

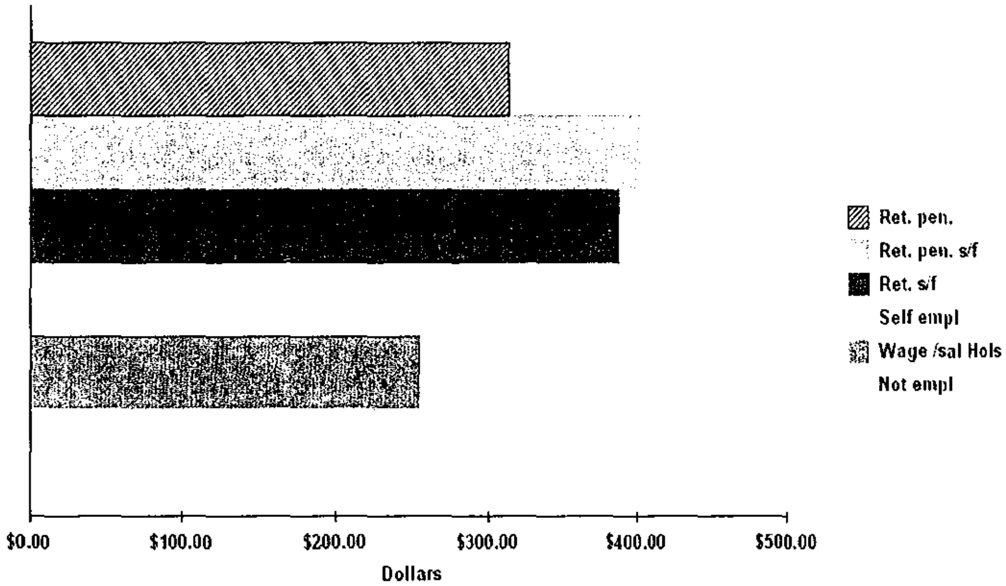


Chart 15: Total estimated value of purchases made while staying at rest area by source of income.

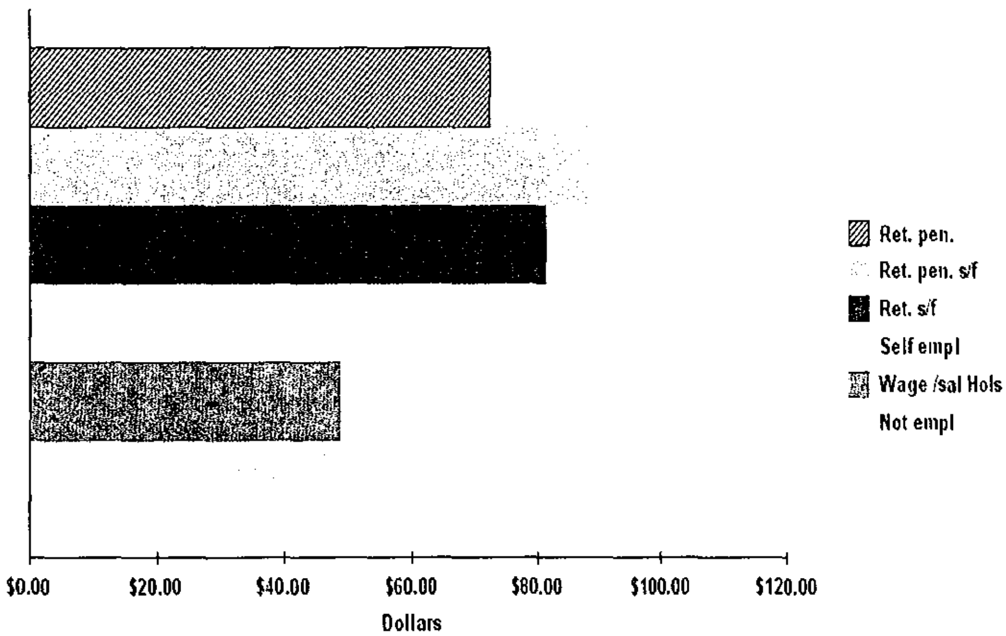


Chart 16: Nights spent in Townsville region by purchases at location

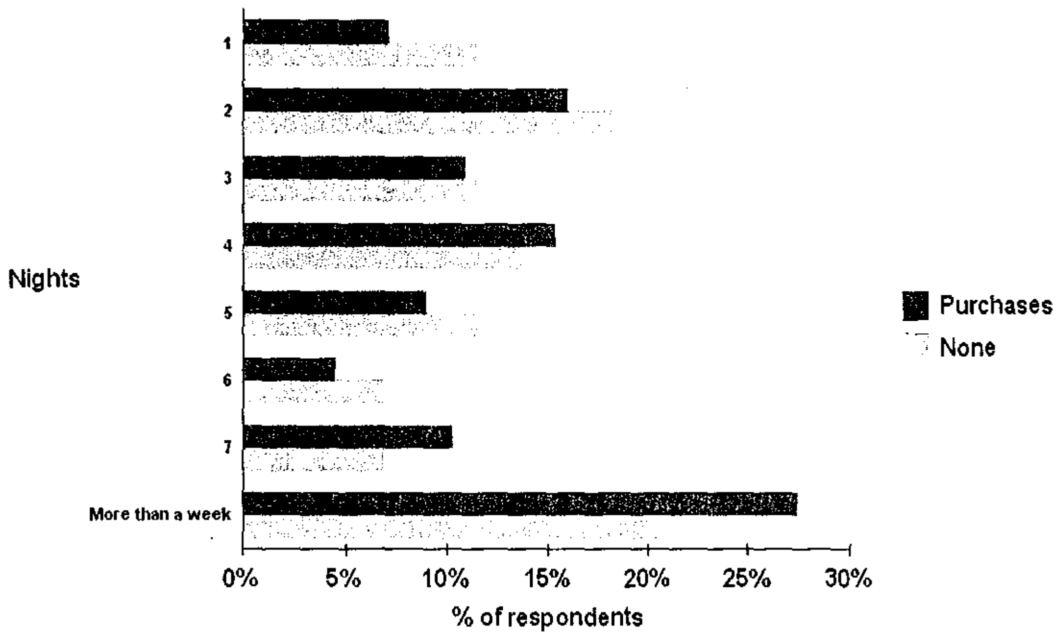


Chart 17: Number of nights in the Townsville region by source of income.

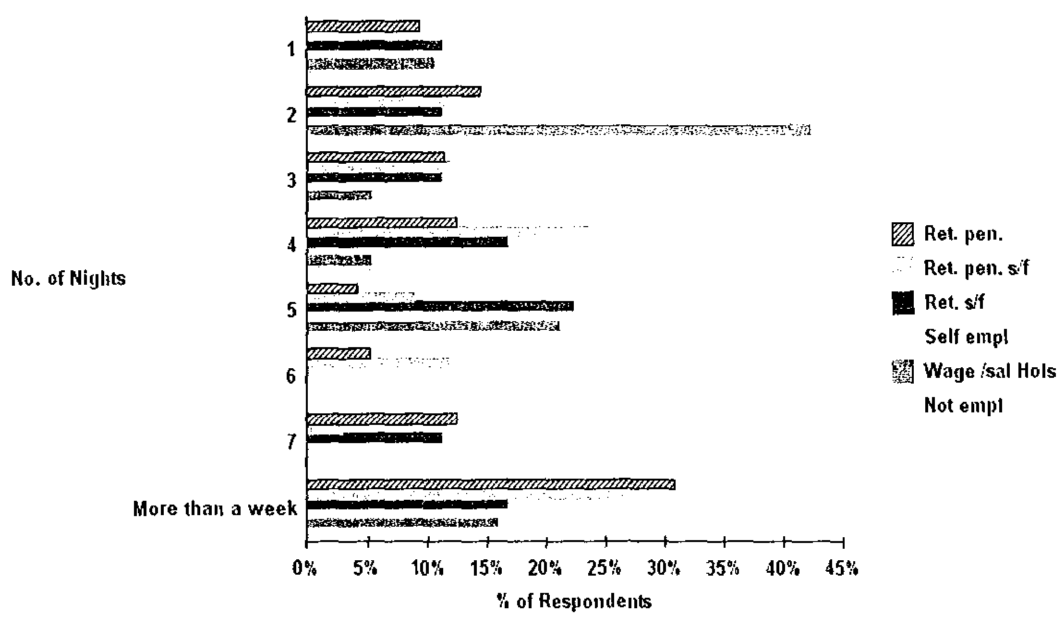


Chart 18: Estimated average weekly spend by source of income

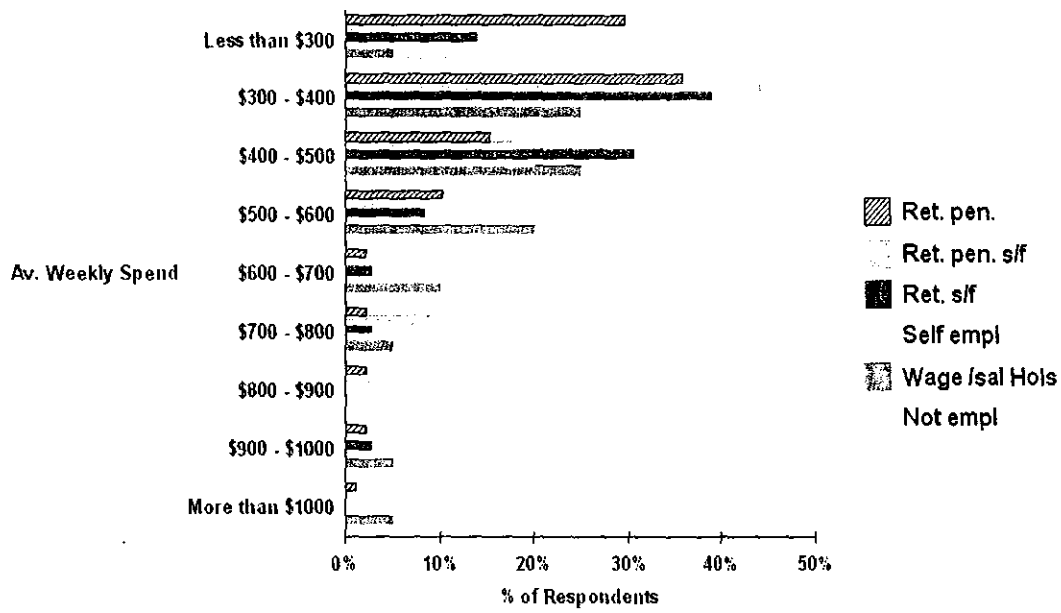


Chart 19: Number of nights have spent in a caravan park and number of nights spent in a rest or camping area by source of income.

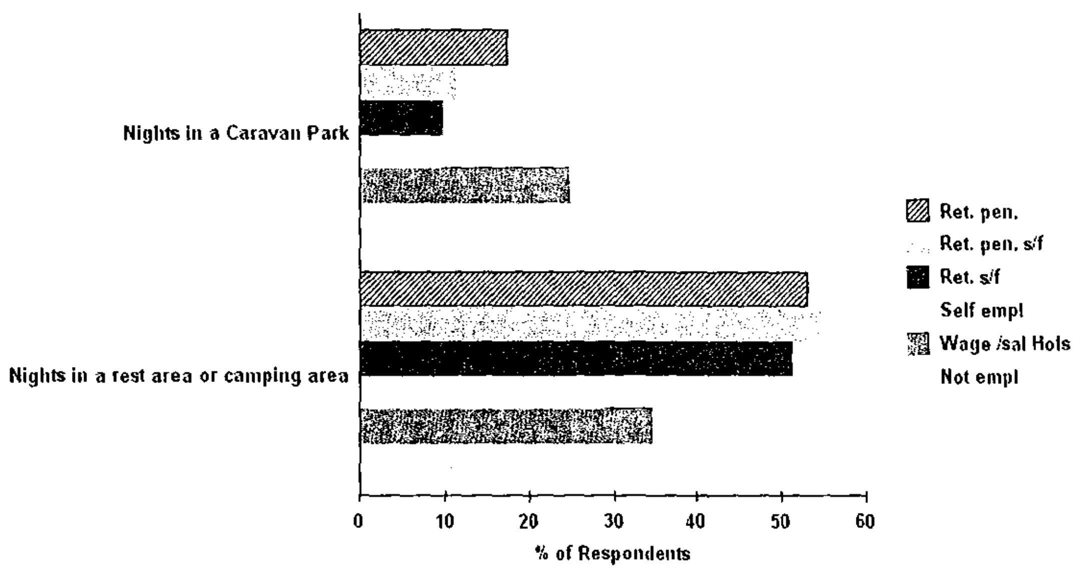


Chart 20: Source of infomation by source of income (Can choose more than 1 answer).

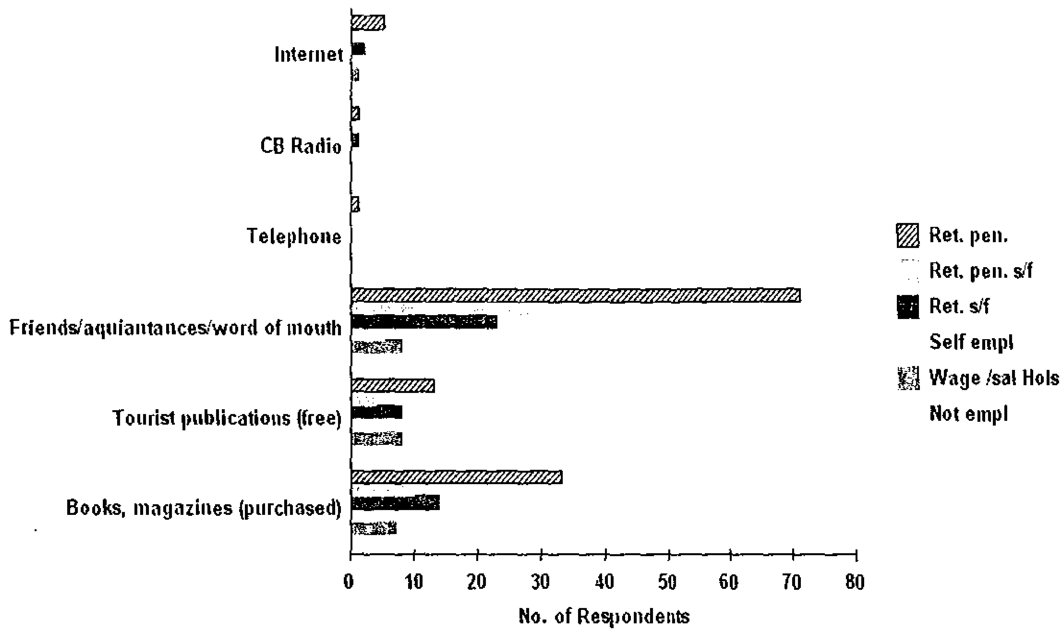


Chart 21: Made purchase of individual item over $200 in last 2 weeks by source of income.

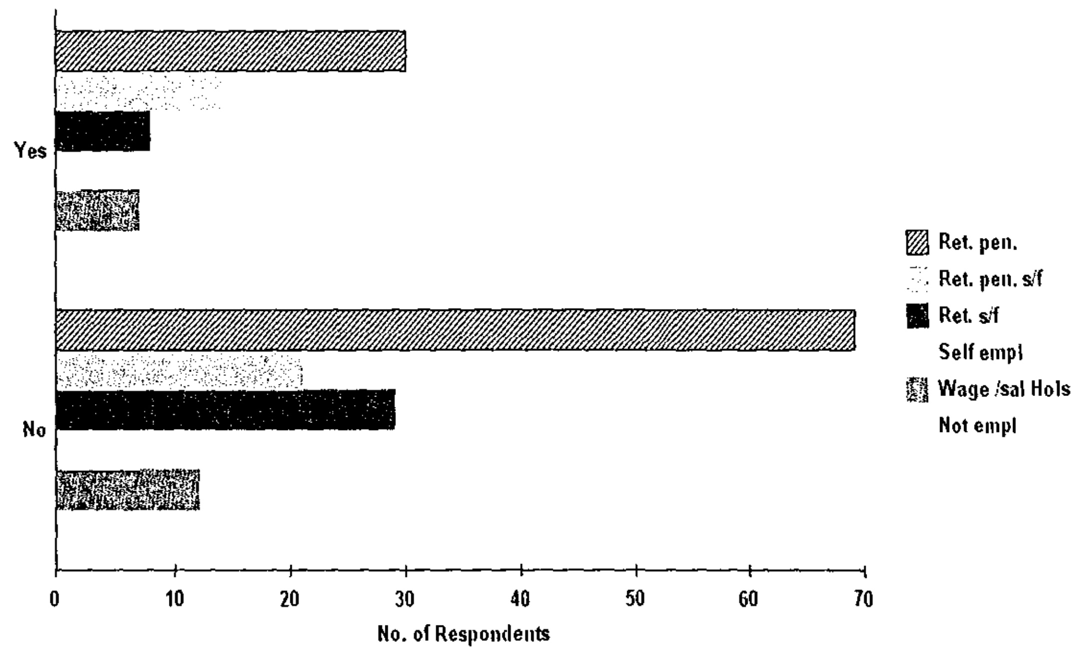


Chart 22: Days already travelled on this trip by source of income.

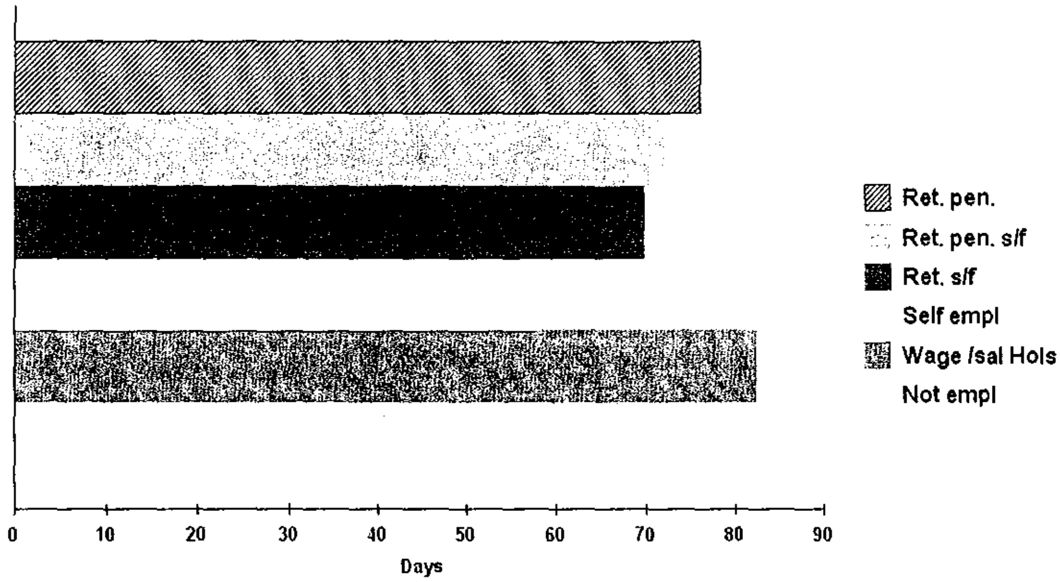


Chart 23: Intended time of travel on current trip.

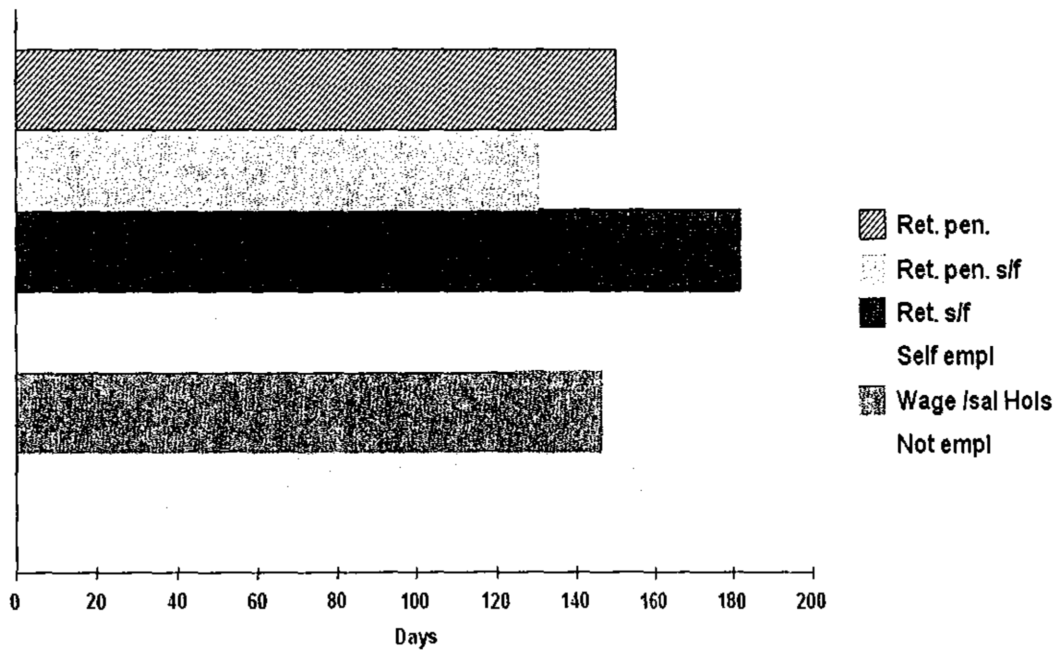


Chart 24: No. of nights at last stop by income source

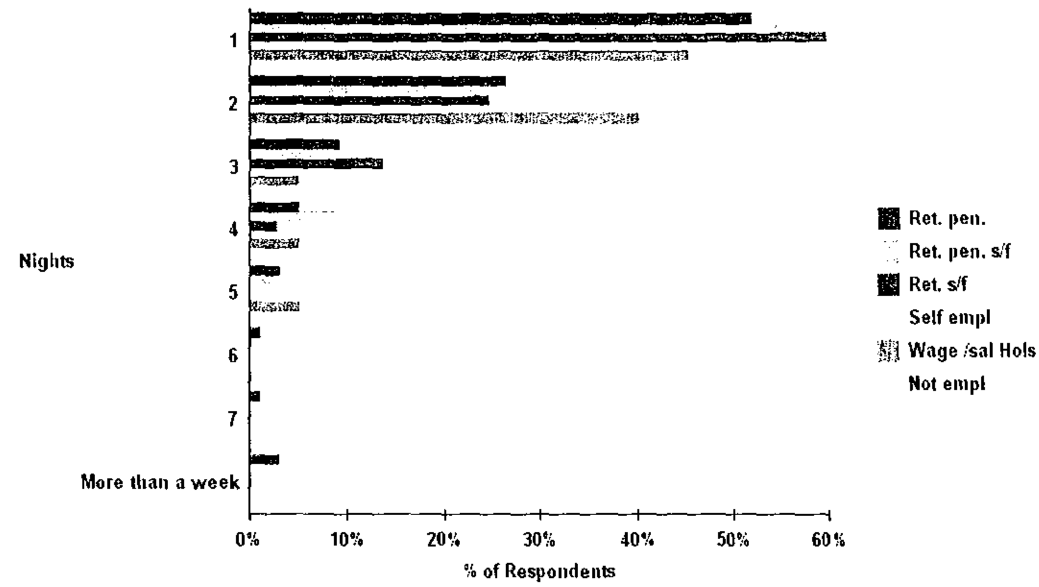


Chart 25: Estimated spend while staying at in a rest area by source of income.

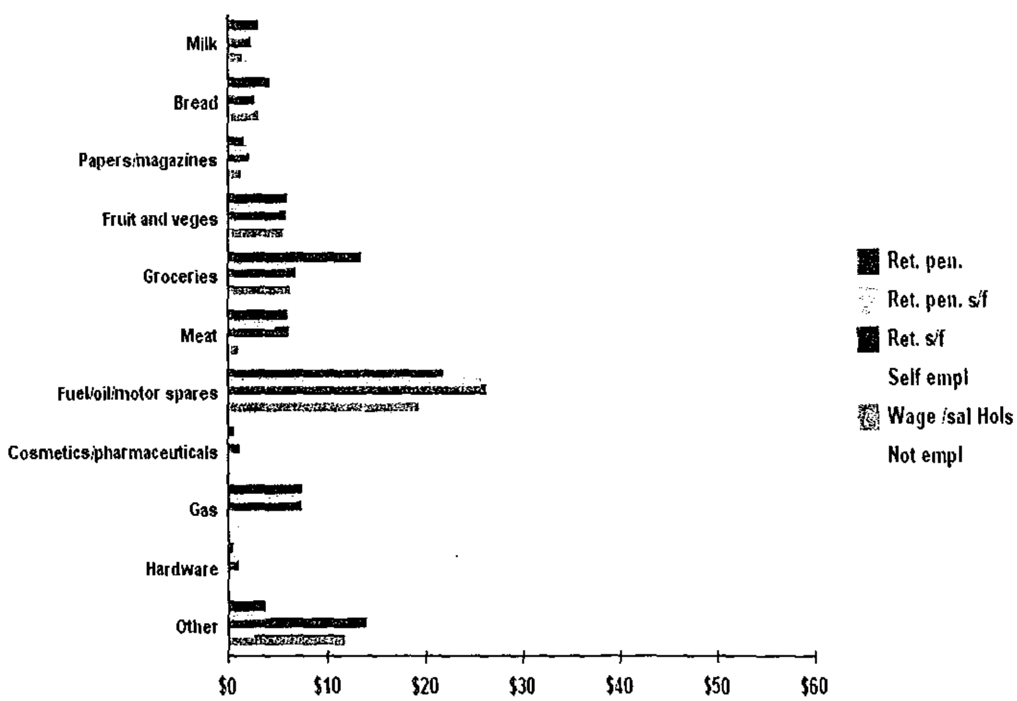
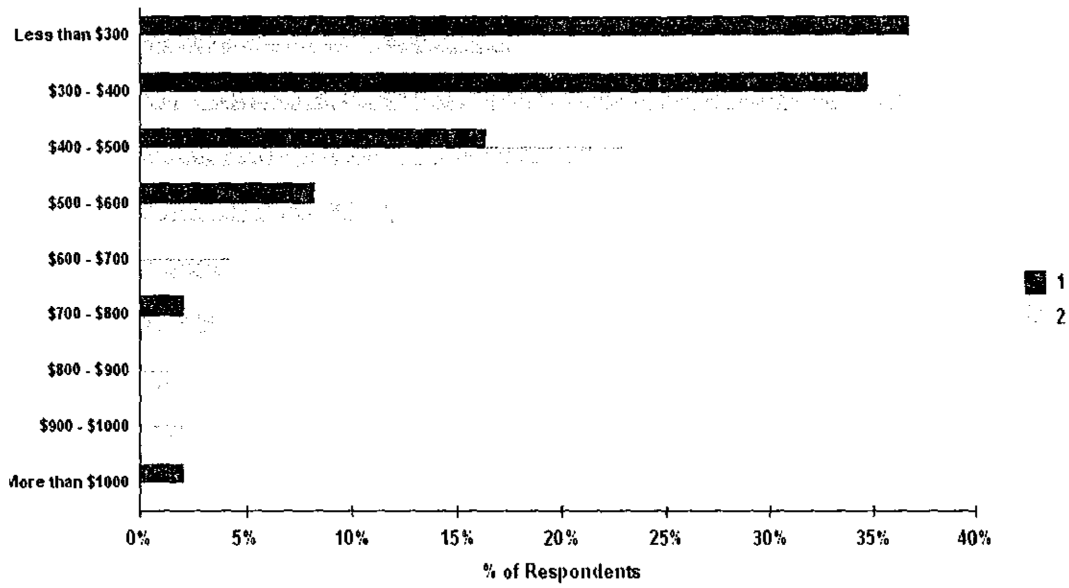


Chart 26: Estimated average spend by the number of people in the vehicle (showing only vehicles with 1 or 2 people).



14. Appendix III - All Tables

Table 1: How long have you travelled on this trip?

	Total
Base	204
Days	76

Table 2: How long do you intend to travel on this current trip?

	Total
Base	196
Days	157

Table 3: Did you make any purchases in the last major town you stopped in?

	Total
Base	205
Yes	198 97%
No	7 3%

Table 4: What is the total estimated value of your purchases in the last major town you visited?

	Total
Base	197
Total Value ($)	360

Table 5: Have/will you make any purchases while staying in this location?

	Total
	205
Yes	160 78%
No	45 22%

Table 6: What is the total estimated value of your purchases made while staying at this location?

	Total
Base	149
Total Value ($)	75

Table7: Did your spend over the last 2 weeks or, if travelling less than 2 weeks since your trip started, include any individual items costing more than $200?

	Total
	204
Yes	65 32%
No	139 68%

Table 8: What are the age groups of the people travelling in your vehicle? (Please indicate the number of people in each age group)

	Total		Total
Females	**182** **49%**	**Males**	**189** **51%**
Less than 25 years	12 3%	Less than 25	11 3%
26 - 35 years	12 3%	26 - 35 years	12 3%
36 - 45 years	12 3%	36 - 45 years	11 3%
46 - 55 years	31 8%	46 - 55 years	22 6%
56 - 65 years	76 20%	56 - 65 years	66 18%
66 - 75 years	33 9%	66 - 75 years	58 16%
More than 75 years	6 2%	More than 75 years	9 2%

15. Appendix IV - Verbatim Responses

Table 9: Name the last location where you stayed overnight.

Total # Verbatims: 204

Airlie Beach - 4	Eungella - 1	Port Douglas - 1
Proserpine - 6	Mount Malloy – 2	
Alligator Creek - 6	Friends Yard - 1	Plantation Creek - 1
Alva Beach - 1	Ravenswood - 3	El Arish - 1
Ayr - 4	Giru - 1	Reid River - 1
Babinda - 2	Gordenvale – 1	Rollingstone - 21
Sarina - 1	Murray - 1	Crystal Creek - 4
Balgal Beach - 14	Guthalungra - 4	Saunders Beach - 17
Bluewater - 22	Hull Heads - 1	St Lawrence - 1
Bowen - 4	Ingham - 2	Taylor's Beach - 3
Jorama Falls - 1	Toomulla Beach - 2	Wynjunga - 5
Lucinda - 1	Townsville - 29	Conway Point - 1
Mackay - 2	Tully - 1	Tully Gorge - 2
Brandon - 1	Magnetic Island - 2	Tully Heads - 1
Cairns - 1	Marian - 1	Wallaman Falls - 1
Cardwell - 5	Marlborough - 1	Waverley Creek - 1
Carmilla Beach - 1	Milla Milla - 2	Woodstock - 1
Charters Towers - 3	Mission Beach - 4	Clermont - 1
Bowling Green National Park - 3		

Table 10: Where is your usual place of residence?

Total # Verbatims: 204

Adelaide SA - 4
Anglesea Vic - 1
Anna Bay NSW - 1
Auckland NZ - 1
Banora Point NSW - 1
Blackbutt - 1
Blayney NSW - 1
Blibli Qld - 1
Bowral NSW - 1
Ipswich Qld - 1
Brisbane Qld - 7
Burpengary Qld - 1
Buxton NSW - 1
Byron Bay NSW - 1
Caboulture - 1
Cabulture Qld - 1
Cairns - 1
Canberra ACT - 1
Christies Beach SA - 2
Clunes Vic - 1
Coffs Harbor NSW – 2
Connellys Marsh TAS - 1
Coolangatta Qld - 1
Coombabah Qld - 1
Corawa NSW - 1
Gosford NSW - 1
Dandenong Vic - 1

Goulburn NSW - 1
Hadspen TAS - 1
Hastings Vic - 1
Hay NSW - 1
Hervey Bay Qld - 5
Hobart TAS - 7
Palm Beach Qld - 1
Woollongong NSW - 1
Ilbilbie Qld - 1
WA - 1
Katherine NT - 1
Kilcoy Qld - 1
Port Macquarie NSW - 1
Kingaroy Qld - 1
Kingston TAS - 1
Launceston TAS - 2
Echuca Vic - 1
Rockingham WA - 1
Lower Portland NSW - 1
Maroom Qld - 1
Mackay - 2
Maitland NSW - 1
Malanda Qld - 1
Malboro Qld - 1
Maryborough Qld - 1
Mayfield TAS - 1
Melbourne Vic - 3

Netherlands - 2
Newcastle NSW - 1
New Zealand - 2
Nowra NSW - 2
NSW - 2
On Road Fulltime - 15
Ireland - 1
Palm Woods Qld - 1
Pemberton WA - 1
Philip Island Vic - 1
Port Albert Vic - 1
Kilkivan Qld - 1
Redcliffe Qld - 1
Redhead NSW - 1
Richmond TAS - 1
Rockhampton Qld - 1
Perth WA - 2
Rooty Hill NSW - 1
Sawtell NSW - 1
Seaford SA - 1
Shepparton Vic - 1
Shoal Bay NSW - 1
Singleton NSW - 2
Somerville Vic - 1
St Albans Vic - 1
Sunshine Coast Qld - 2

Deception Bay Qld - 1	Mirani Qld - 1	Sussex Inlet NSW - 2
Devonport TAS - 3	Monavale NSW - 1	Swann Hill Vic - 1
Dubbo NSW - 1	Mooroobark Vic - 1	Sweden - 1
Elanora - 1	Mornington Vic - 1	Switzerland - 1
Mountain Creek - 1	Sydney NSW - 7	Wellington Pt Qld - 1
Forster NSW - 1	Mount Gambier SA - 2	Tamworth NSW - 1
Gatton Qld - 1	Mundurah WA - 1	Tathra NSW - 1
Germany - 2	Murwillumbah NSW - 1	Tauranga NZ - 1
Gladstone Qld - 2	Nagimbie Vic - 1	Tin Can Bay Qld - 1
Glen Innes NSW - 1	Nanango Qld - 1	Toowoomba Qld - 1
Gold Coast Qld - 3	Nathalia Vic - 1	Townsville - 2
Greystone NSW - 1	Nelson Bay NSW - 1	Tarnagulla Vic - 1
Griffith NSW - 1	Nerang - 1	Tweed Heads NSW - 3
UK - 8	Wahroonga NSW - 1	West Sunshine Vic - 1
Umina Beach NSW - 1	Whistler Canada - 1	Vic - 2
Wooli-Crafton NSW - 1	Warrnambool Vic - 2	Wynyard TAS - 1
Victor Harbour SA - 1	Warwick Qld - 1	Yeppoon Qld - 1

Table 11: Name the last major town you stopped in?

Total # Different Words: 26

Total # Verbatims: 203

Airlie Beach - 1	Charters Towers - 3	Mackay - 9
Atherton - 1	Clermont - 1	Port Douglas - 2
Ayr - 13	Cooktown - 1	Proserpine - 1
Babinda - 2	Darwin - 1	Rockhampton - 3
Emerald - 1	Sarina - 2	Cardwell - 3
Bowen - 4	Gordenvale - 2	Townsville - 106
Cairns - 21	Ingham - 9	Tully - 6
Canella - 1	Innisfail - 8	Weipa - 2

Table 12: When you leave this location, what is you next stop likely to be?

Total # Different Words: 56

Total # Verbatims: 204

Alligator Creek - 2	Ingham - 19	Sarina - 1
Ayr - 4	Ingham/Tully Heads - 1	Saunders Beach - 3
Ayr/Homehill - 1	Innisfail - 2	South - 1
Babinda - 5	Kurramine - 1	Taylors Beach - 1
Balgal/Saunders Beach - 1	Lucinda - 2	Hull Heads - 1
Balgal Beach - 10	Mackay - 4	Whitsundays - 1
Bilyana - 1	Magnetic Island - 2	Toomulla Beach - 4
Bluewater - 8	Mareeba - 9	Rollingstone/Ingham - 1
Bowen - 3	Mission Beach - 5	Towards Cairns - 1
Brisbane - 1	Murray Falls - 2	Towards Mount Isa - 1
Cairns - 15	North - 1	Townsville - 21
Cardwell - 6	Townsville Area - 1	Hinchinbrook - 1
Charters Towers - 4	Palma - 3	Townsville or Bluewater - 1
Cloncurry - 1	Port Douglas - 1	Tully - 3
Crystal Creek - 1	Proserpine - 1	Tully or Ingham - 1
Ewot Springs - 1	Ravenshoe - 1	Unknown - 21
Giru - 1	Rollingstone - 20	Wallaman Falls - 1

Table13: Name the item/s on which you spent more than $200

Total # Verbatims: 63

Batteries - 1	Food & Petrol - 1	Pharmacy Cosmetics - 1
Battery Booster - 1	Fuel - 8	Push Bike - 1
Camera - 1	Fuel Pump - 1	Rental Campervan - 1
Camper Service - 1	Gas - 1	Repairs To Motorhome - 1
Camping Hire - 1	Generator - 3	Solar Panel - 1
Stove - 1	Vehicle Parts - 1	Food & Fuel - 1
Caravan Park - 1	Groceries - 1	Supplies - 1
Car Parts - 1	Head Gasket - 1	Tourist Attractions - 1
Car Service - 2	Mechanics - 3	Glow Plugs for Motor - 1
Cruise to Hinchinbrook - 1	Motor Repairs - 1	Tyres & Electrical4vehicle - 1
Diesel - 1	Uhf Radio – 2	Motor Scooter & Rack - 1
Dining Out - 1	Petrol & Gas - 1	Musical Instruments - 1
Dive Trip to Reef - 1	Nappies& Food - 1	Van Service - 1
Diving - 1	New Tyres - 1	Vehicle - 1
Electrical - 1	Tyres - 7	Film - 1
Panel Repairs - 1	Vehicle Service - 1	Wool Underlay For Bed - 1
Food - 4	Petrol - 3	
Camping Tour Of Cape York - 1		Ornamental birds for garden - 1

16. Appendix V – Questionnaires

16.1. Rest Area Survey 2003

Q.1 Name the last location where you stayed overnight.

____

Q.2 How many nights did you stay there?

☐1 1	☐5 5
☐2 2	☐6 6
☐3 3	☐7 7
☐4 4	☐8 More than a week

Q.3 Where is your usual place of residence? (Please include city/town, State, and Country if applicable)

____

Q.4 How long in total have you travelled on this trip?

Days....._____

Q.5 How long do you intend to travel on your current trip?

Days.....____

Q.6 On this current trip, how many nights have you spent in a caravan park and how many nights have you spent in a rest area or camping area?

Nights in a caravan park .... ____
Nights in a rest area or camping area... ____

Q.7 Name the last major town you stopped in?

____

Q.8 did you make any purchases in the last major town you stopped in?

☐ 1 Yes ☐ 2 No

Q.9 If YES to Q8, how much did you spend on the following items?

Fuel..................................... $________
Vehicle parts .... $________
Tyres .... $________
Vehicle repairs .... $________
Electrical items .... $________
Groceries/vegetables/food.... $________
Pharmaceuticals/cosmetics... $________
Tourist attractions/services ... $________
Clothing................................ $________

Medical Services	$_______
Hardware	$_______
Dining/takeaways................	$_______
Wine/beer/spirits	$_______
Hairdresser/beautician	$_______
Other	$_______

Q.10 What is the total estimated value of your purchases in the last major town you visited?

Total Value... $_________

Q.11 Did you visit a major shopping centre or the city retail centre at the last major town you visited?

- ❑ 1 Shopping Centre
- ❑ 2 City Centre
- ❑ 3 Both
- ❑ 4 None

Q.12 How many nights do you intend to spend in the Townsville region?

- ❑ 1 1
- ❑ 2 2
- ❑ 3 3
- ❑ 4 4
- ❑ 5 5
- ❑ 6 6
- ❑ 7 7
- ❑ 8 More than a week

Q.13 How did you come to know about the location you are stopping at tonight? (You may choose more than one answer)

- ❑ 1 Internet

- ❑ 2 CB Radio
- ❑ 3 Telephone
- ❑ 4 Friends/acquaintances/word of mouth
- ❑ 5 Tourist publications (free)
- ❑ 6 Books, magazines (purchased)

Q.14 Have/will you make any purchases while staying at this location?

❑ 1 Yes ❑ 2 No

Q.15 While staying at this location, how much do you estimate you will spend on the following items?

Milk	$________
Bread	$________
Papers/magazines................	$________
Fruit and vegetables.............	$________
Groceries	$________
Meat	$________
Fuel/oil/motor spares	$________
Cosmetics/pharmaceuticals...	$________
Gas	$________
Hardware	$________
Other.....................................	$________

Q.16 When you leave this location, what is your next stop likely to be?

____

Q.17 What do you estimate your average spend per week has been over the past 2 weeks or, if travelling less than 2 weeks, since your trip started?

- ☐1 Less than $300
- ☐2 $300 - $400
- ☐3 $400 - $500
- ☐4 $500 - $600
- ☐5 $600 - $700
- ☐6 $700 - $800
- ☐7 $800 - $900
- ☐8 $900 - $1000
- ☐9 More than $1000

Q.18 Did your spend over the past 2 weeks or, if travelling less than 2 weeks, since your trip started, include any individual items costing more than $200?

- ☐1 No
- ☐2 Yes

Q.19 If YES to Q18, name the items on which you spent more than $200.

____

____

____

Q.20 How many people are travelling in your vehicle?

- ☐1 1
- ☐2 2
- ☐3 3
- ☐4 4
- ☐5 5
- ☐6 6
- ☐7 More than 6

Q.21 What are the age groups of the people travelling in your vehicle? (Please indicate the number of people in each age group)

Less than 25 years...	__	56 - 65 years..........	__
26 - 35 years..........	__	66 - 75 years..........	__
36 - 45 years..........	__	Over 75 years	__
46 - 55 years..........	__		

Q.22 How many females and how many males travelling in your vehicle?

Female/s... __ Male/s ...... __

Q.23 What is the employment/income status of the people travelling in your vehicle? (Please indicate the number of people in each category)

Retired - Pensioner.......................... __

Retired - Pension + private income... __

Retired - self funded .... __

Self employed .... __

Wage/salary earner (on holiday) ...... __

Not currently employed.................... __

16.2. Business Survey – 2003

Name.......................................

1. Are you aware of the campervan and caravan rest area at this locality?

2. What are your views on campervan and caravan owners being allowed to stay for a clearly defined number of nights in a free rest area?

3. What effect do campervan and caravan owners have on your business directly?

4. Do you think having them staying in nearby rest areas is a positive or a negative for your business, and for business in the area in general?

5. What are your views on the overall positives and/or negatives for your community that comes from having campervan and caravan owners staying in the rest area?

6. What changes, if any, would you like to see happen to this rest area in the future?

16.3. Residents Survey

1. Are you aware of the campervan and caravan rest area at this locality?

2. What are your views on caravan and campervan owners being allowed to stay for a clearly defined number of nights in a free rest area?

3. Does having caravan and campervan owners staying in this rest area effect you or your family directly, and if so what kind of effect does it have?

4. What are your views on the overall positives and/or negatives for your community that comes from having campervan and caravan owners staying in the rest area?

5. What would you like to see happen to this rest area in the future?