

SUBMISSION NO 39 R + PDF – rec'd 8.03.19 – Caravan and Camping Industry Assoc'n of NSW

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Future trends: What do you see as the future trends which will shape and change the industry over the next 10 years?

Please provide your response

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Regional dispersal: Given that growth in tourism beyond 2020 will mainly come from inbound visitors, particularly those from the Asian region, how can we achieve greater dispersal into our regions for longer periods of time? Should there be specific targets set for international visitation to regional Australia?

Please provide your response Please refer to attached letter

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Data: What role do you see data analytics and segmentation playing now and into the future?

Please provide your response

:

Technology: What technological advances do you think will shape the sector over the next 10 years? What legislative and regulatory amendments are needed to better facilitate the adoption of new technology to meet the diverse needs of the future traveller?

Please provide your response

:

Indigenous tourism: How can industry and Australian and state and territory governments better coordinate and support the development and continuation of Indigenous tourism businesses, experiences and offerings on a national basis?

Please provide your response

:

Infrastructure/seasonality: What kind of tourism infrastructure investment should be prioritised to encourage all-year-round visitation to Australian tourism icons affected by seasonality?

Please provide your response

:

Employment: How can the tourism industry improve career perceptions and create career pathways to attract new workers into the industry?

Please provide your response

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Australian expertise: Looking beyond tourism demand and supply, how can the next long term strategy seek to leverage the export capability of Australian tourism businesses?

Please provide your response

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Aviation: What are the missing links in Australia’s aviation network, including ‘secondary’ international hubs and domestic regional locations?

Please provide your response

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Social licence: How do we better message the social and economic benefits of the tourism industry to the Australian community to ensure ongoing social licence to operate?

Please provide your response

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Resilience: How can the Australian tourism industry ensure it is resilient to the impact of global shocks beyond 2020 (economic, political and environmental)?

Please provide your response

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Title: What is the appropriate title for the strategy?

Please provide your response

:

General: Any other comments

Please provide your response

:

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Updated 22 February 2019

Organisations must satisfy the criteria, and agree to the terms, that follow in order to submit feedback and comments for the Beyond Tourism 2020 Strategy consultation (the “Initiative”).

1. I am authorised to provide this submission on behalf of the abovenamed organisation;
2. Our organisation maintains business ethics and fulfils its legal obligations, including those arising from anti-bribery laws in Australia and overseas;
3. Our organisation warrants that all the information and content provided herein is true and correct and there is no breach of confidentiality in disclosing this information to Austrade;
4. Our organisation consents to Austrade storing, using and publishing the information submitted in this form as part of any marketing material related to the Initiative, and agrees to it being translated and distributed nationally and internationally;
5. Our organisation understands that submitting our details does not guarantee inclusion in any of the marketing materials relating to the Initiative, that this decision is made at Austrade's discretion and that Austrade's decision is final;

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8 March 2019



Submitted online: <https://www.austrade.gov.au/events/beyond-tourism-2020/beyond-2020>

FEEDBACK ON BEYOND TOURISM 2020 STRATEGY - STEERING COMMITTEE REPORT TO GOVERNMENT

The Caravan, Camping & Touring Industry & Manufactured Housing Industry Association of NSW (including Caravan & Camping Industry Association, Manufactured Housing Industry Association and Land Lease Living Industry Association) is this State's peak industry body representing the interests of caravan and holiday parks, manufacturers and retailers of recreational vehicles (RVs)¹ and camping equipment, residential land lease communities and manufacturers of relocatable and manufactured homes.

We currently have, as members, over 700 businesses representing all aspects of our industry. More than 400 are operators of holiday parks and residential land lease communities (residential parks, including caravan parks and manufactured home estates) in New South Wales (NSW) and over 200 are manufacturers, retailers and repairers of RVs and accessories.

Caravan and camping visitors to NSW are overwhelmingly engaged in holiday and leisure activities and these visitors are heading to regional areas, bringing significant economic benefits in the form of employment and expenditure.

As an important segment of the tourism industry we are strong contributors to the visitor economy and we welcome the opportunity to provide our comments on the Beyond Tourism 2020 Steering Committee's Report to Government (Report to Government).

¹ Including motorhomes, campervans, caravans, camper trailers, tent trailers, 5th wheelers and slide-ons.

About the Caravan and Camping Industry

The caravan and camping industry is one of the fastest growing tourism sectors in Australia. In 2017, the caravan and camping industry welcomed 379,964 international visitors who stayed 5.1 million nights. Meanwhile, domestic caravan and campers undertook 11.9 million trips and stayed 51.9 million nights. Overall, caravan and camping visitors now spend more than \$8.6 billion annually.²

This economic growth is important for all Australians, but with 92% of the country's caravan and camping travellers staying in regional Australia³ this industry provides significant benefits to our regional towns and communities. In 2017 caravan parks generated \$2.1 billion in revenue (up from \$1.1 billion in 2010),⁴ and for every \$100 of caravan park revenue generated \$138 of direct economic benefit flows back into the local economy.⁵

This is great news for NSW because we are Australia's favourite state for caravan and camping, receiving 33.8% of caravan and camping visitors to Australia and 29.9% of nights in the year ending December 2017.⁶

Like the rest of the country, regional NSW is the main destination for domestic caravan and camping visitors to the State, having accounted for 93.3% of visitors and 94.6% of nights. And with caravanning and camping accommodating almost 21% of the visitor holiday nights in regional NSW,⁷ it is an extremely important part of the tourism infrastructure.

The increasing popularity of caravan and camping holidays is also reflected in the strong growth in caravan and campervan registrations across the country. There are currently 679,378 registered RVs in Australia - an increase of almost 5% from last year.⁸

Since 2013, the number of caravans registered in Australia has increased by 29% and campervan registrations have increased by 23%. Last year, NSW recorded the fastest growth rate at 6.22%, with a total of almost 160,000 caravan and campervan registrations,⁹ and there's undoubtedly more growth to come. In 2017, 22,381 recreational vehicles were manufactured, the second largest year for manufacturing in the last 37 years.¹⁰

Feedback on Report to Government

The six strategic pillars, proposed actions and performance measures identified in the Report to Government to drive growth in tourism to 2030 are appropriate and comprehensive. We strongly agree that Australia's next strategy should be designed to be implemented in partnership between governments and industry. This is the best

² Caravan Industry Association of Australia, *Caravan and Camping State of the Industry, 2018*

³ *Ibid*

⁴ *Ibid*

⁵ BDO, *Economic Benefit Report – Commercial Caravan and Holiday Park to a Local Community, October 2012*

⁶ *Tourism Research Australia, International Visitor Survey and National Visitor Survey, YE December 2017*

⁷ *Ibid*

⁸ BDO, *Caravan and Campervan Data Report, 2018*

⁹ *Ibid*

¹⁰ Caravan Industry Association of Australia, *RV Production Statistics, December 2017*

way to assist industry to meet the challenges and opportunities presented by emerging markets, changing consumer expectations and advances in technology.

We also support measures to address tourism workforce issues and promote tourism and hospitality industry career pathways. Collaborating with industry for the targeted development of skills and capacity to meet demand, providing greater funding opportunities to assist SME's to take up accredited and non-accredited training and supporting industry led initiatives to promote tourism industry career paths, will be critical to the future success of Australia's tourism industry.

More Opportunities for Regional Dispersal Identified

There are, however, further opportunities available to facilitate growth in visitation and yield, particularly in regional areas. The Report to Government identifies the importance of encouraging visitor dispersal to regional centres with actions to expand aviation growth into non-capital airports (page 12). Yet, there are no actions identified to promote growth in self-drive tourism, which is crucial to encouraging visitors to travel beyond capital cities.

As a driver of dispersal and overnight stays in regional areas, growth in self-drive tourism can be accelerated through a number of initiatives, including:

-) providing quality roads, rest areas and driver amenities,
-) improving signage, Wi-Fi services and digital information sources for self-drive visitors,
-) supporting further development of touring routes between major gateways (e.g. Sydney/Gold Coast and Sydney/Melbourne), and
-) the promotion of self-drive itineraries to the spectacular regional destinations surrounding our major cities.

Accordingly, the caravan and camping industry is a key sector that can assist in encouraging international visitors to disperse into regional areas to achieve the growth targets identified in the Report to Government.

International demand for caravan and camping holidays is already on a growth trajectory with increasing visitor numbers from American, European and Asian markets.¹¹ In the year ending September 2018, 89% of international visitors who drove campervans and motorhomes in Australia visited regional areas, with 65% of nights being spent regionally.¹²

This indicates that caravan and camping holidays in Australia are an integral part of regional dispersal of international visitors. Australia's tourism strategy should therefore include building on the strong performance of the caravan and camping industry to maximise our engagement with both the domestic markets and international travellers.

In terms of promotional appeal, a self-drive holiday for international visitors (using a rental campervan, motorhome or passenger vehicle) staying in holiday parks and national parks, is a quintessential Aussie experience and therefore one of the best ways to experience the 'real' Australia.

¹¹ *Caravan Industry Association of Australia, Op. Cit., p 18.*

¹² *Tourism Research Australia, Op. Cit.*

The latest cabin and glamping-tent infrastructure in holiday parks offers top quality accommodation in some of the country's most pristine and natural environments - from beachside locations, to the bush and beyond to our stunning outback.

Our industry offers a style of holiday where visitors can have all the creature comforts international visitors expect, yet be surrounded by nature and wildlife, with plenty of opportunity to meet the friendly locals as they travel and explore at their own pace through regional communities. This style of holiday experience could have a much higher profile in marketing to international visitors.

As the peak industry body for this State, we have a strong, long-standing working relationship with Destination NSW. Every year, our Association and Destination NSW invest in campaigns targeting the domestic market that promote the caravan and camping holidays. Our partnership with Destination NSW is key to building the domestic caravan and camping sector in NSW, which is a top priority for stimulating visitation to regional areas.

However, more can be done at the national level. We believe it's important for self-drive tourism and the caravan and camping industry to have a much stronger focus in Australia's tourism strategy to 2030, and specific actions developed to drive future growth. The sector has the capacity and resources to work with major international travel distributors to further encourage self-drive holidays and dispersal of visitors into regional areas of Australia.

Thank you for your consideration of the issues we have raised. It is excellent to see a forward-thinking strategy that acknowledges the great potential of the tourism industry to drive employment and economic growth in Australia. We look forward to further developments and are keen to continue to participate as a stakeholder in any future consultations.

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