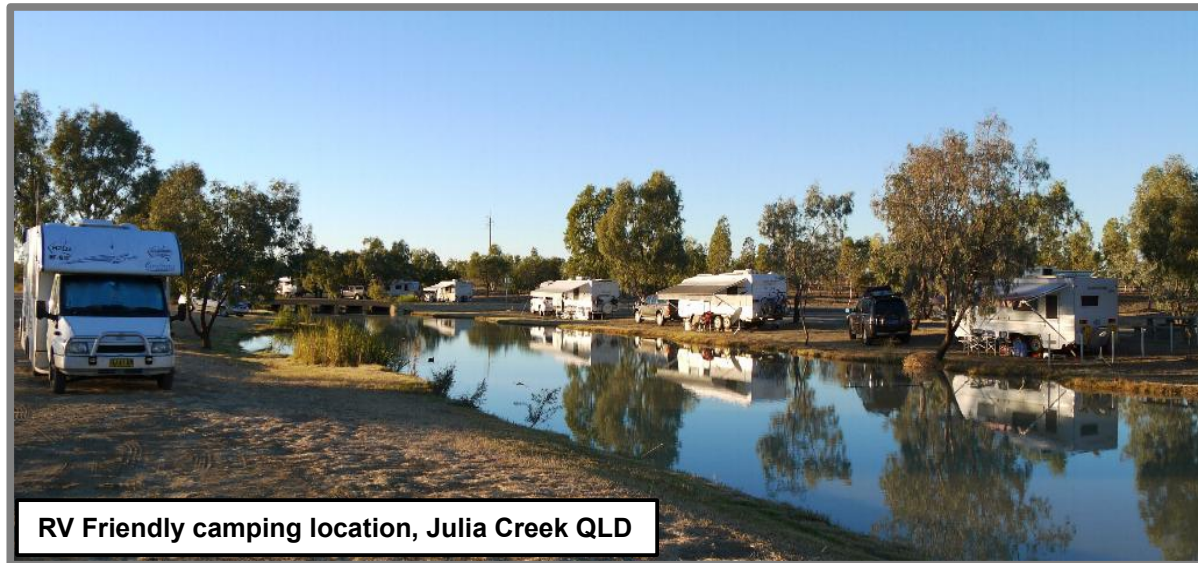


# The camping habits & economic value of 'free camping' travellers



RV Friendly camping location, Julia Creek QLD

# How 'free camping' travellers are supporting Australian towns

**Freedom Camping Australia**

<https://sites.google.com/site/FreedomCampingAustralia>



## How 'free-camping' travellers are supporting Australian towns

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How free camping travellers are supporting Australian towns

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4. Non-commercial campers – travelling – Australia.
5. Caravan parks – Australia.

Link to full 100-page report:

<https://drive.google.com/open?id=0B3mppmlkOSkua3E1SWQyY1Z6Ukk>



How 'free-camping' travellers are supporting Australian towns

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**This report describes the results of a national survey of everyday caravanners, motorhomers and others who enjoy 'freedom-of-choice' camping.**

**It has come about following revelations that traditional commercial operators and their industry associations are lobbying state and local governments seeking the closure of low-cost or free campsites that are within 20 kilometres of any caravan park.**

**To support their position they assert that non-commercial campers spend less in the community than commercial campers and that non-commercial campers are a drain on any community that allows 'free camping', i.e. non-commercial campers are fundamentally 'freeloaders'.**

**In an attempt to counter this emotive and quite uninformed assertion from within the traditional commercial camping industry, a group of concerned non-commercial campers initiated a survey of campers staying in acknowledged non-commercial locations across Australia. This report analyses the responses received during the survey.**



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## Notes

**1:** In this document we are using several terms regarding camping:

The terms are:-

- free camping
- freedom camping &
- freedom-of-choice camping.

These terms are used here to describe the freedom of choice style of camping we undertake

**2:-** During this survey **we have interviewed campers in 195 locations** across Australia

The survey gives responses to “who are the campers” & “how much do campers spend”. The free campers provided us with financial data undertaken over **2800 travelling days** and over **6500 financial transactions**

**3:** This document is an abbreviated version of the complete report that extensively examines all the issues surrounding this topic  
[It is available from our web site].



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## Summary:

1. most freedom campers are travellers and 'life-stylers', they are not 'holiday makers' seeking a traditional commercial holiday park. Many travel with a pet, and many caravan parks still deny accommodation to travellers with a pet.
2. most freedom campers do not need or want all the features found in traditional Holiday Parks, e.g.: ablution facilities, camp-kitchens, children's adventure playgrounds, TV / video-games rooms, swimming pools, tennis courts etc.
3. when freedom campers stay at a traditional commercial park they are forced to pay for the above unwanted facilities
4. most freedom campers have self contained vehicles including toilet & personal washing facilities and as such they only need a place to park their vehicle each night
5. these *non-commercial* freedom campers spend around \$700 per week while travelling and this does not include overnight parking costs



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# Key Findings

## Demographics

- most campers were retirees

## RV features

- most RVs were self contained

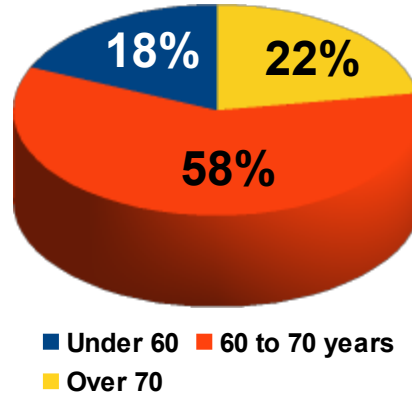
## Days camping per location

- most campers move on in 3 to 5 days

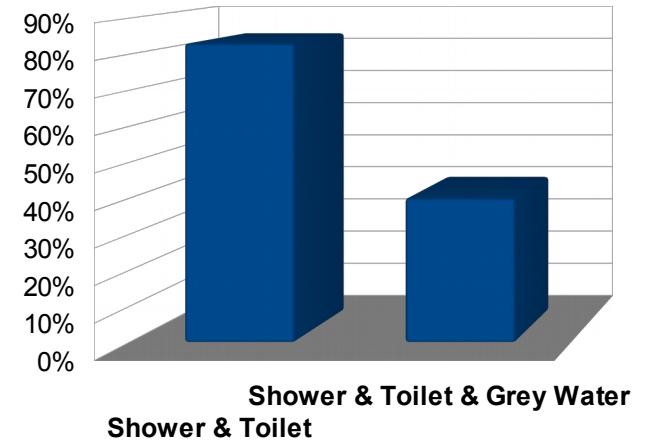
## Use of caravan parks

- 52% use a caravan park for most of their camping

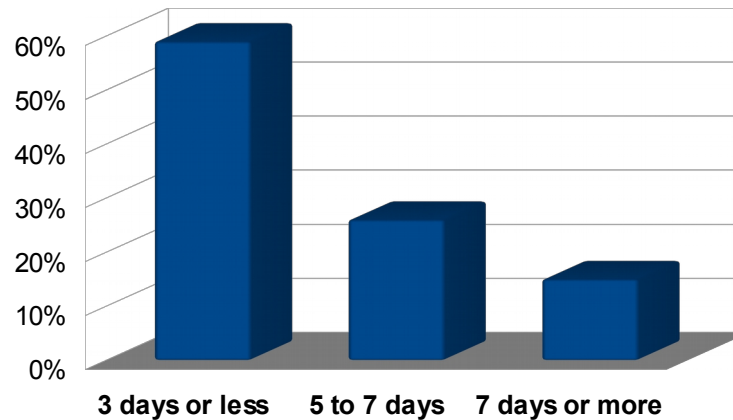
Demographics for Free Campers



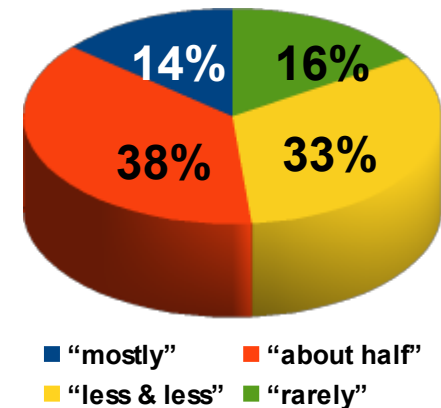
Self Contained status of RVs surveyed



Average days camping at specific location



Use of Caravan Parks





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## Recommendations

- *That State and local government bodies acknowledge the dramatic increase in self contained recreational vehicles currently on the road plus the increasing numbers forecast for the next decade, and create more locations for self contained RV campers to camp outside traditional caravan parks & camping grounds*
  - **Towns and Shires to become more RV friendly which encompasses general access for larger vehicles to the town precinct and places of interest, and parking for over-length vehicles at those places of interest along with shopping centres**
  - *Towns and Shires to acknowledge that “No-Camping” signs are not needed for self contained RV campers*
  - *Towns and Shires separate backpacker & itinerant campers who need toilets etc., from self contained campers in dedicated, pet friendly, 'Self Contained RV' camping reserves*



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## Why run a survey?

- significant numbers of non-commercial campers comment upon the apparent conflict between their desires for the traditional Aussie camping holiday versus the restrictions upon that camping
  - increasing numbers of 'No-Camping' signs have been erected in locations where one would not expect to see such signs
  - the commercial camping industry is lobbying governments, both state & local to bring an end to all camping within 20 kilometres to a town, unless that camping is within one of their own member parks [it currently is 50km in much of Western Australia]
  - caravan parks around Australia are refusing to acknowledge that modern self contained recreational vehicles do not need to be charged full tariff when they are not using caravan park facilities





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## Headline Issues raised by campers

- there are plenty of people who enjoy a caravan park's lifestyle, and equally, there are plenty who would prefer to go somewhere that suits them better
- it has become abundantly clear that the vast majority of campers are finding that caravan park sites are too small for their caravan plus opened awning plus the tow vehicle
- outside school holiday periods – for 40 / 52 weeks of the year, the vast majority of campers are retired or “over-50s” pre-retired couples, but they are not catered for in commercial park facilities
- the issues surrounding self contained caravans and motorhomes whereby their owners no longer have need of the caravan park's traditional 'services' is a topic that will need to be addressed sooner rather than later
- modern caravan & motorhome campers who all have full facilities on-board, are increasingly asking local government authorities to permit more & more freedom camping within their shire



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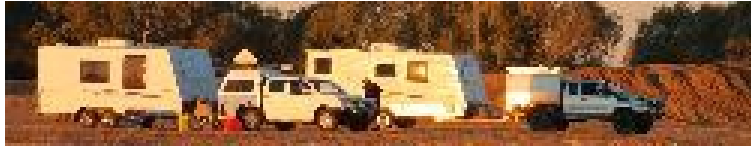
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## Who 'pays' for free camping?

An assertion heard occasionally during this survey was the comment

“ah yes, but the ratepayers in the local town have to pay the cost for fresh water, the installation and maintenance of the black water dump point and rubbish removal for campers having their holiday, so there really is no such thing as 'free camping' ”

- **96% of travellers had a home base for which they were paying council rates for a full year, even though the traveller was not residing at home for a fair slice of that period**
- **the travelling camper does not receive a rebate from their local council whilst they are not in residence, as all those services are made available every day of the year for all local residents and visitors**
- **therefore all of these travelling campers are funding their local home council for the supply of services for the benefit of all, whether they be visitors or local residents.**



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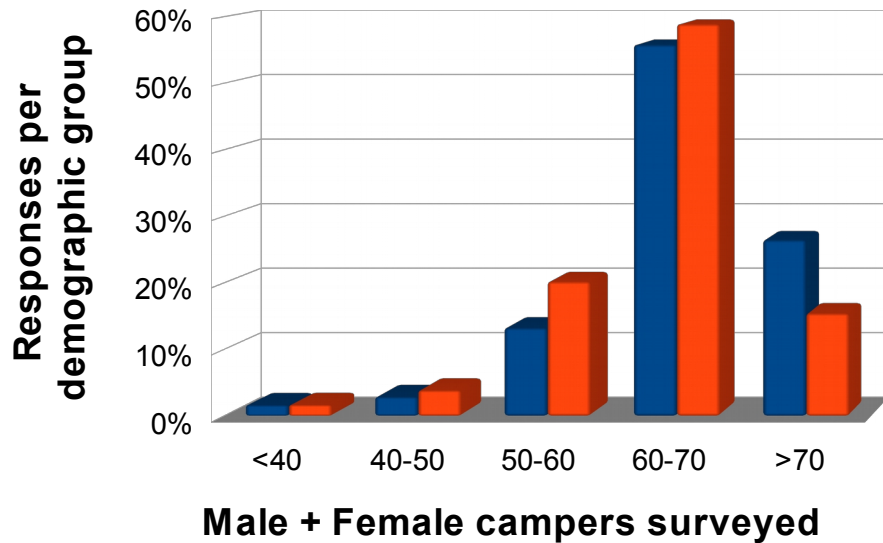
## Does free camping impact upon the viability of traditional commercial parks?

- the short answer is “no” because these campers are seeking something that suits them better than a traditional caravan park
- freedom camping is not causing the caravan park any economic harm because most of these campers were not going to use the caravan park anyway
- most new RVs have a full range of gas cooking, heating, flushing toilets and the easy availability of an on-board hot shower, which means that caravan park facilities are largely redundant. It also means that these freedom campers can co-exist with non commercial camping sites without impinging upon the environment
- when a council or community organisation offers camping at the recreation reserve or showground and does so for a realistic tariff for those facilities it brings revenue to ALL the town's ratepayers

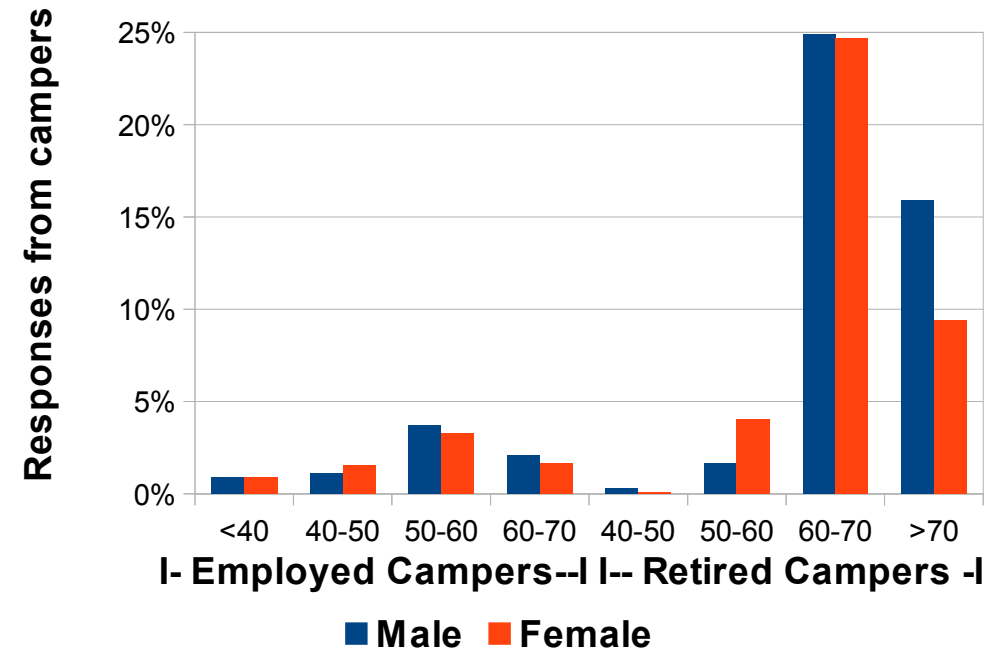


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## Who make up the cohort of freedom campers?



Demographics of free-camping travellers surveyed [n=1250]



Grey Nomad campers employed / retired, Male & Female [n=890]



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## What is the current situation regarding self contained vehicles

- 96% of motorhomes
- 80% of modern caravans

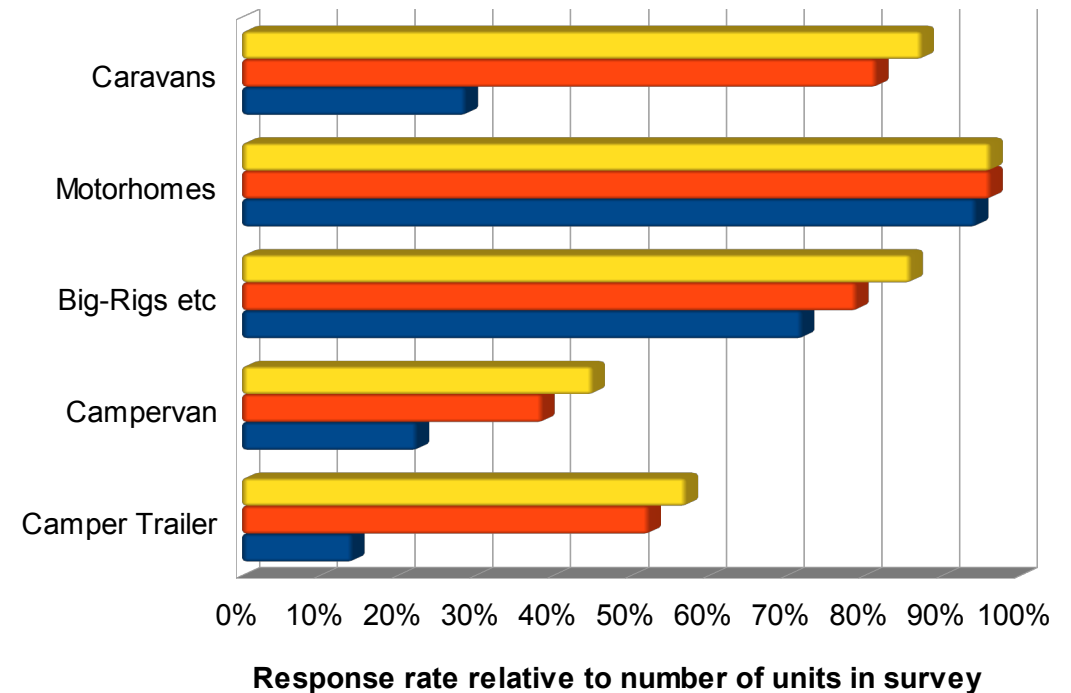
are self contained with internal shower & toilet facilities

and

- 95% of motorhomes,
- 62% of Big-Rigs and 5th-wheeler vans,
- 27% of caravans

are 'fully self contained' with shower, toilet AND grey-water capture of some sort

Type of RV in use by campers surveyed



- Grey Water captured by tank or drum
- Shower & personal washing facilities
- Toilet either cassette or tank



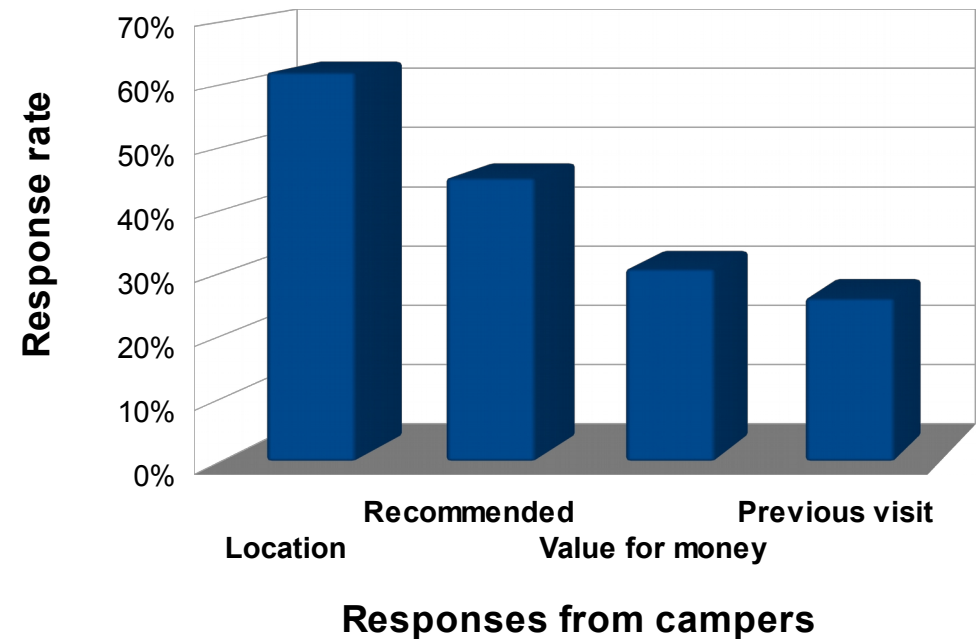
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## What is so attractive about freedom camping?

With so many good quality, 4-star caravan parks across the country, why is it that so many campers choose to stay in locations with few if any facilities and services?

### Some of the many reasons were:

- nothing (in the caravan park) is necessary
- all we want is somewhere to pull in to each night
- a fireplace for campfire is great
- I like some some space & some privacy
- we have a dog and can't get into many van parks
- fresh water + dump point & maybe a toilet is all we need





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## What percentage of your camping is free camping?

The free camping referred to here encompasses responsible camping at showgrounds, recreation reserves, farm stays, state forests, national parks, etc.

### Survey results show:

***16% of campers surveyed*** acknowledged that their non-commercial camping was less than 33% of their touring days. i.e. these campers are predominantly the commercial operator's bread & butter customers,

***65% of campers surveyed*** said that between 33% and up to 95% of their camping is non-commercial camping,

***19% of campers surveyed*** were dyed in the wool non-commercial campers for over 95% of their camping days & nights.

**NB: only 8% of campers advised they rarely pay for accommodation**

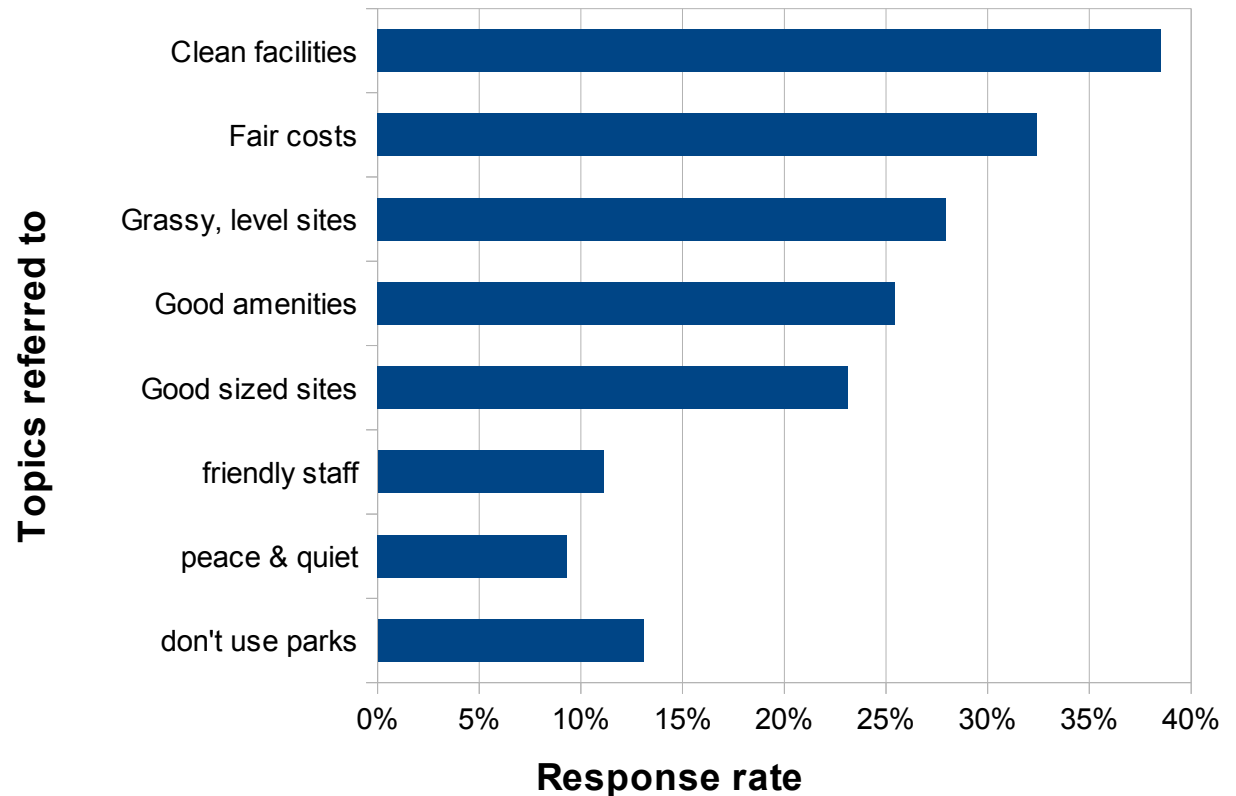


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## Camper's responses about 'what do you look for in a commercial park'?

People expect:

- a clean & tidy park
- no over-charging for site tariffs
- sites that are reasonably level
- sites large enough to fit the caravan with its awning opened & including their towing vehicle
- good staff, both office staff and outdoors staff
- well looked after gardens and amenities, and being pet friendly







How 'free-camping' travellers are supporting Australian towns

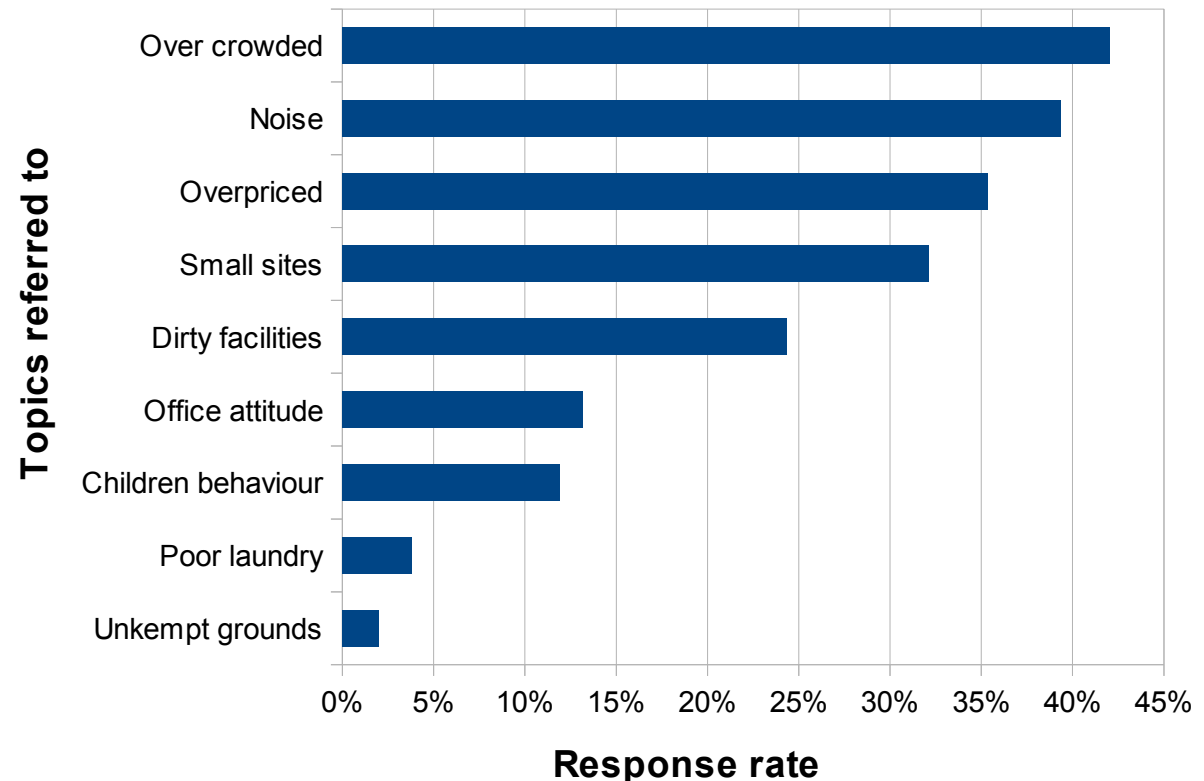
## Camper's responses on “what disturbs you with a commercial park”?

many expectations were undelivered:

- overpriced sites
- sites that were unable to contain the caravan + awning + the tow vehicle
- unclean facilities and uncontrolled children came next

however the overwhelming items that disturbed most respondents were overcrowding and noise –

- noise from neighbours sited very close together
- noise from permanents who talked &/or drank late into the night





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## Will isolating free camping areas to distances more than 20km from a commercial facility bring campers to that commercial facility?

Responses:

- No** anywhere except caravan parks
- No** anywhere we find as we are fully self contained for a reason
- No** councils and shires that seek to ban all free camping will be put on the by-pass by us
- No** it means that I would only be able to spend less in the town
- No** that town will miss out on our spending dollars
- No** we stop in caravan parks for our convenience. Otherwise we free camp outside the town limits
- No** we will travel out of town, -- consequently the local businesses will suffer because we will not be staying there



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## The economics of free camping

When one examines the dollars spent each week by freedom campers, it is signally obvious that those free campers are comfortable with exchanging their money for services wanted by them. This includes accommodation, both within caravan parks and outside caravan parks

Whether the campers are using commercial facilities or freedom camping for their nightly camping, as the camper is travelling to and from that location

- they will do their general shopping several times each week over any of those 7 days
- they will purchase fuel several times each week over any of those 7 days
- they will replenish food supplies several times each week over any of those 7 days, and
- they will often treat themselves to a take-away lunch or morning tea break several times each week, again over any of those 7 days

Each night the traveller needs to locate somewhere to camp for the night, and they have the choice of a commercial facility or a non-commercial community camping reserve.



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## How much do campers 'save' by free camping?

People who participate in freedom camping do so to save money that is otherwise depleted via the use of expensive commercial facilities

- how much they 'save' will vary considerably between each camper / camping family & children
- some feedback mentions that caravan park fees could consume 50% of their \$650 weekly pension, whereas community camping reserves might only require 20% - 25% of their pension, making a \$200 per week 'saved' difference now available for other things
- in peak season weeks, caravan park tariffs reach [and often exceed] the total pension received by the camper
- where or with whom the camper decides to spend the money 'saved' is their personal choice
- every camper has their own travelling budget, and they decide their spending priorities



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## How much does the average free camper spend each week?

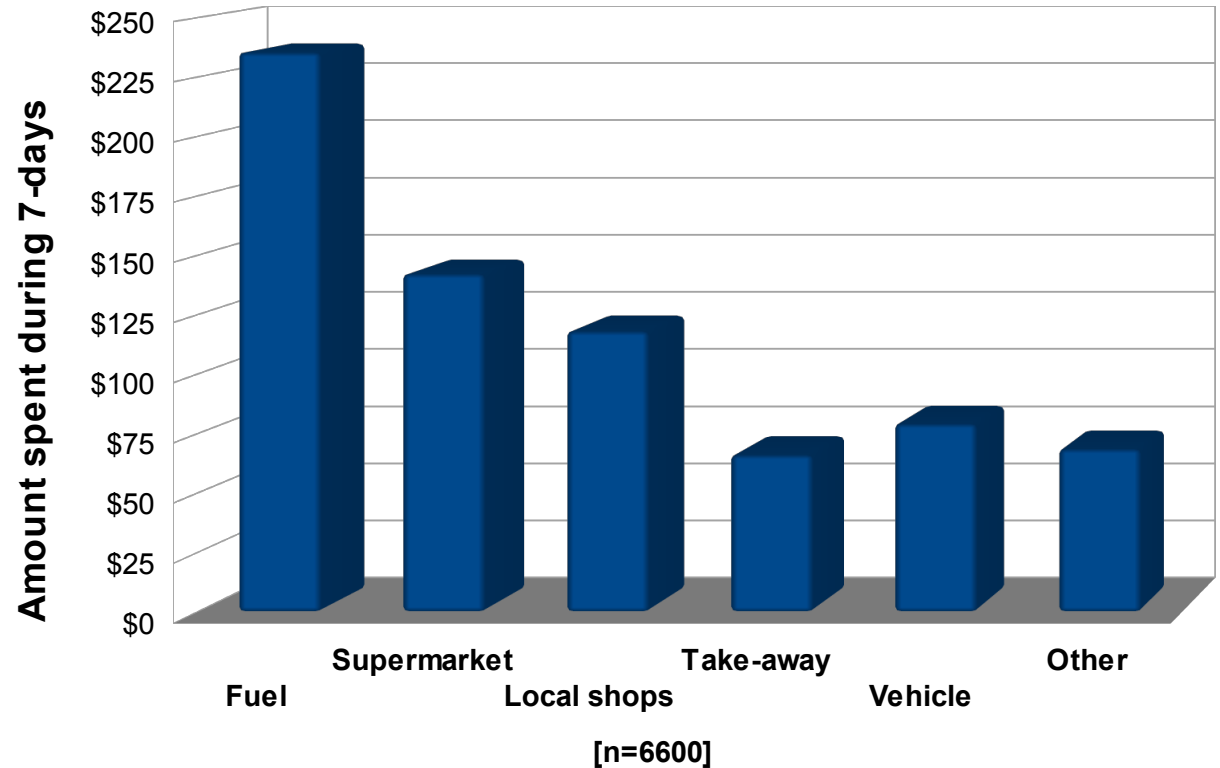
Average weekly expenditure ...

NB: this chart excludes accommodation

We want to clearly articulate how much financial support the free camping travellers provide to the town's shopkeepers as they go about their travelling

**\$700** averaged weekly total without accommodation

**\$800** averaged weekly total including accommodation





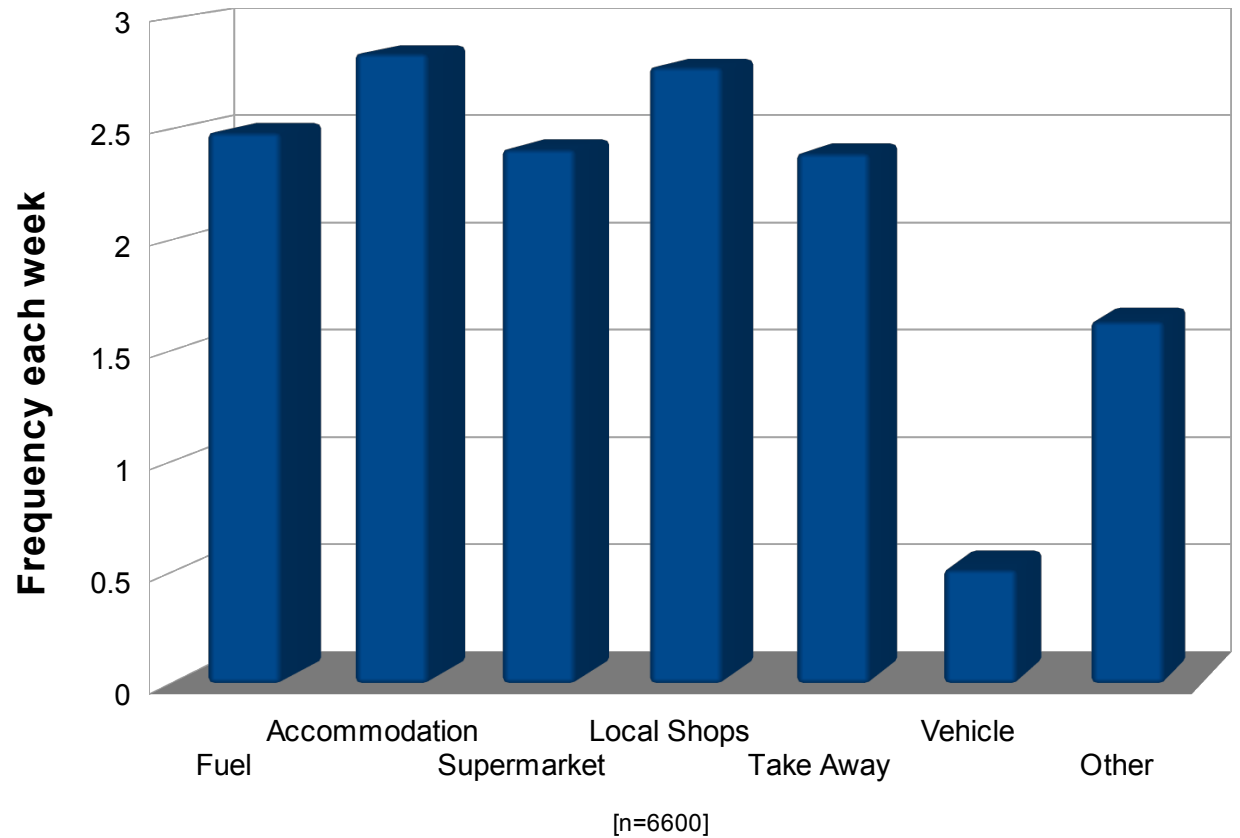
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## How often each week does the average free camper visit shops & spend money around the town?

When one examines the frequency of the financial transactions of the free campers, again it is quite obvious that free campers are comfortable with paying for services wanted by them

Whether this is accommodation or supermarkets or smaller local shops dotting the main street, does not matter

What matters is that *it is beyond reasonable doubt* that free campers do support the town's traders



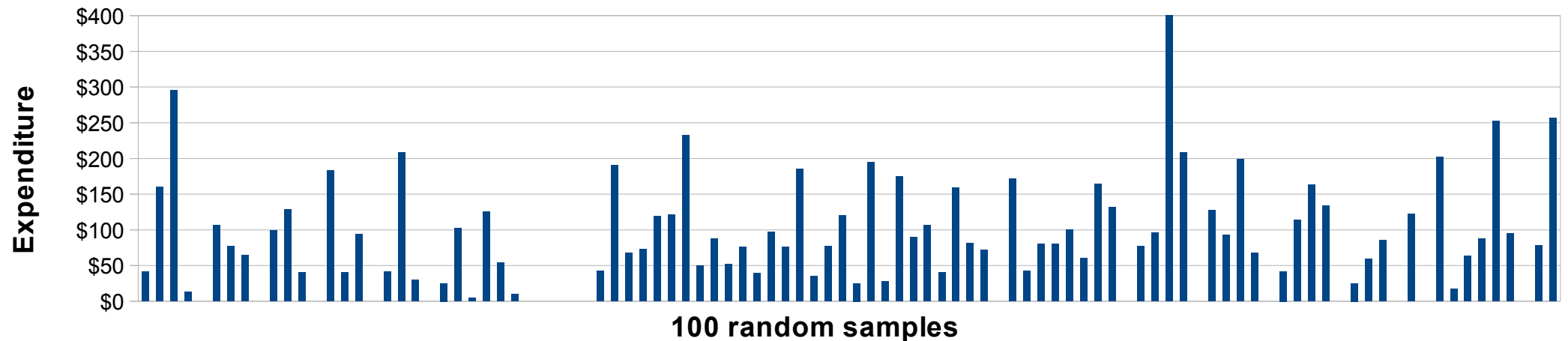


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## Averaged weekly expenditure for accommodation

Many respondents offered the anecdotal “we have a few nights at a caravan park before free camping for a few nights” using community recreation reserves or show-grounds, farm stays or national parks. A few recorded “free camping away from civilisation”. It did not surprise the review team to ascertain the above results, as it is well known that many travellers are regulars at these low-cost alternatives to caravan parks.

The average weekly expenditure on accommodation was \$92 with the maximum recorded at \$588pw





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**The “problem” we have today is that the commercial camping industry seems unable to accept that campers have the right to choose where they will camp each night**

**Freedom campers are paying for alternate accommodation many nights each week and are comfortable doing so,  
*because alternate accommodation now suits them better than the traditional caravan park***





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## Assertions regarding freedom camping made by the commercial camping Industry

The regular themes expounded by the commercial camping industry are that:

- “free campers want a free of cost holiday”

&

- “free campers as they travel do not support local shopkeepers”

&

- “if local government permits free camping within the shire, it will endanger the viability of commercial facilities”



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## Samples from recent industry statements

1

*“The need to implement [non commercial] overnight camping is not necessary. Other than a very small and vocal market segment, whose desire is to not pay their way, consumer demands are currently being met by existing caravan parks.” (1)*

2

*“Free or low cost camping should only be established at distances of more than 20kms from existing commercial facilities.” (2)*

3

*“... a successful and viable caravan or holiday park brings a huge economic benefit to a local or regional area. The loss of such an industry would be catastrophic to many towns and the detrimental impact would flow on to many other businesses and persons in the local area.” (2)*

(1) Making Geraldton Recreational Vehicle (RV) Friendly Strategy, submission #26, CIA-WA, Aug 2014

(2) Parks SA Camping Policy Paper - A Guideline for Management of Camping Areas. March 2014



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## FCA response to Caravan Industry Assertions

Data received during this survey shows quite clearly that 'freedom campers' as they travel do spend generously within the towns they visit, and to claim that caravan park customers spend considerably more than the 'free campers' is not borne out by the facts.

In a somewhat obscure way, it does become an issue of “it's about paying or not paying”.

Survey respondents have made it quite clear that *they do not wish to continue being over-charged for unwanted services* during their stay in the park.

Dealing with a caravan park has been described as 'a bit like going into a cafe and being charged for a 3-course meal when all you wanted was a pie & sauce'.



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## Why is it so important to accurately determine how much the average 'freedom camper' spends in the community?

As mentioned earlier, two of the most common assertions levelled at free campers by the commercial camping industry are

- that commercial campers spend considerably more in and around the town than free campers – and
- that free camping travellers do not support the town's businesses

The analysis of our survey data shows that these assertions are quite erroneous. We've already shown you that free campers spend around \$700 per week supporting the town's shopkeepers.

Let's now examine another of these quite erroneous claims:



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## Caravan Industry Association assertions regarding freedom campers' alleged “non-spending”

The Caravan & Camping Industry Association [CCIA] have many submissions to local gov't & councils around Australia openly published as part of community disclosure. Many refer to a 2013 report by BDO Australia.

SPENDING PATTERNS OF TOURISTS COMMERCIAL VS NON-COMMERCIAL CAMPERS		
Aspect	Commercial camper	Non-commercial camper
Per location spend (excl accommodation cost)	\$576	\$213
Difference in spending in each location	2,7 times more than non-commercial	

BDO Spending Patterns Commercial / Non-Commercial Campers, July 2013

**NB: just over 200 non-commercial campers were interviewed to derive the \$213 figure.**

**However – and this is most important ...**

**There is no mention in the submissions referred to that indicates how many days were included in this expenditure survey.**

Comment:  
Freedom Camping Australia makes it quite clear at this point that we have no issues with BDO Consulting's conduct in this matter. The CRVA commissioned BDO Consulting to conduct a survey, and BDO completed that survey with their usual efficiency.



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## **With this in mind, an observer could state that the caravan park industry's claims are flawed on multiple levels:-**

- 1. as it happens, the \$576 figure was achieved from a considerably greater number of days than the \$213 figure**

**This basic fact makes any comparison of the two figures quite inaccurate, and any statement of 'fact' alleging that a commercial camper's expenditure is “2.7 times greater” than non-commercial camper's expenditure is quite erroneous**

- 2. when full analysis of the CRVA sponsored survey is done, and when each dollar amount above is brought to a common baseline of the 'per-day amount actually spent', one finds that the daily expenditure difference between the two types of campers is only \$20**
- 3. \$20 per day difference – about the cost of a pub lunch.**



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## Issues for Local Government – short term [ <5 years]

- to make towns and Shires more RV friendly
- to encourage towns and Shires to welcome self contained campers
- to advise towns and Shires that “No-Camping” signs are not needed for self contained campers – nor do they encourage tourism
- to encourage towns and Shires to offer camping reserves close to town for the use of self contained campers who have zero need for a traditional caravan park
- settle differences between backpackers & itinerants vs self contained campers. Different campers ~ different issues, but easy solutions are possible with the creation of 'self-contained RV camping areas'



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## Issues for Local Government – long term [ >5 years]

- the need expand facilities for self contained RV campers
- there is a self contained RV revolution on the horizon
- open up caravan park regulations to allow more options for operators
- the non-commercial cohort of campers going to overwhelm shires

Using the trend data [ABS & FCA survey], suggests that within 10 years, there could be 45,000 RVs and non-caravan park campers every day seeking somewhere to camp and preferring a community camping area.

*The forthcoming explosion in usage of self contained recreational vehicles along with the demands by those campers to access community owned, non-commercial camping facilities is an issue that local governments will be faced with, in ever increasing numbers over the next few years.*