

DRIVING AUSTRALIA INTO THE FUTURE

Policy Priorities for a Safe, Compliant and Sustainable Caravanning and Camping Industry



**'To lead and champion a safe, compliant and sustainable
caravanning and camping industry in Australia'**

- Caravan Industry Association of Australia vision





TABLE OF CONTENTS

FORWARD

Message from The Chairman	4
Message from The CEO	5

OVERVIEW

Caravan Industry's Policy Platform	6
Executive Summary	8
Breadth of the Australian Caravan Industry	10

THEME 1

Strengthening Sovereign Manufacturing	12
Projects & Policies	15
Business Profiles.....	17

THEME 2

Supercharging Australian Tourism for Recovery	19
Projects & Policies	22
Business Profiles.....	26

THEME 3

Developing an Industry for the Future	28
Projects & Policies	29
Business Profiles.....	33

THEME 4

Improving Safety Outcomes	36
Projects & Policies	37
Business Profiles.....	40

KEY CONTACTS

Media Inquiries	42
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MESSAGE FROM THE CHAIR

GRANT WILCKENS

In YE September 2021, the caravan and camping industry continued to grow and evolve in Australia with more than 12.8M caravan and camping trips taken and 52.1M nights spent caravan and camping around the country. This growth has been on the back of an exceptional response by the industry to the COVID-19 crisis and the long-standing connection that the industry has with the Australian psyche.

The manufacturing of recreational vehicles in Australia continues to defy other automotive manufacturing sectors, with more than 23,000 vehicles being built in Australia in 2021. An increased focus on manufacturing sovereignty in Australia across all sub-sectors is a policy priority and will help Australia develop the skills and expertise needed to develop export opportunities.

Already we are seeing leading Australian RV manufacturers export to the US, Europe and the Middle East and the value of exports from the industry have increased ten-fold since 2012.

From a tourism perspective, caravan parks remain the backbone of the accommodation industry in Australia, particularly in regional areas. The evolution of caravan parks over the past twenty years has led to some of the most valued tourism experiences around Australia. From luxury wilderness cabins in the Northern Territory to beachside access all along the coastline – a stay in a caravan park remains one of the most affordable and preferred holiday choices for Australians. As the industry recovers from COVID-19, it remains vital for Australians to continue to be encouraged to spend their hard-earned annual leave and savings on experiences in Australia which are world class. The

rest of the world looks at the Australian traveller with envy and in coming years we will be one of the most sought-after markets – Tourism Australia must remain in domestic marketing and continue to build the desirability of Australia for Australians.

In terms of business viability, insurance is an issue dramatically impacting tourism. Reforming the insurance industry to increase stability for operators and surety in accessing affordable insurance needs to be a priority for all sides of government (both state and federal) in the coming years. Success on this front can result in a tourism industry that empowers operators and experience providers to develop world class adventure and tourism products, and be able to operate competitively.

A successful caravan and camping industry is good for Australia. It is good for governments, communities and businesses alike, and provides respite for all Australians looking for a holiday to reconnect with families and friends in a variety of contexts.

On behalf of the board of Caravan Industry Association of Australia, I am pleased to present these policy priorities and look forward to working with the federal government to continue to build a safe, compliant and sustainable caravanning and camping industry in Australia.

GRANT WILCKENS
Chair - Caravan Industry Association of Australia



MESSAGE FROM THE CEO

STUART LAMONT

Through the chaos of the past two years, the caravan and camping industry has shown its mettle as one of the most resilient industries in Australia across both manufacturing and tourism. The caravan industry is the largest remaining bastion of automotive manufacturing, and the largest provider of holiday nights of any accommodation offering according to Tourism Research Australia.

This is a staggering achievement and testament to the 6,000+ businesses in the sector and the deeply passionate, largely SME workforce and the loyalty of caravan and camping consumers – both new and old. Over the past ten years, the changing face of the industry has been remarkable. This is manifested through innovative tech platforms such as Camplify and TripTech, the emergence of corporate and institutional investment throughout the industry, companies committed to research and product development, all among hundreds of other stories of growth and innovation.

However, beyond these headline companies in industry (some of which are now ASX listed) lies a plethora of tales of small business success and durability. Caravan Industry Association of Australia over many years has worked tirelessly to improve the industry and convey to the government the importance of having a safe, compliant and sustainable caravanning and camping industry in Australia.

We remain firmly committed to the effective date of the Road Vehicle Standards Act – now being implemented from July 1 next year, and we have already provided a large amount of resources to

industry to assist in this massive transition, the most significant change in the way caravans, campers and motorhomes are first supplied to market in over 30 years. This will not only provide for a competitive industry but will deliver significant benefits to caravanning consumers.

Looking ahead to the 2022 federal election we are urgently calling on both sides of government to recognise the enormous contribution of the caravan industry to Australia. Not just through the \$23B in economic value it delivers, but the social and cultural value it adds by being intrinsically Australian. A recent study has shown that for every \$1M in tourism revenue generated from caravanning and camping 12 FTE jobs are supported, many of which are in regional Australia.

The following issues are priorities for the incoming government post-May 2022:

- Strengthening Australia's sovereign manufacturing
- Supercharging Australian tourism
- Future proofing the caravan and camping industry
- Improving safety outcomes

We are looking forward to continuing to work productively with both sides of government around solutions to business problems in our industry and are keen to highlight policy ideas and platforms that will benefit all Australians.

STUART LAMONT
CEO - Caravan Industry Association of Australia

CARAVAN INDUSTRY'S POLICY PLATFORM

800,000+
RV'S ON AUSTRALIAN ROADS

100,000+
RESIDENTS IN LAND LEASE COMMUNITIES

50,000+
AUSTRALIANS EMPLOYED

Australia's caravan and camping industry is a \$23B industry that consistently provides more holiday nights in Australia than any other tourism sector. The manufacturing of recreational vehicles (RVs) underpins this, with the local manufacturing industry being the largest remaining bastion of automotive manufacturing in Australia. In fact, 90% of the 800,000 RVs on Australia's roads today were built in Australia.

In the last twelve months over 23,000 caravans, campervans, camper-trailers and other RVs were built in Australia, supporting over 6,000 businesses and 50,000 jobs.

A strong policy landscape for the caravan and camping industry will recognise and create more investment in regional Australia, leading to more jobs and higher-quality tourism product, an inspired manufacturing sector that supports building products in Australia and opportunities for export developments.

Caravan Industry Association of Australia is the peak national body that represents all businesses in the caravan and camping industry. It works across data and research, advocacy, compliance, accreditation and marketing pillars to lead and champion a safe, compliant and sustainable caravan and camping industry in Australia.



STRENGTHENING AUSTRALIA'S SOVEREIGN MANUFACTURING

POLICIES:

- **RV MANUFACTURERS MODERNISATION FUND**
- **RV INNOVATION HUB**

KEY INITIATIVES:

- \$20M TO SUPPORT \$40M PRIVATE INVESTMENT TO ADOPT & SCALE NEW TECHNOLOGIES IN AUSTRALIAN RV MANUFACTURING
- \$600K FEASIBILITY STUDY FOR THE CREATION OF AN RV INNOVATION HUB, CONSUMER INSPECTION AND DRIVER TRAINING PRECINCT IN THE ELECTORATE OF LONGMAN



FUTURE PROOFING THE CARAVAN & CAMPING INDUSTRY

POLICIES:

- **RESIDENTIAL LAND LEASE COMMUNITIES**
- **REGIONAL INVESTMENT**
- **CARAVAN & CAMPING & NET-ZERO**
- **ENERGY UPLIFT SCHEME FOR CARAVAN PARKS**

KEY INITIATIVES:

- INVESTIGATE APPROPRIATE MECHANISMS FOR LAND LEASE TO PARTICIPATE IN HOUSING STIMULUS PROGRAMS
- CO-INVESTMENT TO IMPROVE REGIONAL TOURISM PRODUCT
- MEASUREMENT OF CARAVAN & CAMPING CO2 EMISSIONS
- ENERGY EFFICIENCY PROGRAM IN CARAVAN PARKS



CARAVAN INDUSTRY'S POLICY PLATFORM

SUPERCHARGING AUSTRALIAN TOURISM

POLICIES:

- **REFOCUSING TOURISM AUSTRALIA**
- **LABOUR FORCE SOLUTIONS**
- **INSURANCE REFORM**

KEY INITIATIVES:

- ADDITIONAL \$50M FOR TOURISM AUSTRALIA TO CONTINUE DOMESTIC MARKETING VIA PARTNERSHIPS
- REFORM OF THE WHM VISA SYSTEM TO EXPAND ELIGIBLE WORK TO ALL HARD-TO-STAFF REGIONAL AREAS OF AUSTRALIA
- EXTENSIVE CIVIL LIABILITY REFORM AS PER SMALL BUSINESS OMBUDSMEN (ASBFEO) REPORT & EXPANSION OF CYCLONE REINSURANCE POOL



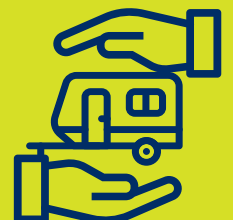
IMPROVING SAFETY OUTCOMES

POLICIES:

- **ASSIST INDUSTRY'S TRANSITION TO RVSA & SAFER VEHICLES**
- **NATIONAL CARAVAN SAFETY CHECK PROGRAM**
- **SAFER DRIVERS**

KEY INITIATIVES:

- \$750K INDUSTRY EDUCATION CAMPAIGN
- CARAVAN SAFETY CHECK PROGRAMS HELD IMMEDIATELY BEFORE PEAK TRAVEL TIMES
- \$2.5M SUBSIDY SCHEME FOR CONSUMERS TO UNDERTAKE CARAVAN TOWING COURSES



EXECUTIVE SUMMARY

Caravan and camping, pre and post the arrival of COVID-19 in Australia, has consistently been one of our nation's largest domestic tourism sectors. Australian caravanning manufacture is also our country's largest remaining automotive manufacturing sector, following the cessation of the local car manufacturing industry.

These are significant outcomes which reinforce to government the sustainability, growth potential and economic and social impact that our sector delivers in Australia's COVID influenced future.

Globally, as one of the most popular tourism destinations in the world, a strong and vibrant caravan and camping industry creates memorable experiences for Australians and international travellers alike.

The following themes will provide a pathway for a strong and sustainable caravan and camping industry that will continue to provide positive outcomes right around Australia. The caravan and camping industry underpins more than 6,000 businesses (including 2,000 caravan parks) and more than 50,000 workers across Australia. We support many additional tourism jobs in regions across the nation where travellers venture.

The industry today generates \$23B in measured annual economic revenue across manufacturing, trade, retail, rental and caravan park revenue as well as the visitor expenditure of caravan and camping travellers.

A strong and responsive policy landscape for the caravan and camping industry will create more investment, in particular across regional and rural Australia, leading to more jobs and higher-quality tourism product, a reinvigorated manufacturing process that supports building innovative caravan and RV products in Australia and opportunities for



continued export developments including to the US and Middle East.

This document outlines four key themes that will lead to a stronger caravan and camping sector and will facilitate investment, strengthen regional communities, bolster sovereign manufacturing capabilities and improve road safety. These themes are supported by a number of policy and project concepts and case studies of businesses within the Australian caravan and camping industry. This is designed to highlight the diversity of the industry and demonstrate the innovation of the sector currently while exploring the potential for years to come.

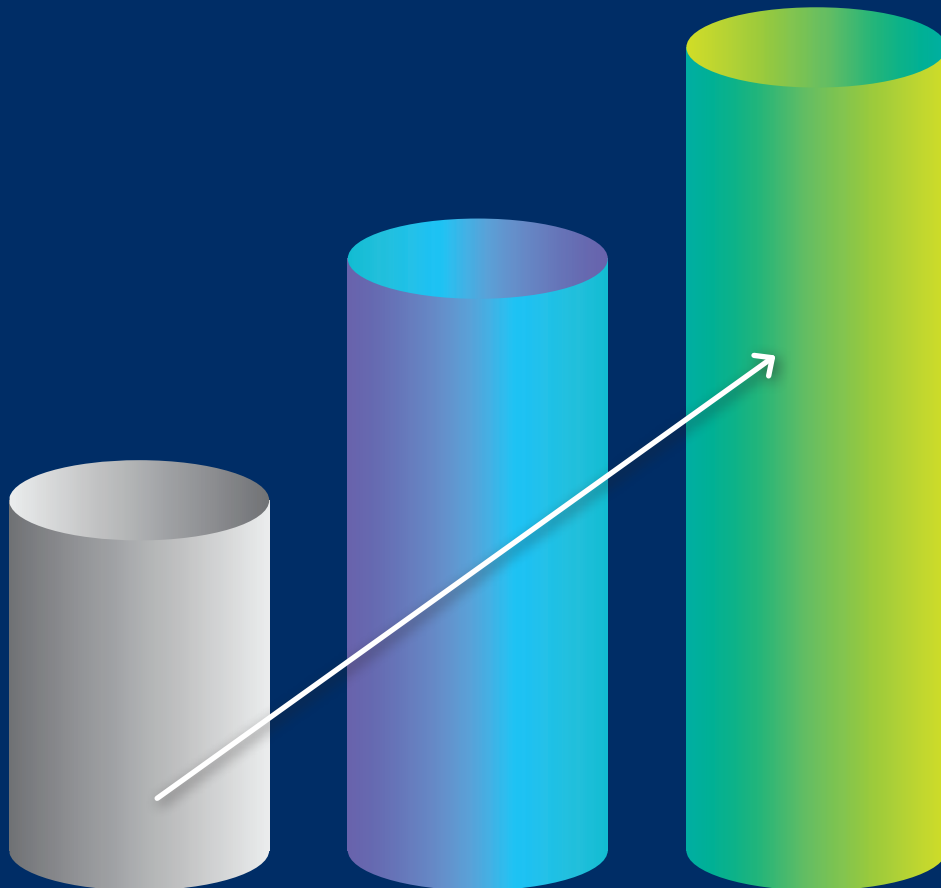
POLICY VISION

To support regional economic development, sovereign manufacturing, social & health outcomes and road safety around Australia.

NOW

2023-24

2024 - ONWARDS



CRISIS MANAGEMENT & RECOVERY

- Labor Force Solutions
- Refocusing Tourism Australia
- Insurance Reform

PLANNING & GROWTH

- RV Manufacturers Modernisation Fund
- Regional Investment
- Assist Industry's Transition to RVSA and Safer Vehicles
- Residential Land Lease Communities

FUTURE RESILIENCE & SUSTAINABILITY

- RV Innovation Hub
- Caravan & Camping & Net-Zero
- Safer Drivers
- Energy Uplift Scheme for Parks
- National Caravan Safety Check Program

BREADTH OF THE AUSTRALIAN CARAVAN & CAMPING INDUSTRY

The holistic caravan and camping industry touches many parts of the Australian economy across manufacturing, retail and rental, tourism and associated supply chains. There are an estimated 6,000+ businesses in this network that are dependent on Australians and pre-COVID a growing number of international visitors taking caravan and camping trips around the country. Two decades of sustainable performance!

A total of 12.8M caravan and camping trips were taken in the year-ending September 2021, demonstrating the industry's continued strength despite the impact of COVID-19 and government induced lockdowns, as well as international and domestic border closures and economic disruptions.

In line with increasing consumer demand, the manufacturing of RV product has increased post COVID-19 with over 52% of these still being built in Australia. Today 90% of RVs on our roads are Australian made.

Unlike other sub-sectors of the automotive industry, the caravan manufacturing sector in Australia has consistently held it's own in trade diversion, globally recognised craftsmanship and technology advances (particularly in road safety), with limited subsidisation from the federal government.

The future is bright for the caravan and camping industry, and Caravan Industry Association of Australia is calling on all sides of politics to recognise the scale, value and breadth (economically and socially) that the sector provides to Australia (and Australians), and to provide a supportive policy and project environment to enable the industry to thrive in the coming decade and beyond. Now is this sector's time to shine!

DOMESTIC CARAVAN & CAMPING SINCE 1998

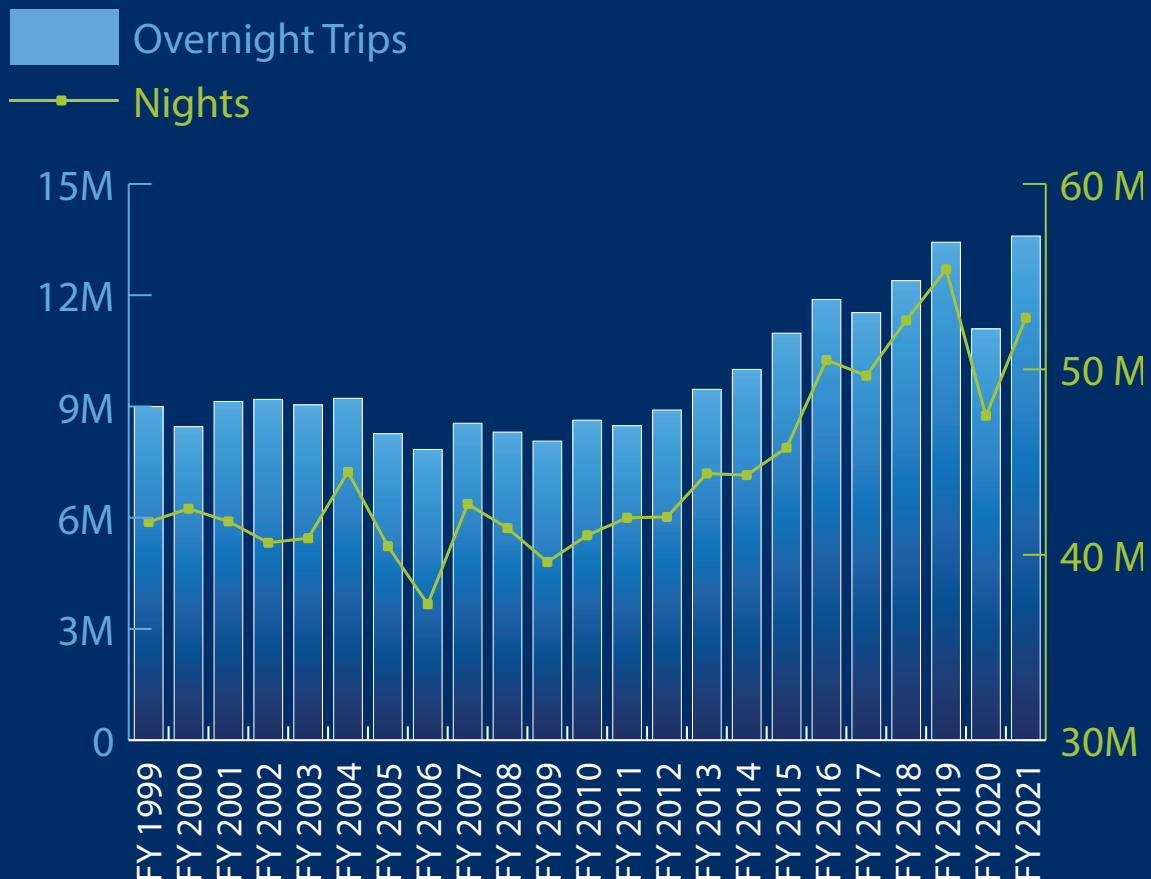


Figure 1: Tourism Research Australia: NVS 2021.



THE CARAVAN & CAMPING ECO-SYSTEM BY BUSINESS TYPE

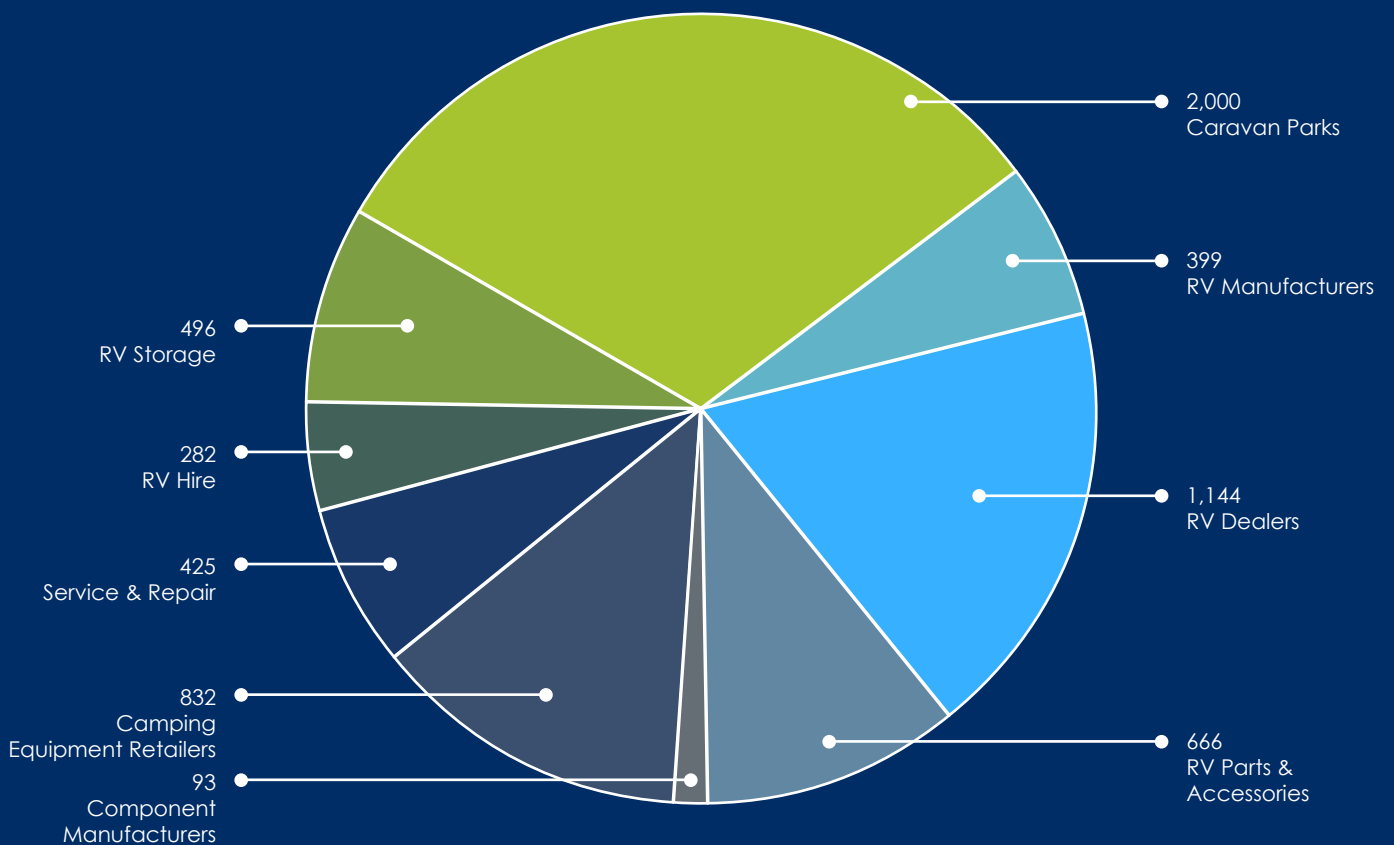


Figure 2: NEM Australasia 2019: Economic Value of the Caravan Industry.

THEME 1: STRENGTHENING AUSTRALIA'S SOVEREIGN MANUFACTURING

The recreational vehicle manufacturing sector is Australia's largest remaining bastion of automotive manufacturing. There is an enormous opportunity to infuse this industry with technological advancements to ensure sustainability of growth is achieved in the coming decade and beyond.

SUPPORTING AND ENABLING MANUFACTURING ADAPTATION IN AUSTRALIA

RV manufacturing contributes jobs and businesses to the Australian economy through the supply chain of components, assembly in factories and the dealership, aftermarket, service and repair sub-sectors. Unlike the diminished car industry, the RV manufacturing sector has not received widespread federal funding to underwrite activities over the years – it has commercially flourished independently to meet a local and international consumer market aligned to Australian conditions. It has also fostered a small but growing caravan and RV export sector.

The end result is an RV industry that facilitates extensive regional and urban tourism visitation (visitor dispersal) and spend of more than \$10B annually to rural and remote communities with their businesses including caravan parks and experience providers.



The manufacturing of recreational vehicles in Australia continues to rebound strongly post-2020 despite the direct impact of COVID-19 on local manufacturing activity, supply chains and closed borders. The industry is on track to record a 30-year high in new RV's supplied to the local Australian market, and export growth will also continue; recognising that the world's toughest constructed caravans are being manufactured right here in Australia. This is a substantial feat and turnaround underpinning the sector's sustainability and growth prospects.

Australia is a global leader in RV manufacturing and the segment has evolved significantly in recent years. As such there is a pressing need for broader federal government and state government recognition and strategic alignment. This will ensure that the industry can continue to provide jobs and benefits to Australians in the years to come.

SUPPORTING A TECH INFUSION

Caravan Industry Association of Australia is calling on the federal government to recognise the potential of the local RV manufacturing sector and to both strategically and more closely work with the industry to facilitate an infusion of technology in the sector with the latest technological and scientific advancements for both a future COVID and low carbon economy.

Whilst our sector faces disruption, this will fuel economic growth and help Australian manufacturers maintain their position as world leading builders of RVs.

THE FUTURE OF CARAVANNING

The coming decade and beyond will see the most radical changes to the way that Australians drive, including the towing of their caravans, with the progressive take-up and transition to electric vehicles. The Australian weekend and Australian way of life

through caravanning can very much be retained but will need forward planning in the coming years.

With the future steady rise of electric, hybrid and hydrogen powered vehicles, (although their volumes and percentage take-up of new sales remains less predictive) this sits alongside the development of autonomous vehicles which are already being trialled around the world. EVs and driver-less vehicles are major, but not insurmountable disrupters. But their rise in take-up will fundamentally change almost all aspects in the way that consumers engage with caravan and camping industry, particularly regarding towing technology for caravans. These have acute future impacts on regional and rural communities, including Australia's domestic visitor economy where caravanning is the largest sector, if policy remedies and co-collaboration between industry and government does not occur.

The inevitable electrification of Australia's vehicle fleets, whilst it will not occur until well into the next decade, poses a significant challenge for the caravan and camping industry with electric vehicles (EVs) currently in-market lacking the capability to tow caravans any meaningful distance. An EV could not perform the 'traditional lap' of Australia by caravanning families and cohorts, given existing technology and the paucity of charging stations across the country.

ROLLING ANNUAL RV MANUFACTURING IN AUSTRALIA

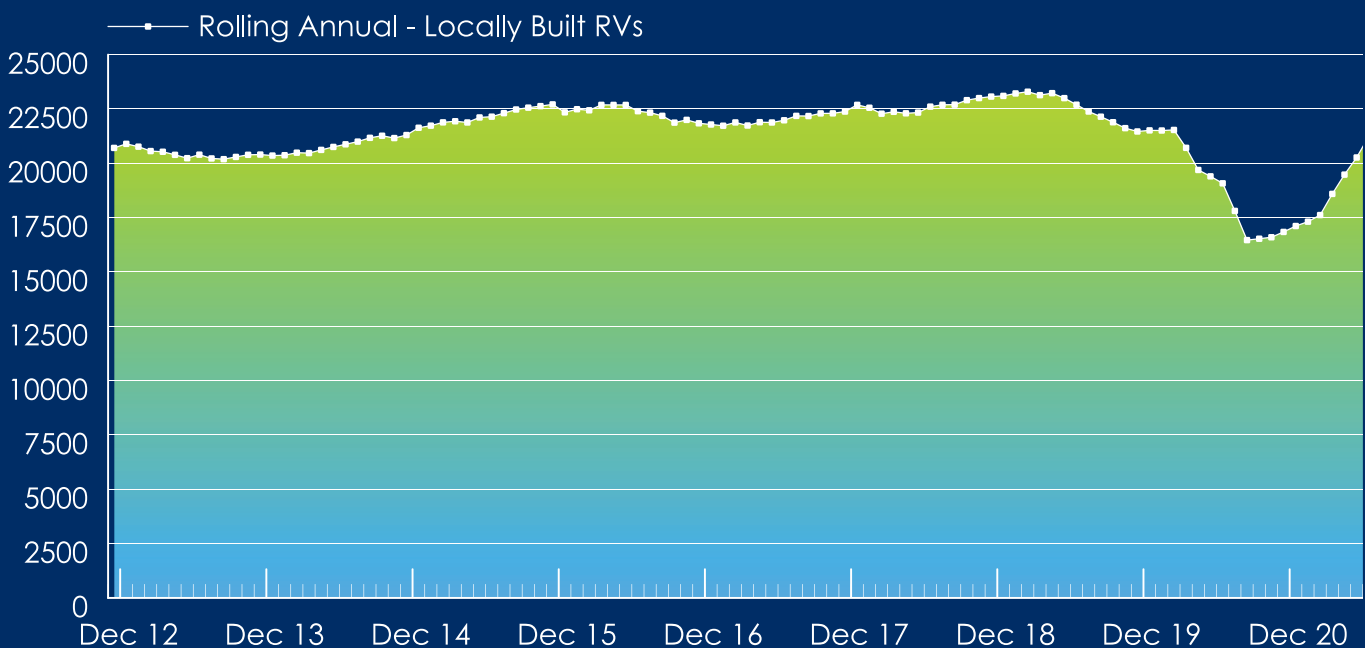


Figure 3: Rolling Annual of RVs built in Australia. Source: NEM Australasia 2021.

THEME 1

This is a significant disrupter for our country's largest domestic tourism and vehicle manufacture sector and is not well-understood by authorities and the wider public. Through this transition we wish to be a constructive and collaborative partner as Australia's roads and transport move towards a lower carbon future, with informed debate.

As an industry sector, we are determined this issue (of not being able to tow a caravan any great distance and poor EV charging infrastructure) can be overcome. With solutions, not politicised slogans, we believe this can be achieved through technology, product and market innovation, to support the necessary and inevitable transition, as vehicle supply, designs, infrastructure and capability can support EVs towing caravans. With the right incentives, regulatory and policy prescriptions and a forward strategic vision, the Australian caravan and camping industry could become the global leader in this transition, but success should not be presumed.

The industry wishes to play a constructive role in the slow, steady transition of Australians' vehicles from combustible fuel powered to electric and other cleaner energy means as part of our nation's commitment to net zero emissions by 2050. Transition for our sustainable sector needs time and needs collaboration and partnerships to tackle and seize the opportunity. This needs to start now!

Fundamental to this will be creating space and increasing collaboration between industry bodies, the educational sector and businesses to promote innovation and adaptability through the fourth Industrial Revolution, the rise of EVs. It also requires a true partnership between industry and the federal government on this journey.

Infusing industry with technology will ensure that Australia retains and grows the amount of jobs available in local caravan and camping manufacturing and continues to grow export markets by taking a global lead.

Caravan Industry Association of Australia looks forward to being at the forefront of engagement on behalf of our forward-facing sector.

EXPORT VALUE (FOB) OF RVs & COMPONENTS

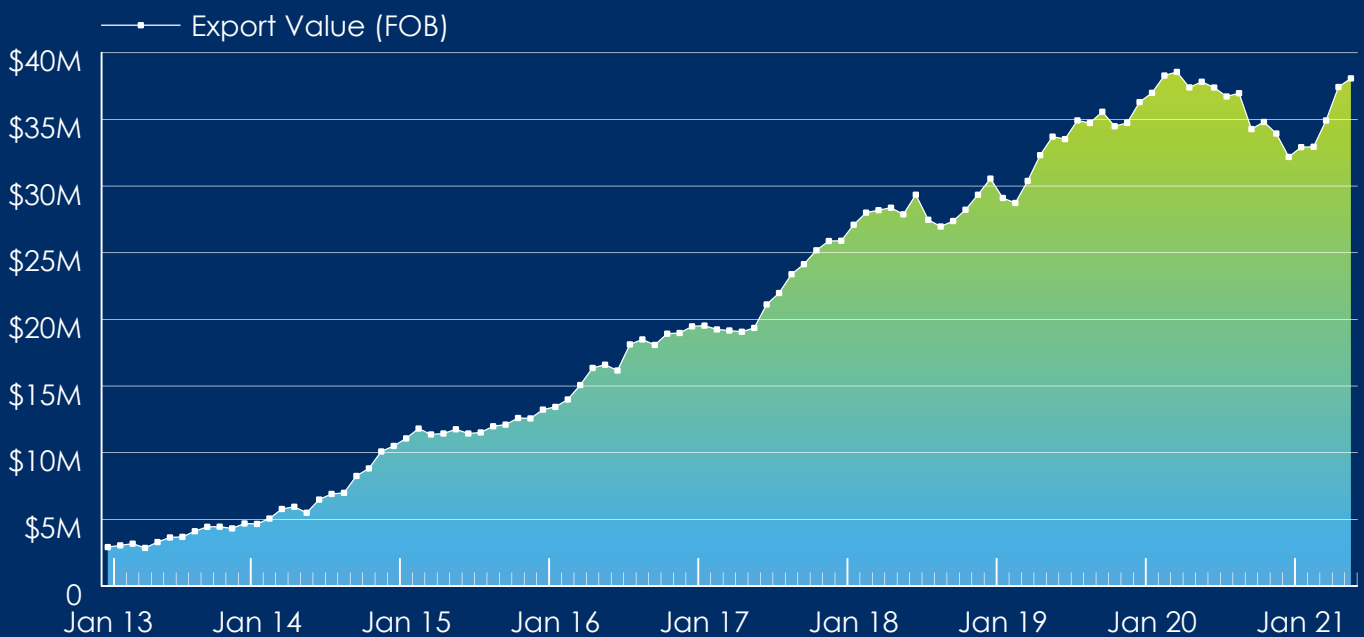


Figure 4: Exports of Trailers and semi-trailers of the caravan type, for housing or camping and parts thereof. Data Source: Australian Bureau of Statistics, 2021.

THEME 1: PROJECTS & POLICIES

RV MANUFACTURERS MODERNISATION FUND

This proposes co-funding of a 2:1 (caravan business enterprise : government) initiative for manufacturers in the recreational vehicle sector to the value of \$20M (federal government investment). An established [RV Manufacturers Modernisation Fund](#) - would help modernise production methods, install new equipment and technologies and encourage innovation and investment in the sector, including the future transition to lower carbon emitting towing vehicles such as EVs.

The fund could be used to adopt and scale new technologies, including 3D printing and the integration of composite materials. It could also be used to expand their footprint by building new manufacturing facilities. This would allow the industry to further modernise and expand, increasing existing production levels, boost exports, and create more local jobs.

It would also assist local manufacturers and suppliers to look toward advanced manufacturing processes which have been taken up in other industries, and adjust their manufacturing to reduce emissions and improve efficiency.

KEY INITIATIVE:

**\$20M TO SUPPORT AN ADDITIONAL \$40M
IN PRIVATE INVESTMENT TO ADOPT AND
SCALE NEW TECHNOLOGIES IN AUSTRALIAN
RV MANUFACTURING**

An estimated 400+ jobs could be created by a Fund investment of \$20M supported by an additional \$40M of private investment.

The fund will also help facilitate a path to progress through this decade and beyond 2030 around lower carbon emitting towing vehicles and how caravan and RV manufacture can play its role (such as lighter, stronger and safer RVs).



RV INNOVATION HUB - LONGMAN

Caravan Industry Association of Australia is looking to partner with the federal government to develop an RV Innovation Hub for advanced recreational vehicle manufacturing businesses. As a new centre-of-excellence, the hub would facilitate and foster collaboration between RV manufacturers, component suppliers, research and development teams and universities to combat the challenges ahead.

Recognising the progress towards lower carbon-emitting vehicles on Australian roads, including EVs, and the disruptive nature of this technology on caravanning road trips/holidays, establishing such an Innovation Hub could not be more timely. It would aid the industry in adapting and evolving to continue its position as a valuable part of the Australian 'way of life' and as a major, sustainable economic contributor in the future low carbon economy.

There is a clear need for the Australian caravan and camping industry and the federal government to rethink and collaborate on how these advances in technology can fit in with the industry.

KEY INITIATIVE:

\$600K FOR A FEASIBILITY STUDY FOR THE CREATION OF AN RV INNOVATION HUB, CONSUMER INSPECTION AND DRIVER TRAINING PRECINCT IN THE ELECTORATE OF LONGMAN



We also recognise there are many new caravanning consumers who have been and will be attracted to the industry through COVID-19 and beyond. This innovation hub provides the opportunity for RV testing, education and driver training for caravanning consumers looking to enjoy a safe caravanning experience.

Taking into consideration the proximity to existing bespoke and innovative RV manufacturers based in the northern suburbs of Brisbane and beyond, as well as an estimated 180,000 registered recreational vehicles within 4 hours of Caboolture – 22% of the total fleet in Australia, it is considered that this RV Innovation Hub should be ideally located within the electorate of Longman, Queensland. The by-product of such an investment in Longman will see job creation in an important and growth population corridor, while also providing hands-on experience for local youth looking for potential trade career paths. Caravan Industry Association of Australia would work and collaborate with the Commonwealth (and would seek appropriate assistance through our caravanning state association and the state and local governments) to locate this hub in the best interest of the sector and economic outputs, leveraging the economies of scale available through a collab style hub while stimulating potential job growth.



(FEDERAL ELECTORATE OF CALWELL, VIC)

Concept Caravans was established in 2004 and is a top 5 manufacturer in Australia. In addition to the 'Concept' brand, Concept Caravans has revitalised three brands from the 1960s: Newlands, Franklin and Viscount and has recently expanded their manufacturing facility to 14,000sqm across seven sites in Melbourne's north. The company today employs 165 workers, which represents significant growth from the one site, which began with just seven employees.

A key component to their growth has been the ability to adapt to technological changes; a consistent challenge in the industry and one which needs to be strengthened moving forward.

This includes:

- Technology with manufacturing
- Technology with consumer interphase and digital sphere
- Technology with materials and appliances

These need to be addressed constantly to be more viable in the market, particularly with the emergent level of global competition that is entering the market.

Concept Caravans take a conservative view to their expansion and post-pandemic growth is not a driving factor for this. However, their assessment has determined that they will have to cater for additional future growth, in a two-stage process, one short-term and another in the medium-term.

Increases in competition and RV imports, along with the increased cost of embedding technological changes in local product, will mean that companies like Concept Caravans, will expand future production. But it could come at a future cost of some local jobs as both technology and levels of competition will leave few choices other than looking for outsourced technology and parts options for their business operations. The value of the AUD against key currencies is also a mitigating factor.

BUSINESS PROFILE



THE POWER OF
REDARC[®]

(FEDERAL ELECTORATE OF KINGSTON, SA)

REDARC Electronics was founded in 1979 in Adelaide, South Australia. In 1997, owners Anthony and Michele Kittel purchased the business with eight employees. Under the current ownership, REDARC grew and in 2014 won the Telstra Australian Business of the Year. In 2015 it acquired Hummingbird Electronics in NSW.

Today REDARC Group (REDARC) operates in a state-of-the-art advanced manufacturing facility, employing over 300 people nationally and abroad, of which over 50 are full-time engineers.

REDARC is a major supplier to caravan and camper manufacturers and the 4WD aftermarket. Their products include RedVision a Total Vehicle Management System that allows the control and monitoring of multiple on-board devices in a 4WD, caravan, camper trailer, or motorhome in one place. RedVision was awarded the Caravan Industry Association of Australia's inaugural Gerry Ryan OAM Award for

Innovation, and has also been named the Australian Industrial Product of the Year at the 2019 Endeavour Awards.

With a growing export portfolio, the time is right to bring more attention than ever to Australian-made products and REDARC believes that 'Australian made' is a point of competitive advantage. In 2020 REDARC was awarded the Global Supply Chain Integration of the Year at the Manufacturers' Monthly Endeavour Awards and named the Manufacturers' Monthly Exporter of the Year.

THEME 2: SUPERCHARGING AUSTRALIAN TOURISM FOR RECOVERY

Australia's caravan and camping industry was the biggest domestic tourism market segment pre-COVID and has only extended that margin of difference as the largest domestic tourism sector in the new COVID-economy. This marks a historic and long-term trend that can be sustained into the future and will be necessary to support Australian Tourism's sustainable COVID recovery, underpinned by federal strategies like THRIVE 2030.

STRONGEST PERFORMER OF 2021

The caravan and camping industry is at the front and centre of Australia's tourism recovery despite the immense hurdles placed before it throughout 2020 and 2021. But even among government and tourism leaders, this is not a well-known or well-informed point.

For the year-ending September 2021, there were 12.8M caravan and camping trips taken, despite the crippling impacts of the COVID-19 pandemic and collective governments' approaches to hard border closures and restrictions, including state/territory borders which greatly hamstrung caravan and RV vehicle movement and border crossings. This performance underscores the pent-up consumer demand for caravanning holidays and short breaks in the years ahead, matched by the quality product of Australia's caravan parks and camping grounds.

BEDROCK OF DOMESTIC TOURISM

Australia's domestic tourism industry will be dramatically challenged in the coming years (2022 and 2023), due to the disruption of the pandemic, and post COVID outcomes. The release by Austrade of THRIVE 2030 strategic outlook is welcomed by the Caravan Industry Association of Australia. In its early form, THRIVE 2030 indicates potential recovery in 2024 to pre-pandemic levels, led by a domestic

tourism rebound, in the absence of overseas visitors and travellers.

Our industry sector embraces competition. But as outbound international travel begins to reopen to Australians and airlines come back online to service the lucrative Australian traveller to overseas destinations, the pent up demand for our citizens to again travel abroad to visit friends and relatives and tourist travel, is real.

Prior to the pandemic, Australian tourism serviced record numbers of international inbound tourists, as well as record numbers of Australian overseas outbound trips. Similarly, Australia experienced record domestic tourism, strongly driven by caravanning, and more broadly road-tripping.

Australia has seen record levels of outbound international travel in the past, a significant but underestimated competitor to local tourism. Our industry does not ignore or oppose this market reality, but instead strives to capture a greater share of Australia's household travel, leisure dollars, and time spent on discretionary activities.



Despite the resilience of the Australian caravan and camping industry, Australia's overall tourism economic value halved over the pandemic in the 18 months to mid-2021. This was largely due to closed international travel and heavily restricted state and territory borders.

A continued focus on, and investment in, domestic tourism is vital to continue to inspire and capture Australian spend and sustain the industry (as taken up by THRIVE 2030 and other federal tourism initiatives), in this new, changed environment until inbound international tourism returns in any meaningful way

Caravanning and camping facilities can lead in this regard but our voice needs to be heard and respected in policy making.

SUPPORT OF NEXT LONG-TERM NATIONAL VISITOR ECONOMY STRATEGY

Support of this next strategy, recently outlined as THRIVE 2030, is a follow up to Tourism 2020. Caravan Industry Association of Australia believes a federal visitor economy strategy for the next decade and beyond, is both warranted and vital to ensure a sustainable revival of the tourism industry and support of industries can be underpinned.

On this front, it is imperative that government(s), including the commonwealth and states, and industry

can collaborate and can again grow our wider industry in a sustainable way.

'Reimagining the Visitor Economy', the important work undertaken by Austrade during 2021 and headed by former Federal Tourism Minister, Martin Ferguson, facilitates the type of government/industry collaboration we endorse. It is the basis for the vital re-start to help again establish Australia's reputation as the world's best domestic and long-haul tourism destination. This includes a future anticipated, pre-eminent long-haul visitor market; one where some cohorts (including Backpacker / Working Holiday Makers and visitors from Asia and Europe) have historically embraced caravanning through Australia.

However, this next federal strategy will need to be underpinned by investment and support from industries (including us), the private sector and all of government, but must be strategically led by the commonwealth.

Moreover, it is vital that peak industry bodies, such as Caravan Industry Association of Australia, are recognised and offered the opportunity to participate and effectively contribute to the delivery of policies and programs and acknowledge advocacy in underpinning the future program.

It is important to note, our organisation is the leading researcher, gatherer and deliverer of data and insights for the caravan industry and RV manufacture data in Australia. We already supply a number of federal and state government authorities and agencies and have the potential to play a far greater role in this area.

TRIPS, NIGHTS & REGOS BY STATE





INCREASED ROLE FOR TOURISM AUSTRALIA

Caravan Industry Association of Australia supports and advocates for a continued, strategic role for Tourism Australia (TA) in our domestic industry beyond the end of FY22. This decision requires no regulatory change, rather a direction by the Federal Government to be recognised and adopted into TA's Corporate and Strategic Planning processes.

Domestic tourism has historically been part of TA's corporate plan and strategic intent. The national agency can bring a unifying role to drive specific, targeted and research driven outcomes to sustainably re-build and expand our local tourism economic pie which domestically has sat at least 70% of our entire visitor economy. Further, the release of THRIVE 2030, out of the Reimagining the Visitor Economy initiative, has highlighted the strategic need for domestic tourism (and key categories of it that move well beyond state and territory borders) to deliver coordinated, strategically driven outcomes.

Domestic tourism remains the bedrock of our industry and this will not change for many years to come.

We see important, strategic initiatives and support the activities of TA in ongoing and new initiatives. Examples include national (across state/territories) road journeys; co-partnerships and key-collaboration with industry; an acute national focus on regional tourism product and its promotion to a national audience; as well as fostering important areas such as accessible tourism and indigenous visitor experiences where caravan parks can play an important role.

TA's prowess in digital marketing and campaigns is unprecedented in our country. So they should be tapped to help address still low digital capability across many of our nation's predominant tourism SMEs including some caravan parks.

The efficient and effective communication of market insights, including consumer and market trends, from TA's well of research will boost innovation in the domestic market. This will improve dissemination and foster partnerships with key sectors like ours.

It is not lost on our sector that record levels of annual leave remain on Australian businesses and government books, exacerbated by the impact of the pandemic. However, previous successful national campaigns such as 'No Leave, No Life' addressing similar issues, show the proven value of the national tourism agency in supporting a stronger and more sustainable visitor economy.

Caravan Industry Association of Australia is also now building creative linkages between Australia's tourism and agricultural industries, which would best benefit from a national interface.

Whilst TA has only recently returned to domestic campaigns following the devastating 2019/20 Bushfires and the COVID-19 pandemic through PR partnerships, shared insights and industry communication; it should retain its presence within Australia's domestic tourism market activity until the end of 2025 before review. It is simply too early into the new COVID economy for TA to walk away and solely target the international market.

THEME 2: PROJECTS & POLICIES

MAINTAINING DOMESTIC TOURISM MARKETING FOCUS UNTIL 2025

Caravan Industry Association of Australia is calling on Tourism Australia to remain in domestic marketing until the end of 2025. Tourism Australia, post the 2019/20 bushfires, was instrumental in highlighting the value of local tourism to regional Australian destinations and stimulating demand through their 'Holiday Here this Year' campaign.

Campaigns such as this, and a series of collaborative industry partnerships, whilst successful in the short-term, need to be reinvigorated, strategically focused and extended until end of 2025. This will continue to stimulate the local market in domestic Australian experiences.

KEY INITIATIVE:

ADDITIONAL ALLOCATION OF \$50M FOR TOURISM AUSTRALIA TO CONDUCT DOMESTIC MARKETING THROUGH PARTNERSHIPS & NATIONAL COLLABORATIONS (E.G. JOURNEYS & ROAD TRIPS)



There is no regulatory constraint to TA being in the domestic market. This has historically been a long-term position and its continuation into FY22 and out to FY25 can simply be agreed by the Federal Minister and the government and be part of TA's corporate and strategic planning.

We also believe this position has strong bipartisan support.

TA's continued presence in support of domestic tourism can continue to stimulate and specifically target the largest consumer segment (the domestic traveller) to travel more often, travel further, disperse better and spend more widely.

Its success and outcomes can then be regularly reported back to industry, including through public forums and internal insights.

LABOUR FORCE SOLUTIONS: FOREIGN & DOMESTIC

In line with the broader tourism sector, caravan parks are experiencing acute labour shortages, particularly in remote, regional, and rural areas. Multiple policy responses directed at both the domestic and international workforce will be required to address the issue.

Whilst the November 2021 announcements regarding the reopening of Australia's border to Working Holiday Makers (WHM) and other visa holders were welcomed, more needs to be done to bolster the local labour capacity over time. This is an acknowledged issue across Australian industry.

The Final Report of the "Inquiry into the Working Holiday Maker Program" by the Joint Standing Committee on Migration (2020) strongly highlighted the important role that WHM visa holders can play in complementing staff resourcing and seasonality issues experienced across the visitor economy and included many bipartisan agreed findings.

In particular, Caravan Industry Association of Australia strongly supports recommendation 3 of the report:

- The Committee recommends that Working Holiday (subclass 417) and Work and Holiday (subclass 462) visa holders should be able to work in tourism and hospitality in all hard-to-staff rural and remote areas of Australia as part of their 88 days or 6 months to qualify for their second- or third- year WHM visa.

KEY INITIATIVE:

REFORM OF THE WHM VISA SYSTEM (IN LINE WITH RECOMMENDATIONS MADE BY JOINT STANDING COMMITTEE ON MIGRATION) TO EXPAND ELIGIBLE WORK TO ALL HARD-TO-STAFF REGIONAL AREAS OF AUSTRALIA

It will take great efforts to recapture a significant share of the WHM market, also taking into account Australia's successful, but outward-looking, isolationist approach to managing COVID-19 since its onset.

Tourism Australia (TA) is perfectly situated to re-pitch and re-position Australia as an attractive, safe, accessible and leading destination for current visa holders and future Working Holiday Makers. A major marketing campaign later in 2022 and ongoing, led by TA in collaboration with industry, would aid Australia in rapidly regaining its position as a top 3 global WHM visitor market.

To compound this, a major advertising campaign aimed at Australians highlighting the opportunities to work in regional areas would further alleviate the staff shortages currently facing industry and regional Australia at large.



INSURANCE REFORM



Access to affordable and viable insurance is a fundamental need for all businesses. It is vital in stimulating investment from the private sector, including the caravan industry, into developing and building tourism-related infrastructure that creates jobs and puts value into local communities. The dire business insurance situation in our visitor economy was recognised in the Australian Small Business and Family Enterprise Ombudsman's (ASBFEO) 2020 Report and continues to be reinforced by the current ASBFEO as a major issue.

Our industry has provided many examples of communal facilities and leading product being closed in caravan parks (such as jumping pillows, swimming pools, etc.), simply for the parks inability to obtain insurance cover.

Additionally, many caravan industry businesses have faced annual insurance-product rate hikes of between 40% and 500%+, which is unsustainable and further exacerbated by the COVID-19 pandemic. The insurance product offering is in major need of reform to allay property and public liability insurance.



EXPANSION OF CYCLONE REINSURANCE POOL

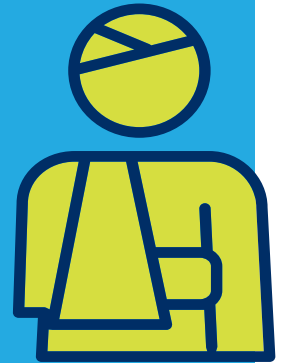
It is pleasing to finally see federal government involvement in identifying solutions for businesses affected by natural disasters, including cyclones. However, the proposed reinsurance pool for cyclones needs to be significantly expanded if access to affordable insurance is to be realised.

There are an estimated 400 caravan parks that require cyclone insurance coverage. Yet, there are many more caravan parks requiring bushfire insurance and other natural disaster protections. While Caravan Industry Association of Australia is optimistic that this legislation is a step in the right direction towards combatting under-insurance and non-insurance amongst businesses, the reinsurance pool needs a massive upscaling to deliver any real benefit to Australian SMEs, caravan parks included.

Summary of Recommendations:

- 1: Increase the coverage of the pool to cover ALL natural disasters (not solely cyclones as declared by BOM)
- 2: Increase of the threshold of 'Total Sum Insured' from \$5M to adequately cover SMEs.
 - to at least \$10M, but preferably \$25M
- 3: Extend 48 hours of damage post weather event
 - to at least 96 hours, but preferably 168 hours (1 week from end of event).
- 4: No insurer should be able to receive an exemption to participate in the pool.
 - inclusion of Lloyd's underwriters in proposed legislation
- 5: Hail damage, during a cyclone period, be regarded as a loss.

CIVIL INSURANCE REFORM



Obtaining property and public liability insurance is the single biggest issue currently facing caravan park operators. Caravan parks across Australia, from northern Queensland to Victoria, top end, Central and Western Australia are collectively struggling to find or afford public liability and/or commercial property insurance.

In support of Insurance Council Australia, The next Australian Government must:

- Lead a national review of tort law which will examine the impact current legislation is having on small and medium businesses, including the caravan park sector, in particular their ability to access appropriate insurance.
- Fund training and education programs to improve risk management and national standards across industry sectors experiencing a higher frequency of personal injury liability claims.

Obtaining property and public liability insurance has been a recognised issue since 2019; the ASBFEO Insurance Inquiry (the 'Carnell Report') highlights recommendations which Caravan Industry Association of Australia is strongly advocating.

In Support of ASBFEO Recommendations:

- #5: Liability for personal injury should be subject to statutory caps.
- #7: Where there is only one or no insurers left in a professional indemnity market, the Federal Government should provide an insurance scheme of last resort for SMEs.
- #8: Expand the Australian Reinsurance Pool Corporation to provide reinsurance for all-natural disasters for commercial property insurance.
- #12: Decisions about claims should be shortened:
 - For general time frames from 4 months to 3 months.
 - For 'extraordinary catastrophes' from 12 months to 4 months.

Our nation's business insurance crisis is well-acknowledged by the Australian government and across the bipartisan divide. It now requires action and intervention for a sustainable long-term outcome. Caravan park operators are being forced to close existing tourism product when faced with the unaffordable and unconscionable insurance premiums being seen in the current market. These products are demanded by the industry's consumer base and offered ad nauseum in overseas markets.

Caravan Industry Association of Australia is working with Insurance Council of Australia, insurers and industry businesses to find practical solutions to this long-standing, yet growing issue.



BUSINESS PROFILE



EDWARDS GROUP (FEDERAL ELECTORATE OF CHAFFEY, SA)

Edwards Group is responsible for running some of South Australia's premier tourism and lifestyle destinations. This family owned and operated business is currently taking big steps forward in the lifestyle living industry, among other innovative ventures.

The Edwards Group was founded by Ian Edwards when it acquired one small caravan park in Wallaroo, South Australia in 2002. Over the next 10 years, the Group acquired two more parks that were run by the Edwards family along with a small group of employees.

From 2012, the Edwards Group changed direction and began its streak of sustained growth that is continuing today.

2014 -
Purchase of the Riverbend Caravan Park, Renmark

2016/17 -
Development of the new Waikerie Holiday Park – the first new tourist park developed in South Australia in over 20 years

2018 -
Development of Stages 2 and 3 of the Waikerie Lifestyle Village

2019 -
Purchase of the Windsor Gardens Caravan Park

2019/20 -
Development of Stage 4 of the Waikerie Lifestyle Village

2021 -
Purchase of the Naracoorte Holiday Park

2022 -
Purchase of the Port Pirie Beach Caravan Park

The Edwards Group is now the second largest owner and operator of parks in South Australia with operations in both the tourism and land lease sectors. Today they employ over 60 people, the majority of which are in regional areas.



WHITSUNDAYS CARAVAN PARK OPERATOR¹ (FEDERAL ELECTORATE OF DAWSON, QLD)

¹Business name has been omitted for privacy reasons.

Three weeks out from the date of renewal, the caravan park's current insurer refused to renew the product. The caravan park owner looked all over the world and only received one offer.

Despite six cyclones hitting the area since the park opened, this property has only had one claim in 28 years. The claim was for \$1.1M following cyclone damage. Even so, their policy premium has gone from \$295k to \$840k annually, with a \$1M excess.

The insurer provided a 2-day window to decide whether or not to take this offer. The operator is now deciding whether to stay open at the end of this period. They are considering dropping from 70 to 25 staff and removing some park facilities.

“ We need a massive overhaul on the insurance industry and we need help now, we will lose so many businesses and our industry could really suffer over this issue. I tried every Avenue to find insurance and had three brokers at once out there looking for us and nothing. Capping on accident and no win no pay lawyers are a huge issue that are ruining so many businesses ”

– Owner, Caravan Park Operator in Whitsundays.

THEME 3: FUTURE PROOFING THE CARAVAN & CAMPING INDUSTRY

The caravan and camping industry in the coming decade will face unprecedented challenges regarding its ongoing viability, as motor vehicles of choice for Australians are gradually electrified.

94% of RVs manufactured in Australia are towed vehicles, with 65% of these being caravans (2020 figures). This makes the industry heavily reliant on which types of cars are making their way onto Australian roads, with max towing capacity being a vital metric in choosing an appropriate towing vehicle.

Collectively there are over 6,000 RV manufacturers, RV suppliers and caravan parks across the nation. The industry will require assistance to adapt to a future with fewer combustion engines and less towing capacity, which threatens its long-term viability.

CONTRIBUTING TO NET-ZERO BY 2050

Significant collaboration is needed between the caravan industry, businesses and universities to identify opportunities for the industry, and how the sector can contribute to Net-Zero emissions by 2050. This will involve research and creative partnership between industry bodies, private enterprise and the federal government.

The bipartisan plan to reach Net-Zero by 2050 must be supported by funds, roadmaps, and sector-specific goals that enable the industry to contribute to targets.

FACILITATING EV TRAVEL TO THE REGIONS

If EV regional travel is to become reality, it is private enterprise that will have a critical role in adapting the infrastructure through EV charging points and battery technology. Encouraging private investment in charging points will extend the electric vehicle charger network into regional Australia and ensure EV travellers aren't restricted to city travel.

Australia's caravan parks are well placed to provide overnight charging facilities to ensure that future EV owners have the confidence to travel beyond major cities and regional hubs and know they have a place to recharge.

PRODUCT DEVELOPMENT

Caravan parks account for one-third of all commercial holiday accommodation in regional Australia. Investment in this sector would stimulate job creation and supplement local workforces, including tradespeople, with the construction of new facilities and accommodation. As a result, local visitor economies directly benefit from increased visitation to a region.

Some 60% of caravan park revenue now comes from cabins and roofed accommodation – which has risen in the past decade as caravan parks opt to invest in higher quality and more bespoke accommodation options (e.g. glamping) in line with market demand, and corporate need.

THE FUTURE OF RV TRAVEL

Increasingly, new adaptations on the way our industry product is used are coming online in the caravanning and camping sector which promote travel within regional Australia by new consumers who may be historically naive to our industry offerings, or which solve essential localised problems. These include peer to peer technology platforms to support the RV sharing economy, and the use of RV product for temporary accommodation purposes around seasonal harvest trails or for displaced persons as a result of natural disasters. This has recently been seen through the NSW and QLD flood disasters.

THEME 3: PROJECTS & POLICIES

RESIDENTIAL LAND LEASE COMMUNITIES

Residential Land Lease Communities facilitate independent living in a supportive environment for Australian families, semi-retirees and retirees. Residential Land Lease Communities are not just about retirement and also offer long term home ownership and housing solutions to a diverse age cohort.

There are over 100,000 Australians living in residential land lease communities and caravan parks around Australia and this is predicted to have strong and ongoing growth.

People who live in a Residential Land Lease Community own their home and lease the land upon which the home is situated. This makes the cost of entry significantly cheaper than surrounding residential property, providing for the release of equity for positive living choices. Many of these people have downsized their homes, rightsized their lives, freeing up housing stock for the next generation of home buyers and capital for the economy.

KEY INITIATIVE:

WORK WITH INDUSTRY TO INVESTIGATE APPROPRIATE SECURITY MECHANISMS WHICH ALLOW FOR RESIDENTIAL LAND LEASE COMMUNITIES TO PARTICIPATE IN FUTURE HOUSING STIMULUS PROGRAMS

Housing is integral to people's wellbeing, particularly for older Australians. For many older people, home ownership provides security and independence in retirement, with older Australians strongly preferring to age in place. Yet, recent government programs such as Home Builder and the Pension Loan Scheme have excluded the sector due to home owners being unable to provide title on the land.

Most people are happy staying in their family home, despite a common perception that such homes are too big for them. For others, age-specific housing options provide more integrated accommodation and care, offer a way to release home equity, and may delay entry into residential aged care.



REGIONAL INVESTMENT

Australia today houses 2,000 caravan parks which are responsible for an estimated 15,000 direct employees and tens of thousands of indirect employment roles.

This co-investment proposal would reinvigorate investment spend by caravan parks and greatly increase the number of jobs in regional areas. The building of a cabin for example, not only supports the initial construction, but subsequent maintenance and cleaning personnel, having an extensive economic flow-on benefit to the wider local community. A recent study by BDO highlighted that every \$1M of additional caravan park revenue supports 12 FTE jobs, many of which are located in regional communities.

Moreover, it would increase capacity and destination attractiveness for visitation, which in turn would increase sales in local food and beverage, fuel, retail, and attractions.

The proposed co-investment would also encourage regional businesses to integrate EV charging infrastructure, thereby expanding the EV network's reach into regional Australia.

KEY INITIATIVE:

\$15M (3:1 BUSINESS : FEDERAL GOVERNMENT) MATCHED CAPITAL EXPENDITURE GRANTS TO SUPPORT FACILITY UPGRADES & INVESTMENT IS ESTIMATED TO STIMULATE AN ADDITIONAL \$45M FROM THE PRIVATE SECTOR.





THE CARAVAN INDUSTRY & NET ZERO EMISSIONS

The transition to electric vehicles (EVs) represents a disruptive force for the caravan and camping industry that cannot be overstated. Our \$23B industry must be given the chance to adapt to future market conditions, address threats and subsequently accelerate forward as we embrace change and contribute to a Net-Zero future.

A government/industry partnership is proposed to report on the emissions that the caravan and camping industry is responsible for and to identify how the transition to net-zero emissions will impact the caravan and camping industry.

In line with the bipartisan move towards Net-Zero emissions by 2050, this report will also identify where caravan parks, manufacturers, suppliers and consumers can reduce their emissions and, where this is impossible, how offsetting can reduce the net impact of these emissions.

This study may also identify how businesses can leverage future investment opportunities and change their business models to reduce emissions while remaining profitable.

KEY INITIATIVE:

PROJECT TO DETERMINE THE CO2 EMISSIONS THAT THE CARAVAN AND CAMPING INDUSTRY CONTRIBUTES AND IDENTIFY HOW THESE EMISSIONS CAN BE REDUCED OR OFFSET.

This is proposed to be a joint partnership between Federal Department of Industry, Energy and Emissions Reduction, Caravan Industry Association of Australia, and a range of universities. A study of this nature is estimated to cost \$1.5M.



ENERGY UPLIFT SCHEME FOR CARAVAN PARKS

The cost of electricity is the second-largest expense for a caravan park, after wages. In addition to this, the vast majority of Australia's caravan parks are situated in regional areas and have ageing infrastructure that causes increased running costs and emissions. Overall occupancy costs (of which electricity makes up the majority) have increased 45% over the last ten years (BDO, 2021), and greatly impact a park's bottom line.

Caravan Industry Association of Australia proposes a program that mirrors the 2020 'Hotel Energy Uplift' scheme delivered by Department of Industry, Energy and Emissions Reduction. The program would focus on upgrading equipment to reduce and monitor energy consumption. It would assist 500 caravan parks in improving and modernising their facilities (based on a \$10,000 grant per business, matched at 1:1 by the business) and stimulate job creation and \$5M in private investment.

KEY INITIATIVE:

A \$5M PROGRAM TO MIRROR THE 2020 'HOTEL ENERGY UPLIFT' SCHEME BASED ON A \$10,000 GRANT PER BUSINESS AND MATCHED AT 1:1 BY THE GRANTEE. ASSISTING INDUSTRY IN REDUCING ITS ENERGY CONSUMPTION AND CARBON EMISSIONS BY UPGRADING INFRASTRUCTURE AND EQUIPMENT.





(FEDERAL ELECTORATE OF SHORTLAND, NSW)

Camplify is Australia's leading peer-to-peer (P2P) digital marketplace connecting recreational vehicle (RV) owners to hirers, enabling everyone to experience camping holidays and van life.

Online travel is a highly complex and competitive industry and evolution is core to Camplify's approach. Camplify's innovation and success speak to Camplify CEO and Founder Justin Hales' original vision - helping people to experience van life and to be an enabler for van owners to achieve their financial dreams. Camplify is super-charging Australian tourism with fast-growing operations in Australia, New Zealand, the United Kingdom and Spain.

Camplify has helped travellers enjoy more than 1.5M nights under the stars. Many of them – and the associated tourism dollars – were spent in regional and rural Australia. Camplify welcomed more than 51,000 new customers in FY21, and an additional 19,898 customers in Q1 FY22 as travellers embrace hiring a van for their travel accommodation

Camplify is a future-facing business that's enabling and empowering Aussie SMEs and is creating new, tourism-fuelled income for anyone who owns a van. Van owners earn money and build their incomes and small businesses ('van-trepreneurs') by sharing their van with others (i.e, putting their van 'to work' when they're not using it, helping them to save for holidays, pay off loans or start their own business). Camplify has paid more than \$35M in hire income to van owners in its community.

It was not so long ago, Camplify was an Australian regional start-up. Camplify's van-sharing service was conceptualised in 2014, founded in 2015, and listed on the Australian Securities Exchange in June 2021 (ASX: CHL) with an IPO of \$11.5M AUD; which was four times oversubscribed. In the months following its listing, Camplify's share price tripled. The Camplify platform was designed, created and continues to be managed by a highly diverse team of engineers based in Newcastle, NSW.

BUSINESS PROFILE



Tourism Holdings Limited (thl) is the world's largest RV rental operator.

thl has 10 Australian locations providing rental campervans, an RV manufacturing plant in Melbourne and a national vehicle sales dealer network. It has 35% share of the RV rental market with 1200 motorhomes and 120+ employees.

thl encourages regional dispersal, delivering valuable tourism dollars throughout the country – particularly important post-2019/20 bushfires and COVID to help affected communities. thl is a Future-Fit business; one which contributes to a Future-Fit Society. In essence, all business decisions are designed to ensure they are environmentally restorative, socially just and economically inclusive.

Domestically, COVID birthed the 'Year of the Road trip' with a record number of new customers hiring or buying their own motorhome. However, the domestic market opportunity was severely impacted by the populous cities of Melbourne and Sydney being unable to travel.

The non-tourism business opportunity commenced immediately on border closing in April 2020. A Business Development scrum team unit was formed to connect to 4,000 non-tourism entities with a use case for the motorhome fleet that would meet their needs. This resulted in providing NSW Health and VIC Health with RVs as emergency accommodation for remote locations impacted by COVID outbreaks, worker accommodation for infrastructure projects in South Australia and film units for the burgeoning film production sector.

BUSINESS PROFILE



(FEDERAL ELECTORATE OF BOWMAN, QLD)

GREENPLATE® is an Australian owned and operated company based in Queensland that specialise in the design and manufacture of stainless steel Commercial Electric BBQs and Solar Electric BBQ Systems.

The client base includes a particular focus on the Caravan and Camping Industry. Greenplate is now recognised as a supplier of choice to several large Park Groups including Discovery/G'Day Parks, Big4, Ingenia and Reflections.

Their greatest attributes seen by this industry are their quality and reliability and, perhaps most importantly, well-documented power savings. Greenplate Electric BBQ Systems will draw, on average, 50% less power than competitor products with higher temperatures at the hotplate, consistently ensuring excellent cooking results.

THEME 4: IMPROVING SAFETY OUTCOMES

Recreational vehicle users travel more than a billion kilometres on Australian roads every year, making them a vital part of the road safety solution. Caravan Industry Association of Australia strongly believes that one caravan crash is one too many, and is committed to working through the Safe Systems approach from the Office of Road Safety to improve vehicle safety, boost consumer education and develop regional roads to a higher standard.

SAFER VEHICLES

A significant percentage of Australian road users are recreational vehicle users with over 800,000 RVs registered on Australian roads today. This figure represents a 4.5% annual increase and is the 10th successive year of growth of over 4% (ABS, Motor Vehicle Census, 2021). Improving the road safety of heavy mass vehicles is a policy priority in Australia, and as the largest remaining part of automotive manufacturing in the country, it is also one of the only sub-sectors where safety can be influenced at the point of manufacture.

Caravan Industry Association of Australia works closely with Vehicle Safety Standards (VSS), part of the Department of Infrastructure, to educate members of the industry about their obligations under the new Road Vehicle Standards Act (RVSA). Before the 12-month transition period closes, and RVSA takes full effect in July 2023, it will be necessary to significantly increase promotional efforts to capture manufacturers' attention at a time when the industry is primarily focused on commercial survival.

SAFER DRIVERS

Improving consumer education is a priority for Caravan Industry Association of Australia and currently, it

is estimated that only 5,000 individuals each year complete a towing course at one of the six nationally recognised providers in Australia. In a worrying statistic, it is estimated that only 5-10% of purchasers take a towing course, and while some owners have prior experience, many do not.

WIDER IMPACTS

The impact of accidents involving caravans and other RVs goes beyond the immediate harm to drivers and occupants but can have lasting psychological damage as well as significant disruption to other road users, particularly freight transport in regional Australia.

TECHNOLOGICAL ADVANCES

Australia is a global leader in towing related road safety technology. The world's first anti-lock braking system (ABS) for trailers was developed and released in Australia in 2020 by AL-KO and Bosch and is being rolled out into many new makes of caravan. Other key safety technologies, like sway control and electronic stability control, are being continually improved upon and adopted by the sector.

CARAVAN PARKS & SAFETY

Caravan Industry Association of Australia, in partnership with the Department of Health, has recently successfully distributed 870 defibrillators to caravan parks across Australia, with 50% of the cost subsidised by the federal government. So far, the lives of four caravan park visitors have been saved as a direct result of the subsidy program. This also highlights the vital role caravan parks can play in delivering positive community safety outcomes for not only their surrounding townships but the travelling public which frequent these businesses.



THEME 4: PROJECTS & POLICIES

ASSIST INDUSTRY'S TRANSITION TO RVSA AND SAFER VEHICLES

Support for the Recreational Vehicle Manufacturers Accreditation Program (RVMAP) would allow engagement with more businesses and further improve the recreational vehicle manufacturing sector within the construction phase of the product life cycle (safer vehicles).

Caravan Industry Association of Australia is well placed to facilitate an industry education program as it sits on six various committees with Vehicle Safety Standards (VSS) and two committees chaired by Standards Australia, and was deeply involved in rewriting the current Vehicle Standards Bulletin following changes to the legislation. To effectively manage these changes, an education campaign needs to be supported for the RV industry. The education program would ensure Australian businesses are equipped with the knowledge needed for a smooth transition to operating under the new legislation.

Road Vehicle Standards Act (RVSA) was passed in December 2018 to upgrade manufacturing and importation regulations of RVs in Australia. This will ensure that only new vehicles which comply with Australian safety standards make their way onto Australian roads. The new legislation will positively impact the RV industry in the longer term but requires major and expensive reforms to many local companies' manufacturing designs.

KEY INITIATIVE:

\$750K OVER THREE YEARS TO ASSIST INDUSTRY'S TRANSITION TO RVSA & SAFER VEHICLES THROUGH AN INDUSTRY EDUCATION CAMPAIGN



The timing of these changes in standards has been challenging for the industry. Mainly due to the impact of the COVID recession on Australian manufacturing capacity; most facilities were closed for months and 80% of manufacturing supply chains are reliant on Melbourne based facilities which experienced frequent and extended lock-downs. Despite this, the industry remains committed to the new 1 July 2023 deadline.



NATIONAL CARAVAN SAFETY CHECK PROGRAM

In Australia, road safety for heavy mass vehicles is a policy priority that must reflect the needs of businesses and consumers alike.

Caravan Industry Association of Australia seeks to introduce two safety check-up days, just before Easter and Christmas holidays, where consumers can take their caravans for a safety check-up. These are the most popular dates for consumers to go caravanning and camping, with a large portion of the 800,000+ RVs registered in Australia out on the road.

The safety check-up days will provide an additional method for caravan owners to check the weight of their caravans and tow vehicles to ensure they are safely setting out for their trip.

Research compiled from state police forces, road safety bodies and government indicates that there have been over 1,800 crashes involving caravans and other towed vehicles which has led to 51 fatalities on Australia's roads since 2015.

The above proposal would assist the caravan industry in supporting Road Safety – Vision Zero road fatalities to 2050.

KEY INITIATIVE:

ESTABLISHMENT OF A NATIONAL CARAVAN SAFETY CHECK PROGRAM IN CONJUNCTION WITH INDUSTRY HELD IMMEDIATELY BEFORE PEAK TRAVEL TIMES.



SAFER DRIVERS

With COVID restricted international travel, many Australians have flocked to explore the caravanning and camping scene. Yet, very few of these new travellers have extensive towing experience and are subject to varying and unfamiliar road and traffic conditions while transiting between destinations.

In support of the National Road Safety Strategy 2021 -30 aiming for a 50% reduction in deaths and 30% reduction in serious injuries over the next decade, the support of subsidised towing courses will aim to promote the value attached to a new or refresher towing course ahead of a caravanning adventure, providing added safety for the caravanning traveller, as well as other road users.

KEY INITIATIVE:

\$2.5M SUBSIDY SCHEME FOR 10,000 NEW AND EXISTING CARAVANNING CONSUMERS TO UNDERTAKE A CARAVAN TOWING COURSE THROUGH A SERIES OF APPROVED TOWING EDUCATORS.



BUSINESS PROFILE



AL-KO

QUALITY FOR LIFE

(FEDERAL ELECTORATE OF ISAACS, VIC)

AL-KO International Pty Ltd manufactures, markets and distributes a comprehensive range of products for the trailer, caravan and RV markets in Australia and New Zealand. The company is best known for its high quality running gear range, including axles, brakes and suspension products.

AL-KO, in partnership with Bosch, is helping to build the world's safest caravans and manufacturing across a wide range of products in Australia. This includes world-leading safety technology, developed with the Australian caravan and camping market in mind.

Tow Assist brings the most advanced automotive level safety systems to caravans to protect you and all the important things in your life. Combining electric ABS brakes, sway mitigation and evasive action control technology in a world-first for caravans, this product looks to revolutionise the way safety is managed in a caravan. AL-KO and Bosch are committed to a safer industry, demonstrated by their membership of Caravan and Trailer Road Safety Alliance, an alliance formed by Caravan Industry Association of Australia of 12 industry businesses, associations and consumer groups committed to improving road safety amongst the caravan industry.



TOW-ED

Education for those who tow

(FEDERAL ELECTORATE OF LINDSAY, NSW)

Tow-Ed is an Australian family owned and operated Registered Training Organisation delivering nationally accredited practical based training for over 15 years.

Tow-Ed is an Australian family-owned and operated Registered Training Organisation delivering nationally accredited practical based training for over 15 years. Started by John and Julie Eggenhuizen and now run by their son Carl Eggenhuizen, Tow-Ed was born of the need for comprehensive practical based training to up-skill and encourage a safe and responsible road user who is towing trailers and specifically caravans on the open roads of Australia.

Starting in 2004, Tow-Ed is now the largest supplier of towing education in Australia, delivering training to over 4,000 people each year. Tow-Ed also works closely with government and industry bodies to help develop targeted education programs to assist in maximising driver education and safety. Tow-Ed also continues to work with local councils, individual state police organisations and state road and transport authorities to deploy ancillary informative programs, such as vehicle weight checks.

Tow-Ed continues to evolve and grow to meet the increasing complexities of towing education and the growing demand for more education from the Australian consumer with an end goal to maximise road user safety.

KEY CONTACTS

MEDIA INQUIRIES

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Caravan Industry Association of Australia
operates under a federated model
working closely with each of our state
caravanning associations

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