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This report was produced in November 2011 by Savannah Way Limited as a part of the Drive North Queensland program.
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Introduction

Drive North Queensland

The Drive North Queensland program is a series of tourism marketing and development sub-projects aiming to extend visitor stay and expenditure through self drive experiences in the Outback Queensland, Townsville and Tropical North Queensland regions. The program has been funded by Tourism Queensland under the Queensland Tourism Network Grants Program. Drive North Queensland is owned and operated by Savannah Way Limited.

The Touring Market Workshops Schedule

One of the 2011-12 Drive North Queensland sub-projects involved a series of Touring Market Workshops, regional meetings to discuss the changes occurring in the Touring Market and potential local responses from businesses, organisations and Local Government. Each workshop ran from 9.00am until 12.30pm and was hosted by a key local stakeholder.

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<tr>
<th>DATE</th>
<th>TOWN</th>
<th>HOST ORGANISATION</th>
<th>VENUE</th>
<th>ATTENDANCE</th>
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<td>Longreach Civic Centre</td>
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<td>Mount Isa</td>
<td>Mount Isa Chamber of Commerce</td>
<td>Outback at Isa</td>
<td>15</td>
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<tr>
<td>7-Oct</td>
<td>Hughenden</td>
<td>Flinders Shire Council</td>
<td>Diggers Entertainment Centre</td>
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<td>Tully</td>
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<td>Normanton</td>
<td>Carpentaria Shire Council</td>
<td>Council Boardroom</td>
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The Research

The workshops’ Market Research presentation was undertaken by Balfour Consulting in support of the Drive NQ initiative and was the key focus of workshops.

This presentation, "The RV Travellers - Coming ready or not!" is based primarily on research undertaken in 2010 on behalf of the Campervan & Motorhome Club of Australia (CMCA) surveying RV travellers using rest areas across the northern and outback Queensland regions. It also includes comparisons with similar research undertaken in 2003, plus data from other RV research, desktop research and Australian Bureau of Statistics data.

The initial research undertaken in 2003 was ground-breaking in that no previous research had covered spending patterns, communications, demographics and travel patterns of campervan and motorhome travellers using rest areas. This research covered all motorhome and campervan travellers, including international visitors overnighting at rest areas in the then Thuringowa LGA. The 2010 research surveyed all domestic travellers using free rest areas, including motorhomes, camper vans and caravans, but excluding international visitors. While general comparisons can be made between the two sets of research to identify trends, it was made clear to the audience that the two sets of research addressed differing markets.
The 2010 research was based on a sample of 397 respondents against an estimated total population of motorhomes, campervans and caravans in Queensland during June/July of approximately 120,000. This estimate was supplied by the CMCA. This random sample delivers a confidence interval of 4.91 at a confidence level of 95%, which is slightly better than standard market research accuracy being a confidence interval of 5 and at confidence level of 95%. Data was gathered from rest areas at Rollingstone, Balgal Beach, Bluewater, Home Hill, Fletchers Creek and Barcaldine. The 2003 research was based on 200 completed interviews, which produced a confidence interval of 6.91 at a confidence level of 95%.

The research was presented in PowerPoint format with 62 slides aimed at providing workshop attendees an insight into aspects of the RV Traveller market. It should be emphasised that this research extends beyond grey nomads with 10% of respondents not retirees. It must also be emphasised that this research covers segments of the grey nomad market but not the entire market, as research undertaken elsewhere indicates there is a segment of the grey nomad market that either exclusively or predominantly uses caravan parks and is reluctant to use alternative low-cost or free RV accommodation.

The presentation addressed the following key issues:

1. Who are the RV travellers? (Key demographic information)
2. What are they travel patterns?
3. How do they communicate?
4. What are their spend patterns?
5. Where do they stay and how long?
6. What about self-contained RVs?
7. Other interesting stuff. (RV friendly towns, volunteering, working)

At the commencement of the presentation, the point was clearly made that the research data did not advocate any particular viewpoint on the issue of establishing free or paid rest areas as alternative accommodation to caravan parks, but aimed to provide an insight into the attitudes, behaviour, preferences and demographic make-up of current rest area users. The research presentation generally received very positive feedback from workshop attendees who considered the information provided to be relevant and valuable. Unfortunately some caravan park owners in Cairns, Tully and Atherton however believed that the data being presented was an argument for free or low-cost accommodation alternatives to caravan parks.

The key messages conveyed in the presentation are:

1. The RV Traveller market is growing at a significant rate with the number of registered RVs in Australia predicted to increase by up to 50% over the next 5 to 6 years and 100% by 2025. The message to local government (and State government) is that preparations should be in place now to meet substantial increases in demand for RV services and accommodation. This includes the provision of water and sewerage services, rubbish removal, accommodation options and parking/access in retail precincts.

2. There is an ever-increasing move to self-contained RVs (shower, toilet and electrical generation on-board) which is driving demand by this group of RV Travellers for accommodation options other than the traditional full service caravan park, as many consider caravan parks charge for services they do not want or need. The research also shows there is a group of RV Travellers (approximately 25% of the population sampled) who seek to minimise their accommodation costs at every opportunity and will consistently seek free accommodation areas ahead of any form of commercial accommodation.
3. There are significant questions posed by the research. These include how businesses and local government might adapt their products and services to deal with the RV market’s growth and change. Regional and product specific responses will affect word-of-mouth, a powerful influence on RV travellers.

The research presentation is now available, courtesy of Balfour Consulting and the CMCA, on the Savannah Way website at [http://www.savannahway.com.au/research.html](http://www.savannahway.com.au/research.html). This web page contains a collection of research and relevant documents made available to participants before and after the workshops. It will remain available. Stakeholders are encouraged to contribute to this collection by contacting Savannah Way Limited.

The Participants

Participant numbers and profiles differed considerably across the workshops, as did the key issues identified. Participants included representatives from:

- Local Council departments
- Caravan Parks, hotels, bed and breakfasts
- Volunteer Organisations
- Tour operations & Attractions
- Visitor Information Centres
- Chambers of Commerce
- Regional and Local Tourism Organisations
- Diverse local businesses
- State Government departments
- Other interested parties

Workshop Reports

At each workshop the presentation of the research was followed by a brief strategic analysis session, including a SWOT analysis of the local/regional ability to service the Touring Market and identification of local/regional key issues impacting on the market. This report also documents participant comments as they emerged in general discussion at the workshops. The “Other Discussions” section includes topics raised by stakeholders outside workshops, including by email and telephone.

This report captures a broad range of issues identified across the eleven locations. It is interesting to note that while there were some shared issues, no two locations identified exactly the same issues.

The purpose of this report is to stimulate and inform local discussion on tourism development and marketing issues pertaining to the Touring Market. It is supplemented by the research and relevant documents at [http://www.savannahway.com.au/research.html](http://www.savannahway.com.au/research.html).
Longreach Workshop

Strengths

- RV Town
- Attractions
- Service Centre
- Free Camping and Dump Point
- Access – Matilda Highway
- En route stops – 4 toilets between Longreach and Winton
- Council involvement in tourism issues

Weaknesses

- Capacity – rest areas, caravan park with showground overflow
- Road conditions
- Communication access – conditions/access
- Season – May-Sep
- Cost of establishing rest areas (approx $150-200K)
- Complexity of establishing rest areas (Native Title, Main Roads)
- Local resident limited perception of value from visitor market needs
- Lack of understanding of full segmentation

Opportunities

- Develop RV focused businesses
- Communicating value to entire local business community
- Strategies to counter fuel costs eg pools of RVs, syndicates or time share lease arrangements
- Workers and volunteers to work in local community
- Communication strategy for weather events etc

Threats

- Complexity of development including rest areas
- Fuel costs
- Shortage of skilled workers
- Communication – managing the messages

Key Issues

- Maximising the value of RV travellers
- Integration of communication with RV market
- Developing appropriate facilities
- Better segmentation research of RV travellers
- Alignment of common goals among regional tourism planning and activity (OQTA, LTOs, operators) and development of an action plan with roles, responsibilities and funding
Winton Workshop

Strengths

- RV accommodation sites include three caravan parks in town, showground used as overflow during local events (80 powered sites + camping), and nearest free camping areas 2km out of town
- Strong local attractions’ appeal

Weaknesses

- Accommodation capacity including dormitory style for school and similar groups
- Shoulder season visitation
- Human resources – finding local staff

Opportunities

- Some other locations run a shuttle bus to free camping areas, usually supported by a pub. The council bus (public passenger vehicle) may be available for this though a volunteer or business owner (with Driver Authorisation) would be needed to drive.
- There are numerous areas in town that could be used for free camping. The North Gregory Hotel has free camping at the back for around 12 campervans and the new owner is keen to develop this opportunity.
- Birdwatching is seen as an opportunity to attract higher yield visitors in the late season due to nearby sites eg Bladensburg NP
- Boulder opal fossicking

Threats

- There is concern that the future growth of the market may bypass Winton if there is not free camping. There are several appropriate spaces however there is concern for the commercial business of the three caravan parks. Council needs to find a balance between attracting the free campers and supporting all businesses in town.
- Fire risk at free camping areas – bonfires may get out of control, especially in heavily grassed areas.

Related Issues

- Australian Age of Dinosaurs has accommodation for their workers only. Some free campers have been staying on the access road which is thought to be Council land (not AAOD). AAOD won’t open space on the jump up for campervans as it is a wilderness area.
- Windermere used to have campervans stay until someone stole their barbecue’s gas cylinder. They have now closed this function.
Mount Isa Workshop

Comments from participants

- Fuel prices impact on travel – a jump in prices leads to more localised travel.
- Cyclones and Floods – travellers still believe Queensland coast is damaged and not attractive for visiting.
- The bigger the vehicle the more cheap deals travellers want.
- 2011 peak season travellers had difficulty getting caravan park spaces in Queensland if they had not booked ahead.
- Self contained vehicles want services from caravan parks including a dump point, power to recharge batteries and water to refill and wash vehicles.
- Wifi is not important to older travellers as they have independent internet access.
- Families are a significant growth market – more are on the road for 3-4 months, registering for School of Distance education and completing homework assignments based on regional attractions eg dinosaurs, natural features etc. These families choose their caravan park based on facilities eg pool, playground.
- Caravans are making a comeback as they are increasingly self contained and are a cheaper package with a car (eg $85K caravan + $100K Landcruiser is similar standard to $300K campervan) which is detachable.
- Satellite TV repair and dump point location are the most common enquiries from RV travellers.
- There is a growing number of gas fuelled vehicles and this affects where they travel due to fuel availability.
- Woolworths has the best reputation for low prices and fresh food – their figures show a significant rise over the tourist season (also IGA) as opposed to Coles.
- Deaf travellers in groups need specific communication.

Strengths

- Range of services in remote location eg suspension, air conditioning, medical
- Distance to next town makes Mount Isa a definite stop
- Waste management facilities
- Core of enthusiastic people looking to build tourism

Weaknesses

- Remoteness
- Delay on accessing services, no dedicated RV/Caravan service centre
- Not a tourism town – lack of focus from local government and businesses
- Lack of tourism economic value data to guide council investment and confusion/amalgamation/broad regional scope of existing data
- Mount Isa’s reputation is now about mining and lead poisoning rather than previously for rodeo
- Seasonality
- Lack of a Tourism Development Officer
Opportunities

- New business - dedicated RV/Caravan repairs
- Increased product eg cattle station stays, children’s activities
- Visits of miners’ friends & relatives to see Mount Isa, however cost of access and accommodation a major impediment
- Hub for day tours to scenic and experience spots
- Heritage (including indigenous) interpretive expansion
- Walking and self drive trails being developed (will be operational for 2012 season)
- Promotion of local handicrafts

Threats

- Lack of tours and accommodation as mines take up transport and room capacity
- Small employment pool
- Possible cessation of passenger train services

Key Issues

- Services for RV owners
- Promotion of attractions and experiences including signage (funding required) in town and region
- Need for economic and statistical data for Council and other decision making
- Coordination of tourism planning – currently local tourism organisation is merging with the Chamber of Commerce
Comment from Participants

- Caravanners and RV users do not like stopping beside the “whiz-bangers”, ie Wicked and similar campervans with sliding side doors opening and closing all night. Some caravan parks segregate these vehicles for visitor comfort.
- Word of mouth is regularly confirmed in local surveys as the primary reason for staying in local caravan parks.
- The divide between campervanners and caravanners is closing – there is growing realisation that they need to live together.
- There are increasing numbers of large campervans towing cars and boats. These usually cannot reverse and often, if imported, open on the wrong side for spaces.
- Outback towns often have problems with campervans flouting parking rules eg parallel across several angle parking spaces rather than in the appropriate spaces. Travellers will not park and walk far to a shop or attraction, and avoid congested areas such as the town centres of Townsville and Cairns.
- Some travellers use Centrelink rent assistance while they are travelling. Caravan parks are asked to sign Centrelink forms to verify accommodation costs that are then partly supported by Centrelink payments.
- Larger rigs use Woolworths in major centres for most groceries, alcohol etc. Spending in small towns is limited to milk, bread and fuel.
- When the local caravan park segregated self contained to lower paying ($6 instead of $18) areas the travellers still used the facilities. In parks where coded locks on doors were used the door was left ajar or others let them in, again cheating the system.
- CRVA (Caravan & Recreational Vehicle Association) is growing, along with the CMCA (Campervan and Motorhome Club of Australia).
- Grey Nomads website, Property Sit and Grey Nomads Employment websites are growing.
- Birdwatching is growing in traveller interest, with over one third of travellers participating.
- After resistance to a $6 charge for non-facilities sites, Hughenden found that it was useful to make a “What is an RV Friendly Town?” brochure quoting CMCA regulations. They found that those who argued were generally not CMCA members.
- Hughenden requires travellers staying in the non-facilities sites to complete a form (page 12-13) to confirm that they have their own waste retention facilities.
- QLD National Parks eg Porcupine Gorge are impending problems as on-site registration ceases. There will be increasing numbers of non-registered campers taking up spaces, registered campers arriving and conflict occurring. This is already starting and will increase significantly with improved access eg sealed road.
- Baby Boomers tend to have higher expectations and want higher standards that are sometimes not available in regional towns. They tend to be the most demanding.
- “The bigger the rig, the bigger the attitude!”
- Sullage is a dividing factor. Caravan parks usually have sullage points for each powered site that go into the sewerage or septic system. Given few campervans and caravans have grey water tanks free camping sites have grey water draining onto the ground.
- Higher fuel prices slowed travellers down. Rather than fill up and go they spent extra nights in individual locations.
- German and French WOOFERS are in significant numbers, travelling in their own old station wagons.
Strengths

- Space and access
- Unique attractions
- Good main road access
- Partnerships across Highway (Overlanders Way) and Dinosaur Trail
- TQ and OQTA marketing campaign success
- RV Friendly Town
- VICs
- Council support

Weaknesses

- Unsealed access to some attractions
- Local understanding of the market and benefits of tourism
- Accommodation options
- Access to staff and local skill base
- Funding for infrastructure and marketing

Opportunities

- Increased targeted marketing to more clearly defined segments
- Locally based tour operator and hire car
- Improved telecommunication and awareness of coverage (Telstra vs Optus vs Vodafone)
- VIC Volunteer staff exchange for product knowledge
- Longer stay can be encouraged through local activity eg fossicking, and the friendliness of the town
- Increased local marketing

Threats

- Media inaccuracy and sensationalism on floods etc
- RACQ website is renowned for inaccuracy on website with roads indicated closed well after they are open
- Inaccurate information in out of date books, brochures and website

Key Issues

- Market communications
- Community involvement and understanding
- Access, accommodation and parking – visitor management
- Partnerships – local/regional/state
- There has been a significant drop off in support and communication from TQ and OQTA in last two years eg newsletters, coop advertising campaigns, media visits, staff visits, consultation on local issues, overall communication. Programs such as Outback Mates have not been extended beyond Longreach region. Councils contribute to OQTA + Overlanders Way + Dinosaur Trail + advertising. This stretches budgets and value is continually being evaluated.
Flinders Shire Council Permit used to regulate camping in Hughenden:

---

**Permit for Camping at RV Camp Area**

Number of Days / Weeks planned to stay: 

Date: From 

Name/s: 

Contact Number: 

I agree and declare that my accommodation holds the following:  

**FALSE DECLARATION CAN INCURR PENALTIES.**

☐ Grey water holding tank  
☐ I understand that no grey or black water is to be discharged onto the ground.  
☐ Has a black water holding tank or toilet cassette.  
☐ Carries a minimum of 20 litres of fresh water.  
☐ Has a sealed container for household garbage.

**CONDITIONS OF USE.**

- All other vehicles/caravans or camping must use the caravan parks in Hughenden  
- No open fires – fuel stoves only  
- No power or amenities available  
- Council has the right to move on any unsuitable vehicles or non paying visitors from this site.  
- Keep noise to a minimum. Radios, compressors and generators are not to be used to the annoyance of other campers  
- Take your rubbish when you leave  
- Pets allowed but must be restrained  
- Black Water Dump facilities available in McLaren Street follow road signs to Winton  
- Local events will take precedence over motor home/caravans for parking eg Campdraft & Local Show  
- Camping Fees $6.00 per vehicle per night  
- Fees to be paid at the Flinders Discovery Centre, Gray Street PH (07) 4741 2970

Permit Holder Signature

Issuing Officer:

---

Permit for Camping at RV FRIENDLY CAMP AREA

To be held at the Flinders Discovery Centre

Number of Days/ Weeks planned to stay: 

Registration plate Number:

Date: From 

Name/s: 

Contact Number:

Permit Holder Signature  

Issuing Officer:

---

*Drive North Queensland: Touring Market Workshops Report*
DO NOT UNDER CIRCUMSTANCES ENTER THE SHOWGROUNDS

Rules and Regulations of use of Camping Grounds

You must take your rubbish when you leave. Do not bury rubbish, as animals will dig it up.

Allocated Camping Area: Camping is only permitted in the allocated area (Map Shown to right) if camped in other areas or misuse of Show facilities, not allocated by council you will be asked to vacate the premises immediately.

Disposal of Grey Water: There is a disposal dump for Black water located in McLaren Street (Shown on Map)

Allocate Camping area
Tully Workshop

Comments from Participants

- Our Site Fees have had to be raised as a result of our downturn. The cost of 'Water In' & 'Water Out' and electricity are huge, so next year we will be charging travellers who call for one night a higher fee.
- In our opinion Free Camping is simply Illegal Camping. Council allows a thriving alternative lifestyle at Ratepayers expense in opposition to caravan parks’ business. There is no management of how long some of the 'Free Loaders' stay in the 'Rest Spots'. We do not have a problem with Free Camping in Remote areas or National Parks, some hour distance from townships or if no proper accommodation business exists.
- The 'BIG4 Local Member Benefit Program' has been beneficial offering local discounts for members.
- Not all caravan parks are full or overcrowded, although this is variable with park, location and season.
- Some caravan parks are busy due to the experiences they provide eg campfire entertainment, owner interaction, craft activities etc.
- Main Roads are increasing the provision of rest areas for fatigue management. Caravanning Qld has made recommendations on locations for these spots away from towns.
- Many businesses in towns benefit from travellers’ shopping.
- A minimal charge should be instigated for rest areas to cover toilet cleaning.
- Instead of seeing the changes to the market as a threat we should embrace the increased numbers of visitors and find the new opportunities. Existing businesses need to look at reinventing.
- Caravan parks generate local business by selling tours, recommending restaurants, markets etc.
- Mission Beach Tourism and local police wanted to address illegal camping (and varying legislation across the previous councils’ jurisdictions) especially after an accommodation provider took independent unlawful action against free campers resulting in a criminal conviction. The mirror hanger (page 16) advises what is illegal and where budget camping is available in Mission Beach.

Strengths

- Unique region – two World Heritage Areas with many free activities
- VIC network
- First choice destination for travellers
- Paronella Park as a drawcard
- Good coverage of region in Camps Australia Wide and many of the areas are full or poorly serviced which provides a spin off opportunity to commercial caravan parks
- Regional collaboration between LTOs and RTOs including Drive North Queensland
- Friendly people
- Safe

Weaknesses

- Disjointed marketing – many regional groups
- Lack of data on behaviour of RV travellers
- Loss of key attractions after Cyclone Yasi
- Seasonality
- Lack of shuttle buses and public transport
- Parochialism between regions and former council boundaries
Opportunities

- Increased visitation
- Caravan Park differentiation of offerings
- Regional RV strategy
- Research behaviour of travellers
- Specific RV traveller information, perhaps through QR codes
- Regular local markets
- Food Trail
- Voluntourism and casual employment
- Local tourism ambassadors and educating the community and businesses to value tourists
- Skills development among locals – hospitality and other areas
- Travellers identify social activities and nature engagement as desirable
- Wellness program targeting older travellers eg Yoga
- Increased local networking, information sharing, events and news updates to tell visitors
- Pet friendly

Threats

- Tablelands RV Friendly push gives them a competitive advantage
- Weak tourism infrastructure including dump points
- Possible negative perceptions through media reporting and out of date word of mouth
- Quality experiences
- Mixing Grey Nomads and young campers can cause conflict over noise, alcohol
- Valuing/appreciating/welcoming tourists

Key Issues

- Timely and targeted information for visitors
- Regional tourism coordination under new LTO structure
- Creation of regional RV strategy is imminent, so Council is trying to gather information for local operators and other areas. One information source is Tony Benson of Caravanning Qld.
- Associated Infrastructure strategy, including rest areas, Main Roads rest stops
- Land tenure plus the diversity and spread of free camping sites make uniform rules and policing difficult. Empowering volunteers to be wardens has significant risk.

Drive North Queensland: Touring Market Workshops Report
Mission Beach promotional mirror hanger:

Luxury camping on a shoestring budget
From $15 double per night

1. Beachcomber Coconut Caravan Village
   1800 008 129
   Kennedy Esplanade Sth Mission Bch

2. Dunk Island View Caravan Park
   4068 8248
   Webb Rd Wongaling Beach

3. Tropical Hibiscus Caravan Park 4068 8138
   Cassowary Drive Wongaling Beach

4. Bali Hai Cabin & Tourist Park 4068 9291
   Bantfield Parade Wongaling Beach

5. Mission Beach Holidayway Holiday Village
   4068 7104
   Porter Promenade Mission Beach

6. Mission Beach Council Caravan Park
   Porter Promenade Mission Beach

7. Bingil Bay Council Camping Ground
   Bingil Bay

*Free camping is not available at Mission Beach

Drinking liquor in a public place is against the law and you can be fined.
Menzies Bay is a public service to improve the health and well-being of our community. Don't get yourself arrested and become the target of a police officer. Protect your valuables whilst enjoying this great destination.
Keep valuables out of sight, lock your car and don't leave your belongings unattended.
Townsville Workshop

Comments from Participants

- North American RV travellers have free camping sites at Wal Mart stores.
- Free Wifi sites and libraries are used for cheap internet access.
- RV travellers will not volunteer without a benefit eg free accommodation
- Home Hill uses a private security company (that also normally checks council buildings) to patrol the free camping area. While they have no legal authority a uniformed person reinforcing the 48 hour limit has some effect.

Strengths

- Townsville and Home Hill are RV Friendly towns
- Townsville is a crossroads for inland & coastal travel
- Vibrant volunteer community to build on
- Attractions and events, especially Magnetic Island and natural attractions

Weaknesses

- Other areas around Townsville could be promoted more eg Alligator Creek
- Road capacity & maintenance
- VIC visitors and highway travellers can bypass Townsville
- Limited information available after VIC is closed
- Parking in the city and at the VIC
- Lack of integrated planning between council departments, main roads, TEL etc
- Parking/shuttling access to attractions and events
- Wet season road access
- No depot for RV vehicle hire/drop off
- Regional tourism marketing coordination especially with Cairns and Whitsundays

Opportunities

- Greater promotion of free activities, regional history (especially military) and activities
- Service centre facilities for vehicles
- Day trip itinerary promotion for self drivers
- Apex, Lions and Rotary etc clubs as marketing channels
- Volunteering
- Creating new businesses
- VFR market, especially for short term residents
- Customer service training to build word of mouth

Threats

- Price of fuel
- Realignment of highways bypassing towns
- Overall economy downturn for self funded retirees
- Lack of accommodation stock when numbers rise
- Impact on heritage sites
- Poor customer service and resulting word of mouth
Key Issues

- Dealing with the realignment of roads and possible bypassing of towns
- Volunteering given existing not-for-profit group and volunteering base
- Regional planning for a suite of rest areas, caravan parks and RV facilities, coordinating Local and State government agencies
- VIC locations in Townsville
- Regional and inter-regional communication
Cairns Workshop

Comments from Participants

- There are many segments within the Touring Market including international travellers and a diversity of vehicle and venue preference travellers.
- The research at the presentation uses samples from Rest Areas and CMCA membership. CMCA members represent only around 10% of travellers, and Rest Area users include a wide cross section of travellers. Samples were not taken in caravan parks. The survey results presented should be understood in general terms given the segment sampled and likely misleading responses on some financial questions.
- In Cairns, although some caravan parks have shut, there are more sites now than ten years ago due to the expansion of some parks.

Strengths

- Beautiful natural attractions and weather
- High appeal to domestic and international market
- Wide price range of accommodation options including National Parks
- High quality caravan parks available in attractive locations
- Events
- Fly/drive market (domestic and international)
- Cairns is a well known and attractive brand as well as other regional destination brands
- Activities, markets

Weaknesses

- City parking for large vehicles eg at VIC
- Seasonality
- Media reporting of weather events
- Conveying information on caravan park features and benefits
- Lack of rest areas
- Perception that Cairns welcomes backpackers but not older traveller RVs
- Marketing focus on younger market
- Lack of research on the drive market
- Misinformation on the drive market
- Distance from source markets

Opportunities

- Engaging motoring organisations
- Holding a rally event
- Corporate partnerships with eg navigation, tyres etc
- Digital site integration including social media to build word of mouth
- Volunteering opportunities
- Lack of a singular promotional publication for the Cairns region
- Generating positive word-of-mouth through existing visitors becoming ambassadors
- Working with neighbouring regions for linked promotion
- Tapping into regional plans
- Extending length of stay
Threats

- Free camping areas challenging caravan parks in urban area (commercial vs non-commercial)
- Illegal camping
- Growth in individual thinking and diversity of consumer behaviour
- Loss of tourism infrastructure
- Economic change
- Free camping may result in a loss of tour and attraction sales given lower daily spend
- Lower customer satisfaction in peak months

Key Issues

- The issue of free camping versus caravan park stays dominated discussion and unfortunately limited discussion on any other issues.
Cooktown Workshop

Comments from Participants

- The stated spend of travellers is difficult to verify as different respondents may have included different elements in their answers. This may include vehicle repairs, splurges on equipment etc. While these expenditures may not be in tourism businesses the expenditure is indicated as being in the local economies.
- Engaging travellers to volunteer and managing them can be difficult.
- Many Baby Boomers are hippies who got used to work in the end.
- One regional hotel applied to be an RV Friendly site/town and complied with all criteria except the provision of $10 per day (maximum) camping.
- A privately driven survey is being conducted in Cooktown to determine the attitude to Free Camping in the town. Early indications support Free Camping although there are various uncertainties and discussion points to be investigated further. Other local examples are of interest. The Mount Molloy Rest Area is a popular local example.
- In Exmouth (WA) an overflow system is managed by the VIC. This appears to work well for caravan parks and visitors.
- Most travellers with big rigs are good planners and book in advance to ensure they can get into caravan parks.
- There is some anecdotal evidence of anti-Cooktown sentiment in some grey nomad circles, although the research indicates that many visit.
- While each region is different many Councils would like to have some standard regulations across north Queensland to set traveller expectations.
- Bicycle and motor bike riders are another market that should be included in this discussion. Charity event participants do not want to stay in commercial accommodation however 400 visitors have substantial requirements.

Sheils Barra (Cook Shire Council):

Council local law on caravan parks and camping designates free camping at Archer Point. All other places require a council camping permit ($5). These are not issued unless caravan parks are full and have only been issued during the Cooktown Festival long weekend. Free camping on private land also requires a permit (no cost). Council has evolved its regulations to respond to uncontrolled camping on the Big Annan River and in proximity to commercial operations. Council does not have the resources to police every site in the shire.

There are two distinct issues for Cooktown & the Local Council:

- Free camping in Cook Shire ie in sections of Cape York Peninsula (predominantly 4WDs and campervans) not in the NPA and National Parks. Currently it is technically illegal to free camp within the Shire although it is not policed in the Peninsula. There is the potential for bad publicity within the 4WD segment if the illegality becomes widely known.
- Free Camping in the Cooktown region (RV/caravan market). The impact on caravan parks and cost to council/ratepayers is a major consideration here.

It is estimated that Council costs for servicing one significant site with toilets and waste removal would be $700 per day. The issue of toilet provision (vs dump site) is a potential consideration here (approx $200 of the servicing cost). This does not include lighting, water, grounds maintenance, vandalism. At present there is not enough data on the visitor input to the community to provide a full cost/benefit analysis.
Drive North Queensland: Touring Market Workshops Report

Tina Fleming (Cook Shire Council): Two important planning processes are underway:

- Disability Access – Council is developing a plan to increase access for people with disabilities, another significant market. This involves complex infrastructure considerations.
- Cooktown Foreshore Masterplan – community benefit needs to be established, relationship to different visitor markets and financial capacity of council to maintain the facilities from core budget. Community consultation has identified polarised views on the project, partly around local amenity versus visitor management.

More data is required to determine the best way forward on these projects.

Strengths

- Attractions, heritage, museums, natural beauty
- Destination, not a travel through town
- Compact town area with walking distance to attractions
- Great VIC
- Wide roads for parking etc
- Retail availability of all produce & consumer goods
- Incremental growth easy to achieve ie small base
- Climate – pleasant for much of the year
- Clean, non-polluted environment
- Friendliness of locals
- Indigenous tourism

Weaknesses

- Facilities for RV vehicles
- Perception that it is expensive
- Perception of remoteness
- Word of mouth – some perception of anti RV sentiment in Cooktown
- Lack of a reliable labour force
- Local perceptions that Touring Market is worthless
- Critical mass to support some services eg Dentist
- Out of town business owners may not promote as effectively without local knowledge
- Limited Council budget
- Customer service

Opportunities

- Growth market
- Regional linkages with Tablelands
- Shoulder season extension
- New businesses providing tourist services
- Bitumen to Laura may bring additional visitors, especially if Battlecamp Road is upgraded
- Local businesses marketing directly to travellers eg flyers to caravan parks
Threats

- Time to repair breakdowns for businesses (accessing service people and parts)
- Unrealistic perception of wet season access problems
- Land tenure and visitor management implications
- Inaction/apathy
- Misinformation from VICs further south
- Environmental issues

Key Issues

- RV accommodation strategy/model/cost
- Communication and community understanding and engagement on what is of value to the town
- Local law development
- Working with neighbouring regions
- Market communications - messages to the RV market to change negative perceptions
Atherton Workshop

Comments from Participants

- Some participants found the vehicle and fuel spend figures in the presentation difficult to understand. The general message is that the spend priorities are vehicle and fuel first, groceries second, and tourist attractions and other sundry expenditure third priority.
- There are varying legalities and compliance at Rest Areas. This has caused frustration for Caravan Park Managers, legal action against Councils in some areas, uncertainty in many circles and disagreement at workshops. It appears that most travellers do not differentiate between the varying tenures and background legality.
- After the Railway Yard RV area closed Ravenshoe saved its RV Friendly Town status (must have a $10/night max accommodation site) through the willingness of the local caravan park to introduce a $6 per night no service (toilets, power etc) product option.
- The Discover magazine (150,000 copies) is the most widely distributed regional publication in Australia.
- Best year for Christmas in July in Mareeba was 2006 (300,000 people)
- “Atherton Tablelands” is the domestic brand. “Cairns Highlands” is used in the international market to geographically position the region.
- Caravanning Queensland has a policy on overflows to eg showgrounds to allow for expanded accommodation inventory in peak periods
- Caravan Parks can often accommodate large groups for events
- Conservation Volunteers Australia – in winter approx 20 volunteers work in the region on conservation projects such as surveying in a Nature Refuge.
- The Bicentennial Trail horse ride accommodation guide lists Mount Molloy rest area as a site for horse riders, though it is usually full of RVs.
- We may lose some of our Caravan Parks if their use is not encouraged. Also the offers of developers are sometimes too attractive to refuse. Caravan Parks are significant local employers and community contributors. In the Tablelands they support local businesses through discount voucher systems.
- VICs aim to support the tourism industry and recommend caravan parks to all visitors. They are however confronted by travellers who will not stay every night in caravan parks and need to keep these visitors in the region, so a range of options need to be offered.
- Many Rest Areas and associated policy is up to Main Roads department. Council is also constrained by budgets
- Alternative accommodation on private land may provide diversification for farmers. This could be considered in regional planning, although the liability obstacles may make this prohibitive.
- National Parks in the Tablelands cover a wide area with limited resources. Maintaining biodiversity Mount Bulla and Tinaroo visitor management has evolved over time in response to challenges to waste management and health issues. There are some hardened sites for RV travellers and a range of visitors must be catered for.
Strengths

- Climate
- Attractions (natural and built) that are noted in research as of high appeal including markets, museums, walks, parks etc
- Food/markets/agritourism
- Strong, integrated VIC network
- Access including by 2WD vehicle
- Hub location - crossroads for various routes
- Environmental diversity and experiences
- Wide variety of small accommodation including pubs, caravan parks, B & B’s
- Good quality caravan park with ample sites
- Excellent service and friendly people
- Large agricultural base providing work opportunities

Weaknesses

- Not enough free/low cost rest areas (VIC feedback)
- Marketing communications – knowledge of areas beyond Cairns
- Funds to expand marketing. Non tourism operators (groceries, vehicle servicing etc) that benefit from touring visitors could be contributing to attracting visitors through TTT membership, advertising etc.
- Distance from southern markets.
- Seasonality and weather events
- Professionalism of some tourism operators eg maintaining advertised hours, lack of marketing participation
- Connectivity – town parochialism versus unity of all Tablelands
- Highway road conditions on some access routes
- Potential negative word-of-mouth

Opportunities

- Self drive markets – all segments
- Conservation volunteers
- Expanding RV accommodation options, perhaps on private land
- Events and sports tourism
- Marketing directly to the Rodeo ground RV travellers

Threats

- Media portrayal of weather events
- RACQ road information website
- Rising fuel prices
- Economic instability and associated perceptions
- Periodic alternative destinations dragging visitation away eg Lake Eyre filling, Olympics etc
- Travel security eg wars, terrorism, Hendra virus etc
Key Issues

- People/businesses not recognizing that they are in tourism and contributing accordingly
- Local infrastructure ie parking bays, town access for increasingly larger vehicles
- Local service provision eg health, toilets, BBQs
- Tourism Investment – ability of the region to attract new investment in eg accommodation for 48 seat coach groups
- Sustainable profitability given seasonality
Georgetown Workshop

Comments from Participants

- Some rest areas have security issues. Bedrock Village reports an increase in visitation after theft at Fletchers Creek.
- VIC staff are frustrated by continual demands from RV travellers for free accommodation and services and threats of non-support for the town. A significant number of RV travellers have an arrogant attitude regarding their intention to camp where they choose.
- Water and waste management are significant impacts in some areas. Water is becoming an increasing cost for businesses such as service stations. In some low water areas in Australia a $2 metered charge on taps has been introduced. In WA towns where areas are short have a minimum 3 day stay to recoup costs for waste and water.
- Caravan parks could consider a low cost area with minimal/no services for a low charge. There are opportunities in some cases to get added value from these people by selling them food, tours etc. However there is a segment that will not spend on additional items. These people are not worth having in caravan parks.
- Many regional Councils do not understand the extent to which they are inevitably involved in tourism just as a result of their management of infrastructure, waste, water, free camping and parking. The increasing impact of the Touring Market poses a threat to communities
- Many local businesses acknowledge the significant increase in business during the tourism season but do not understand the relationship between destination marketing and their business success.
- Council has a By-Law that states that camping is not permitted within 20km of town except in caravan parks.

Strengths

- Savannah Way brand strength
- Fossicking
- Geological attractions and natural environment
- Heritage attractions
- Trains such as the Gulflander
- Climate
- Relaxed & friendly
- Cost/value ie cost of accommodation
- Activities – golf, swimming pools
- Services eg supermarket

Weaknesses

- Health facilities eg pharmacy, doctor and other services
- Hot weather leads to visitor departure
- Limited road access
- Services/facilities including phone and digital communications
- Marketing coordination between Councils
- Economic fragility
- Cost of fuel and freight as a remote location
Opportunities

- Growth in traveller numbers
- Fossicking tours from Georgetown
- Regional cooperation
- New tourist services/businesses eg Laundromat, internet cafe, restaurant, markets
- National Broadband Network

Threats

- Free camping in towns
- Pollution threat from traveller toilet cassettes and rubbish
- Extreme weather events
- Media reporting of weather events
- RACQ road reports
- Conservative mentality towards growth and innovation
- Lack of understanding of the value of tourism

Key Issues

- Commercial versus non-commercial accommodation
- Management and planning for RV market especially waste management and pollution
- Communication to the market/travellers
- Understanding the value of tourism in the community and Councils
- Facilities & services to meet growth
Normanton Workshop

Comments from Participants

- Beautifying the area with parks etc would certainly make a difference. Karumba is not eye catching as many small country towns eg main streets could be landscaped with hedges and gardens, historical information around the towns to stop and look at.
- Infrastructure for travellers in Karumba needs to be enhanced to keep them in the area. Visitors indicate they would stay longer if there was more to do apart from fishing.
- Signage at turn off to Karumba Point is not clear enough.
- Free camping has been provided by the Council in one area only across the river from town which has no facilities. It has a two night maximum with a free permit from Council and has a maximum of ten vehicles per night. There are rubbish and toilet paper problems here. Rubbish bins and toilets are on the town side of the river.
- Rubbish is an issue in several areas such as Leichhardt Falls and Walkers Creek. Free campers there come into town around once a week for supplies, though there is not a large financial input to the community from these campers.
- In some towns the caravan park is uninviting (dusty, exposed, run down etc) however there are nearby park areas that travellers would love to camp at, however this is prohibited. This could be driving visitors out of town.
- Croydon is missing some travellers’ spend – they like the town but often move on to stay elsewhere.
- Adels Grove uses volunteers as additional staff to assist with various duties, customer service etc in return for camping site and meals. They take around 4 per season and would not be able to take too many more. The system works very well.
- Providing road conditions advice is difficult due to the varying experience of drivers
- The market is changing and Caravan Parks have to re-adjust their offerings to also cater for self-contained vehicles who don’t want to pay $30 per night. They are still attractive from social and security aspects but are pricing themselves out of part of the market.

Strengths

- Desirable destination and experiences
- Climate
- Activities including heritage attractions and World Heritage Riversleigh Fossil Fields
- Space/Outback

Weaknesses

- Seasonality
- Camping facilities & dump points
- Road conditions and awareness of single lane road technique
- Awareness of all of the attractions and less medical etc services than urban areas
- Isolation
- Lack of tours and products for tourists
- Lack of business focus on tourism and awareness of opportunities eg businesses closing on weekends
- Some Councils have a lack of understanding of tourism and complete focus on cattle & mining
- Public transport timing – coordination of plane and bus times to Cairns and lack of service to Mount Isa
- Lack of market awareness all available Gulflander departure times
Opportunities

- Encouraging individuals to start small business opportunities (eg birdwatching, walking tours) that could leverage off existing hubs eg Gulflander
- Birdwatching linkages eg Lawn Hill, Karumba, Lake Belmore
- Heritage related tours
- Low cost camping areas for RV travellers to capture them
- Regional cooperation between Councils and businesses
- Market communication on the experiences and conditions
- Council imposing building codes on deteriorating pubs and accommodation to force maintenance
- Cooperative links and referrals in town between businesses

Threats

- RACQ road reports and trip planner
- Extreme weather events
- Absentee landlords and changing/poor management
- Negative word-of-mouth
- Accommodation availability in Croydon

Key Issues

- Communication to the market re roads, weather, products
- Access – road conditions and closing of loop possibilities when one road is cut
- Human resources - staff and volunteers
- Tourism product development
- RV friendly camping sites and dump points (Croydon, Normanton, Karumba & Burketown are not RV Friendly towns)
- Acknowledgement of tourism value to the community
Other Discussions

Several additional discussions were held with a range of participants and stakeholders during the workshop period, raising important issues. These are noted here for regional consideration.

The Need for Research

- Clearly there are many aspects of this market that require further research to enable tourism operators and local government to make informed decisions. Suggested areas for investigation include:
  - Caravan park usage and satisfaction levels
  - Rest area usage and satisfaction levels
  - Touring Market expenditure patterns and opportunities
  - Touring Market visitor management in other regions

Marketing Issues

- The marketing of many regions is dominated by commercial tourism products, although the experiences that will extend the stay of many driving travellers are free or low cost eg National Parks walking and swimming, birdwatching, fossicking, fishing and social events. Promoting all attractions is critical for regional destinations.
- Regional tourism attractions, Caravan Parks and related businesses have had highly variable visitation in the past two years. The reasons for the variations have been suggested as possibly regional (eg Yasi disaster area), financial (GFC impacts) or individual. Operators that have been successful at maintaining occupancy have often modified their product offerings and focused on higher service levels and value adding. They are marketing in nearby regions and working with networks.
- Higher rated caravan parks seem anecdotally to be maintaining occupancy levels. Many of these parks are associated with chains such as Big 4 or Discovery and the marketing initiatives of those organisations are noted as significant factors by park managers.
- Some segments of the Touring Market may not be desirable visitors and some locations inappropriate, however it is a delicate job to maintain positive word of mouth and attract the travellers that will benefit the community through their expenditure and other aspects such as volunteering and supplementing the employment pool.
- Rest Areas present a marketing opportunity and could feature signage and QR codes detailing nearby caravan parks and attractions, walking tracks and other activities.
- All accommodation sites should promote local experiences to encourage extended stay. Personal engagement with locals, including caravan park managers, can significantly extend stay and low cost, social activities effectively keep visitors in a town. Volunteering, casual work and engagement with locals through events and local clubs or organisations are clear opportunities here if logistical and financial arrangements are mutually acceptable.

Rest Areas

- There is a range of rest areas in North Queensland provided by:
  - Main Roads for fatigue management
  - Councils to manage illegal camping and centralise visitors for waste management and community amenity
  - Other land tenure holders seeking to access the Touring Market eg pubs
Drive North Queensland: Touring Market Workshops Report

- There are also many illegal free campers in streets, parks, National Parks, private property and other spaces. Local Councils and Police have limited powers and resources in many instances to move or fine offenders. Regulations alone will not change the behaviour of these travellers.

- There are significant numbers of travellers with resistant attitudes to travel costs. There is a segment of the market that believes that their generation (or their parents) fought for this country and so it should be free for them to roam. This is compounded by the attitude of some who feel that their tax payments throughout their working life entitle them to free government services. On top of this attitude is the Australian “tradition” of rejecting authority and working around the system.

Caravan Park Accommodation Stock

- There is serious concern that the lack of accommodation in and around major mining projects is causing an increase in permanent residents in caravan parks and a substantial reduction in the casual availability of powered and unpowered sites in several regions. Travellers often avoid caravan parks with permanent residents. In many areas around Australia demand from the mining sector is also pushing up caravan park rates. This has the potential to discourage visitation and increase the usage of low cost and illegal rest areas.

- A CMCA review highlighted that owing to the recent mining and construction development activity on the eastern seaboard it is now difficult to locate an overnight site or cabin in Caravan Parks located on the Bruce Highway from Gympie to Mackay. In addition caravan parks from Toowoomba to Roma, Toowoomba to Moranbah, Rockhampton to Barcaldine, Mt Isa and Cloncurry are currently now accommodation bases for mining activities. These are key access routes to North Queensland.

Rest Areas versus Caravan Parks

- The relationships between Rest Areas and Caravan Parks is a topic causing division in some communities, although the actual impact of Rest Areas on the parks is unclear. Some travellers will simply pass a town if there is no free Rest Area, removing their expenditure entirely. Some will stay at the cheapest available location in town, in which case Caravan Parks lose business to rest areas. Others always prefer a Caravan Park for security or facilities. Overall it appears that many caravan and campervan travellers mix Rest Area and Caravan Park stays. The percentages and specific influences on these travellers are unknown.

- Communities may be able to filter their touring market visitors through accommodation offerings. If there are no free camping sites in or near town mainly Caravan Park users will come. If there is a self contained vehicle area with a small charge (eg $6-10) the bottom spending travellers will be discouraged. Caravan Parks may be best placed to provide this level of accommodation as an additional product or manage external spaces in cooperation with councils. This is being investigated in some towns.

- One theory is that having a diverse regional accommodation profile including rest areas may benefit local Caravan Parks ie the destination gets higher visitation which in turn boosts travellers’ usage of caravan parks. The Ayr Caravan Park has expanded since Home Hill free camping has expanded.
Conclusions

The Drive North Queensland Touring Market Workshops project disseminated important research and gathered a wide range of valuable viewpoints.

The key messages to be considered in ongoing discussions are:

1. The RV Traveller market is growing at a significant rate and the increasing self-containment of RVs is contributing to the dispersal of these travellers beyond traditional Caravan Parks. This presents significant threats and opportunities for local government and businesses. They are coming - ready or not!

2. There is no single visitor management model that will meet the market and satisfy all stakeholders. Regions have varying levels of appeal, capacity and responsiveness that will affect their ongoing success in this market. Towns’ locations (ie at the end of long driving days), diversity of attractions and current accommodation availability makes each case different. It would be in the interest of many Local Councils, however to have some standardisation of regulations and responses to set visitor expectations and maximise the benefit that can be derived in North Queensland from RV travellers.

3. The changing demographics and psychographics of the Touring Market necessitate new marketing and communication strategies. Cooperative initiatives linking tourism and industry organisations are valuable activities that will maximise reach and uptake as well as the regional benefit derived from this market.

4. The development and promotion of opportunities for Touring Market travellers to undertake volunteering and casual work would provide significant benefits to many communities. These ideas will be pursued by Drive North Queensland and the Queensland Tourism Industry Council (QTIC) in an associated project.

Savannah Way Limited would like to thank Tourism Queensland for their support of the Drive North Queensland program, the local venue and catering providers and all participants in the above discussions.

For further information on Drive North Queensland please contact:
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Appendix 1: Drive North Queensland / QTIC Volunteer Project handout at workshops:

Grey Nomads and your community – increasing their stay and spend

We need your ideas, thoughts and opinions on short term work and volunteering opportunities for drive tourists.

With funding provided by the State Government, Queensland Tourism Industry Council (QTIC) conducted a survey with much travelled grey nomads; some of the results were quite surprising. Many said they would like the opportunity of short term employment (a few days to four weeks) as they travelled - anything to help reduce costs so they could continue to travel! It was felt that information about longer term employment is readily available via numerous internet sites, job networks and publications, but there was no information available about opportunities that may arise as they are travelling.

Travellers’ amazing skills include building, plumbing, retail, retail management, caravan site maintenance and management, service station, fast food, accountancy, hospitality and tourism, aged care, child care, pet grooming and so many other skills and experiences. These visitors can help out in peak times, fill in for a sick staff member or assist a project.

Other travellers want to volunteer on a local project. Does your community have a heritage restoration or environmental project, community sporting event, reading or craft program that could use some extra help?

Of course there would be other benefits – employment or a volunteering role would mean a longer stay in your community and money being spent!

Drive travellers felt the best place to advertise these positions would be Visitor Information Centres, being their first stop in town.

To progress this further and look for opportunities to foster short term employment or volunteering, QTIC and Savannah Way Limited are seeking your feedback.

If your organisation or others in your community are interested in discussing these opportunities please complete the attached form and Diana from QTIC will contact you. Your responses will be compiled to provide an overview of the current situation. Savannah Way Limited will then assist in the development of some local opportunities under a grant funded by Tourism Queensland.

Please return the attached form to Russell at this workshop and pass additional forms on to your community contacts to fax or email to Diana Hassett at QTIC within seven days of your workshop.

We look forward to helping you develop your ideas!

For further information please contact:

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