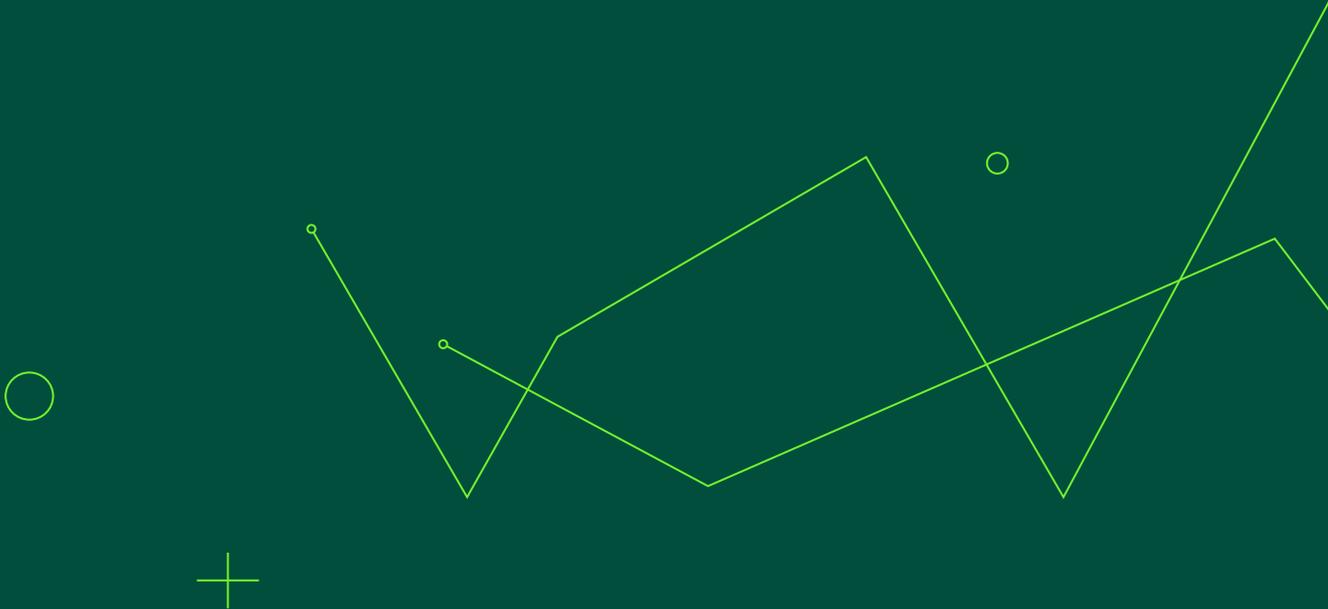

— Australian caravanning and camping industry

TOWARDS 2030: A CONNECTED FUTURE



KEY OBJECTIVES

KEY OBJECTIVES

Contribute research to assist
in future-proofing the industry

Inspire new thinking, ideas,
and potential partnerships

Provide stimulus to ignite
conversations and action



CONTENTS

04 **Foreword**

06 **Background and Context**

11 **Introducing the Trends**

15 — Hyperconnectivity

24 — New Technologies

32 — The Millennial Way

42 — Escapism

52 — Experience-Based
Communities

61 — Tourism Growth Markets

70 — Urbanisation Solutions

79 — Manufacturing Evolution

88 — Retail Reinvention

97 **The Future for the Industry**

99 **Glossary**

100 **Sources**



This report is about being nimble and responsive, while recognising the importance of partnerships. Importantly, it is also about being futuristic and trying to identify trends so that the industry can continue to be relevant and part of the social and economic fabric within the Australia of tomorrow.'

Mark Lindsay, Chairman
Caravan Industry Association of Australia

RADICAL INNOVATION AWAITS

Technology and innovation are more internationalised, connected, and collaborative than they have ever been. We have more access to information, people, and ideas, and as the caravanning and camping industry moves towards 2030, there is no greater influence on the trends impacting the sector than this idea of 'connectedness'.

As a consequence of our hyperconnectivity the world around us is innovating at a rapid pace (and there's more and more momentum and expectation to get to the next big thing). We're in a good place. In 2016, Australia is amongst the fore of countries leading the Global Innovation Index.

Industry commentators have highlighted the need for not only new ideas, but also radical innovation within the broad Australian tourism market. Similarly, the Australian government is backing innovation across sectors, investing in what they're calling the 'Ideas Boom'. As the AU\$8.6 billion caravanning and camping industry continues to experience growth and increased levels of investment, the sector is well placed to capitalise on Australia's own leadership position and to form innovation-based partnerships domestically and internationally.

FOR
E
W
O
R
D

There's a need for forward thinking
and introduction of new ideas, new
markets and new products, rather
than acting in a reactionary manner
through incremental improvements.

On innovation in the Tourism & Travel Industry

In the age of disruption where complete industries can crumble by just one company entering the market, there is pressure to continue to move forward and be a trailblazer. Our industry has not escaped this. There is more pressure on the industry, its associations and individual members than ever before.

This report is designed to show industry associations and their members a glimpse into the future. It will investigate trends and impacts on business, to best 'future-proof' the sector by providing insights, to inspire and elevate current thinking. Specifically, this report will take a macro look at several emerging trends, an understanding of what is driving the trend, the challenges it presents and the opportunities to be seized as we move towards 2030.

BACKGROUND AND CONTEXT



CARAVANNING AND CAMPING IS QUINTESSENTIALLY AUSSIE

Going caravanning and camping brings back great memories... Many Australians have stayed in a caravan holiday park at some point in their lives. It's part of our cultural fabric and is quintessentially Australian. Which is why, unsurprisingly, 90% of caravanning and camping activity done in the country is from domestic travellers (with the largest cohort aged 30-54).

11 million overnight caravan and camping trips were taken last year, accounting for 51.6 million nights.

Positively, interest in caravanning and camping is on the up – it has become the fastest growing domestic accommodation in Australia, increasing 5% year-on-year since 2011. The industry is already a major economic driver for Australia, and this is likely to increase, which is particularly important for our regional centres. For every \$1 of revenue, \$1.38 is contributed to the local community, with 90% of all activity being undertaken in regional Australia.

WE'RE IN A CARAVANNING AND CAMPING RESURGENCE #VANLIFE

BACKGROUND AND CONTEXT



This resurgence of interest in caravanning and camping is also happening around the world, particularly amongst younger generations. #Vanlife is one of the more popular hashtags on Instagram, inspired by Foster Huntington. When the inspiring nomad posted about #vanliving it created movement around 'living deliberately'. Members of the millennial generation have even commented that a life of freedom on the road, or living without the traditional trappings of established adulthood is 'The New American Dream'. Nearly half of international holiday park visitors in Australia fall into this millennial demographic.

Other factors contributing to the demand for caravanning and camping include new technologies, new products,

an increase in positive perception, as well as overall infrastructure improvements, such as national roadways. Further, the car manufacturing industry has developed more fuel efficient and powerful passenger vehicles, which makes towing easier than ever before.

Whilst interest is rising in activities surrounding caravanning and camping, the number of sites available is not keeping pace with this increased demand – creating a shortage in the industry. This generates an opportunity for reinvention and creation.



Diversity Presents Opportunities – Change is on the Horizon

It's not just holiday makers or travelers that have to be catered for through the nomadic caravanning and camping lifestyle. 70,000 of Australians currently live in residential land-lease communities a subset of the broader industry. The manufactured housing industry is transforming. It is moving towards an increasingly diversified mix of housing, designed to be a more affordable option for permanent housing. This presents both challenges and opportunities. In recent years the industry has worked hard to change negative stereotypes of caravan parks by promoting manufactured home estates, which includes resort-style houses and facilities.

The provision of communal recreation spaces and services that cater to the wide range of visitors and residents across demographics will be essential - generating environments for relaxation, meeting, socializing, preparing food, being active, or engaging in play. Furthermore, sites will also need to cater for a variety of vans and vehicles with amenities such as drive-through, ensuite access, camper trailer configurations, modern kitchen facilities and new forms of mobile accommodation.

While there is both innovation and growth driving demand and interest, there are still challenges to be overcome in the industry. There is a level of volatility (with asset value) of holiday and tourist parks as well as Manufactured Home Estates (MHEs) influenced by other economic and cultural factors – much the same as any real-estate venture. Tourism, travel as well as the purchasing of vans or vehicles (particularly RVs) are influenced by consumer confidence and uncertain economic conditions.

The industry has also not kept pace with the broader retail category, and massive improvements need to be made in order to promote and sell related products and services. The majority of travellers (81%) now use the web to research and book accommodation or space. When it comes to buying caravans and campervans there may be a day where physical dealerships do not need to exist.

The future of the caravanning and camping industry in Australia and beyond will be determined by the convergence of social, cultural, economic and technological factors, with all successful roads leading to a more connected future.

CONNECTED COMMUNITIES

CONNECTED NETWORKS

CONNECTED PARTNERSHIPS

CONNECTED TO NATURE

CONNECTED TO SELF

CONNECTED EXPERIENCES

CONNECTED DIGITAL ECOSYSTEM

CONNECTED IDEAS AND VISION

INTRODUCING THE TRENDS



INTRODUCING THE TRENDS

‘Trends are just a means to an end:
successful (and profitable!) innovation.’

– Trendwatching

—The only guarantee is change – it is imminent

Trends are a valuable way to understand how these changes might affect your existing or future category. The reality is, trends help us gain an understanding of shifts within our industry and beyond, opening up our minds to new opportunities and ideas. They connect us to broader sociocultural dynamics, ensuring that we get out of our ‘bubble’. Lastly, trends can assist in future-proofing businesses.

‘The future is already here,
it’s just not evenly distributed!’

– William Gibson

—Trends are identified in a few different ways

Trends are identified through shifts, which are long-term, macro changes (e.g. our aging population) that can play out over many years or even decades. These work in conjunction with triggers, which are more immediate and timely changes, which can include technology, economic fluctuations, political events or consumer demand.

They are often observed by looking at other industries or categories (businesses, entrepreneurs, initiatives, NGOs etc.); these changes will soon affect every industry. Very few innovations are totally new; most (successful) innovation comes from combining seemingly unrelated elements, or taking something and deploying it in a new context. Lastly, trends are often found by looking at points of tension between what consumers’ need, want or desire and what is currently available in the market or from your brand.

—Making the most of trends

There are many potential uses for the trends. They can be used as a strategic filter for what industry should and shouldn’t move ahead with. Trends can generate new ideas, new directions or offer proof-of-concept. Lastly, we can use information gathered as a partnership generation tool, enabling us to both identify potential new partners and provide information of value.



REPORT STRUCTURE

This report is structured around nine macro-trends that are forecast to significantly impact the caravanning and camping industry. Many of these trends are influencing the industry today and are forecast to increase their impact as we move towards 2030.

Trends are also thematically grouped – the first trends are the broadest, influencing almost everything, the next few trends are behaviourally based and the last trends are focused on more structural changes.

The description of each trend is supported by insight into the challenge it presents. Each trend highlights examples of the trend in action, showcasing inspiration from around the world. Lastly, each trend is supported by ideas that the caravanning and camping industry and related partners could implement.

THE NINE TRENDS

01 _ HYPERCONNECTIVITY

02 _ NEW TECHNOLOGIES

03 _ THE MILLENNIAL WAY

04 _ ESCAPISM

05 _ EXPERIENCE-BASED COMMUNITIES

06 _ TOURISM GROWTH MARKETS

07 _ URBANISATION SOLUTIONS

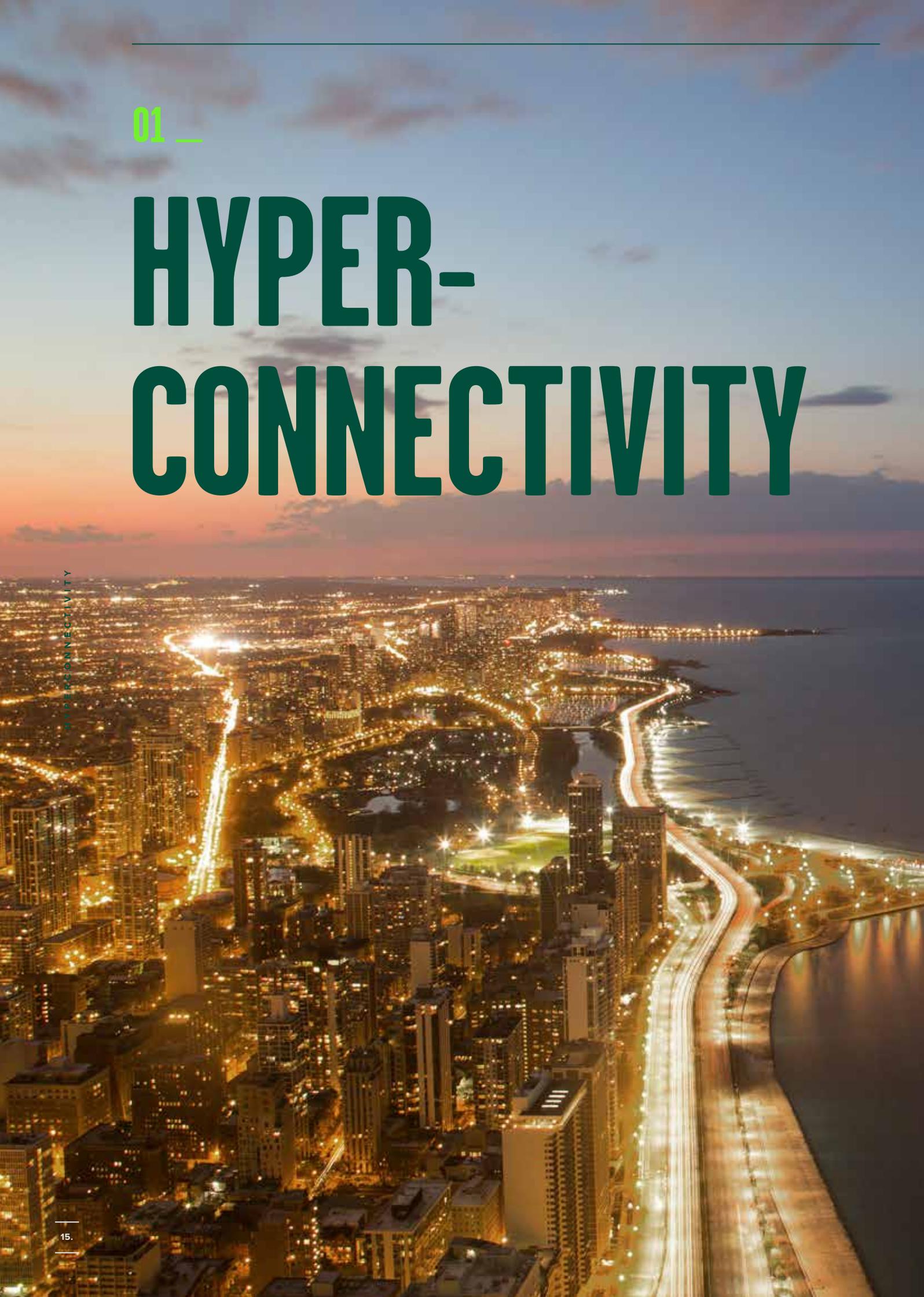
08 _ MANUFACTURING EVOLUTION

09 _ RETAIL REINVENTION

01 _

HYPER- CONNECTIVITY

HYPERCONNECTIVITY



OVERVIEW



A networked society.

We are more connected to each other, and everything around us, than ever before. We've almost become addicted to being connected – constantly attached to devices and glued to our screens. Our hyperconnectivity has also pushed us toward the desire for hyperproductivity, where every moment needs to be filled with some form of media, entertainment or activity.

The number of connected devices will only keep growing, and each household is forecast to be surrounded by hundreds, if not thousands, of sensors and wireless connections. Hyperconnectivity refers to not only humans connecting to the internet, but also the wide range of objects and devices interacting with each other (also referred to as The Internet Of Things, which is made possible by smart sensors implanted in objects).

Hyperconnectivity will shape the technological demands put on the industry and retail environments, and continues to influence how consumers interact with the world around them. It raises expectations across all touchpoints. Consumers want to be able to access the internet at all times, so expect to see greater levels of connectivity within caravan holiday parks and MHEs. In the future, road based travel won't simply be about getting from A to B but providing people will real-time information and ability to connect person-to-person and person-to-machine.

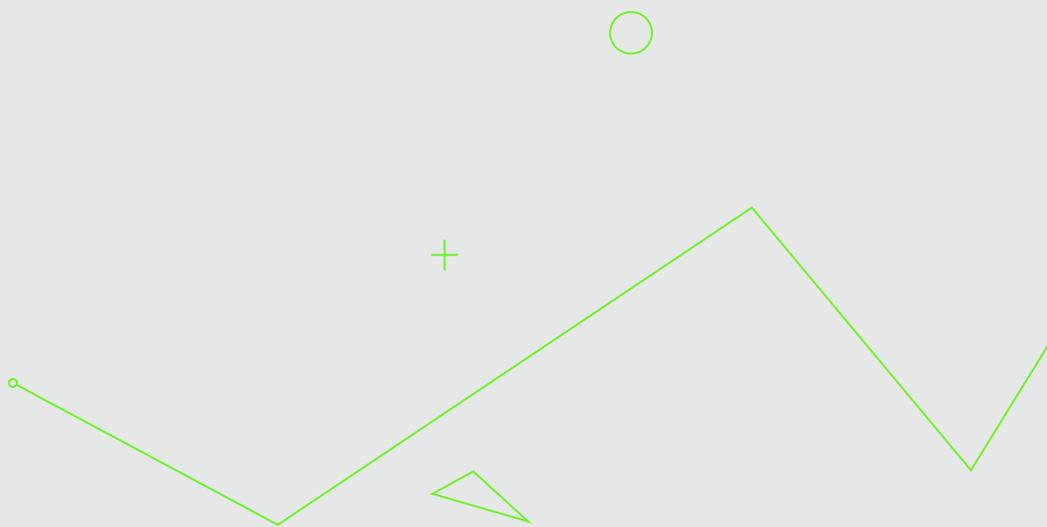
CHALLENGE

— Expansive Country to Connect

The caravanning and camping industry extends to all corners of our 7.692 million km² country. Governance and provision of high speed internet connection is a serious challenge faced by the industry insofar as being able to deliver against the needs and wants of hyperconnected consumers and smart devices.

— Continued Industry Disruption

Hyperconnectivity will continue to disrupt the industry, significantly changing the consumer purchasing process, manufacturing outputs and overall infrastructure design. We will need to support our partners as the whole category evolves, helping our partners adjust to new norms.



OPPORTUNITIES

— Technology Partnerships

There is scope for commercial investment into the research and development of innovative digital technologies. This technology will in turn create product and service value propositions that cater for the ever growing demands of connectivity in the caravanning and camping industry.

— Real-Time

Hyperconnectivity means the notion of waiting for anything will die a slow and frustrating (for consumers) death. This will be of interest for all industry businesses when reviewing their consumer purchasing process. For example, parks and leisure providers should consider real-time connectivity when reviewing how they book, receive and upsell customers.

— Smart Sensors in Manufacturing Housing & RVs

There is the opportunity for MHE providers and RV manufacturers to lead the way with connectivity and develop systems of embedding sensors that deliver connectivity and practical outcomes for consumers.

— Meaningful Driving Time

Drivers will want to use their time in more meaningful ways and not have it feel like they are in passive transit. RV manufacturers and retailers will be presented with the opportunity to develop products that deliver a connected experience as consumers travel.

— Connected Sites

There is opportunity to provide greater connectivity at caravanning and camping sites. This can help to attract a different market (meeting general travel expectations) by offering a scalable experience – from ‘back to basics’ camping to more of a ‘glamping’ offer.

Google Home

The hands-free home.



WHAT IS IT?

Google Home is a voice-activated speaker powered by Google Assistant. You can ask it questions or tell it to do things. Rather than typing your question into the Google web browser, Google Home responds to a verbal query.

HOW DOES IT WORK?

The speaker is activated by voice. The user must simply say 'OK Google' and follow with a question or request. The device is wirelessly connected to the internet and incorporates: far-field microphones, natural language processing, hi-fi speakers and is able to instantaneously reply to a voice-activated request.

WHO IS INVOLVED?

Google, an American multinational technology company specialising in Internet-related services and products, has created Home which is seen as an advancement on Amazon's Echo speaker technology. Google Home partners with YouTube, Spotify, Pandora, Chromecast, Nest and Phillips, amongst others.

RELEVANCE FOR THE INDUSTRY?

The rise of voice-activated smart speakers being developed by big technology companies represents the ever-increasing trend of Hyperconnectivity in society. As the caravanning and camping industry prioritises improving the quality of products being delivered to consumers, incorporating such technology into retailing will be pivotal to deliver on demands.

Find more information

<https://madeby.google.com/home/>

<https://www.youtube.com/watch?v=r0iLfAV0plg>

<https://www.amazon.com/Amazon-Echo-Bluetooth-Speaker-with-WiFi-Alexa/dp/B00X4WHP5E>

Related opportunities

Connected Sites

Technology Partnerships

Smart Sensors

Jaguar Mind Sense

A car that reads your mind to keep you safe.



WHAT IS IT?

Jaguar Mind Sense Project is a biometric car system that monitors and maintains the health of the driver. The project is working towards creating a car that can literally read a driver's mind and tell if they are concentrating by analysing their brainwaves, heart rate and breathing.

HOW DOES IT WORK?

The system is designed around hundreds of sensors that monitor the drivers' biometrics. These sensors are embedded within multiple surfaces of the vehicle, including the 'Wellness Seat', that are able to monitor biometric indicators and respond accordingly. For example, if the vehicle detects the driver is not concentrating on the road ahead it can alert the driver by vibrating the steering wheel.

WHO IS INVOLVED?

The Mind Sense Project was created by leading luxury automotive brand Jaguar to increase driver and vehicle safety.

RELEVANCE FOR THE INDUSTRY?

Vehicles that monitor driver biometrics represent true hyperconnectivity in automobiles. As connected sensor technology evolves, the caravanning and camping industry has the opportunity to build collaborative partnerships with technology developers to ensure RV technology adapts and remains relevant.

Find more information

<http://www.digitaltrends.com/cars/jaguar-land-rover-sixth-sense-project-pictures-news-brainwave-monitoring/>
<https://www.wearable.com/cars/with-a-dedicated-wristband-key-and-hundreds-of-sensors-the-jaguar-pace-is-the-ultimate-wearable-876>

Related opportunities

- Technology Partnerships
- Smart Sensors
- Real Time

Other Examples

— **Ford Connected Car**

The car health monitor

<http://www.dailymail.co.uk/sciencetech/article-2360694/>

[Ford-car-monitor-HEALTH-drive--ill-fall-asleep.html](http://www.dailymail.co.uk/sciencetech/article-2360694/Ford-car-monitor-HEALTH-drive--ill-fall-asleep.html)

— **Go-Get, Drive Away**

Pick up from hot-spots with your phone

<https://www.goget.com.au/>

— **Amazon Echo**

The audio retail revolution

<https://www.amazon.com/Amazon-Echo-Bluetooth-Speaker-with-WiFi-Alexa/dp/B00X4WHP5E/>

— **Total Personalisation**

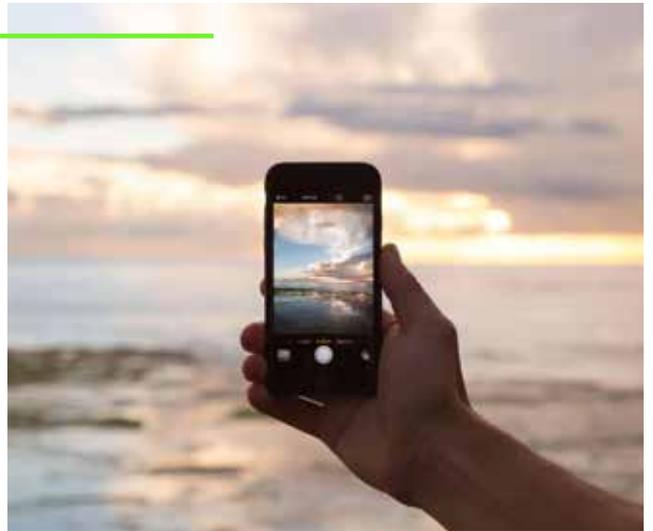
Your travel your way

<http://dornob.com/mar-adentro-high-tech-hotel-allows-you-to-hyper-customize-your-room/>

IDEAS

SHORT-TERM INITIATIVES

- Google Maps Integration – highlighting caravanning and camping, MHE sites, key businesses.
- Create a Facebook group or page for the business e.g. local caravan dealership, MHE community groups or holiday park sites – highlight key features, location, contact details, and take advantage of albums to share photography.
- Digital PR/Content – produce listicles (list-articles) e.g. 10 best campsites within driving distance of Sydney CBD, share with appropriate platforms (The Urban List).
- Digital training/social media workshops for partners (B2B approach).
- Living Social or Groupon month – a month of deals across partners (under a specific theme).
- Mobile friendly caravanning and camping guide hosted on a blog site e.g. Squarespace.
- Partnership with Telco for international tourists – specialist regional SIM.
- Road-side charging stations – partnership with grocery or fuel chain.



IDEAS

FUTURE THINKING

— Drive Fit: A Connected Caravan Health System

Creation of a Fitbit for caravans and campervans, tracking a range of bio-metric data through sensors and connectivity. The main goal would be to alert the driver when they are becoming fatigued (Third highest killer on the roads in Australia). Further data could let drivers know that they may need to stop for water, go for a walk, or even take themselves to the doctor.

Potential partner(s): Fitbit, Auto companies (already implementing technology)

— Mobile Hotspots

Create mobile hotspots at caravanning and camping industry sites, allowing travellers to access strong internet connectivity for multiple devices. This reliable connectivity in remote areas enables travellers to tap into more entertainment options, such as movies and music on-demand. Sites which offer technology add-ons, such as mini-mobile projectors and tablets that enable travellers to transform hotspots to entertainment hubs.

Potential partner(s): Telstra, Microsoft, Google

— Regional Rewards Program / Kilometre Club

This special loyalty program would enable road trippers and frequent travellers access to rewards and benefits that can be redeemed in local communities. The program would be fully mobile enabled, tracking total kilometre through GPS as well as stops at local vendors and service stations. Club members would be able to check-in at specific locations in order to earn more points and activate higher levels of rewards. Benefits could include complementary nights on camping grounds, or even equipment hire (e.g. surfboards in Byron Bay) as well as coupons for food at local cafes.

Potential Partner(s): American Express (Small Business Saturday), Caltex/BP, IGA

— Caravan Pool

The platform would operate similarly to Uber Pool – the application would enable like-minded holidaymakers to split the costs of the trip or just share resources along the way... someone brings the meat, another the BBQ. The collaborative travel tool also provides another way to meet new people which is great for solo or group adventurers.

Potential Partner(s): Intrepid, Lonely Planet



02 _

NEW TECHNOLOGIES

NEW TECHNOLOGIES

OVERVIEW



'New Technologies' is a broad concept and has widespread influence across all industries. In this context, it represents improvements in the operational and mechanical side of the industry – applying new technologies to drive greater manufacturing efficiencies, improved urban and regional infrastructure, reduce environmental impact, and produce new design concepts.

Many of the advancements in new automotive technologies have come to the fore from global and national pressure on auto manufacturers to be more environmentally sustainable – specifically, lower and achieve set goals on CO₂ emissions. Manufacturers are accelerating down the path to supply CO₂ neutral technical solutions currently in the form of hybrids, battery electric vehicles and fuel cell vehicles. This has the potential to significantly impact on the running costs of tourism, retailing and manufacturing.

Another big influence on the industry, will be Artificial Intelligence (AI). AI is the ability of a computer program or a machine to think and learn – which can be applied to a broad spectrum of tasks. The technology will have an impact on both manufacturing processes as well as the design of the vehicles themselves e.g. Self-driving campervans.



Artificial Intelligence is developing fast and is forecast to become omnipresent.

In the near future, innovations such as Powertrain technology, battery storage and Artificial Intelligence are likely to have the most impact on the Australian caravanning and camping industry. But it won't stop here, as we move closer to 2030 new technologies will continue to be a powerful force for change.

CHALLENGE

— We Don't Know What We Don't Know

There's only so much that you can be prepared for. We must continue our efforts to plan for the future, working towards solutions for potential alternative scenarios. The challenge, however, lies in the fact that understanding new technologies is a never-ending task, and we'll never quite know exactly what will happen.

— A Collaborative Effort

The other part of the challenge lays in bringing people, companies and organisations together to secure research, development and infrastructure funding. To ensure the caravanning and camping industry is prepared to take up these advancements, it must be a combined and consistent effort.



OPPORTUNITIES

— New Sources of Energy

The advancement in effective large scale solar power battery storage presents the opportunity for the caravanning and camping industry to minimise the running costs of tourism, retailing and manufacturing.

— Self-Driving Vehicles

Autonomous vehicles are one of the major technological advances in this sector. This presents an opportunity for our industry to potentially become a leader in this space.

— Regional Australia Infrastructure

The caravanning and camping industry has the opportunity to prepare and lobby for the infrastructure development that will be needed for new consumer technology in regional Australia. The opportunity extends from the provision of alternative fuels, including automotive charging stations through to the pre-existing requirements in electricity, telecommunications and roads. If the opportunity to prepare for alternative fuels is not created there may be consequences for regional tourism systems as consumers may be forced to limit their travel to areas that supply the charge and fuel they need.

— Labour Solutions

Innovative use of Artificial Intelligence presents the opportunity to have collaborative Robots/Robotics as a Service (RaaS) perform physical tasks in-store, in manufacturing or on site at caravan holiday parks. Right now, for parks that may look like an automatic check-in via vehicle scan, tomorrow that may look like robots servicing lavatories and performing property maintenance.

— Ideas Exchange

There is an opportunity to create platforms for sharing information and ideas, this will assist in understanding and planning for new technologies – creating a pipeline for the caravanning and camping industry.

Tesla Powerwall

Energy storage for sustainable living & operational expenses.



WHAT IS IT?

The Tesla Powerwall stores renewable energy in an automated and compact shell that is designed to enable everyday people, and businesses, to maximise the consumption and storage of solar power.

HOW DOES IT WORK?

The Tesla Powerwall is a wall-mountable battery that is designed to power a home during the evening, and charges using electricity generated from solar panels during the day. It is designed this way to bridge the gap between peak solar and peak demand, allowing users to use photons when needed. The battery comes in 7 or 10 kilowatt-hour sizes. For potential commercial use, there's also a 100 kWh unit called the Powerpack.

While battery innovation is already robust, Tesla has been able to improve the efficiency of the technology and make it available at accessible price points with units under \$3000.

WHO IS INVOLVED?

Tesla is an American automotive and energy storage company led by billionaire inventor Elon Musk.

RELEVANCE FOR THE INDUSTRY?

New sources of energy storage represent New Technologies that could be used to drastically reduce operational expenses incurred within the caravanning and camping industry.

Find more information

https://www.tesla.com/en_AU/powerwall

<https://www.wired.com/2015/05/teslas-batteries-will-power-home/>

Related opportunities

Operational Savings

Regional Australia Infrastructure

The Sartre Project

Autonomous driving road train initiatives.



WHAT IS IT?

The Sartre Project looked at how changes in personal transport could be encouraged by developing road trains called platoons. By using the technology of autonomous driving vehicles and the concept of shared mobility, it tested the benefits of adopting road trains on highways.

The vision of the project was to create a transport system where joining the road train was more attractive and comfortable than leaving a car behind and using public transportation on long-distance trips.

HOW DOES IT WORK?

The Sartre Project developed a scheme where a lead vehicle with a professional driver took responsibility for a line of semi-autonomous vehicles that followed along. The experiment allowed the drivers to do things that would normally be considered illegal; such as operate a phone, read a book or watch a movie.

WHO IS INVOLVED?

The European based project had multiple partners including Volvo, Tecnalia Research & Innovation, IDIADA Automotive Technology and consulting universities.

RELEVANCE FOR THE INDUSTRY?

Autonomous vehicles will be a fixture in the future of transport. The Sartre Project provides an example of trialing how New Technologies can be adapted. The Australian caravanning and camping industry will benefit from initiating such trials – in their own form – through collaboration with community and government.

Find more information

<http://www.sartre-project.eu/en/Sidor/default.aspx>

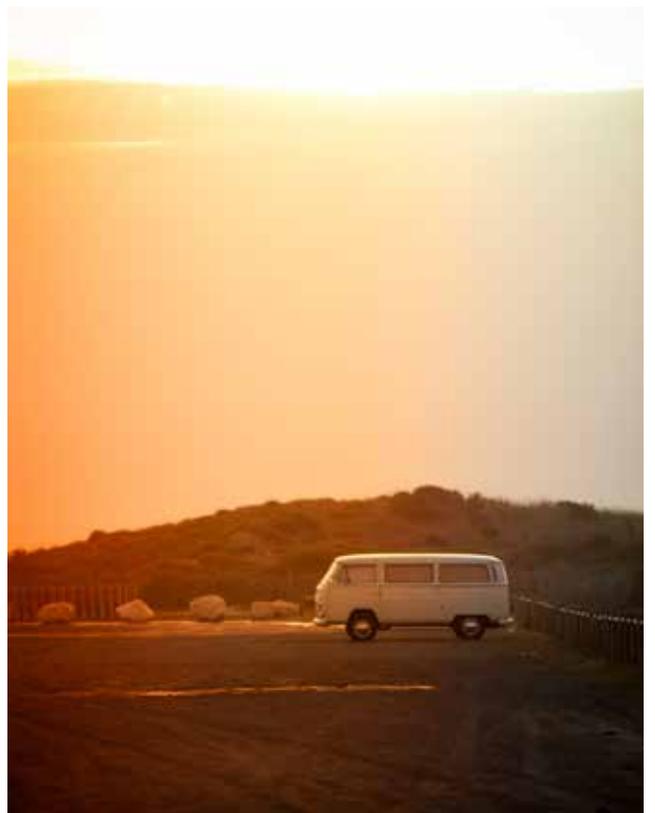
Related opportunities

- Self-driving Vehicles
- Regional Australia Infrastructure

IDEAS

SHORT-TERM INITIATIVES

- Ideas exchange forum – a regular get together to discuss the application of new technologies (can be replicated online).
- Partner and support other organisations investigating New Technologies – especially those in the auto industry.
- Curate related auto/caravan industry innovation stories on digital media or via an e-newsletter e.g. Innovation News (places for information include Wired, Fast Company, Reddit, The Verge, CNET).
- Attendance of key innovation conferences, creating special reports to share with Australian industry partners e.g. The Consumer Electronics Show (CES) held in Vegas every year.
- Organise innovation visits with local companies, NGOs, and universities – visits would involve tours around lab/campus and a discussion around innovation pillars.
- Yearly Futures Report – based on expert opinion and qualitative conversations with partners produce a ‘thought leadership’ document outlining future directions.



IDEAS

FUTURE THINKING

Driverless Discoveries

Investment in driverless technology can help take the friction out of road-based travel adventures. Driverless technology integrated into the manufacturing of new campervans and the development of driverless vehicles with towing capacity will enable the family to enjoy the travel time as much as the destination. This technology can also be used to ignite a new type of travel – destination unknown. Travellers enter their driverless campervan, enter key variables about mood and activity preferences, and the vehicle does the rest. It will take you on a surprise adventure, to a place that you don't expect but meets all your needs.

Potential partner(s): Tourism Australia, TripAdvisor, Lonely Planet, Google Earth/Google Field Trip

Electric Energy

Partner with existing or emerging manufacturers in electric or hybrid technology, such as Tesla. Co-create the new breed of RV's using new technologies that make it more energy efficient and environmentally friendly. This includes the building of free supercharger power stations along regional routes, enabling travellers to not only replenish power for their hybrid car or campervan but also store energy for the products and technology within it – battery power for your devices and onboard facilities.

Potential partner(s): Energy Australia, AGL, Origin, Tesla, Google

Cara-Roadtrain: Plug & Play

Investment in technology to bring the roadtrain idea to caravans and campervans and work with developers to create a communal connected chain. Essentially, drivers (or vehicles) would be able to join 'trains' at any point along the journey (operating as vans separately as well as part of a chain). At any point in time, at any point around Australia there may be a 'train' and group to join – drivers can see available, nearby trains via digitally connected devices (an app or potentially embedded within the caravan dashboard). Benefits include increased efficiencies, reduction in costs and social community.

Potential partner(s): Caravan & Campervan developers, road train developers, government transport entities e.g. Transport NSW



03 _

THE MILLENNIAL WAY

THE MILLENNIAL WAY

Millennials are the generation born approximately between early 1980s and mid-1990s – they're currently in their mid-twenties to early thirties.



OVERVIEW

Millennials are a powerful force, and they are currently reshaping all industries. Why? Millennials have significantly disruptive consumption patterns based on their hyperconnectivity, lack of brand loyalty and experiential based purchasing.

Millennials want more, demand more, expect more.

It's worth noting that 'more' has taken many shapes within the cohort... it's not just more money, it's more fulfillment, more support, or more recognition. They've arrived into adulthood in the age of one-click commerce, meaning they can get anything they desire in an instant. And this attitude has spilled over into many areas of their life. Travel, dating, career. Their youth was defined by being pampered by Boomer parents, giving rise to a generation with an overly optimistic and positive outlook on the world – they were told they could do anything, be anything they wanted to be.





The entrepreneurial generation.

The global financial crisis (GFC) shook this optimistic foundation, leaving many with massive student debts and an inability to get the six-figure job they were promised. As a consequence, there has been a move away from conspicuous consumption toward more considered consumerism (which includes the birth of the share economy – rent vs. buy). They want to spend their money with companies who are committed to positive environmental and social impact and are willing to pay more for the association.

The caravanning and camping industry in years to come will be shaped by the emerging generation of Millennials as they step into their earning prime and life with their young families. As they move into the industry's key market – families – their mindset, behavior, purchasing patterns and ownership desires appear to be very different from the current industry profile.

CHALLENGE

—— Meeting a Variety of Needs

There will be a continual challenge to stay relevant with Millennials, and to develop holiday and residential options that meet their growing needs; multigenerational households, single parents, niche communities, young families. The industry will need to adjust how they engage Millennials around the ownership of product and develop strategies to hold their attention. Further, work will need to be done to address the diversity of values held by Millennials in comparison to previous groups e.g. Boomers/Grey Nomads/Retirees.

—— Make it Meaningful

Millennials want to find meaning in the communities they are part of, including where they live, work, and play. A key design imperative for both caravans/campervans as well as the park sites/MHEs will be the need to design for positive interactions, fostering greater connectivity.



OPPORTUNITIES

— Sharing Economy

Millennials have embraced online peer-to-peer sharing and eagerly disrupt established industries where innovation is of consumer benefit. The sharing economy takes shape when a person rents out something they own for mutual benefit, such as land, a car, accommodation and now, even caravans. Rather than ignore this, there is potential for the industry to work with the sharing economy with the strategy to transition the cohort into permanent ownership.

— Experiential Based Purchasing

When it comes to Millennials purchasing patterns, 'experiences' trump 'things'. They will seek out leisure and experiences that help shape their identity and create long term memories. The caravanning and camping industry is well suited to market towards this mindset and can seize the opportunity by creating and marketing experiences rather than a dissection of products.

— The Changing Workforce

Millennials in their pursuit of their dreams are increasingly engaging in entrepreneurial activities – this means that they are not always going to be in an office. They are looking for opportunities to work in flexible spaces, and blend their interest in seeing the world with work.

— Giving Back

This group are motivated by more than just money. They are driven by their positive values (especially social good) and look for brands, companies and partners that also share these ideals. There is opportunity to do more to contribute to broader society, helping people in need.

— Green Star

Millennials are willing to pay extra for sustainable offerings and with the new age of green building design and construction upon us, there is an opportunity for MHE and caravan holiday parks to create Green Star accommodation options. Green Star is a rating system mandated by the Green Building Council of Australia, that is focussed on sustainable living environments and community connectedness. There is also opportunity here for the design and manufacture of ecological building materials that ensure the recyclable lifecycle of the structure. It is forecast that Millennials will see Green Star as the gold star and have it influence their caravanning and camping habits.

CASE STUDY

#dojowheels

Mobile office on wheels.



WHAT IS IT?

#dojowheels is a compact, mobile office or training facility, set within a traditionally shaped caravan. The portable office is created in response to Millennials changing work patterns and need for small functional workspaces.

HOW DOES IT WORK?

The 'dojo' is built within a trailer and the interior is based on a modular design. The structure of the set-up can be shaped and shifted, which allows the small space to be highly functional and multi-purpose. For example, the table in the centre can pop-up and either allow for extra storage or serve as a space for your legs while working or conducting a meeting. When the table is down, the cushion slides out into a bed. The trailer provides the user the option to forgo commuting to an office and allows them to take their office with them whenever they choose.

WHO IS INVOLVED?

A Belgian based studio, FIVE AM, designed the concept.

RELEVANCE FOR THE INDUSTRY?

The mobile working space represents a unique angle for the caravanning and camping industry to tap into The Millennial Way trend, providing a utility-based solution to suit their preferred lifestyle.

Find more information

<http://www.fiveam.be/work/dojowheels>

<http://design-milk.com/compact-mobile-office-wheels>

Related opportunities

— The Changing Workforce

— Sharing Economy

Purpose Hotel

A crowd-funded, co-founded hotel designed to change lives.



WHAT IS IT?

The Purpose Hotel is a crowd-funded Kickstarter campaign that encouraged people to contribute to co-founding a global hotel chain that has the purpose of positive environmental and social impact.

HOW DOES IT WORK?

The hotel chain is currently under development, however holds the vision for accommodation where every touch point is connected to a cause or need. For example, every time you book a room a child gets sponsored, every internet fee fights human trafficking, every product (soap, shampoo, linens, furniture, curated art, specialty products) is purchased from partners who are making a difference.

Every time a guest chooses the hotel they touch a hundred lives or more, locally and internationally.

WHO IS INVOLVED?

The concept comes from serial social entrepreneur Jeremy Cowart who has raised over \$580,000 via the crowd sourced funding online platform KickStarter.com, exceeding his \$385,000 goal.

RELEVANCE FOR THE INDUSTRY?

The Purpose Hotel represents The Millennial Ways trend by connecting with their spending patterns that show support for socially and environmentally minded companies. Developing socially aware business practices is one way the caravanning and camping industry will be able to remain relevant and address the needs of the Millennial market in order to achieve the strategic priority of stimulating market growth.

Find more information

<https://www.kickstarter.com/projects/thepurposehotel/purpose-hotel-change-the-world-in-your-sleep>

<https://www.facebook.com/thepurposehotel/>

<http://www.forbes.com/sites/toriutley/2016/08/27/jeremy-cowart-the-purpose-hotel-and-what-it-takes-to-turn-an-idea-into-reality/#68facf166618>

Related opportunities

- Sharing Economy
- Giving Back
- Green Star
- Experiential Based Purchasing

Other Examples

— **Mobile Cocktail Bars**

A different way to use caravans and RVs
<http://www.oliveandharry.com/>

— **Re-inventing Drive-Thru**

A focus on experience
<http://www.itsnicethat.com/articles/bompas-and-parr>

— **Campervans for Young Adventurers**

A design centric, customizable option
<https://www.airstream.com/travel-trailers/sport/>

IDEAS

SHORT-TERM INITIATIVES

- Leverage Millennial influencers to share pictures and videos on social media (showcase caravanning and camping and MHE offers).
- Develop a network of partners, creating a caravanning and camping member discount – focus on smaller, community retailers (produce a sticker/poster that they can feature in their store).
- Partner with organisations like Camplify to build and promote the caravanning offer and experience (getting more people into the category).
- Provision of additional services ‘on campsite’ such as yoga, art classes, babysitting, or walking groups.
- Provision of caravans and equipment for festivals and events in exchange for a marketing booth/stand at the events (work with partners to supply).



IDEAS



FUTURE THINKING

Join the Movement

A new way of living, but not always in the same place. For Millennials, mobility is key (valuing travel as a very important part of their life). Create a program to enable people to rent vans/modular properties on a subscription basis. There would be many sites across the country, which could be booked online (find a van there, or plug your current van in). The movement would enable people to live all over the country, moving from place to place whenever they please. Ideal for travelers or for locals looking to experience different communities across the country.

Potential partner(s): MHE networks, Airbnb



Pop-up Office Communities

Creation of a pop-up co-working environment offering start-ups and small businesses access to space and amenities in order to start/build their company. This has several benefits. Participants in the program will be sharing space with like-minded entrepreneurs running emerging businesses; it's an affordable alternative to renting an office outright and the chance to network with other start-ups.

Potential partner(s): WeWork, Advertising & Marketing Companies



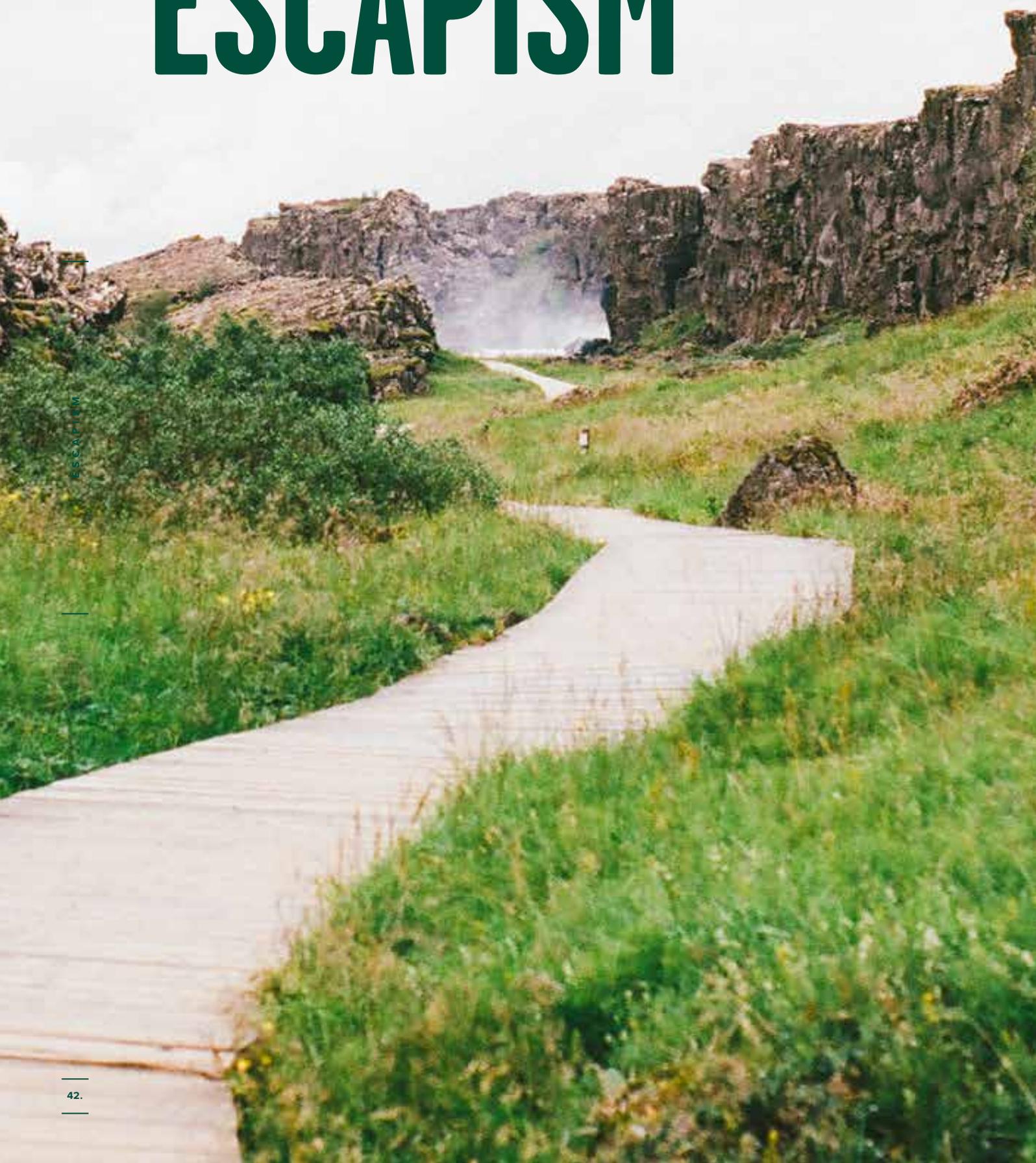
Green Sites: Modern with an Eco Twist

Environmentally friendly caravanning and camping adventures (officially endorsed with the stamp of approval). Catering to the eco-conscious traveller (or local residents) wanting to make a change for the better. Communal facilities are designed to promote the sustainable caravanning and camping experience, constructed using recycled and sustainable materials. With solar panels to produce hot water and electricity, plus a water recycling system. Visitors are encouraged to recycle as much of their waste as possible with campsites providing recycling bins. Campfires are fuelled by sustainable wood sourced locally and natural cleaning products and insect repellent are available for purchase.

Potential partner(s): UTS Institute of Sustainable Futures, Ecospecifier Global, Katmandu, Anaconda

04 _

ESCAPISM



ESCAPISM



OVERVIEW

We are more stressed than ever! Lack of time, the pressures of urban life, and constant connectivity shows an increasing desire within Australians to scale back to the essentials of life – finding a place to escape to (mentally and physically). This movement is a revolt against too much information, too many choices, too many emails, too many friends, too much food and

too many gadgets. The desire to retreat to nature and embrace their own form of essentialism provides a promising outlook for the health and growth of the caravanning and camping industry. Caravan holiday parks and MHEs can also potentially benefit from this increased interest in destinations and experiences that exist beyond urban centres.



‘While the world is speeding up, there is another movement inviting us to slow down, to sink our roots deep into the red dirt and forests, to remember our place in the family of things, to remember who we really are.

It seems we are disconnecting from nature and in the process, losing a fundamental source of our wellbeing. Our connection to nature is an essential element of our humanity and so as we spend more and more of our lives interacting with technology, we must ask what nature means, why we need it, and how reclaiming our place in the natural world might help us be more fully human.’

Claire Dunn, Nature's Apprentice

CHALLENGE

— Reduce Tension Between Escapism and Connectivity

The contradictory nature of Escapism is that it can seem to be in direct contention with the trend of Hyperconnectivity. That is, the desire to always be online versus the desire to get away from it all. This highlights the challenge from a communications and marketing perspective, as well as the development of infrastructure and design of products; we must find the right balance between connection and disconnection.

— Rewilding

Sometimes people need that extra push, a reminder to get back to nature. But it's a challenge – there are so many distractions, and bright shiny things vying for their attention. It will be difficult for people to truly understand the value of rewilding, as it requires real reflection.



OPPORTUNITIES

—— Rural Respite

Catering to the desire for respite from urban life provides great scope for much needed tourism dollars to be directed towards regional communities. Caravan holiday park and leisure providers have the opportunity to develop accommodation and activities that focus on ‘tune off, to tune in’ style experiences.

—— Focus on Wellbeing

When things get busy we often ignore what is happening to our wellbeing – we eat badly, we don’t get enough sleep and often find ourselves plugging the gap with things like coffee. Our wellbeing has become a greater focus in popular culture. There is an opportunity to connect the industry with the broader ideals associated of personal wellbeing.

—— Purposeful Design Choices

There will be demand for designers and manufacturers to embrace essentialist style and create living environments that leave visitors feeling more connected to the essentials of life, themselves and the natural environment around them.

—— Quality vs. Quantity

Essentialism is not to be mistaken for minimalism. Minimalists may want less, but essentialists want what they need. Consumers will prefer higher quality products rather than cheaper replacements. There is opportunity for retailers to offer quality products at premium price points with extended lifetime warranties, complementary repairs and by encouraging reuse.

—— Cultivating Community

Reconnection with nature often means reconnecting with those around us (it’s a big part of the appeal). There is an opportunity for the industry and partners to be the connector and help people find like-minded communities, places and spaces. This is true for both tourism and more permanent housing solutions.

CASE STUDY

Yoshino Cedar House

Retreating to the essentials of community.



ESCAPISM

WHAT IS IT?

The Yoshino Cedar House explores how architecture can promote new relationships between hosts and guests, beyond the existing notions of accommodation. The ethos of the house is to address the pressures of urbanisation and proposes community as a solution. In all stages of its creation, a model of connectedness and community was focussed on to integrate the local traditions into the house. The wood was milled locally, there is a communal dining table and fish are caught along the river.

HOW DOES IT WORK?

The property is accessible by the local community and travellers can book online through Airbnb. Guests live amongst locals and proceeds go towards the community.

WHO IS INVOLVED?

The concept of the property was conceived as part of Kenya Hara's House Vision exhibition in Tokyo, Japan and co-created with Tokyo-based architect Go Hasegawa. The site is offered through Airbnb.com who promote the peer-to-peer accommodation economy and their sub-brand Samara that has been established to innovate outside of accommodation.

RELEVANCE FOR THE INDUSTRY?

Yoshino Cedar House provides an example of how the Escapism trend can be addressed in an alternative yet very practical way. The caravanning and camping industry is well positioned to address the trend in a similar vein, by providing community based solutions, especially through interesting and curated MHEs, stimulating growth through an expanded customer base.

Find more information

<http://samara.airbnb.com/community/yoshino>

<http://www.businessinsider.com.au/airbnb-builds-hotel-japan-community-samara-yoshino-2016-8?r=UK&IR=T>

Related opportunities

— Purposeful Design Choices

— Rural Respite

— Focus on Wellbeing

— Cultivating Community

CASE STUDY

Wagon Station Encampment

Micro-accommodation proves less is more.



ESCAPISM

WHAT IS IT?

The Wagon Station Encampment is a site near Joshua Tree National Park in the US operated by an artist that offers accommodation in micro-cabins in the middle of the desert. The wagon cabins fit only a single mattress, a small shelf, and two opening hatches with a transparent roof to watch the night sky.

HOW DOES IT WORK?

The site is opened up only twice a year where people are invited to apply to stay in the wagons. It has become so popular people now apply months in advance. Often artists and creatives use the space; the transient community can join in hikes together or simply be by themselves in a no-pressure environment. Guests must be willing to pitch in for an hour of morning chores in the communal kitchen and surrounding areas. The isolation and sense of small community is what sets the experience apart.

WHO IS INVOLVED?

Adrea Zittel is the US based artist behind the concept.

RELEVANCE FOR THE INDUSTRY?

The Wagon Station Encampment provides an example of how regional environments with minimal set-up investment can tap into the Escapism trend. Providing quality micro-accommodations in natural settings is one way the caravanning and camping industry can stimulate growth while catering to those who seek less and to disconnect.

Find more information

<https://www.youtube.com/watch?v=-93teK4M9Fg>

<https://www.kcet.org/shows/artbound/decomposing-the-grid-andrea-zittels-designs-for-artful-living>

Related opportunities

— Rural Respite

— Focus on Wellbeing

— Cultivating Community

Other Examples

— **Wall-less Hotel**

At one with nature

<http://design-milk.com/literally-sleep-stars-wall-less-hotel/>

— **Tech-Naturalism**

A less is more approach

<http://www.nano-b.com/buy/toothbrush/nano-b-silver-toothbrush/#.V-yyhRh94Us>



IDEAS

SHORT-TERM INITIATIVES



- Work with not-for-profit organisations (e.g. Mental Health, Mindfulness) to promote the benefits of rural respite.
- Produce meditation tracks (designed to connect you to nature – can be used at home or out in the wild).
- Education podcasts about things you can see & do in nature e.g. understanding more about astronomy (watching the stars).
- Cultivate community by creating a Meetup group(s) helping people find individuals and groups traveling to specific places.
- Partner with Tourism Australia to showcase the amazing places you can go caravanning or camping.
- Bike hire available at caravanning and camping sites to encourage further exploration.
- Pop-up necessities boxes (like pop-up libraries) – drop off/pick up items for the road, a communal, shared resource along the journey.



IDEAS

FUTURE THINKING

Wellness Camps

Australians have become increasingly aware of the importance of staying fit and healthy. The desire to unwind and connect with nature; luxury camping wellness experiences offer the opportunity to detox from city life in style and comfort. Wellness Camps offer travel experiences to connect you with the region's best wellness services, produce and experiences. Design your own wellness adventure and enjoy at your own pace. Choose from a wellness activity menu, such as yoga, fitness and meditation. Explore the area with a bush walk, sea kayaking, paddle boarding or surfing. Take a gourmet wellness journey and sample the region's organic produce.

Potential partner(s): Lorna Jane, WelleCo, Women's Health

The Essentialist Caravanning and Camping Range

Partner with IKEA to create a bespoke caravanning and camping range. IKEA is known for fabulous solutions that work wonders in small space, an ideal partner to create a range designed to cater to the caravanning and camping world. The range could include the essential camping items such as folding chairs and table, stretcher beds, portable toilet, camp stove, cooking items, storage containers and more.

Home Away From Home

The tiny house movement has created new ideas around home innovation and maximising usage of small spaces. Design RVs with the interior and exterior style of homes. Each is uniquely built around different themes and functions allowing travellers to choose an RV that reflects their personal taste and needs. For example: a cabin-style trailer-home with extendable deck, ideal for travellers who love to feel at one with nature, a cottage-style trailer-home with room for the family pet, ideal for travellers who want to feel at home on the road, or a modern-style trailer home with loft bed ideal for travellers who want to a sleek retreat.

Potential partners: Architects, Interior Designers, Small Houses Australia, realestate.com



<http://www.archiblox.com.au>



<http://www.abaton.es>

05 _

EXPERIENCE- BASED COMMUNITIES

EXPERIENCE-BASED COMMUNITIES



OVERVIEW



Travellers are earnest to visit a destination before they actually arrive and are trusting crowd sourced testimony and audio-visual sharing of personal experiences at destinations to guide their travel choices.

Lifestyle communities, both online and offline, have a significant influence over their members and their purchasing behavior (which includes travel, tourism or more permanent residential choices). Such tribalism of belonging to a group is set to become an even stronger influence in the caravanning and camping industry as time progresses.

While review-based goliath TripAdvisor now links out from almost all major hotel booking sites, a comparable service cannot be found in the Australian caravanning and camping industry. There is a huge opportunity here for parks and retail to embrace this trend.

CHALLENGE

— Creating a Systematic Approach to Reviews

Convincing customers to buy is an enduring trend rather than an emerging concept. Word of mouth is a classic marketing concept. However, it is a trend that the caravanning and camping industry has not embraced substantially or systematically compared to other sectors (especially in the connected, highly digital world). For example, peer-to-peer review systems such as TripAdvisor, are now fundamental of business operation in hotel booking systems. The challenge is to foster the systematic organisation of information, encouraging consumers and partners to participate in the review of products, sites and services related to the industry.

We must leverage the existing ‘culture of review’, creating platforms and places for people to see and share experiences with caravanning, camping and MHEs.

OPPORTUNITIES

— Create and Participate in Community

As tribalism proliferates, there is scope for the businesses of the caravanning and camping industry to actively participate in these groups in order to support people with information and inspiration. There is also the opportunity for the camping industry to create and encourage active lifestyle communities, either online or in-person.

— Sharing Systems

There is opportunity for the caravanning and camping industry to innovate with technology partners to develop new systems for sharing information. Right now that might look like a caravanning and camping industry version of TripAdvisor, but in years to come that may look like virtual reality headsets with collaborative inputs of interactive tourist generated video, that instantaneously generates itineraries based on the viewers' eye movements.

— Capturing Reality

Virtual reality, 3-D videos, 360° photos are all emerging ways consumers will readily be able to experience products, RVs and destinations. There is opportunity to attract and expand consumer groups by using this technology within promotions and sales, in fact, it will become expected.

— Curate Different Experiences

There is an opportunity to assist in curating different types of experiences within caravanning as well as residential estates – the mobility proposition means that elements can move around, change and evolve. Homes or caravans can be grouped by theme or idea, creating different experiences for different audiences.

Daydream View

Accessible virtual reality for all.



WHAT IS IT?

Daydream View is designed to allow people to experience virtual reality in a simple, fun, and affordable way. The device allows you to explore virtual reality apps that unfold around you in three dimensions. The same team has also developed a simple virtual reality video capture unit, comprised of a rotunda with multiple mounted GoPro cameras – virtual reality content creation accessible.

HOW DOES IT WORK?

Daydream View is a headset made with lightweight soft fabric that has a mount for a smart phone. The design is paired with a controller that works in a purposefully simple way to encourage content creators and consumers alike to access to the technology.

WHO IS INVOLVED?

Google, an American multinational technology company specialising in Internet-related services and products, created the Daydream View and have opened up Google VR platforms for app developers.

RELEVANCE FOR THE INDUSTRY?

Virtual reality is forecast to be an integral part of the Experienced Based Communities trend as people want to experience a destination before they arrive or buy. Google Daydream View will allow use of the technology to be so much more accessible for the caravanning and camping industry, consumers and businesses. Virtual reality not only offers the opportunity for the promotion of the benefits of caravanning and camping but also provides a valuable service to consumers.

Find more information

<https://vr.google.com/daydream/>

<http://www.gizmodo.com.au/2016/10/googles-daydream-view-is-a-super-soft-super-light-vr-headset/>

Related opportunities

- Capturing Reality
- Sharing Systems
- Curate Different Experiences

The Swedish Number

The first country in the world with its own phone number.



WHAT IS IT?

The Swedish Number was a tourism promotional campaign run by Sweden that encouraged the people of the world to call a Swede.

The campaign focussed on one of the country's core values – freedom of speech – and set up a single telephone line that encouraged anyone, anywhere in the world to call the country and chat to a Swede.

HOW DOES IT WORK?

The phone number was promoted publicly and Swedish ambassadors answered the phone lines.

WHO IS INVOLVED?

The Swedish Tourist Association ran the campaign and it was open to everyone, everywhere to dial in. The campaign generated 9000+ media impressions and 128,000+ calls from 178 countries.

RELEVANCE FOR THE INDUSTRY?

The Swedish Number offered an interesting take on the Experienced Based Communities trend by connecting people of the world to a local expert. The campaign was aimed at encouraging participation and connecting people in new ways to stimulate growth, just as in the future, the caravanning and camping industry will look towards connecting people in new and innovative ways. This could be of particular interest in dispelling myths surrounding MHEs, by providing access to locals, potential buyers can learn more about the lifestyle and community.

Find more information

<http://theswedishnumber.com>

<https://www.youtube.com/watch?v=S087OHdCG8I>

Related opportunities

- Capturing Reality
- Sharing Systems

Other Examples

—— **Tourism Australia and Virtual Reality**

An immersive experience of Australia

<https://mumbrella.com.au/tourism-australia-pushes-feels-visit-using-virtual-reality-global-marketing-push-342117>

—— **Hostelworld Platform**

One of the largest communities for travel booking and reviews

<http://www.hostelworld.com/>

—— **Minnesota in a Box**

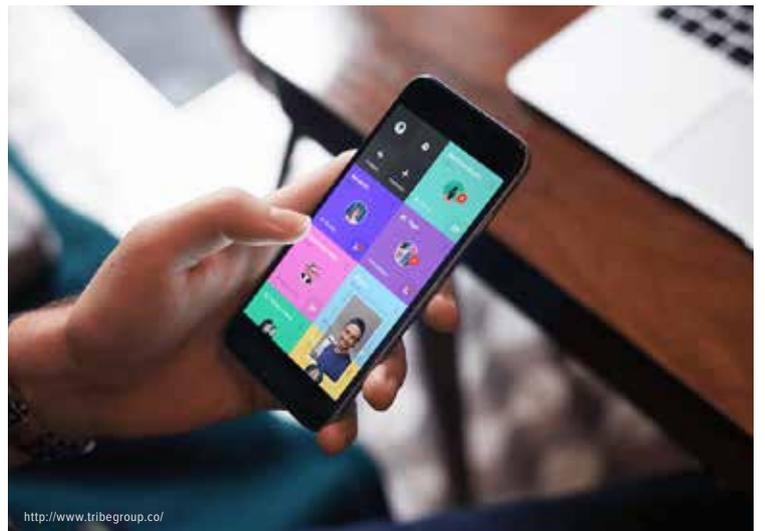
Taking the best of Minnesota to the rest of the world

<http://www.adweek.com/adfreak/minnesota-box-get-you-visit-state-will-now-visit-you-first-172702>

IDEAS

SHORT-TERM INITIATIVES

- Partner with existing social influencers and review platforms to catalogue current experiences on offer.
- Cultivate a group of 'super reviewers' like the Yelp Elite – these people will be invited to special events or exclusive experiences (they can also be utilised as an additional consulting board, to test ideas and gather research insights).
- Develop a survey/satisfaction card that can be utilised by tourists and travellers for vans, sites or related experiences – collate and consolidate results to identify product and service improvements.
- Work with Tourism Australia – supporting their efforts to build a Virtual Reality portfolio of the country and it's incredible landscape.
- Create larger pop-up experiences at key sites e.g. food truck nights, art fairs.
- Experiment with Facebook livestreaming capability – 'live steaming nature' – reminding people to find a moment of calm.
- Produce a content piece (print or digital) – 50 experiences you should put on your bucket list to do this year.



IDEAS



FUTURE THINKING

RV-VR Experience

Partner with auto dealers and caravanning and camping manufacturers to produce and distribute industry specific virtual reality content. The content will give users the experience to access camping sites and remote landscapes via road-travel through their own eyes via virtual reality technology. Visit partner auto dealers selling the 'lifestyle' option of all-wheel-drive/four-wheel-drive vehicles with caravan towing capacity, to see where it can take you. Similarly, RV manufacturers offer a look at caravanning and camping adventures through virtual experiences.

Potential partner(s): RV manufacturers, Google, Tourism Australia

Shipping Container Designs

Tour modular home designs/manufactured homes in shipping containers. Work with different designers and artists to deck-out the pod. The designs would be deployed at festivals and events as an installation or potentially a chill out zone. Further, the pods could be used at trade shows or at building and construction retail environments e.g. HomeWorld in order to sell the product to the public.

Potential partner(s): Artists, architects, HomeWorld

Roadtripper.com.au

Create a digital review platform for the purpose of booking caravanning and camping trips. The platform would showcase all of the available options for rent and travel, including basic camping, connected camping, RVs, right through to manufactured homes and modular units.

Potential partner(s): TripAdvisor, Hostelworld, Airbnb

Talk to a Local

Find local ambassadors around Australia, especially in MHEs that can talk to the benefits and lifestyle of their particular area. Fifty individuals (to start with) across Australia would be identified, selecting different types of people across the country. Ambassadors would be available to speak to via Facebook, and would post observations, photos, and recommendations (e.g. the best local coffee). A video series could also be produced to explore the relationship these people have with their community.

Potential partner(s): Commonwealth Bank



06 _

TOURISM GROWTH MARKETS

TOURISM GROWTH MARKETS



OVERVIEW

Australians are very familiar with caravanning and camping – we've grown up with it. 90% of the trips taken in Australia are done domestically. Many of the trends in this report will directly influence and impact Australian domestic travel in the category.

There is a big opportunity to grow industry perception and receptivity amongst travelers from other parts of the world.

Emerging economy superpowers China & India are the world's fastest growing outbound travel markets. India alone is predicting an incredible 50 million outbound travellers by 2020. Both markets represent lucrative growth potential for Australian tourism. China alone is projected to be worth between AU\$7.4 billion and AU\$9 billion to the Australian tourism industry by the end of the decade. Further, Tourism Australia Global Market Strategy identified this opportunity to grow demand across Asia, including Hong Kong, South Korea, Singapore, Malaysia, Japan & Indonesia. By piggybacking off an existing strategic marketing effort, we can potentially convert international travelers, promoting the benefits of camping and caravanning.



CHALLENGE

— Establishing New Behaviours

In 2015, China was Australia's second largest inbound market for visitor arrivals. However, China remains largely unconnected from the caravanning and camping sector, holding only 2% of the international visitors market share. This pattern is reflected for both India and other emerging economies.

— Address Consumer Barriers

Part of the challenge is connected to similar issues faced here in Australia, which surrounds combatting the negative stereotypes associated with this style of travel and accommodation (especially amongst more affluent travelers coming from emerging economies). Further, the activities are unlikely to rank highly in consideration set, so an education and inspiration job needs to be done to showcase the true nature and beauty of the experience (and Australia).

We must redefine what Australian tourism means to these groups, creating a new (and exciting) image of the caravanning and camping experience.

OPPORTUNITIES

— **Speak in Their Language**

There is a huge opportunity for the caravanning and camping industry to effectively prepare and service the international market through education and training. This includes; multi-lingual assets, cultural understanding education and itinerary content tailored to the experiences desired – all delivered through a strategy of making caravanning and camping in Australia accessible and attractive.

— **Global Tourism Partners**

There is opportunity to connect and form mutually beneficial partnerships with providers out of the caravanning and camping industry, with the aim of attracting specific markets to the category.

— **Technology as Utility**

Growth market tourists, who are likely technology leaders in their own country, will rely heavily on digital capabilities and connectivity. Therefore there is a need for the provision and development of technology in rural and urban localities.

— **Independent Young Tourists**

Doing things differently from their parents. There is opportunity to target independent and adventurous minded tourists from emerging economies. The independent tourist is quite different from the 'group tour' tourist; in that they tend to be young, connected to technology, well educated, and readily seeking a unique travel experience.

— **Curators of Experience**

A core driver of new markets will be the desire to experience something unique – outside of their world. There is opportunity to develop accommodation, experiences, leisure activities and lease-able RVs that deliver on this experiential desire, showcasing the best of Australia.

CASE STUDY

Notel

Part trailer park, part boutique hotel.



WHAT IS IT?

Notel is Australia's newest hipster rooftop hotel that is part trailer park, part boutique hotel. Perched on the roof of a nondescript Melbourne car park, Notel offers six chrome Airstream trailers, completely refitted as designer urban accommodation.

HOW DOES IT WORK?

Notel positions itself as 'like no hotel you've ever been to' and offers four 31-foot trailers (one of the trailers is even accompanied by a spa). Each trailer has its own deck that opens out to a communal rooftop area. Inside guests find a lounge area with WiFi and an iPad Pro pre-loaded with Netflix. The tablet also comes with a virtual concierge that guides guests to the best spots to visit in the surrounding Melbourne CBD – and even helps to secure a hard to get booking. There is no in-person concierge, room service or reception, guests can simply use their smart phone to book and access the trailer. Each site comes with ensuite, high quality linens and year round heating and cooling, with a fridge stocked with local craft beer.

WHO IS INVOLVED?

The site has been developed by FMSA Architecture – a multi-disciplinary design firm with a particular interest in urban design solutions. The team had been investigating options for the existing car park since 2012 and collaborated with local Melbourne creatives to bring their vision into reality.

RELEVANCE FOR THE INDUSTRY?

Notel represents the Tourism Growth Markets trend as they are well equipped to introducing independent young emerging market tourists, who seek adventure backed by luxury, to camping. This relates to the caravan industry's strategic priorities by promoting the benefits of caravanning and stimulating growth within new markets.

Find more information

<http://notelmelbourne.com.au/>

Related opportunities

- Independent Young Tourists
- Curators of Experience
- Technology as Utility

CASE STUDY

Pokémon Go

Discovery through gamification.



WHAT IS IT?

Pokémon Go is an augmented reality game that is accessed via smart phones and has amassed more than 500 million downloads. The game uses location-based software to show a layered version of reality on the user's screen. Rather than the game exploring an entirely virtual world, players have to physically walk around their own world in order to play.

HOW DOES IT WORK?

The Pokémon Go app shows a player a map of the world with their real location on it and as they move around they encounter virtual Pokémon characters to interact with. The app is free and available for iOS and Android phones with options for in-application purchases.

WHO IS INVOLVED?

The app was developed and published by Niantic in partnership with Nintendo and The Pokémon Company. It was initially launched in Australia, NZ and the US. It became an overnight phenomenon as the most downloaded app ever in its first week. This significantly increased the use of augmented reality technology worldwide.

RELEVANCE FOR THE INDUSTRY?

Pokémon Go represents the mass appeal of gaming platforms and shows potential appeal in Tourism Growth Markets. This example also demonstrates an opportunity to use location-based games to encourage mobility and participation across Australia. Further, gamification can be used to bridge communication with non-native English speakers, creating a universal language through technology.

Find more information

<http://www.pokemongo.com/en-au/>

Business Insider: Pokémon Go has been downloaded over 500-million times

Related opportunities

- Curators of Experience
- Technology as Utility
- Speak in Their Language

Other Examples

— **Google Field Trip**

An interactive mobile guide enabling people to discover more around them

<https://www.fieldtripper.com/>

— **Camping Site Finder**

Helping tourists find information on Denmark's 300+ campsites

<http://www.dk-camp.dk/>



IDEAS



SHORT-TERM INITIATIVES

- Partner with Lonely Planet to curate a guide focussed on caravanning and camping in Australia.
- Tactical advertising for caravanning and camping in potential markets e.g. WeChat advertising in China.
- Work with local Australians (that share a similar background as target markets) to create testimonial content, such as short videos, about the benefits of caravanning and camping.
- Host 'Ask Me Anything' conversations on social media about caravanning and camping (ensure these conversations happen at times appropriate for the specific markets).
- Create downloadable PDF guides (in various languages) outlining everything you need to think about for a caravanning and camping trip in Australia – from dreaming to doing.

IDEAS

FUTURE THINKING

iGuides

iBeacon technology guiding the way through caravanning and camping sites. Information about points of interest, maps and exploration guides are triggered when walking or driving into sites. Beacons automatically detect the phone's language setting, allowing information to be served in multiple languages. Weather information is tracked and connected to the activity guides served, tailoring experience ideas on the day, time and conditions.

Potential partner: Google

Treasure Road

Collect – Share – Show – Tag

Creation of a game platform enabling players to collect, share, show and tag. Participants are rewarded with prizes, or rewards that they can redeem on the road. The platform would be totally integrated and incentivised by social media. The platform wouldn't need to be built from scratch. Partnership opportunities exist working with established gaming platforms (which also brings an additional audience).

Potential partner: Nintendo, The Pokémon Company, Creatures, Game Freak, Game Developers Association of Australia

National Go Hotline

Whatever you need, we'll get you going. Provide a helpline offering travel tips and support for tourists, available in all languages. Most importantly, the helpline would be a safety tool. Visitors would be able to call at any time if they are lost, hurt, stranded or in trouble. Phone booths could also be turned into interactive tourist hotspots, with the ability to call for free. On a more positive note, the platform could operate as an app and help connect tourists with locals willing to show them the area.

Potential partner: National and State tourism bodies, Telstra



URBANISATION SOLUTIONS

URBANISATION SOLUTIONS

OVERVIEW

Australia is home to some of the most livable cities in the world and this appeal has ensured the ever-increasing urbanisation of our nation. Despite our country's large size, the magnetism of Australia's cities are causing housing affordability problems. This is having an impact on the changing patterns of home ownership and building, such as increased home leasing, land leasing and manufactured housing.



<http://www.archiblox.com.au>



<https://www.muji.com>

CHALLENGE

— Demand Overwhelming Supply

As high density living and housing affordability pushes into crisis, affordable safe solutions will be required and the caravanning and camping industry is well equipped to assist. This, merged with the nation's ageing population and their need for affordable housing means significant demands will be placed on caravan parks and the manufactured housing sector. The challenge for the industry lays in evolving to commercial funding models and developing partnerships to ensure supply meets demand as to not miss the growth opportunities as they arise.

— Overcome Negative Perceptions

While significant inroads have been made to shift perception of MHEs and caravan parks, stigma still exists. Work needs to be done to drive appeal for this style of living, finding a unique value proposition beyond just cost saving and affordability.



OPPORTUNITIES

— Land Leasing

The lack of affordable housing will push more Australians towards land leasing in place of traditional home ownership. The industry needs to seize the opportunity by lobbying for the opening up of land and commercial funding to ensure MHE supply meets demand.

— Infill Development

There is scope to develop and profit from vacant or under-used parcels of land within existing urban areas that are already largely developed. To use the same philosophy within caravan parks, operators may consider building up, when building out is not viable.

— Caravan Storage

Increases in high density living means there is less room to store the beloved caravan. Therefore there is a great need and opportunity for caravan storage solutions.

— Exclusive Places

MHEs haven't always been the most desirable places to live, however, we have the opportunity to create desire through exclusivity. Curated and customised communities can be created to appeal to different mindsets and psychographics.

— Ageing Population Boom

Australia's ageing population, by 2030, will create significant growth opportunities and demand for affordable MHEs as they trade in their caravans. There is scope to open up land for this development to occur and for business strategies to be developed based on local population density forecasts. In addition, there is opportunity for MHE and caravan parks to partner with senior care suppliers to develop and provide aged care value propositions which may include aged care equipment, care staff, meals and community structures.

Scadpad

Micro-housing experiment transforms parking structure.



WHAT IS IT?

Scadpad Atlanta took on the challenge to create homes in unused urban environments as a solution to urban population density. They found that many of the city's car park decks were being used only 50% of the time. What followed was a unique micro-housing and adaptive reuse experiment that transformed a parking lot into a sustainable community environment.

HOW DOES IT WORK?

The cold, uninhabitable parking structure now houses 12 students. It took 10 months to design and develop the site, including its architectural footprint, custom furniture and remote home control. All of which fits in a small 135-square-foot of a standard parking space.

In addition, they have created an organic garden that is fed by a grey water filtration and delivery system, while a composting and recycling centre helps ensure there is minimal waste. The site also includes a rapid prototyping area, featuring a 3D printer. The printer lets residents customize their unit to their preferences and needs.

WHO IS INVOLVED?

The Savannah College of Art and Design encouraged its students to take on the challenge and were supported by the expertise of faculty and alumni members.

RELEVANCE FOR THE INDUSTRY?

Scadpad represents what's possible if we think out side of the square when addressing the Urbanisation Solutions trend and make use of prime pockets of unconventional real estate within developed areas. This relates to the caravan industry's strategic priorities by stimulating growth through thought leadership as well as potential to create new commercial models.

Find more information

<http://scadpad.com/what-is-scadpad>

<https://www.youtube.com/watch?v=SpAIBNQxes8>

Related opportunities

— Infill Development

— Exclusive Places

CASE STUDY

Heijmans ONE

The movable home for single home households.



WHAT IS IT?

Heijmans ONE is a movable high quality home designed for single person households in Europe. It provides a solution for the shortage of good temporary rental housing and areas experiencing urban decay.

HOW DOES IT WORK?

Tenants and owners have the freedom of living in a prime location, in or near the city centre, with a garden or terrace. However, they need to make no permanent commitment, instead they can sign a temporary land or property rental contract. The sustainable house can be moved and re-used at different locations. The complete home is equipped with kitchen, bathroom and toilet that is energy-efficient using photovoltaic panels integrated into the roof.

WHO IS INVOLVED?

Heijmans is a listed property development company active in the Netherlands, Belgium and Germany. The concept is pitched at young single households between the ages of 25 and 35 and to public and private parties looking for a solution that will inject new life into their old sites.

RELEVANCE FOR THE INDUSTRY?

Heijmans ONE represents innovation that is tailored to changing living patterns and home ownership that is synonymous with the Urbanisation Solutions trend. This relates to the caravan industry's opportunity to reposition mobile homes as viable and attractive options to address the housing affordability crisis.

Find more information

<http://heijmans.nl/en/heijmans-one/>

<https://www.youtube.com/watch?v=SpAIBNQxes8>

http://heijmans.nl/media/filer_public/d8/4d/d84d2dcd-0051-4f32-9d09-fd635afe39e5/brochure_heijmans_one_en.pdf

Related opportunities

___ Infill Development

___ Exclusive Places

Other Examples

— **Largest Temporary City in the World, Burning Man Festival**

A week-long festival creating a 70,000-person strong city

<http://burningman.org/>

— **Airbnb Samara**

A design studio exploring notions of community and sharing

<http://samara.airbnb.com/community/yoshino/>

— **Shipping Containers for Students**

Finding new materials for housing

<http://www.citylab.com/housing/2016/09/floating-containers-as-an-affordable-housing-solution/501353/>

— **The Dumpster Project**

Finding new materials for housing

<http://dumpsterproject.org/>

— **Tiny House Movement**

Downsizing for affordability

<http://thetinylife.com/what-is-the-tiny-house-movement/>



IDEAS



SHORT-TERM INITIATIVES

- Humans of New York Style content telling the stories of people who live in MHEs – position as lively, cultural, connected community.
- MHE one night free – a promotion to encourage people to trial MHEs (activated at a local level, run by the MHEs).
- Content production around topic of urbanisation (and how the industry can help).
- Open night, Open day at MHE sites – put on a fair/market style event at MHE sites to showcase the best of community living (like a University Open Day or Career Fair).



IDEAS

FUTURE THINKING

—— Pop-up Villages

New range of caravanning and camping product developed in line with designer modular home trends, but mobile. These would be activated on high profile sites in capital cities, and can be both permanent and temporary sites (secure the space/rights). Pop-up villages would be established for key cultural moments and times, for example Christmas time / Summer time in Sydney, creating Summer Park Lands. The Pop-up Village model could also work for conferences and events e.g. music festivals (targeting a younger consumer).

Potential partner: Festival partners, MHE manufacturers

—— Caravan Members Club

Why buy when you can subscribe? The Members Club is an opportunity to create a subscription model that offers all the benefits of owning a caravan or campervan but at a significantly reduced cost. The membership would be designed as a tiered structure offering different levels of benefits such as your selection of caravan, accessories and services. Benefits include; free regular maintenance, roadside assistance, community groups, planning and itinerary support. Over time the club would build a database of caravanning and camping enthusiasts with the opportunity to sell in other lifestyle products and services.

Potential partner: RV manufacturers

—— Real Estate Crowd Funding Platform

An online platform connecting MHE owners to share the cost of land ownership. Appealing to small investors that have limited funds, it may allow a quicker route to land ownership and an opportunity to build a community with other MHE owners.

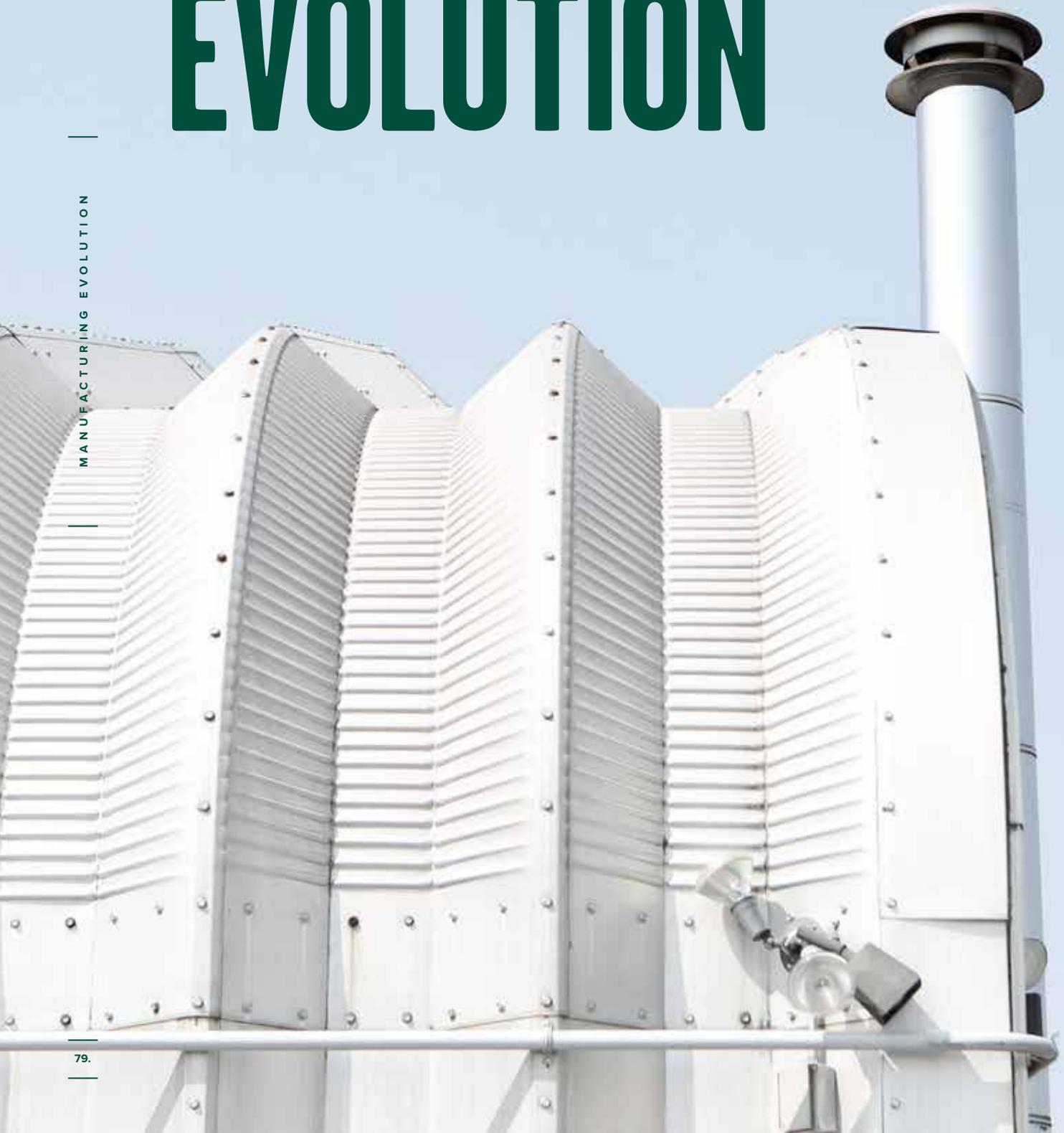
Potential partner: Real-estate.com, Domain, Pozible



08 _

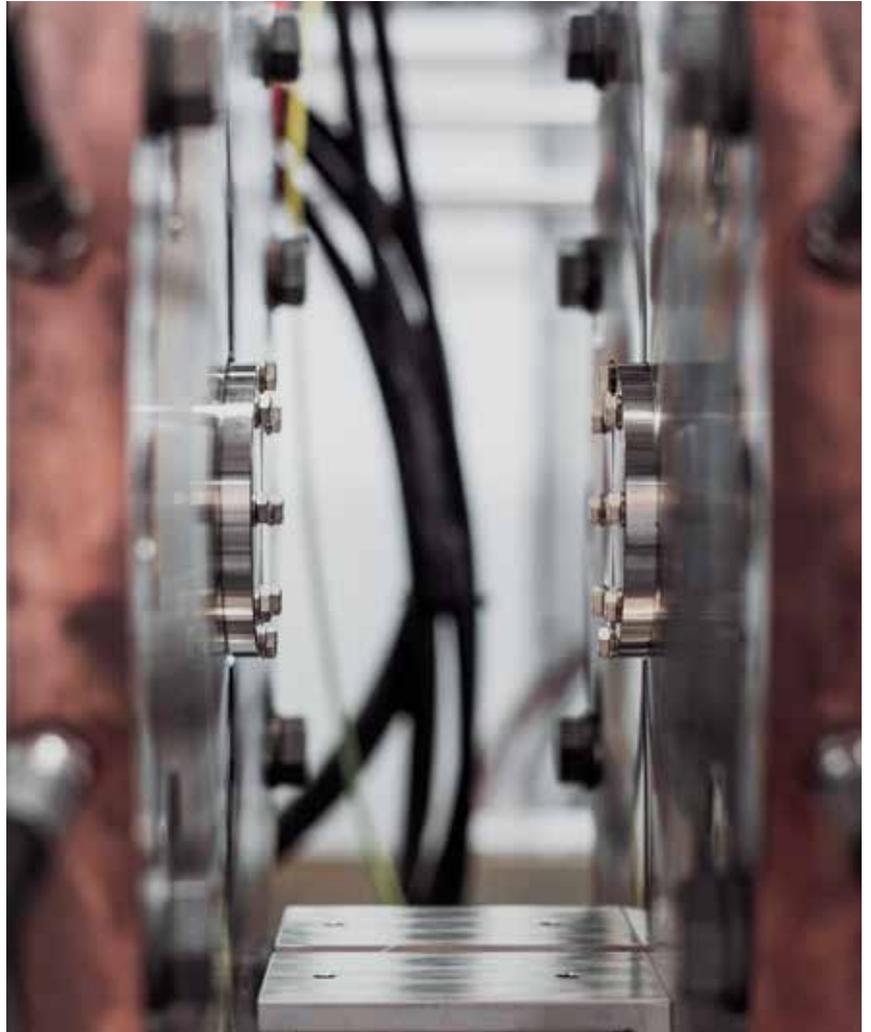
MANUFACTURING EVOLUTION

MANUFACTURING EVOLUTION



OVERVIEW

The Manufacturing Evolution is taking shape across multiple parts of the caravanning and camping industry. Globalisation has generated significant manufacturing efficiencies, which has had a major effect on the Australian market. The local mindset is changing. Australians are now much more open to foreign auto manufacturers (Korean brand Kia is now the fastest growing car brand in Australia), this is coupled with announcements from the major local car manufacturers they are ceasing manufacturing in Australia.



By the end of 2017 Holden, Toyota and Ford will cease manufacturing in Australia.

The foreign importation of passenger vehicles will impact the caravan industry in several ways; the cars from other markets tend to be smaller in size which will mean RV manufacturers will have to adapt their business models and products to meet the specifications determined by vehicles imported from Europe and Asia. The loss of the automotive industry will also potentially impact on the skills and talent available in Australia, along with potential impacts on machinery and parts. While passenger vehicle production is moving overseas, there is still a niche RV manufacturing industry here, which could be a growth sector and a potential specialisation for Australia (built and tested in the harsh Australian conditions).

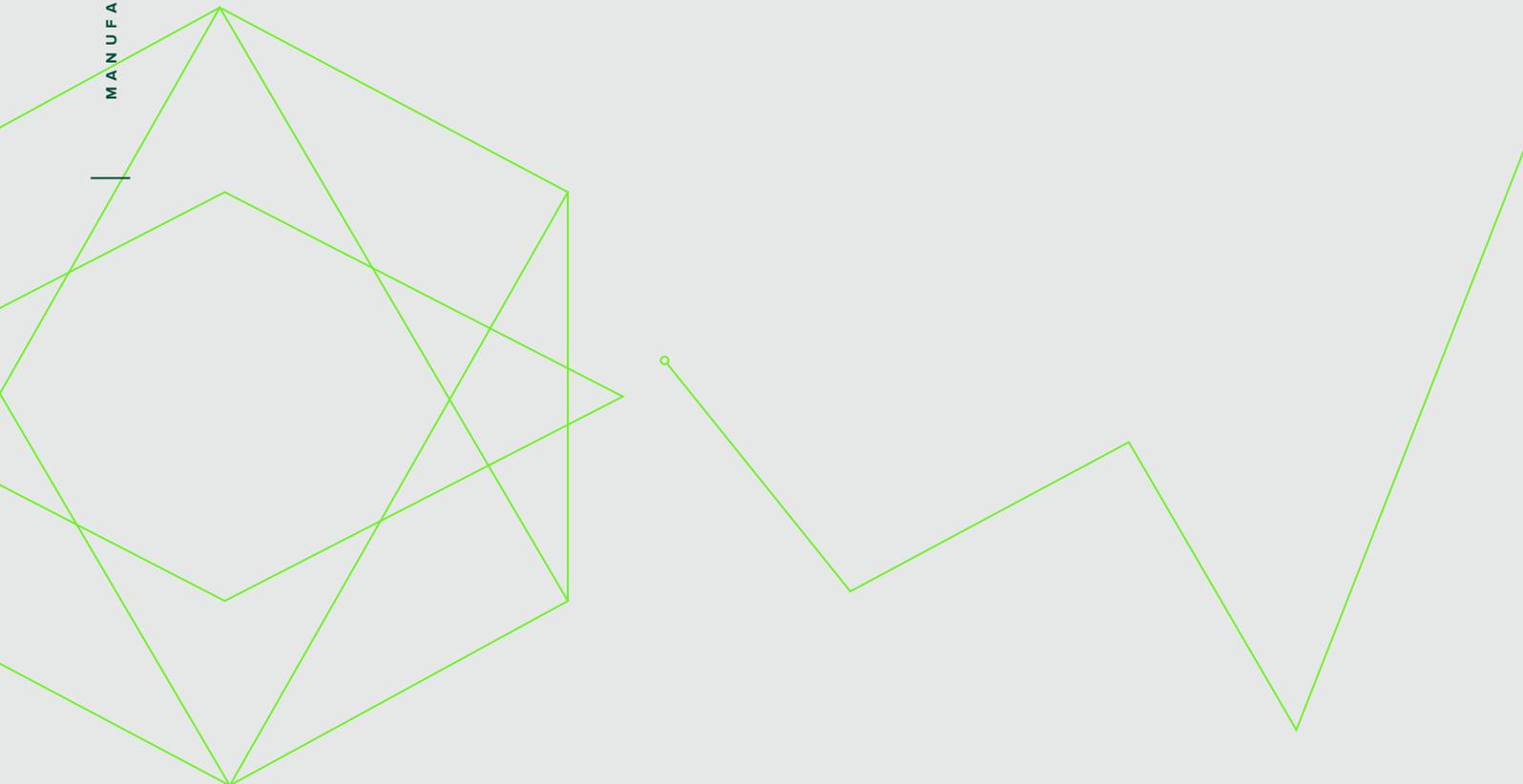
Manufacturing changes also affect the MHE sector. Technological advances such as the introduction of 3D printing, large-scale flat-packs, environmentally sustainable materials (e.g. solar powered roofs, recycled cargo containers) and more will all influence production and manufacturing choices.

CHALLENGE

— Adaptive Processes

The Manufacturing Evolution creates a need for real process changes – more people will need to be involved and it will become a much more collaborative effort. While it's a challenge, it's also a real opportunity to further develop the products manufactured in Australia. We must push towards radical innovation in the sector, looking for ways to increase customisation, improve quality and develop greater, more sustainable products. The industry and partners can play a major role in connecting the right companies and people in order to facilitate connections.

MANUFACTURING EVOLUTION



OPPORTUNITIES

— Designing Innovative RVs

There will be a need for innovative RV design – both small and large, but always streamlined – to meet the increasing demand for foreign SUVs and alternative fuel vehicles. With the potential of driverless car technology becoming mainstream, a progression of advanced driverless or towable RVs will need to follow.

— Nurture Australia's Skillbase

The loss of the automotive industry will impact on the skills and talent available in Australia and potentially impact on availability of machinery and parts. The opportunity will be to nurture skill development within the RV manufacturing sector and secure forward thinkers to lead the industry.

— Collaborative Partnerships

Success will be found in forging inclusive communication pathways with foreign auto manufacturers to understand as early as possible what product development is in the pipeline to assist with RV development.

Ultimately there will be huge value in developing actual collaborative partnerships where towing vehicles are tailored to Australian specifications rather than foreign specifications only.

— New Materials

Building permanent housing solutions or RVs provides an opportunity to look for innovative and new materials to experiment with. These materials may hold benefits such as being cheaper, more environmentally friendly or offer a more appealing aesthetic.

Beauer 3x Concept

Responding to consumer RV design demands.



WHAT IS IT?

Beauer 3x Concept was designed to meet the strong demand for small size recreational vehicles that extend to create large cabin spaces. Small sizes are required by European owners due to RV storage, however, there is an emotional desire for the comforts of a large space.

HOW DOES IT WORK?

The concept is based on the telescopic principle that allows the user to deploy three modules horizontally, and as a result, triples the living area. The system is intentionally designed to be easy to set up in 20 seconds by one person using electrical actuators powered by the 12V car battery or 220V. The furniture is set up automatically and the unit is immediately accessible.

WHO IS INVOLVED?

Beauer is a new French manufacturer of recreational vehicles that are distributed worldwide.

RELEVANCE FOR THE INDUSTRY?

Beauer provides an example of an RV manufacturer responding to the demands of consumers for design to provide them solutions. This is relevant to the Australian caravanning and camping industry as offshore imports of vehicles increase RV design will need to be innovative and also provide solutions to the challenges faced.

Find more information

<http://www.beauer.fr>

Related opportunities

Designing Innovative RVs

Hotel de Slaapfabriek

Europe's first zero footprint 3D printed building.



WHAT IS IT?

Hotel de Slaapfabriek announced that it is set to become Europe's first zero footprint 3D printed building. The construction is planned for July 2017 and planned to be complete in as little as ten days. The building will include twelve rooms, which will be available for business meetings or conferences.

HOW DOES IT WORK?

The construction process of this energy-efficient location will be 3D printed and made entirely of waste materials. A little known feature of 3D printing, amongst its many advantages, is that it has the capability of being extremely environmentally friendly.

WHO IS INVOLVED?

The luxury Dutch hotel will be constructed in Teuge, Netherlands working to the design created by designer Hugo Jager of 3D printing organisation Revelating. The concept for the building was revealed during the Dutch Construction Hackathon in May 2016 – a forum where various startups and innovators from the construction industry work together to pioneer innovative solutions.

RELEVANCE FOR THE INDUSTRY?

Zero footprint 3D printing is an example of leading edge innovation that is happening offshore that presents opportunities for collaboration with offshore automotive imports. That is, 3D printing has relevance to the caravanning and camping industry when considering new construction techniques for how we will adapt RV design to the vehicles being imported from Europe and Asia.

Find more information

<http://www.psfk.com/2016/09/dutch-hotel-constructs-first-3d-printed-building-2017.html>

<http://revelating.nl/>

Related opportunities

Designing Innovative RVs

New Materials

Other Examples

— 3D Printed Hotel

<http://www.3ders.org/articles/20160915-hotel-de-slaapfabriek-to-construct-europes-first-zero-footprint-3d-printed-building-in-2017.html>

— Pedal Powered Campers

<http://inhabitat.com/is-the-foldable-pedal-powered-wide-path-camper-a-perfect-home-away-from-home/>



IDEAS

SHORT-TERM INITIATIVES

- Educational posts on social media – material/ manufacturing process of the week (could also be developed as a podcast).
- Host manufacturing meets where industry partners get together to discuss trends and challenges.
- Develop partnerships with 'Think Tanks' involved in sustainability and innovation in manufacturing – get involved in forums, information sharing.
- Create a materials rating system based on factors such as innovation, cost, environmental sustainability (own the proprietary system – this could be applied to other industries too).
- Sponsor or contribute to start ups in the materials/ manufacturing space (help them grow).



IDEAS



FUTURE THINKING

— Innovation Lab

In partnership with universities, create a materials and manufacturing Innovation Lab. The Lab would be dedicated to finding cheaper and more sustainable materials for production of manufactured housing and RVs. The Lab would directly support all Industry partners, and they would have access to findings, insights and new material recommendations.

Potential partner(s): Universities with an innovation focus e.g. UTS

— Global Insights Tour

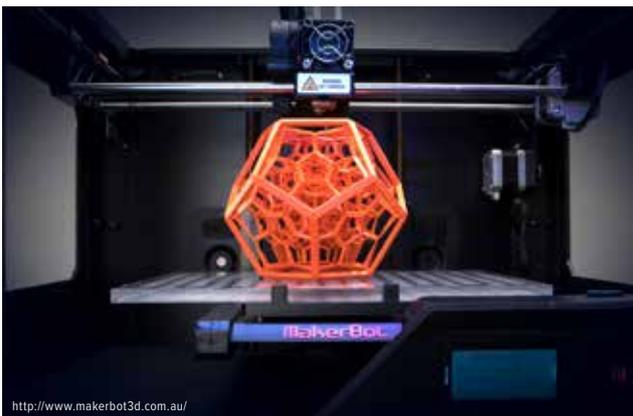
Undertake a global insights tour to experience and learn from the world leaders in the design and manufacturing industry. See the latest innovations in MHE and RVs and gain valuable insights to inspire new product development and design locally.

Potential partner(s): MHE and RV manufacturers

— Global Exchange Program

Similar to the joint venture NUMMI created by GM and Toyota (which ran for nearly 20 years) – we can learn a lot by deep immersion in other processes and cultures through collaborative, practical projects. The exchange program would see the creation of a global program. It would involve an online education platform as well as 'job swaps' or internships in key automotive markets. The types of companies involved can dramatically shape the experience. It would be recommended to mix start-ups with well-established firms/companies and include partners leading the way in innovation.

Potential Partner(s): Tesla, Delphi, Google, VW



09 _

RETAIL REINVENTION

RETAIL REINVENTION



OVERVIEW



Retail is undergoing a revolutionary change, both globally and here in Australia, driven by hyperconnectivity, access to prices points and information, and increasing consumer demands.

Customers are demanding that retailers immediately fulfill or even predict their needs, in real-time, in order to deliver them absolute convenience that is seamlessly integrated across all touch points.

Omnichannel retailing is a multichannel approach to sales that provides the customer with a seamless shopping experience. Whether the customer is shopping online, from a mobile or in-store this is now a reality disrupting multiple facets of traditional retailing. This influence of technology has become critical for the retail industry to remain vibrant and relevant. Global retail leaders are already embracing advancements such as robotics, personal recognition, digital wallets, artificial intelligence and consumer analytics to personalise shopping experiences.



CHALLENGE

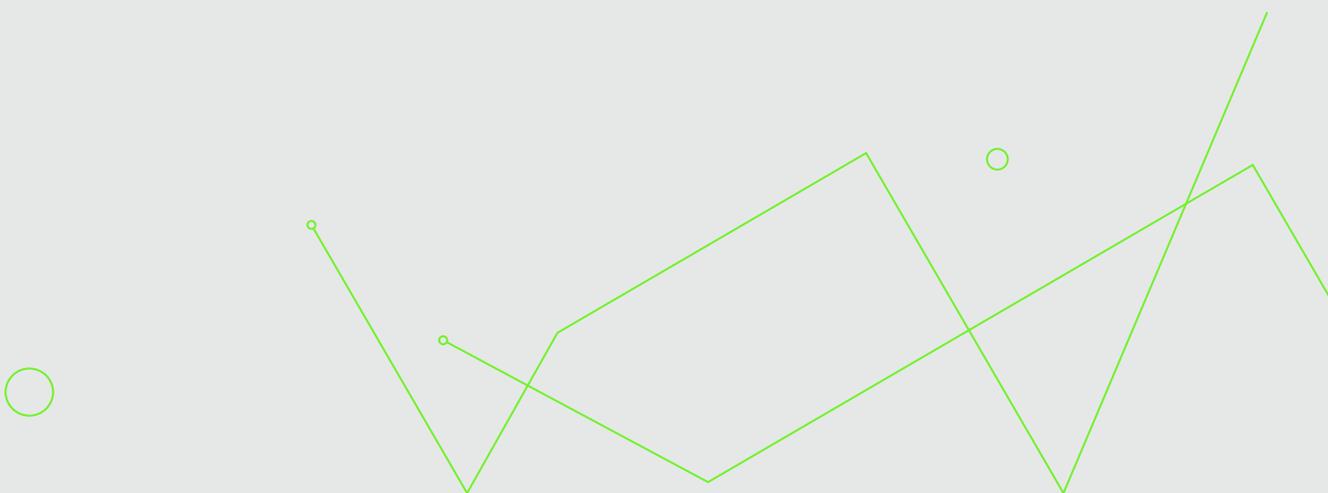
— From the Past to the Future

In the caravanning and camping industry, there is a strong need for traditional retailers to reinvent themselves and far more accurately reflect the lives of their customers, who are looking to optimise their time, investment and quality of life in real-time. There is a large range of people, businesses, partners and organisations all with differing levels of readiness for this retail revolution.

Retail is dead, long live retail.

— Transition to Digital Retailing

For RV distributors, aftermarket servicing/accessories and camping stores, the challenge will lay in resistance to change or lack of practical application of an omnichannel strategy between online (PC/Mobile/etc), stores and showrooms. An omnichannel approach involves meeting the consumer at every touchpoint enabling them to ask questions, find out more about a product or service and to be able to purchase wherever it's most convenient to them.



OPPORTUNITIES

— E-Commerce Platforms

E-commerce is a big opportunity for RV manufacturers – as the auto industry explores different models of engaging the consumer along the purchase pathway, we too can learn how this can work for our industry. Digital retailing is also influencing how we purchase real estate, which we can utilise to showcase manufactured housing.

— Wearable and Digital Payment Devices

Opportunity exists for the caravanning and camping industry to prepare themselves for and encourage payment via wearable and digital payment devices. This will deliver on the objective of omnichannel retailing to enable customers to make purchases via whichever method they find most convenient – for example Apple Pay and Samsung wristbands. This is far less daunting than it sounds, if a retailer has PIN entry devices (PEDs) that are already capable of taking contactless payments, then they can take payment without the need to invest in new hardware.

— A Personalised Approach

While consumers use the ubiquity of data to lead disruption, there is scope for the caravanning and camping industry themselves to use data to better serve their customers and profit through this approach. The opportunity is to evolve to data driven business models that may correlate, for example, purchasing and mobility data to create custom communications for consumers.

— Immediate Delivery

Reinventing retail delivery systems in-line with consumer demand for immediacy is an opportunity for the caravanning and camping industry. At a global level, corporations are developing driverless courier vehicle using autonomous vehicle technology, delivery drones are becoming viewed as fast-paced delivery mechanisms and retailers are upping the ante from same-day delivery to within the hour.

— Subscription Models

The retail revolution has created different ways to buy, one of the key changes was the movement from buying to renting (sharing economy). There is receptivity to engaging with products and services in this way – we can apply this thinking to both caravans and residential housing (MHEs).

Carvana

World's first, fully-automated, coin-operated car vending machine.



WHAT IS IT?

Carvana is an online used-car retailer that has begun opening bricks and mortar storefronts. Their retail strategy involves dispensing cars through a vending machine that dispenses cars like soda cans.

HOW DOES IT WORK?

Carvana sells direct to the consumer online, cutting out any dealerships or middlemen, and the car is dispensed in person. The customer inserts an oversized coin into the vending machine, also known as an automated parking garage, and the car is delivered to the floor.

WHO IS INVOLVED?

Carvana is a technology start-up based in Arizona, USA, that allows customers to shop, finance, and trade in cars through their website.

RELEVANCE FOR THE INDUSTRY?

Carvana has taken a conventional model of online-retailing and combined it with an unconventional delivery of product; it is this type of purchase experience and disruption (by cutting out the dealership) that is driving the Retail Reinvention trend. The concept of Reinventing Retail relationships between online channels and showroom floors relates to the caravanning and camping product industry's strategic priority to improve services delivered to consumers.

Find more information

<https://www.carvana.com/>

<https://www.youtube.com/channel/UCCXzwmWklkj1I6xBp0GxRLQ>

<http://www.forbes.com/sites/jimhenry/2015/11/29/carvana-used-car-vending-machine-is-the-tip-of-the-disruption-iceberg/#2510fd70d9f8>

Related opportunities

— E-Commerce Platforms

— Immediate Delivery

Hyundai Virtual Guide

Augmented reality car manual.



WHAT IS IT?

Hyundai Virtual Guide has created an advanced electronic car manual using augmented reality. The manual comes in the form of an app and was developed to encourage owners to become more familiar with their vehicle and guide them through simple car maintenance.

HOW DOES IT WORK?

The app is used to see an augmented reality view of the engine compartment or interior of the car, with floating digital dots illustrating different points of interest like the windshield washer bottle or the location of the air filter. The user can tap one of the dots and see an illustrated, step-by-step walkthrough of the related maintenance for the item. If they are inside the vehicle they can get a tutorial on how to use different functions of the car, like pairing a phone with Bluetooth.

WHO IS INVOLVED?

Hyundai is a multinational automotive manufacturer based in Seoul, South Korea and their team in North America developed the app for the Hyundai Sonata model.

RELEVANCE FOR THE INDUSTRY?

Hyundai's Virtual Guide has modernised the idea of the owner's manual, which has been a simple bedrock of automotive retail for quite some time. This example of Retail Reinvention in action provides inspiration for how the caravanning and camping industry could use innovation to improve the quality of services delivered to consumers. This is also an example of where the use of specific customer data could assist in making recommendations for maintenance.

Find more information

<http://www.hyundainews.com/us/en/media/pressreleases/44450/hyundai-virtual-guide-introduces-augmented-reality-to-the-owners-manual>
<https://www.youtube.com/watch?v=qOMvI6-cP7o>

Related opportunities

— A Personalised Approach

Other Examples

— Vroom – Delivered to Your Door

Changing the delivery model

<https://www.vroom.com/>

<http://fortune.com/2016/08/02/vroom-cars-virtual-reality/>

— Story Led Retail

Creating a narrative around the retail experience

<http://thisisstory.com/>

— Hotel Tonight Concierge

Integrated digital service

<https://techcrunch.com/2015/07/13/hands-on-with-hotel-tonights-new-concierge-service-aces/>

— Real-Time Insights

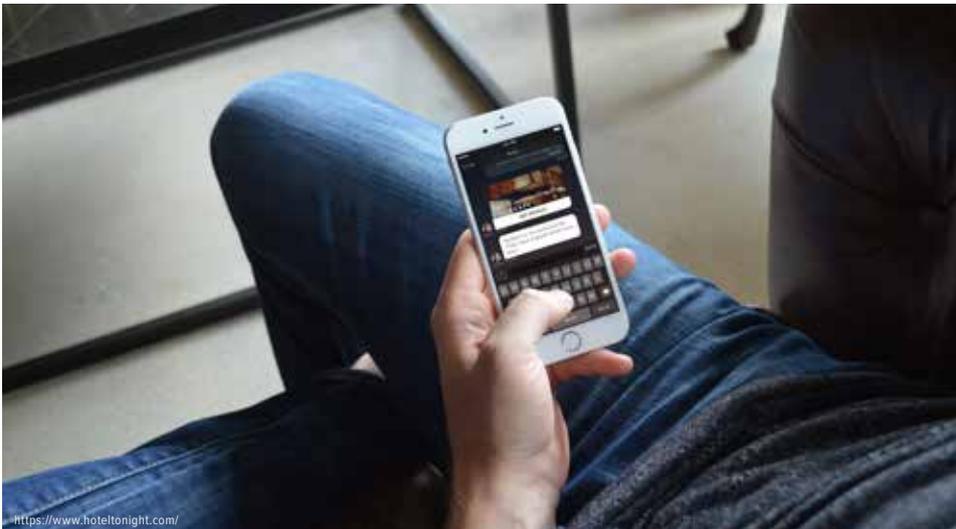
A data support platform for car retailers

<https://gallery.cortanaintelligence.com/Solution/Vehicle-Telemetry-Analytics-2>

— Mixed Reality Showrooms

Using augmented reality to elevate the sales experience

<http://www.bloomberg.com/news/articles/2015-11-20/microsoft-volvo-car-to-bring-augmented-reality-into-showrooms>



IDEAS



SHORT-TERM INITIATIVES

- Partnership with online platforms, integrating caravanning and camping products or realestate.com to include MHE opportunities.
- Partnership with Uber to showcase RV design and interiors (get from A to B in an RV).
- Develop Retail Trend Safaris for Caravan Industry Association Australia partners – a retail trend safari involves a group excursion to several retailers, making observations on what works/doesn't work in retail (inspiring new ideas and service changes).
- Create 'how-to' content e.g. How to buy a caravan, How to set up a camp site (work with influencers, social bloggers in related areas).
- Add to the caravanning and camping offer providing further inclusions such as supplies, park access passes.
- Activate dealerships, encouraging vendors to put on sausage sizzles, campfire sing-alongs or adventure activities.
- Build a network of MHE experts you can consult with if you're considering a purchase – ability to discuss pros and cons and find communities that are right for the individual or family.
- Create a basic web calculator to project cost savings on a family holiday in a caravanning or camping environment.

IDEAS

FUTURE THINKING

Preparation App

Partner with adventure and retail partners to provide a personalised guide on what you need to buy based on where you are going. Create an app with Augmented Reality (AR) capabilities, enter in your destination and information about your trip (number of attendees, style of travel, preparedness), look around the store through the app, and it will tell you what you need and why.

AR overlays will give you information about your destination and compatible products that can be purchased to complement your travel agenda. iBeacon technology can also be integrated in-store to help guide consumers to the right products.

Potential partners: Anaconda stores



Caravan Concierge

Making caravanning and camping experiences as easy as possible! The Caravan Concierge will take care of everything for caravanning and camping adventures. The service designs your experience, it allows you to enter your type of holiday (i.e. luxury, adventure or back to basics), location, duration and number of people, then Caravan Concierge does the rest. It takes care of everything from food supply kits, camping equipment, the itinerary to suit your vacation, then delivers it directly to your door.

Potential partners: online retailers, adventure groups (tap into experts)

Pop-Up Retail – RVs and Manufacturing Housing

Pop-up retail is increasing. RVs and manufactured homes can be considered a retail space themselves. The mobility of caravans offers a benefit to casual retailers or provision of space at more temporary events, for example music festivals. Vans could be hired as a one-off individual retail space or as part of a larger infrastructure development. The industry could put on 'touring markets'; with vendors each allocated a caravan that moves to multiple spaces around the city or country.

Potential partners: Westfield, Lendlease

THE FUTURE FOR THE INDUSTRY

THE FUTURE FOR THE INDUSTRY

While we can't guarantee what the future holds, examining trends across industries, as well as identifying emerging dynamics in our industry, places us in a better position to plan for what's to come. There are a few common and significant themes that bridge trends, appearing and influencing all aspects of our lives.

What is abundantly clear is the future is connected.

The largest theme, evident in all trends is the idea of 'connectedness'. We desire to be connected to other people, both individuals and networks, connected to ourselves, to nature, or new ideas, and connected all the time through technology.

As we strive to become a greater resource, to be 'go-to' indispensable partners, being a connected industry will be the most important factor for trust and reliability. And the more connected we are, the more likely we are to be able to grow the industry – providing more potential pathways to develop new commercial funding models.

Our industry must drive connectivity.

We must make connections happen. Bring unlikely people together. Connect the dots for our partners, and customers. As we review our plans and strategic initiatives we need to ask 'Does this increase connectivity?', 'Are we operating as a facilitator for change?' and 'Are we considering this as a step towards a connected future?'.

If we continually strive to connect seemingly unrelated elements, we can fast become a leader of industry, in our sector and beyond!

GLOSSARY

- **Campervans** as defined by the Australian Bureau of Statistics, are self-propelled motor vehicles containing an area primarily used for accommodation. This definition would include vehicles commonly referred to as motorhomes.
- **Caravans** are defined as ‘any enclosed trailer designed primarily for human occupation whilst stationary’.
- **A Manufactured Home** is a self-contained dwelling that is either built or packaged off-site and then transported to the estate for installation (also known as a ‘relocatable home’, ‘manufactured home’ or ‘mobile home’).
- **Manufactured Home Estate (MHE)** is a piece of land or estates developed specifically for manufactured homes. A MHE may be fully dedicated to manufactured homes or may contain a combination of homes and caravan and/or camping sites.

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THANK YOU

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