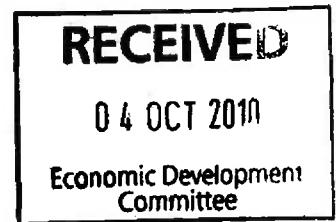




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**SUBMISSION TO ECONOMIC DEVELOPMENT COMMITTEE:  
Issues Paper No: 3**

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

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**April 2010**

*The Centre for Accident Research & Road Safety - Queensland  
is a joint venture initiative of the Motor Accident Insurance Commission  
and Queensland University of Technology*



This submission has been prepared in response to the Parliamentary Economic Development Committee's *Inquiry into developing Queensland's rural and regional communities through grey nomad tourism*. This submission presents the findings of recent research conducted by the authors relevant to the committee's investigation into:

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

The study which forms the body of this submission was conducted by the authors of this submission through CARRS-Q in 2008-09. This study was primarily interested in examining the road safety risks that grey nomad may be exposed to and ways to promote specific road safety messages to this population. However, while not directly related to tourism, the data collected in this study may inform some areas of this inquiry. Relevant findings are set out under each issue below.

For the committee's information, the participants in this study were 631 older recreational road travellers. Of these 440 were male, 139 were female and 52 did not report their gender. Participants were recruited both face to face and through electronic means. Face to face recruitment took place at an annual Caravan, Camping and Touring Holiday Show (Brisbane, June 2008), at caravan parks on Queensland's Sunshine Coast in July, 2008, and at rallies of the Queensland Caravanning Club and the Australian Caravanning Club, in September 2008, and a number of small caravanning clubs (Queensland based), between July and August 2008. The overall return rate for face to face surveys was 41.94%.

At the small club rallies some qualitative data was also collected in the form of open interviews.

An online version of the survey was available for completion from June 2008 through January 2009. The study was advertised on popular websites including that of the Caravanning and Motor Home Club of Australia (CMCA), Caravanning Queensland, and Grey Nomads.com. Caravanning Queensland also promoted the study through their email contact lists and advertisements were placed in the popular magazine publication published by the CMCA, *The Wanderer*. A total of 90 surveys were completed electronically.

Table 1 provides the age composition of the sample and the residing states of participants when not travelling. Modal age bracket was 61 – 65 years.

Table 1

*Age Breakdown and Place of Residence of Participants when not Travelling*

Age Group	Participants %	Place of Residence	Participants %
Under 51	7.70	Queensland	73.40
51-55	8.80	New South Wales	9.70
56-60	20.70	Victoria	8.90
61-65	29.70	Western Australia	1.50
66-70	19.40	South Australia	2.60
71 years or older	13.80	Tasmania	1.50

The majority of participants were retired (65.7%) or semi-retired (9.7%). The educational standard was diverse, with 19.8% who had completed upper secondary schooling, 16.40% who had trade qualifications and 28.2% who had tertiary qualifications.

The majority of travellers toured as couples (78.2%). Seventy three percent had been undertaking extended road trips for more than five years. Most (74.8%) identified themselves as the "principal driver", with men (68.8%) performing this role more often than women (12.5%). Caravans were by far the most popular form of accommodation vehicle (75.6%), with a substantial proportion of the sample (38.9%) towing large, "double axle" caravans (i.e., either full-vans or pop-tops). Approximately half of all driving and towed vehicles were five years old or newer. Most travellers (93.7%) had some form of road assistance insurance. Table 2 provides a breakdown of the types of vehicles driven and towed by the group.

Table 2

*Vehicles Driven and Towed by Older Recreational Road Travellers*

Driving Vehicle	Participants (%)	Towed Vehicle	Participants (%)
Four Wheel Drive	62.80	Caravan - Double Axle (Full)	31.90
Two Wheel Drive	24.30	Caravan -Single Axle (Pop-top)	27.00
Motor Home (2 berth)	5.00	Caravan - Single Axle (Full)	9.70
Motor Home (4 berth)	3.40	Caravan - Double Axle (Pop-top)	7.00
Modified Bus	2.40	Camper trailer	5.80
Fifth Wheeler	1.00	Another motor vehicle	2.60
Slide On Camper	0.50	Box trailer or similar	1.70
Other	0.60	A Van	1.20
		Boat or boat trailer	1.20

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

Data from the caravanning industry supports the rising popularity of recreational road travel amongst Australian retirees. Not only is the caravan, motor home and camping industry the fastest growing sector within the Australian domestic tourism market (Caravan and Camping Industry Association NSW, 2008), but much of this growth is attributed to the increased recreational road travel of senior citizens (Prideaux & McClymont, 2006). Data from Tourism Research Australia confirms that the number of registered caravans and campervans is increasing (Ipalawatte, Carter, Heaney, & Lubulwa, 2005) with a majority of new recreational vehicles in recent years being acquired by those in the 54 to 62 age bracket (Ipalawatte et al., 2005; Prideaux & McClymont, 2006). Retired Australians are reported to take 200,000 caravanning trips, of six weeks duration or longer, annually (Carter, 2002), with an estimated 70,000 – 80,000 caravans touring the country, for extended periods of time, at any one time (Caravan and Camping Industry Association NSW, 2008). While older travellers take approximately the same number of road trips each year as other groups, their average trip length is approximately double that of families (Ipalawatte et al., 2005) and although August is the most prominent month for touring, travel remains reasonably consistent throughout the year (Carter, 2002).

Participants in the current study visited an extensive variety of metropolitan and regional destinations. Trip duration ranged from two weeks to 208 weeks. Mean trip duration across all trips taken in the past two years was 9.59 weeks. Surprisingly, only 9.7% of all trips taken in the past two years were 12 weeks or longer. These findings contrast those of previous research and public perception. The most prominent seasons for travel were Autumn (28.5%) and Winter (28.3%).

Average trip distance (based on all trips undertaken in the past two years) was 6884.40 kilometres, with a modal distance of 5000 kilometres. The average traveller drove approximately 357.14 kilometres per day. It is noteworthy, that those who took shorter trips

of two weeks travelled a mean distance of 1912.30 kilometres, therefore travelling approximately 136.60 kilometres per day. Only 12.2% of all participants did not travel at all to rural and remote areas. Whole trip expenditure ranged from \$60.00 to \$100,000.00; the average trip cost was \$5645.59 (Mode=\$5000). Average expenditure per week was \$588.69. The most common trip costs were fuel and food expenses.

As the majority of participants spent a considerable amount of time in rural and remote areas, the average expenditure of over \$500 a week represents a significant economic contribution to these areas.

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

When conducting the literature review for the current study, specific statistics on grey nomad tourism was difficult to find. It would be useful for future research to collect data which enables the identification of this specific population.

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

There is an urgent need to improve the first aid knowledge and skill of older recreational travellers. Eighty seven of 631 individuals surveyed had experienced a major health scare while travelling and yet less than one third of travellers reported first aid more than basic first aid knowledge. Access to practical first aid courses was an idea generated from within the surveyed population as being important. Further qualitative data suggested that promotion of such courses in towns frequented by grey nomads would be supported, as the importance of first aid knowledge is highlighted once they have embarked on their trip and experienced some kind of health or emergency scare. The provision of information on emergency strategies and contact details for outback regions was also proposed.

Channelling courses and information through existing networks (e.g. Recreational Vehicle Clubs, Recreational Road Travel Shows) and aligning them with reputable sources (e.g., St Johns Ambulance) may be advantageous. Figure 1 shows the health disorders reported by the current participants.

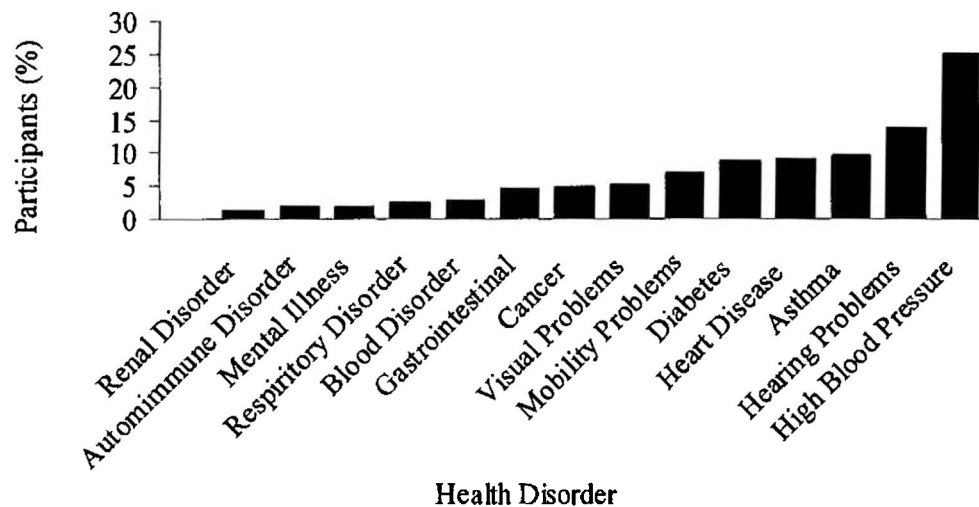


Figure 1. Percentage of participants experiencing various health disorders

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

Participants reported needing more knowledge and understanding relating to travel in outback regions, particularly in relation to:

- Road Train Areas
- Safe Travel Times
- Native Animals
- Key road safety incidents (i.e., flat tyres, shattered windscreens, parking problems)

They suggested that this information would be best provided:

- (a) In written form and distributed or aligned with government, road assistance companies or recreational vehicle clubs as these are respected sources within the target group.
- (b) Display or provision of key information at rest areas and accommodation sites, particularly within or on the approach to road train areas
- (c) Development of a *glove box* booklet providing key road safety and emergency information.

Another key area of concern reported by participants in this survey were parking issues as the majority are driving or towing long vehicles. Concerns in regards to parking were directed to small towns as well as rest areas. Figure 2 shows the most common places for making stops while on the road.

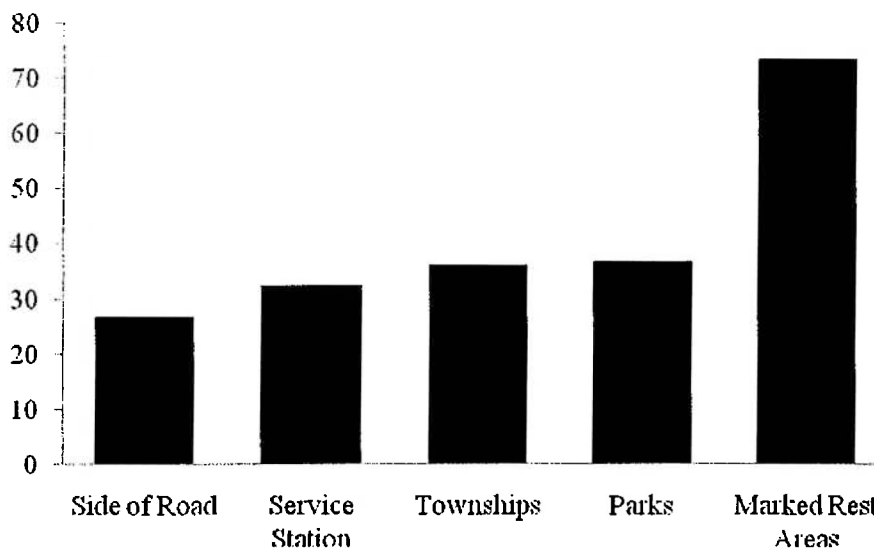


Figure 2. Percentage of participants who stop at various locations for road breaks



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

Although caravan parks were the most frequented accommodation site, participants appeared to fall into two categories with regards to choice of accommodation: those who stay predominantly at commercial caravan parks and those who spread their nights evenly across a range of less formal sites, including bush camping, free parks, and rest areas. While 65.7% spent more than 50% of nights in caravan parks, 34.3% spent less than half of their travelling nights at these locations. The accommodation trends of both groups are depicted in Figure 3. Acknowledgment of the existence of these two separate types of travellers may have implications for regulation of free camping sites as opposed to existing caravan parks.

In the qualitative data, cost was raised as a factor in accommodation choices. Mention was made of the number of small towns who provide free camping sites and public facilities. Respondents did state that such facilities provided an incentive for them to stop in that town.

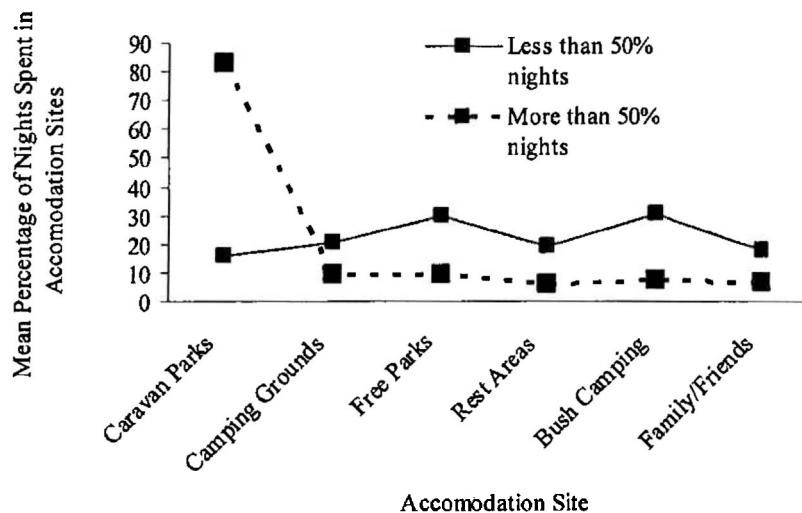


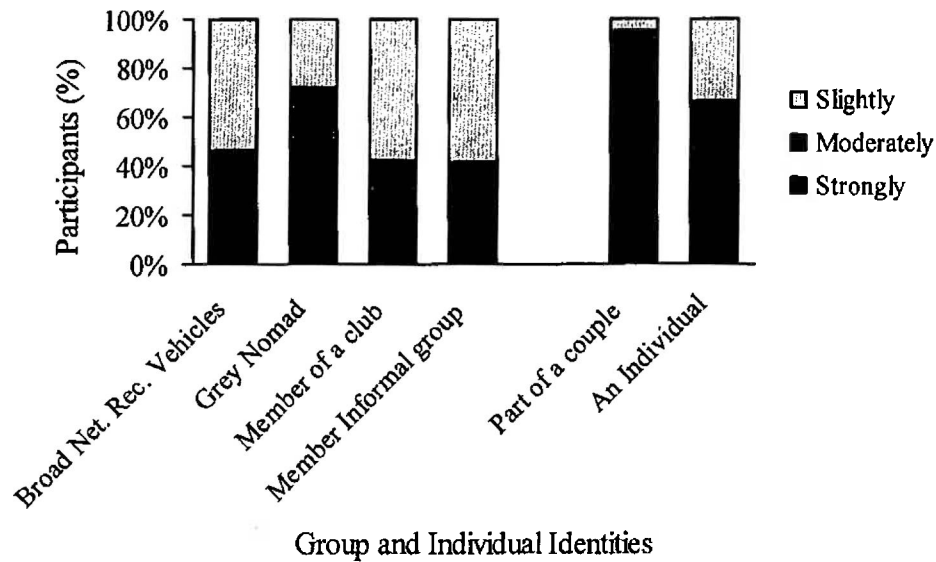
Figure 3. The mean percentage of nights spent at various accommodation sites.

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

In the current research a total of 51.5% of travellers were members of either a formal club (e.g., CMCA, Australian Caravan Club) or an informal recreational network of friends and acquaintances. A further 48.5% identified as non-club members. Communication between club members was regular and principally face to face. Communication using email and club newsletters was also common and may represent an effective means of information dissemination. This indicates that promotion through existing networks such as Caravanning and Motorhome clubs is an effective way of reaching a significant proportion of this population.

The current research also examined the degree to which participants saw themselves as a range of individual and group travelling identities (see Figure 4). Results showed that respondents related more strongly with individual identities (i.e., an individual or a couple) than with group identities.

Further, when asked to *categorise* themselves as either Grey Nomads or a Recreational Vehicle Travellers (i.e., to choose between the two groups), only 35.7 % of the sample categorised themselves primarily as Grey Nomads, compared to 64.3% who categorised themselves Recreational Vehicle Travellers. Hence, while most travellers related to some degree with the Grey Nomad identity, when asked to choose between the two groups, the majority preferred to see themselves as part of the Broad Network of Recreational Vehicle Travellers. These findings have implications for the effective promotion to this population.



*Figure 4.* Participants expressed degree of identification with a range of individual and group identities

Perhaps the most defining feature of those identifying as Grey Nomads in comparison to those identifying as recreation vehicle travellers, was that they travelled for significantly longer in a single trip. Despite their longer trip duration however, the mean distance travelled by the groups was not significantly different, nor was the percentage of travel undertaken in rural and remote areas. Hence, while Grey Nomads travelled the same distance as those within the Broad Network of Recreational Vehicle Travellers, they took longer to do so. Those identifying as Grey Nomads also reported a greater sense of community with fellow travellers than did those identifying as recreational vehicle travellers.

Although Australian society has come to know this group of older travellers as Grey Nomads, it is apparent that for many this is a label ascribed to them, as opposed to one that they have chosen. The current research confirmed that the majority of respondents saw themselves principally as couples when on the road, with social group identity being secondary. Although identifying to some degree with the Grey Nomad identity, when given the choice, over half saw themselves as Recreational Vehicle Travellers as opposed to Grey

Nomads. Community segmentation based on caravan or motor home ownership was also highlighted by the qualitative data.

Social marketing and health promotion literature emphasise the importance of tailoring messages and programs to the specific needs of communities (Siegel & Doner, 2004). Similarly, the Identity Based Motivation Model (Oyserman, Fryberg, & Yoder, 2007) suggest that messages are more likely to be picked up by individuals if they see themselves as part of a group and if the messages are specific to their group and individualise their group. Given that the community of older recreational road travellers is highly segmented, a multifaceted approach to promotion may be necessary. First and foremost, campaigns should target travelling couples. If group identity is to be used, it may be necessary to highlight or acknowledge both the Grey Nomad and the Broad Network of Recreational Vehicle Traveller identities, as only then will the attention of the bulk of the cohort be captured. Care should be taken in developing generic messages for the two groups however, given their slightly different profiles. Portraying caravan and motorhome owners as a combined group should also be avoided.

The strong sense of community amongst those identifying as Grey Nomads was also reported by Onyx and Leonard (2007). This social cohesion is likely to support greater involvement of community members in the planning and implementation of trips (Gillies, 1998) and should be seen as a key resource by promoters. Additionally, by portraying the high level of cohesion amongst Grey Nomads in media campaigns, members may be encouraged to visit new places and share in the grey nomad adventure.

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

The growth of the "grey nomad movement" indicates that the opportunity to experience and travel around Australia may well be an incentive to many retirees. A number of research projects in this area are in progress. Jennifer Onyx (2006) received an ARC grant to enhance grey nomads travel experience and wellbeing through engaging in voluntary work in regional areas. She has worked closely with 6 towns to match nomad volunteer interests to the needs of the small towns. The Campervan Motorhome Club of Australia (with 46000 members) in partnership with Qld Dept of Employment and Training; Tourism Qld and research consultants Tony Charters and Associates, 2006 has also recently conducted research into employment skills of grey nomads and tourism employment opportunities.

The current authors are also currently working on an ARC Linkage grant project with the Department of Communities which is extending on such research to develop a theoretically based volunteer motivation model by which rural agencies can actively seek the professional skills they need to enhance their sustainability. This research will focus on retired or semi-retired professionals, a sizeable and growing proportion of our population as a source of skill development for rural areas.

Hence a number of research projects are currently examining how the skills of grey nomads can be used to enhance development in rural and regional areas. The results that emerge from these research projects will provide further information on this topic. The current authors are happy to provide further information to the committee as their research progresses over the next 3 years.

In the current research only 22% of participants responded that would be interested in participating in voluntary work during their trip. These respondents did tend to be those

who engaged in longer trips. The type of volunteer work they reported being most interested in fell into the categories of environmental work, working on stations or remote areas, working with communities, e.g. aged care, child care, not for profit agencies and manual labour, e.g. building, gardening.

Hence the results of the current study suggests that not all grey nomads or travellers will be interested in volunteering in rural agencies, although there are a proportion who would be if opportunities were available and known.

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