



**Queensland Government response to
the Economic Development
Committee's Issues Paper No. 3:
*Grey Nomad Tourism***

EXECUTIVE SUMMARY

The Queensland Government is committed to supporting grey nomad travel as a means of supporting regional Queensland communities. It is considered that amongst other investments made to support regional development and sustainability, raising the profile and attractiveness of Queensland as a destination for retirees and other mature travellers will ensure regional communities remain viable into the future.

The whole of government response to the Parliamentary Economic Development Committee's Inquiry into developing Queensland's rural and regional communities through grey nomad tourism' responds to a number of key issues raised in the Issues Paper including:

- o The role of grey nomad tourism in developing Queensland's rural and regional communities;
- o Infrastructure requirements for grey nomads;
- o Marketing and promotion of Queensland to potential grey nomad visitors;
- o The role of government in facilitating grey nomad tourism in Queensland; and
- o The utilisation of grey nomad skills and labour in rural and regional Queensland.

By way of summary, key issues of interest identified in the whole of government submission are outlined below:

Economic contribution and statistics for Grey Nomads

Currently, there is a lack of independently verified data about the economic contribution of grey nomads to the economy, both on a state wide and regional level. Notwithstanding, it is anticipated that the grey nomad market will continue to grow, with Australian Bureau of Statistics projections predicting that by 2050 the number of Australians aged 55 years and over will more than double the number in 2010. Similarly, the international grey tourism market will continue to grow as more 'Baby Boomers' celebrate their 55th birthdays. Furthermore, "active" seniors have been the best performing age group over the past decade with their total wealth and numbers increasing, and are expected to increase demand for tourism products.

Infrastructure requirements

Planning for the future infrastructure requirements of the grey nomad market needs to be strategic and recognise the additional demand for infrastructure and services likely to be generated by projected growth in this market. There are new planning initiatives being developed to provide guidance for local government and how to best plan for the infrastructure needs of self-drive tourists, which can be used as a model for infrastructure planning and development across other Queensland regional and rural destinations.

The varying standards and accessibility of medical services throughout regional Queensland is a major issue not only for residents but for tourists as well.

Grey nomads are increasingly becoming more 'technologically savvy', relying heavily on the internet to assist with their trip planning during their holiday. Reliable mobile telecommunication and internet/broadband coverage is important for these travellers, and is not adequate in many of the regional and rural destinations they are travelling to.

The emergence of a number of recreational vehicle (RV) friendly towns is a key issue warranting further consideration. For example, in the South East Queensland Country region, a number of towns are opening up their showgrounds for free camping, to encourage self-sustaining motor home travellers to stop there and spend more time and money in the towns.

Marketing and promotion

Tourism Queensland's approach to grey nomads is from an experience perspective, rather than a demographic one. Tourism Queensland's approach is to consider grey nomads as Mature Connectors, Mature Social Fun-seekers or Mature Active Explorers. Focusing on the experiences these people are looking for, rather than their age, is intended to better guide and inform the assessment and development of infrastructure and facilities for this market, as well as how to market to them most effectively.

Government Coordination

There is a need to find the right balance between meeting the needs of grey nomad visitors for additional camping facilities, while not impacting on the commercial viability of privately owned caravan parks.

Any strategies to increase the availability of accommodation in caravan parks for grey nomads must acknowledge and seek to mitigate the risk of social dislocation and financial loss for manufactured home owners and permanent caravan residents.

From a planning perspective, Local Government is best placed within the scope of the Integrated Development Approval System to address the development of caravan parks and camping grounds, at both the strategic planning and development assessment stages.

Grey Nomad skills development

The issue of utilising the skills of grey nomads in rural and regional Queensland, both for paid employment and volunteer tourism, is a growing area which deserves greater focus.

Through the Queensland Tourism Industry Council's (QTIC) representation on the Labour and Skills Working Group (which has been formed under the National Long-Term Tourism Strategy), the State is also engaged in progressing workforce initiatives that look at addressing recognition and transferability of skills issues. This has the capacity to improve the engagement of grey nomads as a viable workforce both nationally and in Queensland.

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

In recent years, as the so-called baby boomer generation retire they have taken to long drives, taking weeks or even months at a time to explore Australia stopping off at points of interest along the way. Queensland is an integral part of the journey having diverse communities, over significantly varied geography, with an attractive climate.

Grey nomads have taken their title from their propensity to not stay in one place too long, anecdotally staying in regional centres to fulfil either a particular tourist experience, for rest and recuperation or for provisioning and making repairs. Grey nomads are road-based and more recently, grey nomads have at times looked to get to know a place better, by volunteering or undertaking other temporary work.¹

Grey nomads are different from the stereotypical traveller and driving holidaymaker. Most travellers have an origin and a destination, taking a particular, although not always predetermined path between the two. The traveller might make a number of stops along the way, but the journey is only part of the experience and there is generally a feeling of being time poor. The holiday is bound by work, school or family commitments that put a relatively strict timeframe to the journey.²

By contrast, the grey nomad is different, being generally time rich, having discretion as to working or not and generally not having many of the burdens that limit the holidays and journeys of others in society.³

Although the level of information we have about grey nomads is limited, we know that grey nomads can and have important (and varied) impacts on regional Queensland communities – they spend money and enrich the spirit of community – yet they also can, at times, place additional demands on local services.

Anecdotally, there is reason to believe that grey nomad travel has held up well, despite the global financial crisis and the negative impact on superannuation and retirement nest eggs that has been experienced.⁴ There are risks over the horizon however, primarily related to the general cost of living increases.

¹ Onyx, J. (2010) Grey Nomad Volunteers - New partnerships between grey nomads and rural towns in Australia; University of Western Sydney/Volunteering Australia: Sydney

² Murdoch University (2005) Shire of Kondinin Destination Development Strategy - Making Waves: A Strategic Approach to Rejuvenation: Murdoch University: Perth

³ Leonard, R. and Onyx, J. (2005a) Constructing Short-term Episodic Volunteering Experiences: Matching Grey Nomads and the needs of small country towns: University of Western Sydney: Sydney

⁴

www.walrsp.com.au/.../PUB09SuperannuationStakeholder_Communique.pdf<http://www.walrsp.com.au/.../PUB09SuperannuationStakeholder_Communique.pdf>

The Queensland Government remains optimistic that Queensland will continue to benefit from grey nomads and their journeys. Additional to the obvious natural beauty that the state possesses, Queensland's regional towns are unique and in themselves, worth a long drive.

The Queensland Government is committed to supporting grey nomad travel as a means of supporting regional Queensland communities. It is considered that amongst other investments made to support regional development and sustainability, raising the profile and attractiveness of Queensland as a destination for retirees and other mature travellers ensures regional communities remain viable into the future. Recent investments that have been made by the Queensland Government to support rural and regional tourism include:

- \$350,000 North West Queensland Minor Tourism Infrastructure Grant Program in 2008
- \$1.8 million over 3 years to deliver much needed roadside infrastructure for the drive tourism market;
- \$3 million over 3 years to encourage the development of a stronger and more efficient tourism industry network and improved delivery of tourism support at a regional level;
- \$2 million for tourism opportunities surrounding major events across the State, including the SuperGP, the Noosa Food and Wine Festival, the Gold Coast Marathon and the Valentino Retrospective at GoMA;
- \$300,000 to establish a tourism project pre-feasibility grants scheme to support the delivery of priority tourism infrastructure projects; and
- \$470,000 for eco-tourism development grants to capitalise on Queensland's competitive advantage in nature based and ecotourism.

Regional Queensland communities are happy to share their experiences and stories and as grey nomads move from one place to the next, they then share those stories and their experiences and as a result, increase our appreciation of our diverse State and enrich our society. This sense of community participation is central to the ongoing strength of rural and regional tourism and is entirely consistent with the Queensland Government's Toward Q2 vision of a Queensland that is strong, green, smart, healthy and fair.

1. What economic contribution do grey nomads make to rural and regional areas of Queensland?

There is very little hard, independently verified data about the economic contribution that grey nomads make to rural and regional Queensland. What is known is the following:

- Tourism makes a significant contribution to the Queensland economy, contributing \$9.2 billion annually to the Queensland economy and accounting for 4.7 percent of Queensland's Gross State Product (GSP).⁵
- Queensland received 4.5 million mature age visitors³ from around Australia in 2009, representing a two percent increase on 2008.⁷
- The drive tourism market accounts for approximately 70 percent of the overnight leisure market in Queensland.³
- Queensland's drive tourism market is supported by 470 motorist rest areas and 124 dump sites.⁹
- Grey nomads are important to the commercial camping and caravan park industry in Queensland.
- Queensland has over 600 caravan park sites, the majority of which are on freehold land, with approximately 15 percent being on State Land Reserves or on State leasehold land.
- Queensland is Australia's most popular location for international caravan or camping visitors with the state receiving 35 percent of these visitors.¹⁰
- Domestic caravan park or camp visitors spend more of their nights (85 percent) in regional Australia than other visitors (59 percent of nights)¹¹
- Total spend by domestic and international recreational vehicle (RV) and camping tourists across Australia is \$8 billion¹² The RV and camping industry has remained one of the most stable markets since 2000, with little change in international and domestic visitor numbers and nights.¹³
- By 2021 there are expected to be 9 million Australians over the age of 50¹⁴, and tourism forecasts predict that senior travellers will increase their contribution to the RV industry in the future as the baby boomer generation begins retiring¹⁵.

There is a need to keep the size of the grey nomad market in perspective. Although we don't know the specific size of the market, the number of visitor nights or the amount of expenditure to a high degree of accuracy, we do know that it is a subset of a larger grey tourism market, being travel for people 55 years of age and older. Strategies and policies that support this wider market are likely to have benefits across multiple regions.

⁵ Sustainable Tourism Cooperative Research Centre, year to June 2008

⁶ Definition used by Tourism Research Australia - which defines mature age visitors as 'domestic overnight or international visitors aged 55 years and over'.

⁷ National Visitor Survey 2009

⁸ Tourism Queensland, 2009

⁹ <http://www.mainroads.qld.gov.au/Driving-in-Queensland/Maps/Points-of-interest-files.aspx>

¹⁰ Tourism Research Australia, 2008 & 2007, Caravan and Camping Snapshot

¹¹ Tourism Research Australia, 2008 & 2007, Caravan and Camping Snapshot

¹² (Tourism Research Australia, 2008, Caravan & Camping Snapshot).

¹³ Tourism Research Australia, 2008 & 2007, Caravan and Camping Snapshot

¹⁴ Australian Bureau of Statistics, 2006, Catalogue no. 3222.0

¹⁵ Tourism Research Australia, 2008, Through the looking glass- the future of domestic tourism in Australia.

That being said, the grey nomad is likely to be an important component of inbound tourism for a number of small rural and regional Queensland communities. These communities may not receive significant numbers of tourists, but those that do arrive will likely spend money at places like the local bakery, the local café or coffee shop, the local petrol station and potentially the mechanic.

Anecdotally, evidence suggests that grey nomads look for 'value for money and quality' and will spend their money on superior products and experiences. They will eat out, visit tourist attractions and go on tours. While these travellers are saving money on accommodation, indications are that they are spending just as much, on average, as other travellers on regional tourist experiences and retail outlets.

In many respects, the grey nomad is differentiable only by their mode of travel and the duration of their journey. All travellers, for instance, have some predisposition to looking for value for money and quality and look to spend their money on superior products and experiences. Of difference though is the economic "personality" of the grey nomad.

In the absence of independently verified hard data it is necessary to make a number of generalisations about the grey nomad. This profiling of the stereotypical grey nomad may or may not reflect the average but is a useful starting point for discussion.

Grey nomads are generally retired from the labour force, or work only on a part-time, ad hoc basis, living off superannuation, savings and government benefits, or a combination of all three. The grey nomad is not likely to be adding to their savings but is more likely to be drawing them down – this means that there is a need to 'stretch their money' further.

The decisions that grey nomads make will likely be driven by comfort factors, such as the availability of infrastructure and facilities along the route and at the stopover, favourable climate and safe roads along with reasonable access to mechanical support. Beyond these more specific considerations, grey nomads will be seeking experiences comparable to other categories of tourist.

Increasingly, and particularly following the global financial crisis, grey nomads may spend time in the community that they are visiting volunteering or working part-time. It is not inconceivable, for example, to have semi-retired nurses or accountants undertake limited work as they travel from community to community where there is a local need and their skills can be utilised. Although not tourist income, this participation has the potential to make a significant economic contribution to the local community.

While the National Visitor Survey can be used to gauge the number of grey nomad visitors and the number of nights they are spending in regional Queensland, it does not provide an accurate estimate of the economic contribution of these travellers in Queensland's regional areas.

Some industry statistics are available which provide an indication of the visitor expenditure of these travellers. For instance, according to the Campervan and Motorhome Club of Australia (CMCA), grey nomads spend on average approximately \$550 per week whilst 'on the road' per couple¹⁶.

¹⁶ CMCA release April 2009

Ad hoc primary research undertaken in some regional Queensland destinations can also provide an indication of the economic benefit of grey nomad visitors. It should be noted that data obtained from these studies is relevant for the specific towns or regions in which the research was conducted and is not necessarily reflective of the visitor expenditure across the whole State.

For example, a Visitor Profile and Satisfaction study in the Western Downs region in 2008 showed that approximately half of the visitors to the region were "mature nomads" on a long haul driving holiday. The study showed that the average daily expenditure of visitors to the Western Downs was \$78, with a total expenditure in the region of \$307. The largest proportion of expenditure was on fuel (33%), followed by accommodation (22%) and groceries (14%).¹⁷ Other visitor survey research conducted in 2006 in the regional areas of Roma, Winton and Barcaldine showed that visitors spend on average, between \$79 and \$91 per night in these towns.¹⁸

Domestic market

Grey nomad tourism is a predominately domestically driven market; with Queensland receiving ten times more domestic mature age visitors than international ones. Queensland received 4.6 million mature age visitors from around Australia in 2009, which was a four percent increase on 2008 figures. This means 28 percent of all domestic visitors to Queensland in 2009 were aged 55 years and over.¹⁹

The State's domestic visitors stay for an average of nearly six nights, slightly longer than the national average. Queensland's appeal as a holiday destination for Australians was only just beaten by the appeal of friends and family, with 43 percent of mature aged Australians travelling to Queensland to visit friends and family and 42 percent coming purely for a holiday.²⁰

Over two thirds of Queensland's domestic mature age visitors are from regional Queensland showing Queenslanders are keen to explore their 'own backyard.' Also the economic constraints of 2008 and 2009 did not stop our southern cousins from visiting; with 19 percent of our domestic mature age visitors coming from New South Wales and seven percent from Victoria.

International market

Queensland received 453,000 international mature age visitors in 2009, representing 23 percent of all international visitors to Queensland. Although this was a four percent decrease on 2008 figures, the decrease can be attributed to the global financial situation, with Queensland still receiving nearly 40 percent of mature age visitors to Australia. The majority of these mature age visitors came from Queensland's key markets:

- o 32 percent from New Zealand;
- o 16 percent from the UK;
- o 11 percent from Japan; and
- o Ten percent from the USA.

Data does not exist to suggest that a significant number of international mature age visitors undertake their visits as grey nomads.

¹⁷ Statistics provided by Tourism Queensland May 2010

¹⁸ Statistics provided by Tourism Queensland May 2010

¹⁹ National Visitor Survey, December 2009

²⁰ National Visitor Survey, December 2009

Growth trends

It is anticipated that the grey nomad market will continue to grow, with Australian Bureau of Statistics projections predicting that by 2050 the number Australians aged 55 years and over will more than double the number in 2010. Similarly, the international grey tourism market will continue to grow as more 'Baby Boomers' celebrate their 55th birthdays. Furthermore, "active" seniors have been the best performing age group over the past decade with their total wealth and numbers increasing, and are expected to increase demand for tourism products.²¹

²¹ Tourism Queensland, May 2010

2. Are the available statistics on grey nomads in Queensland useful, current and accessible?

There is a limited understanding of data about the grey nomad, their economic circumstances, the economic contribution that they make and the factors that influence their decisions as a definable subset of the broader mature age tourist market. In large part, our understanding of the quintessential grey nomad is based on anecdotes with limited data capture.

General demographic data is readily available through ABS Census information, with the grey nomad cohort notionally identifiable by dwelling type (i.e. caravan) and age group, however Census data is collected uniformly on one day every 5 years. The most recent collection took place in August 2006 so its findings are not current.

Tourism Queensland has conducted research over the past ten years to better understand the visitors to Queensland that travel by car. Importantly, grey nomads were not a specific focus of this work and it would be misleading to suggest that the grey nomad market is better understood as a result of this work.

More research is needed to ascertain statistics specific to grey nomads as a unique subset of the broader mature age tourist market. The most effective way of obtaining this information would be to encourage local area data to be collected over time, similar to the primary research studies mentioned previously.

The grey nomad is a specific subset of the broader mature age tourist market which, assuming that further negative economic shocks do not occur, is likely to grow as the potential pool of grey nomads grows driven by the progressive retirement of baby boomers from the labour force. Improving the knowledge and understanding that State and Local government's have of the broader market, with a greater focus on the grey nomad in smaller rural and regional Queensland communities, will assist in future planning and investment decisions.

3. What are the public infrastructure requirements of grey nomads including health services, waste disposal sites and signage.

4. Is the current infrastructure for grey nomads in Queensland adequate? What additional infrastructure is required?

Grey nomad visitors demand quality and value for money and favour tourism operators that can provide this. However, the size of Queensland and the tendency of grey nomads to explore regional areas means a high or even satisfactory standard of tourism-related infrastructure cannot be guaranteed. Some destinations visited by grey nomads have limited or no air services and their regional infrastructure is not always equipped to support tourism; especially mature age tourism.

Certain sections of the grey nomad market such as campervan and motor home tourists also have specific requirements such as long vehicle parking access close to shopping centres, access to potable water and access to rubbish and grey water disposal points.

It is acknowledged that Government has an important role in encouraging grey nomads to travel to Queensland by providing adequate/appropriate infrastructure. Grey nomads usually travel by road and therefore much of the infrastructure needed to support them is provided by the Department of Transport and Main Roads (DTMR) and/or Local Governments. Most Local Governments provide some infrastructure for roadside camping such as rest stops, grey water disposal points and rubbish facilities. However, the increasing demand for these services has the capacity to place stress on a regional council's ability to deliver these facilities.

As facilities provided by Local Governments are often in public areas and are made available to the whole community, there is often little capacity for Local Governments to recoup revenue from the facilities to pay for their construction, maintenance and improvement. Water use is of particular concern to Local Governments given it is a precious resource particularly in Local Government areas that have been drought affected for years. Some grey nomads are filling their water tanks in large quantities that aren't considered reasonable.

In addition, while there is a demand from the grey nomads for these facilities to be accessible and close to shops and facilities, it should be noted that Local Government must often balance these needs with the needs of residents who are concerned about the loss of amenity caused by the long term storage (greater than 24 hours) of large campervans and caravans on residential streets.

Planning for the future infrastructure requirements of the grey nomad market therefore needs to be undertaken strategically, recognising the significant additional demand for infrastructure and services likely to be generated by projected growth in this market. Through strategic communication and engagement of key drive tourism stakeholders the Queensland government has the capacity to develop well planned and responsive policy directions for infrastructure and services relevant to grey nomads.

The infrastructure and services that are required to support this particular market include access to health services, on-road and roadside infrastructure and ancillary services to support people with a disability or special needs.

Health services

The issues paper released by the inquiry acknowledges that a key issue for grey nomads is the ability to access high quality, reliable health care services. The paper confirms that a key driver in the decision-making process for over-65s examining locations to which they should travel is the ease with which they may access health services should the need arise.

Given the extensive network of facilities within Queensland, including hospitals and primary healthcare centres, there is a major opportunity for the State to attract this cohort of tourists. However, promoting health services for the use of visitors would need to be done in a way that was sensitive to community perceptions about the extent to which the public health system is currently able to cope with demand from existing local patients.

Queensland has 164 facilities recognised as hospitals across the State, and a range of primary and other healthcare facilities which provide direct services to patients. Of these hospitals, 123 are classified as being in rural and remote areas. Additionally, considerable enhancements in telehealth services which link rural and remote services to tertiary facilities provide for a higher, more consistent quality of health services across the State. The increasing roll-out of telehealth services across rural and regional centres can provide further comfort to the grey nomad cohort - particularly those visiting remote locations - that their healthcare needs will be able to be met whilst visiting.

Accordingly, it is clear that a diverse network of facilities exists, and grey nomads - whether visiting Queensland's regional areas or staying in major urban centres - will have ready access to health services. Given that this is a significant driver associated with travel decisions made by grey nomads, it would be beneficial for tourism authorities to examine ways in which the ready access to health services could be promoted to the cohort.

In 2008/09, 4.4 percent of hospital admissions of people aged over 65 years from interstate were in hospitals classified as being in remote or very remote areas of Queensland. Similar proportions of people aged over 65 years (from interstate) are accessing Queensland Health Emergency Departments. Given that less than 5% of admissions are from persons in the grey nomad cohort from interstate, any increase in tourists would likely have only minimal impact on the demand placed on hospitals. In this regard, Queensland Health already incorporates seasonal demand fluctuations - particularly in areas where the cohort congregates such as Cairns, Townsville and the Gold Coast - in its service planning activities.

On a workforce front, in 2010-11 Queensland's health system will continue to grow with an additional 720 nurses, 180 doctors and 300 allied health professionals. While it is recognised that grey nomads will generally not be seeking employment, there are niche opportunities for this cohort for persons appropriately qualified and registered to practice.

The commencement of the national registration regime on 1 July makes cross-border employment easier, and Queensland Health is already working on workforce planning strategies that examine the feasibility of establishing State-wide nursing/midwifery local management services to support rural and remote facilities and further implementing the Allied Health Professional Enhancement Program which focuses on providing professional development opportunities in the bush as well as locum programs for doctors. While acknowledging that only small numbers of grey nomads may wish to partake in such opportunities, there may be opportunities for qualified health professionals to combine part-time work, particularly in rural and remote areas, with their travel.

Waste Disposal sites

Grey nomads require regular rest stops and dump points to dispose of waste. It is important to acknowledge the continual call for the provision of additional waste disposal points and facilities for the grey nomad market. As part of a two year funding program commencing in 2008, the Department of Transport and Main Roads (DTMR) provided funds to deliver 22 dump points throughout the State. DTMR is currently providing a further \$50,000 each year for the next three financial years to extend this successful program. This will mean an additional 34 dump points around Queensland. A list of public dump points, including those funded by the Queensland Government can be found at <http://www.mainroads.qld.gov.au/en/Driving-in-Queensland/Maps/Interactive-map.aspx>

Rest stops, toilet facilities and picnic facilities are all important facilities for grey nomads and encourage people driving long distances to stop and revive. It is important that these facilities are placed in locations that do not impact on the safety and efficiency of the transport network and allow travellers a safe, secure and amenable place to stop.

While acknowledging the availability of dump points, these are not necessarily well advertised locally as to their locations. Opportunity therefore exists to better promote the infrastructure and facilities that are available in rural and regional Queensland destinations for grey nomad tourists.

Signage

Signage is of critical importance to any road based travel by tourists. As highlighted in regional visitor studies, signage can contribute to tourists' dissatisfaction with regional destinations. Small measures such as well placed signage indicating road routes and directions to tourist routes, tourist attractions and distances to centres, rest stops and key services can greatly assist the development of grey nomad tourism. There are many existing signs across Queensland that disseminate key information for tourists – the challenge is to continue to ensure these signs show relevant information and that they still meet standards for signage (particularly road side signage). Signage issues also need to be discussed and considered between the road authorities and local government.

Other infrastructure requirements

Motorist Rest Areas

Motorist rest areas provide opportunities to promote local tourism facilities. Tourist information boards sited by local tourism authorities can provide information to facilitate drive tourism through the provision of information on local business, accommodation and points of interest. Rest area facilities should also be designed to facilitate access and utilisation by disabled motorists.

Stopping Places

Stopping places are available as a place to pull over on the road shoulder, where shoulder width permits, to enable drivers to undertake short stops for a variety of functions such as checking loads or attending to a vehicle breakdown. They generally serve the purpose of providing a relatively safe location for immediate stopping needs at a safe distance from through traffic.

Specific stopping places on sections of road which do not provide adequate shoulder width are required to allow vehicles to stop clear of the carriageway. Accordingly, stopping areas should provide sufficient clearance from the 'through pavement' to allow vehicles to be safely inspected.

Like rest areas, stopping places are designed to meet the specific needs of both motorists and heavy vehicle operators and can be co-located with a point of interest to tourists. Local governments or civic organisations should be encouraged to provide motorist and/or heavy vehicle rest areas to the same or similar standard of delivery provided by DTMR.

Camping at Roadside Amenities

Camping is permitted at a number of DTMR rest areas under legislation. However, camping is expressly prohibited where it may adversely affect an amenities' ability to achieve its primary purpose. For example, a rest area may become so congested with campers that there is inadequate space for drivers who genuinely want to rest along their journey. Camping is to be prohibited at all stopping places, as they are not configured to allow camping to safely occur there.

Need for a safe road network (Queensland Road Safety Strategy)

Much of the State-controlled road network carries a high proportion of long distance travellers. These travellers are susceptible to fatigue and involvement in fatigue related incidents. The provision of appropriate roadside amenities forms one component of a range of initiatives which can reduce the effects of fatigue on drivers, improve the quality of the driving experience, and reduce fatigue related accidents. These initiatives form part of the Queensland Road Safety Strategy.

Roadside amenities can reduce fatigue related incidents in two ways. Firstly, stopping and resting between driving has been shown to reduce driver fatigue, with a subsequent impact on single vehicle and fatigue related incidents. Secondly, by providing facilities for travellers to stop clear of traffic, accidents involving collisions with stopped vehicles can be minimised.

In determining priority for provision of new roadside amenities, the locations of fatigue "black spots" and other road safety issues receive primary consideration. As financial constraints keep the entire road asset from being upgraded all at once, a staged approach to road maintenance and rehabilitation is more feasible. Priority is likely to be given to the major routes in Queensland, such as the key strategic tourism routes. Key strategic tourism routes targeted in 2009/10 included:

- o Pacific Coast Touring Route, Route A1 between Gympie and Cairns
- o Matilda Highway, Route A2 between Barringun and Longreach
- o Country Way, Route A3 between Wallangarra and Rockhampton
- o Savannah Way, Cairns to the Northern Territory Border
- o Overlander's Way, Townsville to the Northern Territory Border
- o Outback Way, Winton to the Northern Territory Border

The 2010-2011 program targets the following six touring routes in Queensland

- o Great Tropical Drive from Cooktown to Townsville;
- o The Adventure Way from St George to the South Australian Border;
- o Great Inland Way from Charters Towers to Dirranbandi;
- o Capricorn Highway, Rockhampton to Barcaldine;
- o Leichhardt Highway, Theodore to Goondiwindi; and
- o Warrego Highway from Dalby to Charleville.

2011-2012 routes are yet to be determined.

Tourism Action Plan to 2012

The Tourism Action Plan to 2012 provides a framework to guide the Government's contribution to tourism development over the next two years. Developed in consultation with industry, it addresses many of the challenges facing grey nomad tourism. While not directly targeting this market, there are a number of benefits:

- o \$1.8M has been made available to establish a three year **Minor Tourism Infrastructure Grants Program** (MTIGP) for minor drive tourism infrastructure such as road signage, roadside picnic areas with amenities and upgrades of existing facilities. Projects submitted for funding are required to have a drive tourism theme catering for holiday makers, overseas travellers experiencing regional Queensland and the campervan and motor home market. Drive tourism is important to the regional economies of Queensland and this program is designed to enhance the experience for the drive market visitors.
- o **Tourism Opportunity Plans** (TOPs) are progressively being finalised for the State's 10 tourism regions. The need to provide services and infrastructure to improve the ability of the region to service the needs of current and future visitors is a key priority in the TOPs. This includes the drive tourism market, of which the grey nomads are an important component.
- o **Tourism Projects Pre-feasibility Grants Scheme**, which will support the delivery of tourism infrastructure projects identified in the TOPs. This initiative's contribution to growing grey nomad tourism is long term as it allows identified tourism products to be developed some of which may attract mature aged visitors, e.g. the White Mountains National Park Wilderness Camping and Walking Trails from the Townsville North Queensland Tourism Opportunity Plan, which 'tick the boxes' of at least two mature aged tourism interest areas.

- o The **ecotourism in and adjacent to protected areas** initiative, which will see low impact ecotourism infrastructure on demonstration sites in or adjacent to protected areas. This initiative focuses on providing environmentally sensitive accommodation and its results are likely to appeal strongly to mature aged visitors, given their strong interest in eco-accommodation and nature based tourism.
- o **Accessibility** - The Queensland Government is committed to ensuring everyone can access the State's unique experiences. Making tourism accessible in all aspects is central to providing quality tourism products and increasing the number of people who come to enjoy them and how much they spend while doing so. Tourism Queensland considers accessibility in all its campaigns and the Department of Employment, Economic Development and Innovation is working with QTIC to ensure Queensland's tourism operators know their legislative accessibility obligations.

A number of other considerations for infrastructure requirements for people travelling by car, including grey nomads, include:

- o Grey nomads are increasingly becoming more technologically savvy, relying heavily on the internet to assist with their trip planning during their holiday. Reliable mobile telecommunication and internet/broadband coverage is important for these travellers, and is not adequate in many of the regional and rural destinations they are travelling to.
- o Trading hours in rural and regional destinations is an important issue when considering grey nomads. Opportunity exists for greater collaboration between suppliers in regional towns to ensure services are available for grey nomad tourists during evenings and weekends.
- o The emergence of a number of RV friendly towns. For example, in the South East Queensland Country region, a number of towns are opening up their showgrounds for free camping, to encourage self-sustaining motor home travellers to stop there and spend more time and money in the towns. This is creating some competing tensions between free roadside sites and commercial caravan park operators.

In planning for the infrastructure requirements of grey nomads, it is important to strike the right balance between not undermining commercial caravan park operators, while at the same time recognising there is a group of travellers who do not want to stay in parks and want the freedom of roadside stops. Furthermore, in some instances such as during special events, privately run caravan parks may be at capacity which can lead to greater utilisation of free alternatives. It is critical that local government works closely with privately operated caravan parks to ensure they achieve the right balance between free and commercial facilities.

A new model for infrastructure planning for self drive tourists

Tourism is recognised in the Central West Regional Plan as a key economic driver for the region. The Regional Planning Committee (RPO), which advises the Minister for Infrastructure and Planning on the development of the plan recommended that the Department of Infrastructure and Planning (DIP) facilitate a project aimed at ensuring better management of the self drive tourism market (a large component of which is the grey nomad) to achieve growth in the sector without compromising environmental values. DIP is at the scoping stage only of the project, and a project plan has been drafted and a steering committee formed to determine the precise scope of the project.

DIP is also involved in a project titled Central West Tourism Management Study which is relevant to this initiative. This project aims to provide advice relevant to improving the management of recreational vehicle tourism as an important economic driver for the region. This project is in the early stages of development, and a steering committee is currently being formed. It is expected this project will prepare some guidelines for local government and how to best plan for the infrastructure needs of self-drive tourists, which can be used as a model for infrastructure planning and development across other Queensland regional and rural destinations.

Green Space

Grey nomads will be one of many user groups to have access to a green space network to be delivered through the Queensland Greenspace Strategy, when finalised. The Strategy will provide:

- o parks for outdoor/public recreation activities needing large areas;
- o expansion of the existing regional trails program;
- o corridors which link parcels of existing green space; and
- o parks to serve the needs of local neighbourhoods.

Indigenous

The economic potential of mature age tourism in remote Indigenous communities warrants further consideration. In 1999, 24 percent of international visitors to Queensland visited an Aboriginal community/site; in 2001, 14 percent of interstate visitors to Queensland visited an Aboriginal community/site. Comparative numbers experienced Aboriginal art/culture or cultural displays²². Northern Territory demographic profile attributes 24 percent of Indigenous culture visitor to people aged 55 years and over.

Only one community (Bamaga) in Far North Queensland has a caravan park. Steps necessary to develop mature age tourism in remote communities could include: infrastructure development; marketing to local and international audience; and local community skill development to manage tourist activities and accommodation.

²² Tourism Queensland: Indigenous Tourism www.tq.com.au/research (paper undated)

Increasing grey nomad tourism to indigenous communities will require careful consideration of flow-on implications. Any future development of tourism ventures such as caravan parks, walking/4WD tours, charter fishing, and accommodation facilities would have to take into consideration local restrictions relating to alcohol (where imposed), and local customs and traditions. Many smaller indigenous communities would struggle to cope with a significant increase in visitor numbers from the perspective of access to health facilities, access to food and groceries and for essential supplies such as fuel.

Institutional Cooperation

Local Government and Civic Organisations

Many existing rest areas are located in towns and fall within the jurisdiction of local governments to meet the needs of both the local population and the road user. Quite often these are public parks that serve the local community and are made available to passing motorists as well. An objective of local governments and civic organisations in providing and maintaining rest areas is to encourage motorists to stop in their area to facilitate the use of local businesses, such as food and accommodation providers.

Often, through the re-routing of State-controlled roads and National Highways, rest areas within townships that were once located on major arterial roads are now located away from the major thoroughfare, thus serving a negligible role in terms of providing a convenient and easily identifiable rest area for drivers. It is therefore questionable as to whether these rest areas located away from the arterial road should be represented as motorist rest areas on the Guide to Queensland Roads publication.

These circumstances suggest there is an opportunity for negotiation with local government or civic organisations to participate in the construction and/or maintenance of motorist rest areas located on strategic routes on approaches to townships. These sites may offer good potential in terms of providing motorists, particularly tourist traffic, with a "gateway" to the town through the provision of tourist information regarding local attractions and businesses and route information. This approach may prove useful in promoting the town's businesses and attractions, particularly in situations where a town by-pass exists.

Business Organisations and Commercial Service Centres

Opportunity also exists to encourage the participation of business organisations to provide roadside amenities, or particular facilities, at roadside amenities. In this way local business can be provided with opportunities to contribute to the upgrading, development, or maintenance of roadside amenities in return for some form of recognition. For example, a toilet block constructed with the assistance of funds donated by a local business. This contribution could be acknowledged through, for instance, the positioning of a small plaque on the facility.

5. What are the major issues relating to the regulation of Queensland's camping and caravan parks?

Clearly, Government has a key role in regulating the operation, development and licensing of the camping and caravan park industry utilised by the grey nomad tourism market.

Regional regulatory instruments related to camping and caravan parks

At a regional level, the South East Queensland Regional Plan 2009-2031 (the SEQ Regional Plan) supports the development of more caravan parks and camping areas and also supports maintaining restrictions on permanent residents of these facilities. The SEQ Regional Plan demonstrates this support through providing for relaxed controls on tourism development by allowing for small to medium scale tourist activities outside the Urban Footprint. However, there have been instances where proponents proposing park developments outside of the urban footprint have not progressed these projects citing dwelling size restrictions under the SEQ Regional Plan. Proponents have indicated that these restrictions have limited their capacity to develop an ongoing sustainable/viable enterprise.

Under the regulatory provisions of the SEQ Regional Plan, caravan parks and camp sites are defined as short-term accommodation (accommodation intended for non-permanent residents for periods of up to 12 weeks). The SEQ Regional Plan provides for a more streamlined process of approval of applications for short-term accommodation facilities, provided that the facility is for less than 300 people and the incidental commercial or retail activity does not exceed 250 square meters. It should be noted that any application is still required to comply with the relevant council planning schemes.

This inconsistency where campgrounds are supported in principle but hamstrung in practice financially requires further consideration in consultation with local government authorities and local communities.

There are currently two regional plans in place with State Planning Regulatory Provisions (SPRP) attached (Far North Queensland and South East Queensland) and one region with an interim SPRP in force (Wide Bay Burnett), with the final regulatory provisions expected to be in place within the next 18 months. These regulatory provisions must be taken into account in planning and development decision-making processes, including deciding on development applications related to camping or caravan grounds.

Operational regulatory planning instruments related to camping and caravan parks

On a functional level, the development of new camping grounds and caravan parks, is currently assessed through the Integrated Development Assessment System (IDAS).

The provisions in the *Sustainable Planning Act 2009* and the *Sustainable Planning Regulation 2009* provide for the 'rules' by which IDAS operates and regulatory provisions must be taken into account in planning and development decision-making processes, including development applications made under the Sustainable Planning Act 2009. Local Government is the primary assessment manager for development applications in IDAS. In the case of development applicable to camping grounds and caravan parks, Local Government would act as the assessment manager for the vast majority of cases.

Local Governments assess a development application against a range of plans and policies, including:

- The Local Government Planning Scheme: this document is drafted by Local Government to account for the local community's needs and State interests.
- State Planning Instruments: these articulate the State's interests and are reflected in the Local Government Planning Scheme. Sometimes Local Government will refer a development application to a State agency for advice, to clarify how a development application may affect a State Interest.

DIP's primary role in development assessment processes is to maintain the IDAS framework and to allow the stakeholders operating within that framework (applicants, assessment managers, advice agencies) to undertake their roles in an effective and efficient way.

It would be fair to say that the involvement of so many competing interests, including project proponent, the local community, Local Government and the State Government makes achieving an acceptable balance to all stakeholders difficult. On this basis, the identification of the most appropriate level of Government involvement is necessary.

Planning and regulatory issues related to camping and caravan parks

The issues paper notes that the development of caravan parks and camping grounds is potentially contentious given that some caravan parks and camping grounds in highly desirable (beachfront) locations have been re-developed into other uses (usually hotels or apartments), permanently excluding the site from being used for camping or caravanning.

As identified above, Local Governments are currently primarily responsible for the regulation of caravan parks and camping grounds under local laws. In addition, councils control the establishment of new camping grounds and caravan parks through their planning schemes. The Queensland Government considers that Local Government is best placed within the scope of IDAS to address the development of caravan parks and camping grounds, at both the strategic planning and development assessment stages:

- Strategic Stage: Local Government configures its planning scheme to account for current caravan parks and camping grounds and facilitate the development of this use in the most appropriate way for its community.
- Development Assessment: In the vast majority of cases, Local Government would be the assessment manager for a development application involving a caravan park or camping ground. As the primary administrators of IDAS as well as being the authority on the needs of their communities, Local Governments are best placed to continue to assess development applications of this type.

Local Governments usually regulate camping grounds and caravan parks in order to protect the health, safety and amenity of the community by licensing parks to ensure that there is no overcrowding and there are sufficient facilities for residents and visitors (toilets, showers, washing machines etc) and the Queensland Government considers that local governments are best placed to continue managing this regulatory responsibility.

While there have been great improvements in the quality of campervans and caravans in relation to the provision of self contained facilities, it is anticipated that there will always be the need for some type of regulation of camping grounds and caravan parks to ensure satisfactory health and safety outcomes. To assist councils in this regard, the Minister for Local Government and Aboriginal and Torres Strait Islander Partnerships has approved a model local law as being suitable for adoption by councils that regulate caravan parks and camping grounds.

Land provision issues for camping and caravan parks

A major issue is the provision of adequate and sufficient land for grey nomads. While Local Governments have a role through their planning schemes to make land available for this purpose, councils can also directly provide additional land for camping and caravan parks by allocating land under their control for this purpose. An issue that arises where councils directly provide camping and caravan park facilities is the impact these additional (and usually much cheaper) facilities have on existing commercial caravan parks.

Department of Environment and Resource Management's (DERM) policy on the use of trust land (particularly showgrounds) for caravan parks is that it should not negatively impact on the commercial viability of existing caravan parks. This policy has created some problems for Local Governments regarding the interpretation of how to gauge the impact on the viability of existing parks but also because, sometimes, the existing parks do not provide the facilities and services needed by grey nomads. For example, grey nomads with modern self contained campervans do not need toilets, showers and bbq facilities provided by caravan parks and sometimes their vehicles are too large to park in traditional caravan parks.

As previously discussed it continues to be a challenge to find the right balance between meeting the needs of grey nomad visitors for additional camping facilities, while not impacting the commercial viability of privately owned caravan parks. Consideration should be given developing tools and practical templates to assist Local Governments with the development of land use management plans for trust land used for caravan parks and camping.

Balancing the needs of short term accommodation needs for tourists and permanent or long-term basis

There are a number of mixed-use residential park owners that have expressed an intention to progressively cease offering sites for occupation by manufactured homes and to concentrate their businesses on providing short-term, tourist accommodation. A significant number of vulnerable members of the community reside in caravan parks on a permanent or long-term basis either in manufactured homes or caravans. While it is important to promote the increased availability of sites for short-term, tourist accommodation in existing caravan parks, this also needs to be balanced against the displacement of permanent or long-term residents.

Any strategies to increase the availability of accommodation in caravan parks for grey nomads must acknowledge and seek to mitigate the risk of social dislocation and financial loss for manufactured home owners and permanent caravan residents.

6. What is the best method of marketing Queensland's rural and regional communities to grey nomad tourists?

Attachment 1 provides a detailed summary of Tourism Queensland's (TQ) approach to marketing and where 'grey nomads' fit within the organisation's strategic marketing framework.

Tourism Queensland recognises that there is a wide range of reasons people travel and the experiences they are looking to have. TQ's domestic segmentation model has shown that it can not be assumed all grey nomads are looking for exactly the same type of holiday destinations and/or experiences. Further, while 'driving' is an important mode of transport which enables visitors to access Queensland's experiences, it is not the key factor determining destination choice. As such, Tourism Queensland incorporates 'drive' into broader 'psychographic' marketing approaches.

Tourism Queensland currently does not consider grey nomads as a distinct target market, but rather they exist within each of the identified domestic target segments currently driving its activities. Grey nomad tourists are looking for a range of experiences which are not dictated by their age, but by what they want to get out of their holiday (both their physical and emotional needs). Therefore, in line with Tourism Queensland's global brand strategy and segmentation models, the grey nomad market needs to be approached from an experience perspective, rather than a demographic one. Grey nomad tourists can be effectively targeted through the Queensland themes of adventure, natural encounters, Queensland lifestyle and islands and beaches.

The needs of grey nomad travellers are closely aligned with Tourism Queensland's key domestic target markets: Connectors, Social Fun-seekers and Active Explorers. Recognising the older market makes up a sizeable proportion of the driving holiday population, and also typically has the greatest disposable income and time available for holidays, Tourism Queensland's approach is to consider grey nomads as Mature Connectors, Mature Social Fun-seekers or Mature Active Explorers.

Focusing on the experiences these people are looking for, rather than their age, is intended to better guide and inform the assessment and development of infrastructure and facilities for this market, as well as how to market to them most effectively. Their age group may guide the types of media or various distribution channels needed to target this group, however Tourism Queensland will continue to focus on the 'experience' in its marketing messages.

Tourism Queensland has developed a domestic consumer segmentation model which identifies consumers' core motivations for holidaying in Australia and the experiences these travellers are interested in. All marketing for Queensland's rural and regional communities should be conducted in partnership between Tourism Queensland, the Regional Tourist Organisations, Local Tourist Organisations and local governments using these established systems.

There are a number of distribution systems which can be very powerful for targeting grey nomads (for example, Visitor Information Centres, consumer and caravan and camping shows) but the primary consideration in marketing to these travellers must be understanding their holiday needs and ensuring appropriate holiday experiences are incorporated into the marketing message. The marketing message and experiences will help to guide the most suitable distribution channels.

Marketing of the State's protected areas

The Department of Environment and Resource Management currently provides a significant amount of information for people visiting the State's parks and forests. It also makes substantial contributions to a range of tourism marketing and promotional material produced for park visitors and general tourism clients. The agency continues to work closely with Tourism Queensland, Regional Tourism Organisations and Visitor Information centres to identify new opportunities to promote tourism to parks in rural and regional areas and assist with marketing these through its own information material and contributing to other tourism media.

Other marketing methods

Other key marketing methods include:

Public Education

An integrated approach to public education would serve to promote the safety benefits of utilising roadside amenities as well as enhancing the driving experience for motorists. This approach would primarily be achieved through the co-ordinated utilisation of a number of different media, including print, tourist display boards, billboards and radio.

Print

The main document which promotes the location and facilities offered at rest areas and "driver reviver" sites throughout Queensland is the Guide to Queensland Roads. This is regularly updated and widely distributed throughout the State. Regional Tourism Organisations also produce tourist publications promoting local attractions and businesses that are ideally suited to incorporating information on the location and facilities offered at rest areas. These publications may incorporate a "theme" route approach. Opportunity exists for DTMR regions to liaise with local tourism bodies to include appropriate roadside amenity advice for tourists in these publications.

Industry publications such as the RACQ's Road Ahead and DTMR's Down the Track are also useful publications that can boost motorist and transport industry awareness of the important role of roadside amenities. Potentially, these articles could be run in conjunction with, or support, other road safety strategies, such as "Driver Reviver".

Tourist Display Boards

Tourist display boards located at motorist rest areas or points of interest by local tourism and /or business groups play an important role in public education for rest areas. Opportunity exists for DTMR to place appropriate fatigue-related posters and distribute copies of the Guide to Queensland Roads at these locations.

Billboards

Fatigue awareness campaigns undertaken by DTMR generally incorporate billboard advertising. DTMR has undertaken to give consideration to incorporate rest area messages within these campaigns. DTMR can achieve similar, or stronger, impacts through augmenting billboard campaigns and the careful siting of advance warning signs indicating the location of the next motorist and heavy vehicle rest area approximately one kilometre after passing a billboard carrying a fatigue awareness message. This approach can alert the motorist or heavy vehicle operator to the location of the next rest area while the individual is still conscious of the fatigue awareness billboard message.

Radio

Many regions in Queensland incorporate a "Tourist Radio" channel which promotes local tourist attractions and businesses. Ongoing liaison with regional tourism organisations is needed to include messages that promote the importance of rest areas in combating fatigue and improving the quality of the driving experience, regional locations where motorist vehicle rest areas are located.

Technology based opportunities

In the coming years, the mobilisation of more technologically savvy grey nomads and increase in the technological capabilities of RV and other vehicles provides an opportunity to market drive tourism through technology based applications including GPS, website and mobile devices. This provides an opportunity to ensure better currency of information and raise awareness of destinations and the range of infrastructure and services available.

Arts and Mature Age Tourism

The issues paper notes that arts and culture are important drawcards for grey nomads, in particular: festivals, arts events, live theatre, museums and exhibitions. Drawing on this, Arts Queensland suggests that any promotional or marketing initiatives developed to target grey nomads be inclusive of:

- o the strong network of arts and cultural organisations and venues in regional Queensland that contribute to meeting the arts and cultural needs of grey nomads, such as regional galleries, regional and community museums, public libraries, Indigenous Art Centres, and the Northern Australia Regional Performing Arts Centre theatres
- o small and large scale arts and cultural festivals and events that occur across regional Queensland. Examples of larger scale events include the Cairns Indigenous Art Fair, the Dreaming Festival, and the biennial Queensland Music Festival.

Alcohol Restrictions

Any marketing and promotional material developed for advertising Queensland's rural and regional communities needs to include information regarding the various alcohol restrictions that exist throughout the state, in particular which roads have a traveller exemption.

7. How successful have existing programs been in utilising the skills of grey nomads in rural and regional Queensland?

8. What can the government do to encourage grey nomads to use their skills by undertaking work in rural and regional areas?

Skill shortages remain a significant issue for the tourism industry. Access to a skilled workforce and efficient technology is important to ensuring long-term competitiveness of Queensland's tourism industry. It is acknowledged that grey nomads potentially bring extensive economic, social and human capital to the outback that addresses skills shortages.

The issue of utilising the skills of grey nomads in rural and regional Queensland, both for paid employment and volunteer tourism, is a growing area which deserves greater focus. Benefits include providing services for regional communities as well as utilising the skills of grey nomads.

Within this framework however it must be acknowledged that previous research into the grey nomad's employee profile indicated that around 22% of grey nomads were willing to undertake paid work for one month or more (on average four months), with the most popular (41%) timeframe for volunteer work sitting around two to four days²³. The following is a small précis of this research's other findings:

- the majority of grey nomads were of working age (i.e. 65 years or less)
- 56% of grey nomads surveyed were interested in paid work while travelling and 51% were interested in voluntary work
- 86% and 67% would modify their travel plans to access paid and voluntary work respectively

Existing programs

There are a number of caravan parks and other operators throughout Outback Queensland utilising the skills of grey nomads. As an example, there are grey nomads who are currently working in Cobbald Gorge and Lawn Hill. While not always full-time, full paying employment, the work they do pay for their van site and earns them a little extra cash, and also encourages them to stay longer in the town.

The Barcaldine Regional Council's Grey Nomad Volunteer Program (<http://greynomadoroject.iimdo.com/>) is deemed to be successful locally. This program is funded through the Queensland Government's Blueprint for the Bush initiative. The visiting grey nomad volunteers provide community groups with access to a range of skills not often available within the communities. The program benefits the community by encouraging the grey nomads to stay longer, meet local people and become part of the community.

²³ The Queensland Grey Nomad Employee Profile. Tony Charters and Associates. 2006 (in collaboration with the Campervan and Motorhome Association of Australia, Tourism Queensland and the Queensland Department of Education, Training and the Arts)

There are a number of websites available (e.g. www.greynomadsemployment.com; www.jobsearch.gov.au/harvestrail; www.cenext.com.au) which can assist grey nomads to connect with job opportunities in the regional areas they are travelling to. The Department of Communities is currently working in partnership with Tourism Queensland and QTIC to develop a website that helps to link job opportunities with travelling grey nomads. This website is expected to be completed in December 2010. Additionally, the Queensland Government or specific agencies who have a substantial rural or regional presence, could promote local opportunities through local businesses, accommodation sources, Australia Post and other Government agencies, including Councils and Centrelink.

The former Department of Education, Training and the Arts also commissioned a study which profiled the grey nomads as a mobile workforce, and investigated the potential opportunities for a range of industries including tourism. The summary report which is available on Tourism Queensland's website contains insights from both the grey nomads' and industry perspectives; as well as results of a pilot program which was conducted in Townsville in 2008.²⁴

The Grey Nomad population may include highly trained health professionals whose skills could be beneficial to the communities they visit. For example, Queensland Health is currently examining the feasibility of establishing an internal, state-wide nursing/midwifery locum management service that would provide support to Queensland Health's rural and remote facilities.

Other workforce models include the Allied Health Professional Enhancement Program (AHPEP) which is focused on providing professional development opportunities in the bush as well as locum programs for doctors. Persons who are travelling through Queensland with appropriate skills and registration may be able to participate in such programs and therefore become a viable workforce alternative. Queensland Health is continuing to examine innovative workforce solutions for rural and remote areas.

Opportunities to participate in paid and volunteer positions in regional and rural areas should also be made available to people with a disability. Further, the capacity for people with a disability to contribute in both paid and volunteer positions should be made clear to potential employers in regional and rural areas. It should be noted however, that, should grey nomads wish to volunteer or work with funded disability service providers, they will need to apply for a yellow card, or a blue card if supports are being provided to children. As volunteers, no application fee is required; however a \$70 fee will apply from 1 July 2010 if paid employment is taken up.

Industry Liaison Officer

Under Skilling Queenslanders for Work initiative, the Department of Employment, Economic Development and Innovation (DEEDI) fund an Industry Liaison Officer with QTIC whose role is to promote mature age strategies in the tourism and retail sectors across Queensland. This officer has done some work in promoting the workforce utilisation of grey nomads.

²⁴ Grey Nomads as a Mobile Workforce: The Industry Perspective. Tony Charters and Associates, 2007

Volunteers Portal

As a key deliverable of the Tourism Action Plan to 2012 a new tourism volunteer's web portal has been developed by the Department of Communities. The portal is hosted on the Volunteering Queensland website that is the peak body for volunteers in Queensland. The site is www.volunteering.org.au

The new web portal will enable tourism volunteers such as the grey nomads to volunteer their time at regional tourism events. This new tourism web portal will help meet the Government *Towards Q2* target of achieving 'a 50% increase in the proportion of Queenslanders involved in their communities as volunteers by 2020'.

The portal is due to "go live" shortly.

National Long-term Tourism Strategy

The State Government, through DEEDI is currently working with other Australian tourism agencies to develop a national tourism accreditation framework to ensure visitors enjoy consistently high quality tourism experiences and products throughout Australia. This will help to address the varying standards in tourism products across Queensland and to ensure mature visitors' expectations of quality tourism are met in Queensland.

Through QTIC's representation on the Labour and Skills Working Group (which has been formed under National Long-Term Tourism Strategy), the State is also engaged in progressing workforce initiatives that look at addressing recognition and transferability of skills issues. This has the capacity to improve the engagement of grey nomads as a viable workforce both nationally and in Queensland.

Campground Host program

The Department of Environment and Resource Management (DERM) is looking at the feasibility of establishing a campground host program, especially for western and more remote areas of Queensland. Such a program could potentially utilise the skills of grey nomads to provide significant support to the agency and enhance their tourism experience through longer stays and more intensive experience with the local area.

This program could enhance the presentation, upkeep and maintenance of campgrounds and generally provide more extensive campground support services for other tourists. These could be especially valuable in those large, remote parks where DERM are unable to provide a regular visible presence due to relatively low staffing levels.

Park Volunteer program

Most volunteer arrangements are currently undertaken on a casual, ad hoc basis however a significant opportunity exists to establish a more formalised approach through a structured program that could see grey nomads actively engaged in a true "volun-tourism" experience. This could include involvement in wildlife conservation, cultural heritage, rehabilitation, environmental monitoring and asset maintenance work to name a few.

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Part 2**Attachment 1****Tourism Queensland's approach to segmenting the domestic tourism market**

The domestic tourism market is increasingly competitive as consumers become more confident, bolstered by more choice and information available. Tourism Queensland (TQ) and its partners require a sophisticated approach to grasp the competitive edge and increase the number of Australians visiting Queensland. Understanding this, TQ embarked on a segmentation based on consumer psychographics (needs and wants), as opposed to more traditional demographic segmentation based on age and income.

Traditional methods of research assume everyone in the same age group or with the same income act in a similar way. However, it is more productive to understand the consumers needs and wants, thus maximising the impact of the marketing dollar and communicating more effectively with the consumer. By understanding the genuine holiday needs and motivations of our consumers, TQ can customise our communications to them by offering tailored experiences.

In 2008, TQ conducted research that identified Australians' ideal holiday needs and wants, and identified there are six consumer segments in the Australian holiday marketplace based on the experiences they are looking for in a domestic holiday. The six segments include Connectors, Social Fun-seekers, Active Explorers, Unwinders, Stylish Travellers and Self Discoverers. For detailed information and fact sheets regarding the six consumer segments, please visit TQ domestic market segmentation at www.tq.com.au

TQ has identified Connectors and Social Fun-seekers as the primary target markets for Queensland, accounting for some 58 percent of the Australian holidaying population. Active Explorers (accounting for 11 percent of Australian domestic travellers) have also been identified as a secondary, growth opportunity market for Queensland. These three segments are all positively disposed to holidaying in Queensland and consider Queensland is able to offer the holiday products and experiences they desire.

For Connectors, holidays are a chance to connect with the people they care most about. For Social Fun-seekers, the essence of a holiday is having a fun time. While they do a lot of different activities, it is sharing the experience with friends and other holidaymakers which makes the difference. Active Explorers also like to be challenged and feel alive. For them, holidays are about pushing their boundaries through physically challenging activity. They enjoy exploring the extremes of the physical environment and feeling alive.

International target markets

TQ, in conjunction with Tourism Australia, has identified the Global Experience Seeker as its primary target market. Experience Seekers can be found among all age groups, income levels and geographic locations. Within this segment there are commonalities in attitude to travel, personal development and everyday life that exist across countries. Experience Seekers want authentic, personal experiences, to make friends and to meet and interact with the locals while on holiday. They wish to experience something different from their normal day-to-day life and understand and learn about different lifestyles and cultures. They seek to participate in the lifestyle and experience rather than simply observe it, and to challenge themselves physically, emotionally and/or mentally.

Tourism Queensland's approach to marketing Queensland experiences

Under TQ's global brand strategy, Queensland and its destinations are collectively promoted under the creative framework of Brand Queensland. The key attributes of each destination are showcased under the four key themes of Islands & Beaches, Natural Encounters, Adventure and Queensland Lifestyle (where applicable).

Tourism Queensland's approach to grey nomads

TQ recognises that there is a wide range of reasons people travel and the experiences they are looking to have. TQ's domestic segmentation model has shown that it can not be assumed all grey nomads are looking for exactly the same type of holiday destinations and/or experiences. Further, while 'driving' is an important mode of transport which enables visitors to access Queensland's experiences, it is not the key factor determining destination choice. As such, TQ incorporates 'drive' into broader psychographic marketing approaches.

TQ does not consider grey nomads as a distinct target market, but they exist within each of the identified domestic target segments currently driving our activities. In TQ's view, grey nomad tourists are looking for a range of experiences which are not dictated by their age, but by what they want to get out of their holiday (both their physical and emotional needs). Therefore, in line with TQ's global brand strategy and segmentation models, the grey nomad market is approached from an experience perspective, rather than a demographic one. Grey nomad tourists can be effectively targeted through the Queensland themes of adventure, natural encounters, Queensland lifestyle and islands and beaches.

TQ acknowledges the needs of grey nomad travellers are closely aligned with its key domestic target markets: Connectors, Social Fun-seekers and Active Explorers. Recognising the older market makes up a sizeable proportion of the driving holiday population, and also typically has the greatest disposable income and time available for holidays. TQ prefers to consider grey nomads as Mature Connectors, Mature Social Fun-seekers or Mature Active Explorers.

Focusing on the experiences these people are looking for, rather than their age, will better guide and inform the assessment and development of infrastructure and facilities for this market, as well as how to market to them most effectively. Their age group may guide the types of media or various distribution channels necessary to target this group, however TQ focuses on the 'experience' in its marketing messages.