Largest RV Club in the Southern Hemisphere

Snapshot

Capturing the Growing RV Market – A Vision for Australia

October 2013

Australia's goal is to double its overnight visitor income by 2020 to $120-$140 billion/year

Investing in the RV market is the most cost effective means of contributing to this goal given:

- ✓ Rapid market growth and anticipated baby boomer spending
- ✓ High level of spending and length of stay
- ✓ Little capital investment - no hotel rooms, little public transport
- ✓ Established regional dispersion
- ✓ Additional community benefits from volunteering, mentoring and seasonal work
- ✓ Additional environmental benefits from increasing self containment and minimal footprints

The Vision – A world class tourism experience for RV travellers

- ✓ A **network of RV trails:** incorporating natural and cultural attractions, seasonal produce, wildlife events and local community events.

- ✓ An integrated **network of accommodation, infrastructure and services:** allowing access to key attractions, business centres and contact with authentic Australian people and enterprises.

- ✓ A **diversity of RV camping experiences**: including sites in natural and rural areas, town centres and environs; and sites with basic through to well equipped/luxury RV facilities.

- ✓ **Price points that match a diversity of budgets**: no-cost and low cost through to high cost for high levels of facilities/convenience/extraordinary locations.

- ✓ **Designated camping locations for self contained RVs** with recognised sustainability standards.

- ✓ **Supportive regional communities:** RV visitors are recognised as important contributors to economic and social well being; partnerships and co-ordination occur across local government, state agencies, business associations, Show Societies, Turf Clubs, Industry Associations and CMCA; operations are within National Competition Guidelines.

- ✓ **RV travellers enjoy**: easy access and booking procedures; repeat visits and long stays; volunteering and casual/seasonal work opportunities.

- ✓ **Safety and security**: rest areas are available for driver fatigue and short stays; campsites are included in police patrols in town precincts.

- ✓ **Contemporary marketing and communication:** themed routes and interpretive signage; drive tourism Apps and online booking capability (for a tech savvy market); links to the CMCA radio network.

Overcoming Barriers – Key Strategies

1. Recognise Changing Market Profiles, Needs and Expectations

- ✓ The RV market is not homogenous with RV travellers looking for destinations that offer an appropriate and varied **mix of accommodation experiences** from low cost to luxury– no different to what occurs on Fraser Island with Caravan Parks alongside beach camping alongside holiday houses and resorts
- ✓ **Caravan parks are *only one* type of camping experience** sought by RV travellers and in this case the park needs to be able to:
  - Accommodate the size of RVs
  - Preferably offer a sliding scale of amenity/service options with a corresponding sliding scale fee structure
  - Preferably accommodate pets
- ✓ Nature based and alternative camping experiences are also part of the mix being sought - particularly for RV travellers that have invested in **self contained vehicles** (which is an increasingly high proportion of the market)
- ✓ RV travellers are also looking for camping options **close to attractions and business centres** to facilitate tourism and shopping activities
- ✓ RV travellers are looking for **community interaction** and **authentic regional experiences**

2. Recognise and Invest in Product and Infrastructure Gaps

Commercial Caravan Parks

Over a quarter of CMCA members have reported difficulty accessing caravan park sites.

- ✓ **Current site availability is limited**, particularly in regions with strong mining activity.
- ✓ **Future site availability will be limited** as RV tourism will grow by more than 25% over the next five years while the growth of caravan parks is likely to remain static or decline. It is unlikely that caravan parks in can meet just the current demand of the 34% of RV travellers who want to stay *only* in caravan parks, let alone the additional 50% who desire a mix of commercial and non-commercial camping options[i].
- ✓ **Physical access constraints** – RVs are frequently quite large, yet caravan sites have mostly remained the same since the 60's.

- ✓ **Pet restrictions**
- ✓ **A lack of minimal service/low cost site options and fees** to accommodate the increasingly limited needs of self-contained vehicles.
- ✓ The **caravan park industry** must redefine their business model, invest in removing infrastructure and policy constraints and provide experiences that better match the needs of the different segments of RV market if they wish to better capture the market.

Rest Areas, Council Grounds, State Parks

- ✓ It is estimated caravan parks provide accommodation for around a third of all RV visitors, so what we need is an investment in **non-commercial and other low cost facilities** that provide parking for a maximum of 48 hours and dump points for black waste.
- ✓ A modest investment by government into rest areas and low cost, non-commercial accommodation with waste services will attract significant intrastate, interstate and overseas RV travellers to regional towns.

Product Integration

- ✓ RV travellers are looking for an authentic regional experience which could be enhanced by:
  - ✓ Encouraging farm gate produce stalls, regional food and wine tours and promoting the local produce of a region; and
  - ✓ A series of themed drive routes – increasingly guided by GPS and in-vehicle communications.

3. Update camping and caravan park policy and legislation

- ✓ Caravan park policies and regulations need to be amended to allow councils to provide accommodation for RVs in country showgrounds, racetracks, local and state reserves when they are not in use.
- ✓ Camping policies and/or a state/territory scheme should be put in place to support a self contained certification system for RVs and link this to access to a network of low facility, low cost camp sites.

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[i] Statistics from Balfour Consulting Research 2010