



Off the Beaten Path: Tracking Self-Accommodating Visitors in North-West Tasmania

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Off the beaten path: Tracking self-accommodating visitors in North-West Tasmania


This study has been commissioned by the Cradle Coast Natural Resource Management committee (CCNRM) and the Cradle Coast Authority (CCA), with funding from the Australian Government's Caring for our Country initiative.

The study was conducted in eight Local Government Areas of North-West Tasmania between December 2010 and April 2011 by Dr Fleur Fallon from the Institute for Regional Development, Cradle Coast campus of the University of Tasmania, and David Clutterbuck. Every attempt has been made to present information accurately and comprehensively. The authors do not guarantee that this document is definitive nor free from error and do not accept liability for any loss caused, or arising from, reliance upon the information provided herein.

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Cover photo: A SAV hire campervan parked at Table Cape near Wynyard. All photos are by the authors.

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EXECUTIVE SUMMARY

This study of self-accommodating visitors (hereafter, SAVs) in North-West Tasmania has been conducted to better understand the needs and interests of SAVs in order to determine their level of interest in the natural values that exist in the region. Options to actively engage this growing visitor segment in natural resource management, including some models of volunteering opportunities are discussed. The study focuses on SAVs who stop overnight at free or minimal fee camping sites.

The study area stretches in a loop from Narawntapu National Park in the east to Green Point at Marrawah in the west to Macquarie Heads near Strahan in the south, Lake Burbury, east of Queenstown and through to Cradle Mountain, Sheffield and Devonport.

The authors became self-accommodating visitors, or participant-observers, for short periods of time during December 2010 to March 2011, conducting qualitative interviews with visitors in free or minimal fee campsites, and observing on-the-road and camp sites.

The research findings support the trends indicated by Tourism Tasmania and national statistics, as well as the visitor feedback survey sheets collected by Councils.

No participants are identified in this report by way of text or visual representation.

Summary profile of a SAV

A SAV coming to North-West Tasmania is likely to:

- Be a newly retired Baby-boomer (born 1943–1964), with professional or technical specialist skills.
- Own their fully self-contained motor-home or caravan.
- Travel as a couple, with one or both partners on repeat visits, and to come from Queensland.
- Spend 19 days in the North-West, representing 30% of the total time of nine weeks in Tasmania.
- Spend \$1261 return fare and travel via the Spirit of Tasmania.
- Spend \$70-75 per day, including fuel, food, some tourist attractions. This represents \$4725 over a nine week period, spread across the State, or \$1425 in the North-West. [Note: the shorter the stay, the higher the daily average spend].

- Use a mix of free, minimal cost and commercial caravan parks. The preferred option is free camping in a natural environment that is quiet, spacious and not too crowded, but not too far from major attractions.
- Have a flexible schedule, and the pathway is influenced by the weather, location of friends in Tasmania, and events.
- Obtain pre-journey information primarily from *Camps Australia Wide Editions 1-6* and mark their journey using highlighter pens.
- Obtain information on arrival from Visitor Information Centres, or word-of-mouth from locals and other travellers.
- Be most interested in sightseeing, viewing the landscape, fishing, a river cruise (Arthur/ Pieman/ Gordon) and short walks or soft trekking up to 3 hours – easy to moderately difficult walks.
- Record their journey with photographs and personal diaries or emails to families. A SAV is not likely to use Facebook, Blogs or Twitter.
- Have a mobile phone (Telstra), an email address, a GPS system, though not always used, a CB/ UHF radio, a laptop computer and a TV.
- Be impressed by the 'near-perfect' landscape and friendly people, comment on the weather (good or bad) and express an emotional response to the whole experience.
- Find the steep, windy and narrow roadways challenging, and stay mainly on the wider sealed roadways.
- Find the distance between attractions is short, and travel up and down the coastline from Devonport to Stanley several times.
- Consider a range of options for volunteering related to natural values, but would want this information prior to arrival and thus information via internet would be the preferred mode of communication. SAVs do not usually plan their itinerary in detail, but would consider more careful planning if they were to engage in volunteering activities.

With their level of professional and technical expertise, and increasing numbers on the road, SAVs could engage more actively with host communities in a range of human and social capital development activities and volunteering projects involving natural resource management. They could play a significant role in regional development with consideration by Councils of the triple bottom line for sustainability of environment, community and economy. Increasing opportunities for engagement in the local community and natural resource

management may be a precursor to becoming an investor and contributing financial capital to the region, as well as an incentive to relocate to the region.

There are seven key recommendations based on: invite-host-offer tastes/ inform-engage-return-invest-reside:

1. Establish consistent standards for self-accommodating visitors across the eight LGAs in the North-West
2. Clearly define categories of self-accommodation
3. Establish a collaborative network of land-holders to create additional free/ minimal fee stopover points
4. Create a calendar of NRM special volunteer activities for visitors
5. Provide three year funding for a Project Officer to develop and implement recommendations 3-4.
6. Partner with Tourism Tasmania to consider the introduction of a 'North-West Tassie Taster' pass
7. North-West Councils work together with CCA and Tourism Tasmania to lobby State government and T-T Line to provide more transparency and better pricing for self-accommodating visitors travelling to Tasmania on the Spirit of Tasmania.

Whilst there may be some tension and dissatisfaction about loss of business by caravan parks and other accommodation suppliers, and the claim that campers seeking free/ minimal cost sites are freeloaders, leave their rubbish behind, are noisy and dump their black and grey water inappropriately, this study provides evidence to dispel these myths and to proffer valid economic, social and environmental reasons for the infrastructure and support to welcome these visitors. SAVs are *'mindful that free camping is a privilege.'* An alternative title for this study might be: *'Free campers are not free loaders'*.

This report will now detail the background for this study, including an explanation of different types of self-accommodation, outline the methods for the data collection and present the key findings, followed by a discussion and recommendations with particular reference to the relationship between SAVs and the natural values of North-West Tasmania.



Figure 1. SAV pathways in North-West Tasmania. Map by Karen Eyles UTAS Cradle Coast campus.

This is derived from the stated pathways of SAVs. They do not take a single distinctive pathway, but may track one pathway several times such as the coastal road between Devonport and Stanley, and to a lesser extent, Arthur River.

BACKGROUND: Trends in SAVs

A huge sense of freedom, unstructured, unhurried daily regimes, just stopping 'wherever you stop', being close to nature, but also close to facilities, safe and in a community of friendly people that extends to other campers and the host community, are critical elements in the expectations of self-accommodating visitors coming to Tasmania. Definitions of self-accommodation types follow.

Types of self-accommodation

Self-accommodating relates to the ability to be self-sufficient in accommodation. There are various levels of self-accommodation. At the top of the range RVs (Recreational Vehicles) and Fifth Wheelers have their own power sources, usually solar or gas, toilet, shower and washing machine and drier, plus kitchen cooking and washing up facilities. They are generally very long like a full size bus and can be wide. RVs also include the popular Winnebago, Sunliner or Jayco motorhomes with extra room for sleeping above the driver's cabin. Caravans may also be fully kitted out like an RV with 90 litre or more fresh water and grey water capacity, but pulled by a vehicle, usually a 4WD. The advantage here is that the visitor can park the caravan at a 'base' for several days and then explore the surrounding areas. Some visitors may tow another small vehicle, boat, canoe or stow bicycles on board to get around once parked.

Another type of accommodation, but not fully self-contained, consists of the campervans and 'whizz bangers' – kitted up transit vans with sliding doors. More rugged looking, but very compact are slide-on campers or active campers that can be detached from a flat top truck and stand on support stilts. A further variation of self-accommodation are trailer tents, where everything fits compactly into a trailer.

Separate smaller tents are used by hikers, younger people touring by bicycle or motorbike, and occasional campers, or those just trying out the 'nomad' lifestyle'. There may also be an element of recapturing quintessential memories of their youth, when Tasmania was less populated, and families enjoyed long camping holidays by the beach over the summer. It should be remembered that mass travel including interstate or overseas travel and a wide range of accommodation options did not grow exponentially until the mid-1970s. Even the author camped for three months as a very young child with four siblings and her parents in tents on the banks of the Tamar River whilst their new home was being built. By the time people reach their mid-60s they have upgraded to something a little more solid than a tent. Caravans have also made huge advances in their inclusions since the 1970s, and most on-

the-road caravans in the study are fully self-contained, that is, they include toilet, shower, washing and cooking facilities, and may include solar and bottle gas power sources. These categories of self-accommodation are summarised in Table 1 below.

Table 1: Categories of self- accommodation

CATEGORY	TYPE	DEFINITION
1	Fully self-contained motor home	Single vehicle, includes solar/ gas power, water, shower/toilet/ kitchen
2	Fully self-contained caravan/ 5 th wheeler	Vehicle + towed accommodation; Shower/ toilet/ kitchen/power
3	Part-self-contained caravan	Vehicle + towed accommodation. No toilet/ shower in caravan
4	Campervan	Single vehicle, sleeping facilities, no toilet/shower
5	Slide-on campers	Single vehicle / utility; detachable sleeping quarters on poles. no fixed toilet/ shower
6	Trailer campers	Vehicle + towed trailer with tent. No toilet / shower
7	Tents	Vehicle +separate tent. No toilet/shower
Note:	Categories 3-7	No fixed toilet/shower/cooking facilities; may have portable facilities

Trends

Baby-boomers are retiring in ever greater numbers. Between 1981 and 1985, the number of 65 year-olds in Australia increased by 6,000 to 122,000. From 2011 to 2015, it is anticipated that the number of 65 year-olds will increase by 33,000 to 246,000 (Salt 2011). And it is from this age bracket, that the biggest increase in SAVs is emerging. Tourism Research Australia (2009) notes that the biggest rise in the domestic caravan or camping market has been in older age groups (60 years and over), and shows an average annual growth rate of 6%. Recent articles in the *Sunday Mail* (Qld 2011) reported a 32% increase in the production of Australian caravan, camper trailer and motorhome production to 21,164 units, a 30-year record, with sales to young families, 'adventurers' as well as 'grey nomads'. According to Tourism Research Australia (2009), domestic visitors were more likely to travel as a family group (31%) and spend an average of 5.8 nights away from home. They are more likely to participate in nature-based activities (56%) or sports or active outdoor activities (50%) and spend 87% of their time in regional areas than other domestic visitors.

Outback Queensland Tourism Association has also conducted a study of visitors to the outback (*Caravanning News* June 2011). Most were likely to be couples (69%) and retirees

(66%) on 'long-haul tourism holidays who wanted to explore, have new experiences and leave the cares of the world behind.' Most (71%) stayed in caravan parks and camping grounds, and about 40% used a mix of commercial and non-commercial sites. Lack of privacy, noise and expense are negative factors of commercial caravan parks, whereas a lack of facilities, safety issues and a lack of policing of non-commercial sites are negative factors for non-commercial sites. On the positive side, facilities, entertainment and social interaction are attractions for commercial parks. Privacy, experiencing the outback with campfires, star-gazing and quietness are reasons to seek non-commercial sites.

According to Tourism Tasmania (2011), there were 117,000 self-accommodating visitors to Tasmania in the year to March 2011. This represents 12.8% of total visitors. The fastest growing accommodation segment is 'campervan/ motorhome not in a caravan park' which grew in the last year by 22.7% to 19,100, followed by a 17.5% growth in 'campervan/ motorhome in a caravan park', as shown in Table 2 below.

Table 2. Growth in self-accommodation visitor types in Tasmania April 2007- March 2011

ACCOMMODATION TYPE	APRIL 2007 - MAR 2008	APRIL 2008 - MAR 2009	APRIL 2009 - MAR 2010	APR 2010 - MAR 2011	APR 2010 - MAR 2011 COMPARED TO APRIL 2009 - MAR 2010 %CHANGE	
Campervan/ Motorhome - in a caravan park (includes caravan until June 06)	23,000	24,800	23,000	27,000	17.5	▲
Campervan/ Motorhome - not in a caravan park (includes caravan until June 06)	14,700	16,200	15,500	19,100	22.7	▲
Caravan - in a caravan park (from July 2006)	15,500	17,200	15,900	11,700	-26.5	▼
Caravan - not in a caravan park (from July 2006)	5,700	6,900	6,500	6,300	-4.1	▼
Tent, camping - in a caravan park	18,600	20,000	21,300	18,900	-11.3	▼
Tent, camping - not in a caravan park	28,500	32,300	31,600	34,000	7.7	▲
Total Visitors 14+	851,500	897,100	912,600	911,900	-0.1	▼

Source: Tourism Tasmania (2011) Table 1. Accommodation used. Total visitors aged 14 years and over.

While there has been an increase in the number of older people travelling in RVs, caravans and campervans, the number of caravan park establishments has decreased, and caravan parking sites have been replaced by cabins. Whilst this older age group do use caravan parks, their preference is for free or nominal fee camping spots as they are primarily self-sufficient, and do not have the need for most of the caravan park facilities. The size of their accommodation and available parking spaces in conventional parks is often cited as a main reason to camp elsewhere.

Taking to the road is not only a growing phenomenon in Australia. In the most recent 19th edition of *France Passion*, there is a network of 1600 host participants for opportunities for stopovers on farms and vineyards for fully self-contained motor-homes in rural France. There is a companion scheme *bienvenue-a-la-ferme* that caters for other types of self-accommodating visitors (caravans, tents). Travellers are reminded that this is not a commercial outdoor accommodation network, and they are asked to observe a few simple rules to respect the host's home, workplace and produce. They are 'privileged guests of the friendliest and most welcoming of hosts...who shape the countryside...that you enjoy so much and are proud to demonstrate their skills.' Similar schemes operate in Italy, Spain, Switzerland and Belgium.

As SAVs are more likely to visit smaller towns, there is an economic imperative to extend a warm welcome to this growing group of visitors in Tasmania. Contrary to Tourism Research Australia (2009) data and Hardy et al. (2005) who surveyed visitors to Strahan and concluded that Tasmania 'appealed to a younger, less experienced and shorter staying demographic', the current study indicates that domestic SAVs who choose free or minimal fee sites are likely to be empty-nesters about to retire, or are retired, are mostly couples from interstate, especially Queensland and New South Wales escaping from northern summer humidity, and spend an average of more than nine weeks in Tasmania, with 19 days or 30% of their time on the North-West coast.

Prideaux and Carson (2006:147) suggest that this segment of older SAVs may play a role in 'future regional development.' This role in development is discussed further in this report (see page 33). For now, it is noted that this role may be difficult to control, as this group shy away from major tourist attractions, opting for 'adventure, freedom and roaming' (Hardy et al. 2006). It should be noted that 'adventure' in the case of the SAVs profiled in this study refers to 'soft' adventure, that is, it is not too strenuous, but it is also not a manufactured tourist entertainment experience. This group does not want to be directed along standard themed driving routes, although they do frequent the main sealed roadways. They do enjoy exploring

the history and architecture of small towns, eating local produce and especially just being in nature.

Whilst the daily spend may be low in comparison with high-end short stay visitors, this should not be under-estimated. The Campervan and Motorhome Club of Australia (CMCA) is a powerful lobby group with nearly 60,000 members throughout Australia. According to CMCA (2010), their members spend about \$500 per week on the road or between \$64 to \$74 per day, and represent 15% of total domestic visitor nights in Australia, and growing. Chapters of the Club organise regular get togethers and major conventions, and communicate via *the Wanderer* newsletter, on-line forums, and two-way radio, as well as face-to-face at camp sites. The CMCA suggests that local councils open up parking spaces in showgrounds or vacant sites to accommodate these visitors for a short time in order to attract and retain their spending power. In Tasmania, there are 21 designated RV friendly towns, and 62% of these are located in the North-West. As most SAVs arrive on the Spirit of Tasmania in Devonport, it is in the interest of North-West communities to attract and to retain these visitors for longer periods.

In addition to exploring small towns, this visitor segment enjoys visits to national parks. According to Jackson (2009), visits to national parks and state reserves in Australia are undertaken by 67% of international visitors. In the year ended September 2008, that represented 3.43 million international visitors, in addition to 12.88 million domestic overnight visitors and 12.51 million domestic day nature-based visits, who are likely to spend more on average than other domestic visitors. This SAV study does not include day trippers, but approximately 6% of campers in the study are from overseas, and almost all SAVs in the study visited one or more National Parks, Reserves or Conservation Areas. The only non-visitors to National Parks are those who are travelling with dogs and cannot leave them outside the park boundary in order to visit. This represents nearly 10% of SAVs. Most visitors seeking a nature-based experience in Tasmania will go to Cradle Mountain. It is one of the top five destinations in Tasmania, after Salamanca Place, Port Arthur, the Cataract Gorge and Mount Wellington. In the year to March 2011, Tourism Tasmania's visitor survey conducted by Roy Morgan Research, estimates that 196,400 or 21.5% (1 in 5) of all visitors to Tasmania went to Cradle Mountain. As the main entrance is located in the North-West, stopover points for SAVs are likely to be at Waratah or O'Neill's Creek, cited as two of the best camp-sites with close proximity to the World Heritage listed Cradle Mountain-Lake St. Clair National Park.

The current study aims to shed further light on the behaviour and motivations of this fast growing visitor segment, especially in relation to their responses to the natural values in the study area.

This report integrates data from:

- 71 face-to-face interviews conducted at 19 different campsites across 8 LGAs in North-West Tasmania
- Additional email feedback from interviewees and bloggers who travelled as free campers in North-West Tasmania
- 96 responses from surveys of campers in Kentish
- Observations over 2 weeks at 3 sites on the Central Coast and 2 on the West Coast
- Observations from 5 camping trips and two other overnight stays by the authors
- Detailed observations along the route are shown in the study pathways. Like the SAVs we tracked, we drove several times along some of the main thoroughfares. The difference in traffic levels – noting motorhomes, caravans and obvious campers – was clearly evident.
- Discussions with free and nominal fee operated campsite caretakers, including Parks & Wildlife Rangers; colleagues, neighbours and friends who have extensive experience of camping or travelling in the North-West, and some private camp site / park operators.
- Relevant documentation on-line and hard copy reports, journal and media articles.

METHODS: Tracking the SAVs

Whilst it may be expedient and efficient to use quantitative methods, such as a questionnaire with a series of closed questions, to obtain a large amount of data in a short time frame, it was considered that this alone would not be appropriate for this study. In order to obtain an in-depth understanding of the profile of SAVs who stay in free or minimal cost campsites in North-West Tasmania, we concur with Hardy et al. (2005) that qualitative approaches with a more open-ended style are more appropriate to allow participants to explain and elaborate on their answers. Indeed, when we asked respondents to state where they had stayed and for how long, they often hesitated. It was easier to show them a map of Tasmania, and to retrace their journey in Tasmania. Many respondents carry large RACT maps or *Camps Australia Wide* editions (1-6) and trace their journey using a distinctive highlighter pen. This visual cue then created the tool to allow a more detailed discussion to obtain thoughts and feelings about places where they had stayed, or plan to stay, activities, behaviour and interactions with other campers and locals in host communities.

Whilst obtaining information about why people travel and how they make decisions may be regarded as 'one of the most difficult components of tourism research' (Hardy et al. 2005), it is also one of the most enjoyable albeit time consuming. It was intended that several sites would be selected from each of the eight LGAs and we would experience staying in each. There were a number of factors that prevented this. Our type of self-accommodation was a three person tent, requiring considerable time to pack up our vehicle, set up and break camp. We also did not know where we were likely to find people free camping, and as we found out, where an RV or caravan might be able to stop, campers, that is, people in tents may be discouraged or not allowed.

Other limiting factors included the inclement weather. An extended camp for nine weeks (average time that SAVs spend in Tasmania), would have been an alternative way to collect data. However, the trends indicated in the first iteration of analysis after 36 interviews have only been confirmed in the second and third iterations of analysis at 50 and 71 interviews. Throughout this process, we have been able to explore much of the hinterland and coastal areas in short 2-4 day bursts between mid-December 2010 and the end of March 2011. Our methods include limited periods of ethnographic study, becoming participant-observers of SAVs, experiencing some of the relaxed lifestyle, enjoying early starts to admire sunrises with no other company or noise on the beach apart from sea birds and the sound of waves, and experiencing the calm of glorious sunsets and luminous night skies.

On the way to a site, we observed every possible roadside place where a single vehicle might pull over, counted the number of SAVs driving in the opposite direction, took detours up long dirt Forestry roads, seeking SAVs, before arriving at our planned or unplanned destination. Sometimes, as at Hellyer Gorge, we would have a rest stop, and within a short time discovered this is a popular daytime rest stop and overnight camp site. Taking the opportunity to interview here for two hours would mean a late arrival at the next planned stop (Waratah). Figure 2 (p.17) shows the roads we travelled, and although the blue dots indicate some key observation points, all of the orange pathways represent observation points.

Whenever we set up camp, we would observe and do a count and check activity and number plate origin before doing a 'soft' and cautious approach to likely participants. We learned not to set up too many interviews in advance for the next day as chances are the SAVs would be up and gone early and we missed some respondents as a result. Often when we interviewed in the late afternoon, the SAVs would want to add more information the next morning.

Many interviews were completed over a 'cuppa' and the best times were after breakfast, or between 3.00-6.00pm. A 125 gram jar of leatherwood honey from Blue Hills Honey Farm, Mawbanna, was given to each interviewee or pair of interviewees. Many were delighted to receive this unique taste of Tasmania, and some offered payment (not accepted), or gifts in exchange (home-made tomato relish, Austrian beer). Interviews generally were completed within one hour; some took a little longer, as interviewees wanted to digress. Thus, the interview questionnaire proved to be a guide only and a springboard for further discussion.

In addition to detailed observations and experience recorded in field notes, and interviews, some discussions have taken place with long term locals with extended experience of camping and self-accommodating travel, rangers and site caretakers, as well as a review of some on-line travel forums and on-line blogs about self-accommodating visits to Tasmania, and in particular to the North-West to support our field findings. Our discussions also pointed the way to investigate exemplar volunteer models for long stay visitors.



Figure 2. The study pathway December 2010-March 2011. Map by Karen Eyles UTAS Cradle Coast campus. These are the actual roadways we traversed during the study; some frequently, especially the Bass Highway from Devonport to Wynyard.

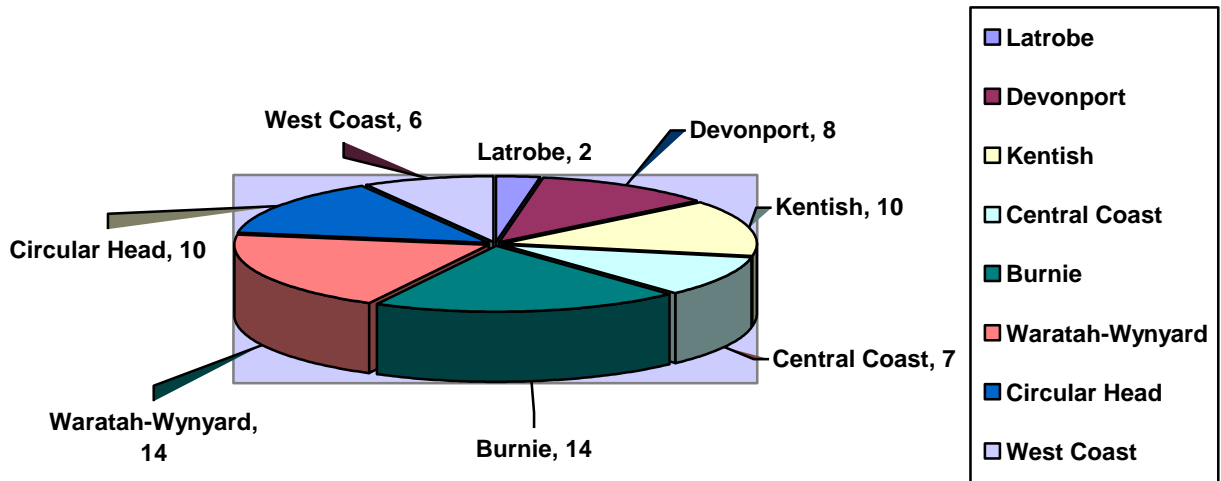


Figure 3. Interviews conducted in each LGA

We conducted the least number of interviews in the Latrobe LGA. However, there were two camping experiences at Narawntapu National Park with detailed observations. We stopped at Latrobe during the motorhome convention in February en route between Launceston and Wynyard. We inspected several vehicles that had open displays or were for sale and it was noted that most of them had Tasmanian number plates. It was decided that interview data from this site at that time would skew the overall data. We note that many of those we interviewed mentioned Latrobe and commended it as an RV friendly town. Latrobe was frequently noted as the first or last stop of the Tasmanian journey. The overall lifestyle and feeling of what it means to be a SAV was clearly evident at the convention. Many vans had elaborate painted pictures and signs such as 'Chasing Rainbows', 'Nan and Granddad's Cubby House', 'Gone Fishin', 'Laugh more- live longer', 'Free wind'. Attendees were members of clubs such as the Van Demons, Blue-Gum Rovers, Escapees, and the Dalrymple Drifters, who also wore matching red T-shirts and were country-style singers. Stickers of the CMCA, their Club and 'I support RV friendly towns' adorned their motor homes.



Figure 4. Latrobe Motorhome convention February 2011

Off the beaten path: Tracking self-accommodating visitors in North-West Tasmania

When we arrived at Lake Barrington (eastern side) mid-December, a rowing carnival was in full swing. The large camping space was filled to capacity with tents in stark contrast to the few tents or other types of SAVs we had observed in all camp sites (free/ minimal fee and commercial) in Devonport, Port Sorell, Hawley through to Narawntapu, Railton and Sheffield at that time. Again to interview from this cluster of campers would skew the overall data, so despite what appeared to be eligible interviewees, this site was not included in the study.



Figure 5. Campsite Macquarie Heads



Figure 6. Slide on camper, Marrawah

RESULTS: Creating a profile of a SAV

This section provides details for the summary of findings in the Executive Summary. SAVs coming to North-West Tasmania are most likely to drive 4WD vehicles pulling caravans. This represents nearly 50% of the total SAV segment. They prefer to stop at one place for 4-5 days and explore the surrounding area without the caravan. For example, using Waratah as a 5 day base for \$110 for a powered site, SAVs can travel easily to Cradle Mountain, Savage River, Corinna and beyond the Pieman River. Many caravans are also self contained with freshwater, toilet and shower, and caravan owners are miffed when they see free park signs for RVs (all-in-one SC vehicles) only. More free parking and long vehicle parking spaces need to be available for this growing group of travellers.

These proportions are at variance with those presented in Table 2 from Tourism Tasmania's visitor survey that showed motorhomes/ campervans comprised 39.4% of self-accommodation and tents 45.2% while caravans only comprised 15.4% of self-accommodation types. The authors noted two events at Lake Barrington (mostly tents and more than 100) and at Latrobe Motorhome Convention (mostly motorhomes) and did not utilize these event numbers as it may skew the data overall.

Table 3. Type of self-accommodation for SAVs in this study

TYPE OF VEHICLE	NO.	%
SC motorhome	10	14.1
campervan	10	14.1
Car/caravan	33	46.5
car/tent	10	14.1
bike/tent	1	1.4
Bus	1	1.4
Slide on camper	5	7
Tent only	1	1.4
Total	71	100

Customised slide on campers, that fit onto flat top trucks and may either form tents or pop-up caravans that are more mobile and adaptable, easy to set up and break camp are growing in number and represent 7% of the study group. An example is shown in Figure 6.

The ratio for the SAVs included in the survey across the eight LGAs almost perfectly mirrors the origin of the campers in Kentish LGA's separate survey on free camping conducted during the summer. This strengthens the reliability of the findings of who, in terms of SAVs, is coming to the North-West. Almost two-thirds (63%) of SAVs in the region originate from QLD, NSW and the ACT.

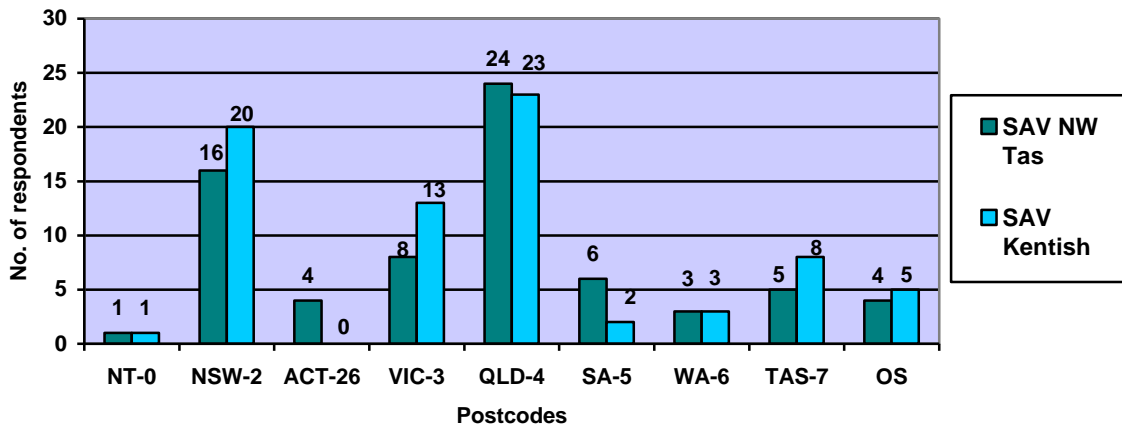


Figure 7. Origin of SAVS in North-West Tasmania and Kentish surveys

Source: this survey; Kentish survey

Typically, at coastal free stopover points, such as Penguin Surf Life Saving Club and Hall Point at Sulphur Creek, observations indicate that between 5-8 vehicles will park each night during this peak summer season, and hinterland camp grounds such as Pioneer Park Riana and O'Neill's Creek will hold 12-16 vehicles per night. These observations were made in the week prior to, and the week following, the end of school holidays in Tasmania. This is in contrast to the West Coast where observations at the end of March indicate only two vehicles per night stop at the gravel oval in Queenstown and one, or none, at the Zeehan designated RV site.

Most people (78%) are travelling as couples who are either retired, or semi-retired, or empty nesters taking 'time out' (approximately 10%). Baby-boomers, born between 1943 and 1964, represent 68% of those in the survey group. Nearly 1 in 5 (18%) are singles, and 30% of singles are travelling with dogs as their companions. Approximately 10% of SAVs overall are travelling with a dog. It was observed that most dogs are well behaved and kept on leads within the camp sites.

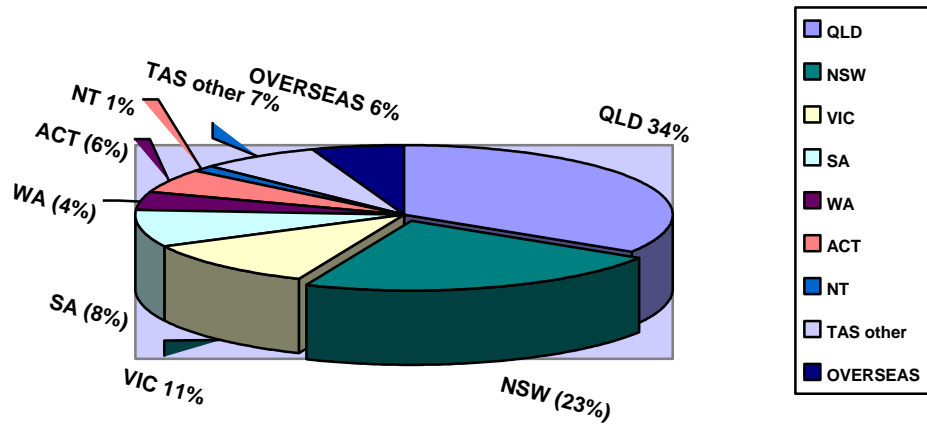


Figure 8. Percentage of SAVs in North-West Tasmania by resident postcode

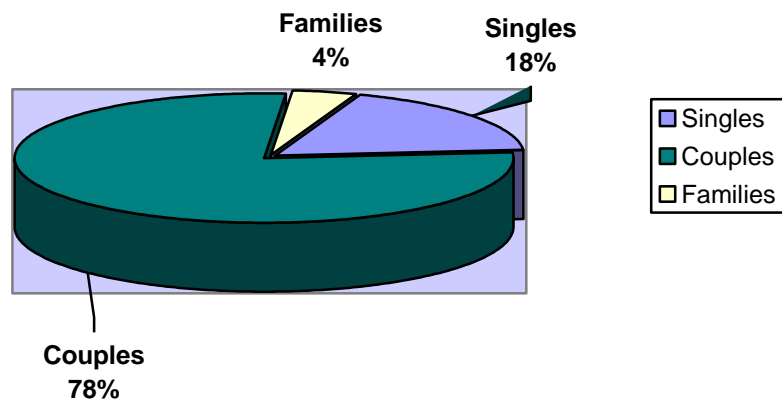


Figure 9. Partner status of SAV respondent groups

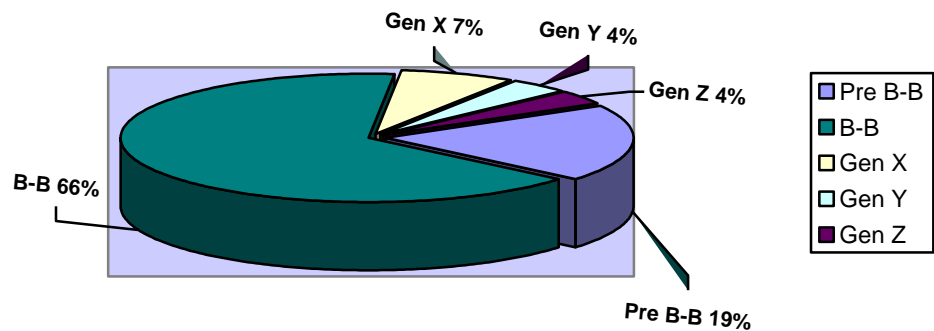


Figure 10. Age groups of SAVs (B-B = Baby-boomer)

For this study, Pre-Baby-boomers are defined as those born in 1942 or earlier; Baby-boomers are born between 1943-1964; Generation X are born between 1965-1980; Generation Y are born between 1981-2000 and Generation Z in the last decade, since 2000. It should be noted that the Baby-boomer group is starting to retire in larger numbers and as part of the SAV segment, increasing by 6% each year (Tourism Australia 2009; see also p.10). The gender ratio is almost equal, with one couple identifying as a same-sex couple (female). For singles, men outnumber women by 2:1.

No-one in the study has permanent mobility aids, although several used sticks for support when walking. At least 14 respondent groups admitted to leg and back problems and 3 had visual/ hearing difficulties. This represents 19% and 4% respectively of SAVs in the study.

Two respondent groups expressed concerns about their aging parents and one was particularly upset that the special travel insurance they had taken out did not cover cancelling their trip due to the need to return home due to illness or death of an elderly parent if the parent was aged over 85 years. At least two women in the study returned interstate and overseas due to the deaths of elderly relatives while their partners remained in Tasmania. Access to health care is an issue, but not part of this particular study brief. We referred one SAV to the hospital at Latrobe one evening, and at least three SAVs reported the need to stay longer in one town for medical or dental reasons. The limited parking sites then can become another cause for concern for these delayed SAVs.

Clydesdale (2011) reported a crash between two interstate groups of SAVs 3.5 km north of Strahan on 15 April. The vehicles involved were a small four-wheel drive towing a caravan and a large motor-home towing a large trailer. Four people were taken to hospital with minor injuries. At least 12% of the SAV study group reported minor collisions or mechanical or tyre problems. One man had to buy two new tyres, after helping a woman to change a tyre on her caravan. And one couple with a 5th wheeler reported a fire which could have been totally catastrophic. Not all these incidents occurred in the North-West, but it is an indicator that SAVs need to allow for unanticipated expenditure on vehicle repair, as well as health matters.

The largest occupation category for SAVs for both retirees (31%) and non-retirees (36%) is 'professional', indicating attainment of high levels of post-secondary education. The quality of their self-contained accommodation and the quality of their vehicles also indicate a reasonably high level of earnings power, either current or past. As retirees, their future earning capacity may be limited so that they need to be cautious in their spending, especially if they plan to stay more than two months in Tasmania.

Table 4. Current or most recent occupation of SAVs

CURRENT/ MOST RECENT OCCUPATION	RETIREEES	%	NON-RETIREEES	%
Professional	26	31.3	19	36.4
Technical	11	13.3	8	15.4
Sales	10	12.1	3	5.8
Creative	0	0	3	5.8
Trades	6	7.2	1	1.9
Self-employed	10	12	1	1.9
Semi-skilled	5	6	9	17.3
Other	15	18.1	5	9.6
Students			3	5.8
TOTAL	83	100	52	100

Self-accommodating visitors spend on average between \$70-75 per day, about the same as indicated by CMCA (2010). They stay in the North-West for an average of 19 days. This represents 30% of the time they are in Tasmania (9 weeks). During their stay in the North-West, it is estimated that the average spend per group ranges from \$1140 to \$1520. The daily average expenditure ranged from \$20 to over \$100, not taking into account unexpected incidents such as mechanical or other vehicle repairs and health matters, or the cost of getting to Tasmania. The median daily expenditure was \$60 per day, that is, half spent more than this amount; and half spent less than this amount. The cost of the crossing on the Spirit, made by 88% of the study group, who also own their own vehicles, averaged \$1261 return per respondent group. The most expensive fare was \$2200 return for a Northern Territory couple who also had the added expense of driving from the NT to Melbourne (their caravan was picked up in Melbourne). Tasmania was the last frontier for them, having visited all other states in Australia. The lowest fare was \$358 return for one person. This question was asked of 36 respondent groups when a concern was expressed about the cost of getting here.

When SAVs do seek out information, the most frequent sources of information include *Camps Australia Wide* 1-6, Visitor Information Centres, brochures and word-of mouth. They want to go at their own speed, and to select daily activities according to the weather, and a flip of a coin to determine whether they turn right and head along the North-West Coast first, or left and head towards the east after leaving the Spirit of Tasmania terminal. The friendliness of a town, the 'look' of a place and facilities available will also determine whether they go or stay.

We want to get off the tourist track and experience Tasmania as it is. We will stay anywhere except tourist parks....

One night at ...was a bit animal; parties of 5-6 vans, large groups of people together; another... was full of big rigs, generators, and chainsaws...we didn't stay.

Added to this is the length of time they can stay in an RV friendly town: there are variations from 24 hours to 5 days. It is a very easy choice to keep moving, and not leave dollars behind if a place looks grim and is unwelcoming.



Figure 11. Sign at Wynyard Showground

One couple with a large caravan commented:

We spent \$400 on food and fuel in Wynyard but couldn't stay at the showground although our caravan is fully self-contained. The site is for motorhomes only.

Instead of being able to explore the town at a more leisurely pace and perhaps spend more money in the town, they continued onto the Fossey River rest stop, south-east of Waratah.

SAVs come to Tasmania and the North-West for a variety of reasons (see Figure 12). The biggest reason is 'just to explore' (41%), and for many this represents the last frontier, as they have travelled in all other Australian states and territories. The Bass Strait is the biggest hurdle to cross when making decisions about destination choice. Few come specifically for the Wild Coast. Typical responses include:

Going everywhere we can.

Tasmania is the 'last state'.

More than half (55%) of SAVs are repeat visitors. Of these, 48% are multiple repeat visitors and 8% are bringing their new partner with them for the first time. I am 'revisiting Tasmania for the 10th time in 10 years as I have family in Hobart.'

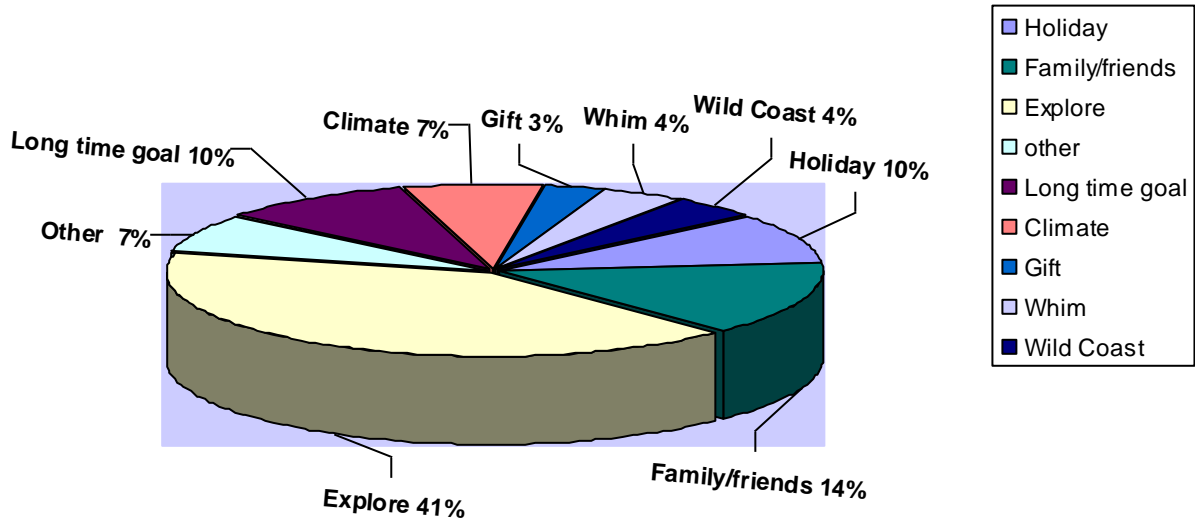


Figure 12. Reasons why SAVs come to North-West Tasmania

A key finding is that SAVs are technologically well equipped, with 60% carrying laptops (some variable internet connections along the routes), 66% have GPS systems, though not always used, 58% have either UHF or CB radio systems (again not always used) and 56% have TVs. This does not always equate to high levels of technology literacy, although only one single baby-boomer male admitted to being computer illiterate. All groups had mobile phones, mostly Telstra and there were only a few occasions when they had no reception. Other systems, such as Optus or Vodaphone had erratic reception. Some expressed relief that they could not get access. However, for those who wanted to, or needed to keep in contact with family, especially in relation to aging parents, lack of access was a concern. Although only 60% have a computer, 82% have an email address. The main methods of maintaining a record of their journey are by photographs, or a traditional paper journal (56%).

Those who have a *Camps Australia Wide* book (and there are many), diligently use a highlighter pen to trace their journey on the map pages. Few are actively engaged with social networking media at a high level: 22% write up their journey on a computer for private use, or just to share emails with family. Only 10% admit to using Facebook and only within their family circle. No-one tweets, and only 3 couples (6%) have created a blog of their journey. The entries are irregular.

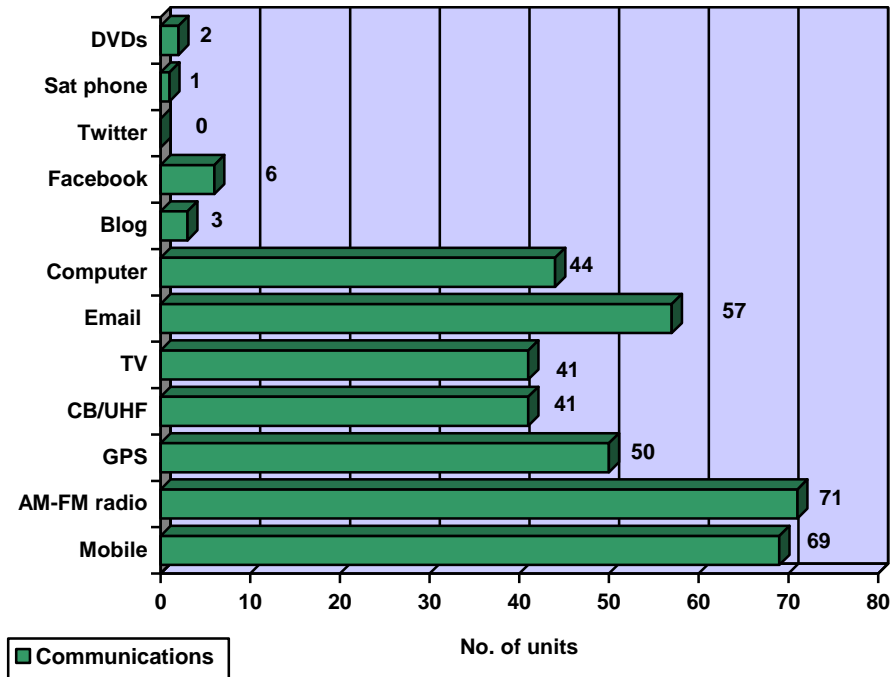


Figure 13. Communications technology used by SAVs

Although the use of technology is high, the number who stated that they accessed the internet for detailed information prior to travelling to Tasmania was surprisingly low. The most frequently mentioned sources of information are the Visitor Information Centres (VICs), whose volunteer staff are rated highly as being excellent and enthusiastic sources of information, other than a reported reluctance to advise about free campsites.

I only go to VICs when necessary; and prefer to talk to other travellers. The first question is: 'Is there any free camping?'

I don't refer to tourist brochures. I want to get away from information processing and tourist information. The main problems in society are due to alienation from nature.

Due to awkwardness of parking large vehicles, and access from the Spirit terminal, several mentioned the preference to locate the Devonport VIC closer to the terminal. SAVs advised that there was limited information on the Spirit. They noted that the sample bag of information sometimes received at the end, should be given out at the beginning of the trip when they would have time to absorb it. From the perspective of commercial park operators, the cost of placing their promotional material on the Spirit (\$300-800 per month) was prohibitive.

Word-of mouth and *Camps Australia Wide* editions 1-6 are the next most commonly cited forms of information, followed by other specific booklets such as *60 Great Walks in Tasmania*.

Table 5. Main sources of information

INFORMATION SOURCE	NO. OF GROUPS	% WHO MENTIONED
VICs	48	67.6
<i>Camps Australia Wide</i>	19	26.8
Word-of-mouth	20	28.2
CMCA	3	4.2
<i>Boiling Billy Camping Guide to Tasmania</i>	7	9.9
<i>The Guide to Free-camping in Tasmania</i>	1	1.4
NP brochure: 60 great walks	11	15.5
Forestry	2	2.8
RACT	1	1.4
Council	2	2.8
Prior knowledge	8	11.3
Internet	7	9.9
Lonely Planet Guide	1	1.4

Table 6. Major activities of SAVs in North-West Tasmania

ACTIVITIES	NO. OF GROUPS MENTION	% OF GROUPS MENTION
Walking	46	64.8
Sightseeing	35	49.3
Photography	23	32.4
Fishing	18	25.3
River cruises	18	25.3
History	11	15.5
Visiting family/ friends	9	12.7
Bird watching	6	8.5
Nature	6	8.5
Cycling	5	7
Waterfalls	5	7
Beach	4	5.6
Canoeing	4	5.6
Train	4	5.6
Food	4	5.6
Events	4	5.6
Surf	2	2.8
4WD	2	2.8

The majority of SAV activities could be categorised as 'Nature' with walking, mostly 'soft' and short walks up to 3 hours as the most frequently mentioned activity. Fishing was also popular, but with some concerns about access to user-friendly information and purchasing a fishing licence. The cost of a short-term licence is considered too high. Although a licence can be purchased on the Spirit, many did not know for sure if they would go fishing. If they then want to go fishing at Lake Burbury, for example, the caretaker refers them to the nearest Service Tasmania Centre in Queenstown. However this is only open between 9.00-5.00 Monday-Friday.

Exemplar camp sites

From the study, two camp sites were often named as the 'best' site.

Waratah is cited as an exemplar for providing excellent value for a low fee (\$22 per night) for a powered site, plus hot showers, heated bathroom, laundry facilities, sheltered barbecue rotunda and a nearby dump point. Waratah is used as a base for up to 5 days to explore from Cradle Mountain to Corinna and Zeehan, Arthur River and the North-West.

O'Neill's Creek in Kentish as a free campground is cited as one of the best free camping sites in Tasmania, due to its location with views of Mount Roland, proximity to the creek, rainforest walk, walking tracks, Cradle Mountain, its natural beauty, spaciousness and the capacity for tents, caravans and SC motorhomes.

This is a wonderful spot and equal to anywhere in mainland Australia.



Figure 14. O'Neill's Creek Camp site near Mount Roland

O'Neill's Creek was the nicest camp ground that we stayed at in Tassie, all the better because it was unexpected. The creek was lovely and the ... walk delightful – I especially liked the pamphlet and drawings and the containers they were in for reusing. I was especially impressed by the upkeep of the toilets and fireplaces and think more councils should take your lead. Well done, thanks for having us.

In summary, SAVs are very respectful of their environment and take care to avoid disturbing others. They do not make a lot of noise, are careful with their rubbish, use of generators and other noise-making items, and are likely to return again. Repeat visitors tend to spend a longer time here than on their first visit, and frequent repeat visitors will spend 3-6 months here every year. Some will relocate to Tasmania.

Suggestions for enhancing the travel experience include the need for consistency of regulations, advance warning signage of points of interest, look-outs or rest stops, more free parking spots, especially for large vehicles (some caravan parks are very crowded and there is limited parking for larger vehicles), limiting use of generators and encouraging solar or gas energy options, signage for dump points and water, and skip bins for rubbish.

Given the rise in the popularity of touring around in Australia by Baby-boomers without depending on conventional caravan parks, hotels, motels or bed-and-breakfast accommodation, most will not worry about booking ahead after the first few nights once they have found their land legs after the Bass Strait ferry crossing, the most common way of arrival.

DISCUSSION: A question of volunteering

Most of the SAVs encountered in this study are Baby-boomers, and many comment that they have no specific plan on arrival. They may turn left or right depending on a whim or the flip of a coin. Whilst very few exhibited major signs of limited mobility, most were interested only in soft to moderate trekking, within 1- 3 hours. While they indicated they had enough knowledge about the flora and fauna, they appeared content to be in tranquil locations, surrounded by natural beauty, but not too far off the beaten path. When asked about volunteering broadly, there was a hesitancy about committing to specific obligations. The general mood appeared to be that when they come back next time, perhaps they could be involved, and if so the best mode of communication would be via the internet. In other words, although this group did not want to plan their trip in detail, they would want to prepare in advance for volunteering activities, even if these were limited. They would consider a broad range of activities relating to both fauna and flora, with penguin and shorebird monitoring being the most preferred activities. The brief for this study did not encompass volunteering specifically, but discussions with SAVs revealed a range of models for voluntourism.

High-end voluntourism models

As its name implies, voluntourism trips are organised around a particular volunteering activity. There is a trend for voluntourism to support capacity building in developing countries. These are not self-accommodating examples, but are included to demonstrate the rapidly increasing growth in guided travel and volunteering opportunities. VolunTourism International (2011) defines voluntourism as ‘the *conscious*, seamlessly integrated combination of voluntary service to a destination and the best, traditional elements of travel — arts, culture, geography, history *and recreation* — in that destination.’ For more insight into volunteerism on the international level, see VolunTourism International (2011), Responsible Travel (2010) and Sustainable Travel International (2003-2009). There is also the opportunity for volunteers to combine adventure to a foreign destination with involvement in scientific work relating to conservation, health, education or archaeological digs with World Expeditions (n.d.). A component of the fee paid goes back into the local destination community. Visitors can also connect with Conservation Volunteers Australia (2010) to be matched with a volunteering project.

One SAV informed us about volunteer programs at Ningaloo Marine National Park near Exmouth Western Australia, where husband and wife teams can volunteer to oversee camp sites for 2-3 months at a time. Visitors cannot book in advance, and there is a limit to the number of vehicles that can enter at one time. The volunteers advise newcomers about the regulations, ensure toilets and sites are kept clean and organise happy hours.

Another volunteer program is the Ningaloo turtles program (n.d.) which takes 12 participants only during the summer for 4-5 hours per day for 5 weeks to monitor turtle movements. Equipment and food are provided, but each volunteer needs to pay \$1,000 for this experience. On 7 April 2011, the Minister for Environment, Parks and Heritage, Brian Wightman, launched a new conservation and tourism program in Northern Tasmania aimed at the growing volunteer tourism market. The program to be known as Green Guardians (Parks and Wildlife Service 2011) links commercial tourism operators with visitors to take part in a conservation project in one of Tasmania's national parks or reserves. Given that the SAV segment is on a do-it-yourself flexible trip and need to stretch their available dollars over an extended time, they may be reluctant to join in such high cost programs.

Volunteer models targeting grey nomad SAVs

There are plenty of low cost or free opportunities for volunteers to be involved in local environmental issues. Parks and Wildlife Service Tasmania (2010) lists a range of local volunteer roles within the National Parks or with partner organisations such as Wildcare: whale rescue, river care, land care, sea spurge eradication groups and animal rescue.

Other models may be worthwhile to explore further, such as the Barcaldine Regional Council (n.d.) Grey Nomads volunteering pilot in Queensland. Barcaldine is a small community of 3,500 people in central West Queensland that is stretched in terms of capacity. By soliciting help from the grey nomad visitors, who camp over summer beside the river, and who are often highly skilled in a range of trades, technical, specialist, and managerial skills, it is aimed to add resources to complete local community group projects and thus contribute to a 'strong, vibrant sustainable community'.

The key activity is successfully creating mutually beneficial relationships with Grey Nomad volunteers visiting our region during the tourist season, where their expertise and skills will contribute to the completion of local community projects.

The program has been funded by the Queensland Government's Blueprint for the Bush Initiative. The emphasis is on building human and social capital. Now in its third year, the program is gaining momentum and there are repeat visitors signing up for new projects. The main conundrum now is locating funding to retain the co-ordinator and for the project to continue. Any program needs to look beyond the initial funding and project timelines to determine how it can become self-supporting.

Birds Australia Gluepot Reserve (2000-2008), South Australia is a biodiversity conservation program that is totally managed by volunteers. Gluepot Reserve was purchased by Birds Australia in 1997. It consists of 54,000 hectares of a once marginal sheep station. Returned to its natural state by bulldozing in the dams and waterholes, rehabilitating flora and controlling feral animals, there are now 75 bird atlasing sites, world-class elevated bird watching hides, interpretive signage and 14 walking trails. Visitors can camp for nominal fees (\$10 per vehicle per night) and must bring in their own food and equipment. It is 60 kilometres of dirt road from the nearest shop at Waikerie. Rangers are volunteers who work for 2-3 months and this program is booked 2-3 years in advance. There are 13 universities with research programs, and 7 PhD students have graduated. There are regular visitors from overseas, especially France and Germany. As a multiple ecotourism destination award winner, this is a particularly interesting program whose operating model could be considered for replication in Tasmania. It is one model that does not require volunteers to outlay large sums of money in order to participate as a volunteer.

Given that the biggest cohort of SAVs to North-West Tasmania comprises Baby-boomers, who have already paid hefty fees to bring their own various types of self-accommodating vehicles with them, and are having 'time out' from busy lifestyles and family obligations ranging across generations from grandchildren, adult children and aging parents, any volunteering program would need to have well organised substantive activities and be promoted well on the internet. The notion of asking them to pay a large sum for the opportunity to volunteer would not sit well with them.

In this regard, the Barcaldine and Birds Australia GluePot reserve models would be better models to follow than the Conservation Volunteers Australia, Green Guardians, World Expeditions or Ningaloo Turtle programs. Ongoing funding to co-ordinate any volunteering program would need to be sourced prior to set-up.

A role in regional development?

The concept of sustainable development is now a familiar one. Development relates to quality of life, and 'sustainable development' relates to development that meets the needs of present generations without impeding the ability of future generations to meet their needs (WCED 1987). The central pillar of sustainable development is the environment. Without it, neither the community nor the economy, which sit inside the environment, can exist. When there are gaps in community human and social capital to enable economic revitalisation or to maintain land and river care responsibilities, it may be tempting to introduce top-down government measures to rectify the imbalance. However, as Eversole (2011:51) reports,

'many attempts to strengthen community participation encounter obstacles theorized as failures or incompleteness of participatory governance.' Government organizations tend to see community 'through government eyes: as participants or non-participants in processes initiated by governments' (Eversole 2011:67). In rural communities where there may be net out migration of high value skills, and insufficient skilled people remaining to stretch across necessary community activities, such as in Barcaldine, the creation of volunteering opportunities for visitors may be an alternative development model. It is quite clear, however, that visitors should not be obligated to volunteer within the host communities in return for 'free' accommodation. These 'back to nature' visitors would soon go elsewhere. From our observations and lengthy discussions, SAVs are not 'free-loaders'.

Given that high end short-term visitors will be attracted to the main touring routes and iconic destinations such as Cradle Mountain, Freycinet Peninsula, Hobart and Strahan, the segment of the drive tourism market who want to get away from 'touristic' destinations and high levels of commercialism, can potentially be the driver for rejuvenation for regional economies and especially the smaller towns (see also Hardy 2006; Prideaux and Carson 2003). The length of their stay and the economic contribution is equal to, or greater than the high-end short term visitor. In return for free or nominal fee camping sites, this segment is willing to spend their money in small towns. This provides a greater distribution of income across the broader community, not just to tourist accommodation, high end restaurants and souvenir purchases.

As most of these visitors are keen to support local businesses, including local producers, some extension of the 'Passion France' concept of offering free stays on farm sites for up to 48 hours (2 nights), could be readily implemented, tapping into the Food Connections (2010) and Gilpin (2010) Stories of the north-west food bowl.

This farm host network could also be linked in with the concept of geo-caching (Geo-caching Australia 2011). Geo-caching is a high tech treasure hunt where players use their GPS equipment to locate caches hidden by other players. A treasure hunt of tourism attractions comprising landscape, fauna and flora values, farm produce or crafted goods could be developed, given that almost two-thirds of SAVs have GPS equipment and laptop computers. These concepts can be further developed in consultation with local CMCA club chapters, who form part of the target market and other stakeholders such as the campervan/ RV hire organisations, caravan parks, T-T Line, airlines and Tourism Tasmania.

RECOMMENDATIONS: Seven step strategy

A key theme to emerge from this project is: 'Free campers are not free-loaders.' Some members of the host community might indicate that self-accommodating visitors are free-loaders, implying that they do not spend much on tourism specific items, such as accommodation, high-end restaurants, high ticket souvenirs or tourism attractions. SAVs will open a conversation, 'We are not free-loaders. We like to stay in the small towns, to explore, and we will spend our money with the locals, rather than in the big towns and large companies.' As SAVs tend to stay longer in a region and go to more destinations within that region than short-stay high-end visitors, their expenditure is more evenly spread across industries and the region. As their pace of travel also allows them more time to engage with locals, they may plan repeat visits, invest in a business and/ or a home, that is, become a long term investor or resident, bringing with them high level skills that may contribute to regional revitalisation. It is recommended that the Councils in North-West Tasmania adopt a long term strategy in relation to this fast growing visitor segment.

Based on the cumulative research data, there are seven key recommendations for local Councils on the North-West Coast that could form a long term strategy aimed at attracting and retaining this rapidly expanding visitor market segment:

1. Establish consistent standards across the North-West Coast. Rather than discouraging low cost (formerly free) campers by restricting overnight stays to 24 or 48 hours or five nights, set a standard that campers can stop for up to 7 nights in designated camping areas. Since the main report was completed, the Office of the Economic Regulator (OTER) has recommended that selected Councils charge a nominal fee for formerly free camping sites located within one hour of a commercial caravan park. By allowing 7 night stays at free or low cost sites, visitors will have the opportunity to experience local farmers' markets and to more meaningfully explore local history, culture, and natural attractions.
2. Clearly define the categories of vehicles, as in some areas a fully self-contained RV (single vehicle) has been allowed to park in a town facility, but the same courtesy has not been extended to a caravan (towed), even though both may be equally self-contained in terms of power, water, cooking, shower and toilet facilities. Suggested definitions and categories are presented for consideration (see Table 1).

3. Create additional free or low-cost camping sites by developing collaborative networks with local land-holders, who have space and instead of offering paid farm holidays, may welcome some support on the land to assist in environment rehabilitation, weed control and tree planting activities, as well as animal husbandry or crop harvesting. Land-holders could specify activities, type of vehicle welcome as per Table 1; pets; arrival times, facilities available; mobility issues; length of stay; dates available for stopover/ special activities. This follows the model of passion France and similar schemes in other European countries. This scheme could be initiated through Food Connections Tasmania (2010).
4. Create some meaningful engagement in the community for SAVs. Acknowledging that they are travelling at a slower pace, provide opportunities for SAV interaction with local experts to learn about local environmental issues and to reduce their own carbon footprint. This could take the form of special volunteer projects with environmental groups, such as the North-West Environment Centre, Landcare, Rivercare, WildCare and 'Friends of ...' groups, or on farms (point 3 above). Host organisations could combine to create a calendar of volunteer and environment/ farm events that could be promoted via the network of Visitor Information Centres, currently frequented by SAVs and staffed by passionate, knowledgeable local volunteers. These regular and special events calendars could also be promoted via Council websites, CMCA *Wanderer* newsletter, and other websites such as Parks and Wildlife Service Tasmania and Tourism Tasmania. Although SAVs indicated that they do not like to do much pre-planning of activity, they want information about volunteering to be available on the internet and to be aware of it before setting out on their journey.
5. In order to boost these opportunities to attract and retain SAVs for longer periods, provide funding for a Project Officer to:
 - Contact organisations and landholders as indicated in point 4 above to gain knowledge about potential environmental care programs and to obtain agreement for SAVs to park on private land for short periods (these sites would need adequate access for larger self-contained vehicles, with turning circles, as well as an indication of suitability for tents. See France Passion 2010 for an example of a summertime farm host scheme for SAVs);
 - Create a calendar of events and prepare a promotional brochure and create content for Council and other relevant website and newsletter links.
 - Year 1-first 6 months contact local organisations and landholders to participate, prepare promotional materials; years 1-2 begin promotions; monitor and evaluate progress; year 3- consolidate, and refresh program.

6. Partner with Tourism Tasmania to consider the introduction of a 'North-West Tassie Taster' pass for a restricted period, say one month, that allows visitors access to certain attractions, some free and others at a discounted price. The goal is to attract and retain visitors in the North-West for as long as possible. Currently the average stay is 19 days. For an example of a pass system, see the 'I Amsterdam' card which offers entry to a range of attractions in Amsterdam (24 hours for €39, 48 hours €49, and 72 hours €59 [approximately AUD\$54, \$67 and \$81]). A swipe card is issued with a small booklet crammed full of wonderful things to see and do in Amsterdam in a short time and considered to be good value by the authors. A comprehensive booklet could be prepared as an extension of point 5 above. Building on this idea, the concept of geo-caching, an outdoor treasure hunt where registered participants hunt for hidden caches based on GPS locations and clues obtained online, is growing in popularity, could be incorporated into the Taster Pass system to lead visitors to particular areas of environmental need. Some discounted attractions or special environmental experiences and interaction with local experts may be enough to motivate SAVs to participate and stay for a longer time in the North-West.

(Included in such a booklet also should be advice on health and dental providers and mechanics and tyre service providers.)

7. North-West Councils work together with CCA and Tourism Tasmania to lobby State government and T-T Line to provide more transparency and better pricing for self-accommodating visitors travelling to Tasmania on the Spirit of Tasmania. Most SAVs who seek out free or low cost sites arrive from interstate with their own vehicles. The cost of bringing their vehicle on the only service, Spirit of Tasmania, reduces the amount of income available for expenditure across Tasmania. To bring a sedan/ 4WD/ campervan is \$79 one way on the Spirit. To add a trailer, which takes up 2 car parking spots, logically should just be \$159, rather than incur a higher charge by the metre. For example, a Nissan X-trail fare is \$79 one way. To add a trailer 2 metres and under 2.2 metres in height, total is calculated at 6.64 metres and the vehicle price jumps to \$280 one way. Tasmania is often seen as the 'last frontier', and it is not just the cooler climate, but the stretch of water, the cost of getting here and high cost of food on board, the strict quarantine and the slow processing especially with difficult street parking conditions at the Melbourne end that are deterrents to potential visitors. Once here, many will return, and a 'frequent visitor pass' scheme could be considered. As indicated in the survey, some of those will convert to investors and residents.

A seven step strategy based on: invite-host-offer tastes/ inform-engage-return-invest-reside is recommended. The seven recommendations that form part of this strategy are aimed to attract and retain well qualified and skilled sea- and tree-changers to Tasmania as a means for regional development stimulation. In the short-term, they may just pass through with minimal expenditure and thus may be perceived erroneously as 'free-loaders', but they may return as a frequent repeat visitor, as an investor or as a long term resident with high levels of education, qualifications and skill sets. And collectively, given the rapidly rising number of Baby-boomers reaching 65 years of age, that could herald a sustained economic boost for Tasmania.

IN CONCLUSION: Free camping visitors are not free-loaders

Although SAVs want an unstructured and flexible experience, and are hesitant to commit to volunteer activities, some indicated they would like some sessional professional work or casual work. They are watching their budgets carefully. Many mentioned the desire to taste Tasmanian food, but there needs to be more farmers' markets outlets or farm-gate experiences. A visitor here who had toured Europe in a motor-home indicated that food producers were missing an opportunity. If they provided some parking space, they might be able to get some help on their farm, or find a ready purchaser for farm produce.

Those caravan parks that have few long-term local park residents, and have friendly and positive customer service, will continue to maintain and grow their business for short-term stays. Some caravan parks are noted as ones to avoid due to poor customer service and the unwelcoming nature of the park, for example, overcrowding, noise, poor behaviour. This group of SAVs is not interested in swimming pools or playgrounds. They seek 'peace and quiet'. As many are members of the CMCA, word-of-mouth either face-to-face at stopover points, via two-way radios, internet or *The Wanderer* club magazine is a very powerful tool that can either make or break host communities.

The question of SAVs being freeloaders should be dismissed. On observing campsites, visitors may be mistaken for local campers who want cheap or free camping sites long term and see the bush or the beach as theirs, having come to the same spot for several decades. Rather than being wary of intrastate, interstate or overseas SAVs, host communities need to welcome them, and allow them to stay for 5 to 7 days, or longer in order to explore the district, provide opportunities to participate in some community volunteer work or paid activity, and perhaps make a decision to move to the community, thereby adding to its knowledge and skill base. Currently, by limiting the time for stopovers at free/ minimal pay campsites, communities may be restricting access to those who could contribute most in economic revitalisation and long lasting community prosperity.

It is strongly recommended that the eight LGAs in the study area co-operate to introduce consistent standards of up to a full week stay in a free camp site. If every LGA had the same standard, then it is highly likely that there would not be a log-jam of SAVs. Rather, they would explore the area and spend money, be happy to volunteer in community or natural environment related roles. They also just might be the key to community rejuvenation.

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