**EDITION 3** 

# CARVANCAMPING MARIEL MAN

# AUTO AND CARAVAN INDUSTRIES COLLIDE

Synergies and investment ramp up as automotive heavyweights dive into caravan opportunity

More space and more luxury Next-gen family vans deliver more luxury to meet changing needs caravancampingsales

RV WORLD

ISUZU

811-WVP

# Edition 3 at a glance



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# Introduction

Welcome to edition 3 of Caravan Camping Market Watch. Since our last edition, positive momentum in the industry has continued. Exciting and innovative new offerings are certainly attracting buyer interest, as evidenced by the upward trend in <u>both visits to</u> <u>caravancampingsales.com.au</u> and enquiries <u>placed on dealer stock listings</u>. With leads placed on dealer stock listings outpacing the growth in total inventory listed onsite, there is plenty of opportunity for dealers and OEMs to win more leads by simply listing more stock.

Of particular interest to dealers and OEMs in edition 3, will be our <u>interstate leads analysis</u>. Technological advancement and evolution in buying behaviour means that consumers are as confident as ever in purchasing way beyond the confines of their local areas or state capital. To best capitalise on the interstate opportunity and the growing inclination of buyers to purchase their next pride and joy sight unseen, get in touch with your Account Manager.

Our team's continued investment and dedication to elevating the consumer experience has delivered a new desktop homepage with exciting features – quicker and easier search capabilities, comprehensive reviews that facilitate more informed decision making and video content that delivers our unique insights and experiences in a vivid and fun fashion.

Excitingly, the first caravancampingsales iOS app is also now available for buyers and



enthusiasts to download. The iOS app is the next step in tapping into the increasingly digital- and online-orientated purchase journey of caravan buyers and further reinforces caravancampingsales as the premier destination for all things caravanning.

As always, we would love for you to get involved in shaping future editions of this publication. If you have ideas or topics that you would like investigated, <u>simply email our team</u>.

Happy caravanning,

**Craig Fraser** 

National Sales Director carsales.com Ltd



## Why are there so many caravan manufacturers?

Why are there less than half the number of car brands in Australia than caravan manufacturers?

Find out more 🗗

# State of the market

"Australia's Caravan and Camping industry performed well in 2016, with domestic trips and nights increasing by 9% and 16% year on year; recreational vehicle registrations continued to represent the strongest growing vehicle category in Australia increasing by 4.9%; and although recreational vehicle manufacturing was down 3.8% from the previous period, 2016 was still the second largest year for manufacturing outputs in the last 37 years and represents the seventh consecutive period over 20,000 units.

The previous year has highlighted that the caravan and camping industry is influenced by

a complex market and political environment that is continuing to shape our sector, business models and consumer behaviour. As we move into 2017, the sector is positioned well to meet the challenges and opportunities that presents, however the industry must not become complacent to the demographic, economic and political factors currently underpinning Australian society."

By Stuart Lamont, Chief Executive Officer, Caravan Industry Association of Australia Ltd



# MORE AVENUES FOR BUYERS TO FIND YOUR STOCK

# Now available: iOS app for caravancampingsales

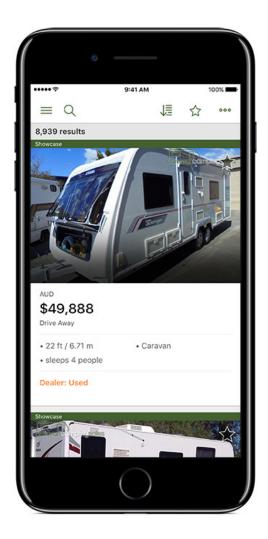
The new app for **caravancampingsales** empowers buyers to research their next purchase and browse your stock listings - anytime and anywhere.

#### **Key Features:**

- Search dealer new and used caravans, camper trailers and motorhomes
- Select multiple makes, models and locations in a single search
- Stay up-to-date with the latest caravan news and reviews
- Share listings directly from their mobile device to their network via Facebook, Twitter, email or SMS



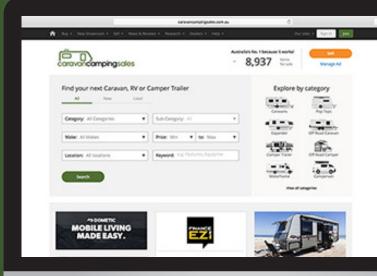




#### Enhanced engagement: Brand new desktop homepage

- More efficient search
- Reviews, news and advice
- Thought-provoking feature articles

#### www.caravancampingsales.com.au



# Revving up the RV industry

Nissan Navara towing the Tvan Murranji

The lines between the RV and auto industries are increasingly blurred.

**C**AD design, 3D parts printing, monocoque body shells with composite timberless structures, aircraft-standard tolerances and adhesives, hybrid and lithium-ion power systems, disc brakes, automotive-style wiring harnesses and just-in-time manufacture...

These are among the obvious technical and business practices filtering their way into the Australian RV industry that, in some areas, is still back in the horse and cart days.

But it's in the less obvious areas of marketing, trading, business positioning, franchise and dealership development that many of the greatest changes are taking place behind the scenes.

The rationalisation of the Australian motoring industry in recent years has led some of the country's oldest and largest retailers to look elsewhere for growth opportunities and the under-done Australian RV industry sticks out like a sore thumb.

We started to see it with a brain drain, notably with a move of Joel Stoddart, then Chief Engineer

at Holden Special Vehicles for a 12-month stint as R&D Manager of Jayco. During this time he oversaw Jayco's industry changing transition from leaf-spring to independent coil spring suspension that is now a standard feature on more than half of all Jayco caravans and campers.

Now we're seeing it with investment, with New Age Caravans and Walkinshaw Automotive last October announcing a partnership designed to bring innovation, fresh products, new materials and advanced technologies to the caravan and RV sector.

Walkinshaw Automotive Group (WAG) is best known in Australia for its ownership of Holden Special Vehicles from 1988 and its high-profile V8 Supercars team, but it also converts RAM trucks to right-hand drive via its American Special Vehicles joint-venture with Ateco Automotive.

Its recent decision to cease manufacture of HSV Holdens as a direct consequence of GM-H's cessation of local production left a gap in its portfolio that the company was keen to fill and the Australian caravan industry beckoned. The rationalisation of the Australian motoring industry in recent years has led some of the country's oldest and largest retailers to look elsewhere for growth opportunities

> New Age was a perfect partner, as the fastgrowing Epping, Victoria company led by dynamic founder and owner Gabby Montagnese has a well-deserved reputation for quality, but is relatively low-tech by modern caravan manufacturing standards.

> "We are great admirers of what Gabby has been able to achieve and taking a stake in New Age is a clear signal of our belief in our ability to assist in the next phase of growth for New Age caravans," said Walkinshaw Automotive owner, Ryan Walkinshaw, at the time of the announcement.

#### From cars to caravans

New Age is among a number of Victorian caravan manufacturers to profit from the contraction of the car industry in other ways, being the recipient of a government grant to employ displaced Ford workers in the wake of its withdrawal from local manufacturing last year.

However, the marriage with Walkinshaw was largely a defensive move in the face of recent industry developments that threatened to leave behind those manufacturers that don't embrace automotive technologies.

The Sunshine Coast's Zone RV has sent a gale of change through the industry with its automotive-style manufacturing processes. These begin



Sunshine Coast's Zone RV has sent a gale of change through the industry with its automotive-style manufacturing processes.

Z-20-6 OFF-ROAD

Zone RV Z-20.6

with 3D modelling, standardised builds, and low tolerance manufacture and continue through the use of aircraft construction techniques, timber-less construction and ISO certified wiring looms that have been machine terminated and are complete 'plug and play'.

"Zone RV by no means draws any of its inspiration from fellow caravan manufacturers or the wider industry, but rather looks to the automotive, marine and aviation industries for new innovations," says co-founder and director David Biggar. "This allows us to stay at the forefront of our industry."

While Zone RV's current products and pricing keep it from threatening mainstream manufacturers at this stage, the big players are watching its progress closely.

Biggar is also the joint owner of a Melbournebased company called CL Composites that is producing one-piece fibreglass sandwich walls for a number of well-known caravan manufacturers, allowing them to rival marketleader Jayco in this more advanced construction medium.

Australia's leading caravan insurer CIL recently recognised the benefits of this construction

There is an entire class of weightconscious caravans being built to be 'Prado-friendly'.

by offering a 10 per cent premium discount to caravans with all-fibreglass cladding.

#### Deals on wheels

Simply diversifying an automotive portfolio into caravan dealerships is another recent industry development and Australia's oldest automotive retailer – the Preston Motors Group whose origins date back to 1912 – now owns the former New Age dealership, Little Joey's Caravan Centre in Epping, now trading as New Age Caravans Melbourne.

To further signal its future intentions in the RV world, PMG has appointed former Melbourne and European RVs dealer principal Scott Webster as General Manager of its caravan division, suggesting further inroads in the future.

In rural Victoria, 80-year-old Holden, Mercedes-Benz, Mitsubishi and Suzuki dealer Callaghan Motors has just opened New Age Warnambool and also partnered with automotive/4WD manufacturer and supplier TJM as part of their business.

Caravan showrooms are also becoming more automotive in their style and customer orientation. Multi-franchise dealer Camperagent in Adelaide incorporates flat screens with rolling videos and separate retail and service reception areas complete with lounge areas. Zone RV is also working on new ways of integrating virtual reality and 3D modelling into the sales process – things that the automotive industry is already doing.

"We admire the way Land Rover position themselves," said Biggar, "which is why we partner with their dealerships to do pop-up viewings and they loan tow vehicles. This allows us to showcase our caravans beside their premium vehicles and lift the perception of our caravans."

Increasingly we are seeing cars and RVs being used together in advertising. Nissan recently put a Track Trailer Tvan behind its new generation Pathfinder; Holden had a playful dig at the caravan industry with its Holden Colorado – Jayco 'Bloody caravanners!' TV commercial; while European and British manufacturers such as Bailey and Swift regularly partner with automotive brands to showcase the light weight of their caravans.

In Europe, German premium caravan maker Knaus regularly features Mercedes-Benz tow vehicles in its advertising to accentuate market exclusiveness and quality, while locally, Nova Caravans cuddles up to Jeep to emphasise the strength and off-road suitability of its products.

New Age is among a number of Victorian caravan manufacturers to profit from the contraction of the car industry.





#### Vanners driving ute sales

The growth in the dual cab utes market can, to some extent, be related to the popularity of the caravan/adventure market, particularly the scramble by manufacturers to promote the desired '3500kg towing ability' of their latest models.

And there is an entire class of weight-conscious caravans being built to be 'Prado-friendly', meaning that they have a laden capability to be towed by Australia's most popular off-road SUV, the Toyota Prado, whose legal towing ability is limited to 2500kg.

So, if you're in the market for a new caravan, camper trailer or motorhome, it may be an automotive dealership that will be your first

S630-BND

#### Caravan showrooms are also becoming more automotive in their style and customer orientation.

port of call in the future. There you will find an automotive sales and service experience with good coffee and a product built to tighter tolerances with an automotive-style warranty.

However, it's not all good news for consumers in this brave new RV age.

As Concept Caravans' National Dealer Manager Conrad D'Cunha points out, caravan manufacturers are ahead of motor vehicle manufacturers in some ways.

"With most caravans, you can opt for an internal configuration that is variable, but built on the same platform. With motor vehicles, that level of customisation is only available with very few manufacturers and then at considerable extra cost and with relatively fewer options," he explained.

And while you can expect to see caravan prices drop further as the scale volume of automotive measures reduces manufacturing costs and as dealers are driven to clear their stocks more regularly as a condition of their automotive-style dealership/franchise agreements, you may not be able find a sales person who has actually spent a night in a caravan.

But then again, you might be battling to do this at most caravan dealerships now. How many Ferrari salesmen actually own a Ferrari, anyway?

> The growth in the dual cab utes market can to some extent be related to the popularity of the caravan/adventure market.

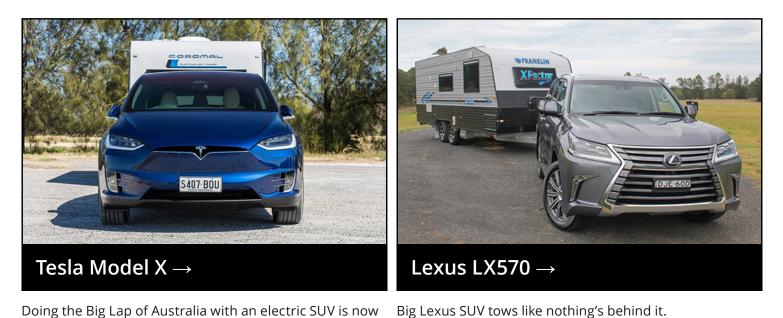
> > Mitsubishi Triton Exceed; Crusader Excalibur Nobleman Advance

# Hop in the driver's seat with our Tow Tests

We put the latest vehicles to the test in towing caravans across our wide brown land.



We load up a top-spec dual-cab GT variant to see how the New V6 ute has plenty of grunt but can it tow? big Mazda ute tows close to the limit.



a reality.



Land Rover Discovery Sport  $\rightarrow$ 

There's another Disco that shapes up as a decent two tonne tow tug.



Travelling over 3000km towing a caravan will test any vehicle, as we found out with the latest Mitsubishi Triton.



Toyota Fortuner GXL  $\rightarrow$ 

It's a masterful multi-tasker but can Toyota's ute-based SUV handle the big loads?



#### Mitsubishi Pajero Sport ightarrow

A great all-rounder let down by lacklustre towing performance.



The new Hilux continues to sell its socks off but is it a



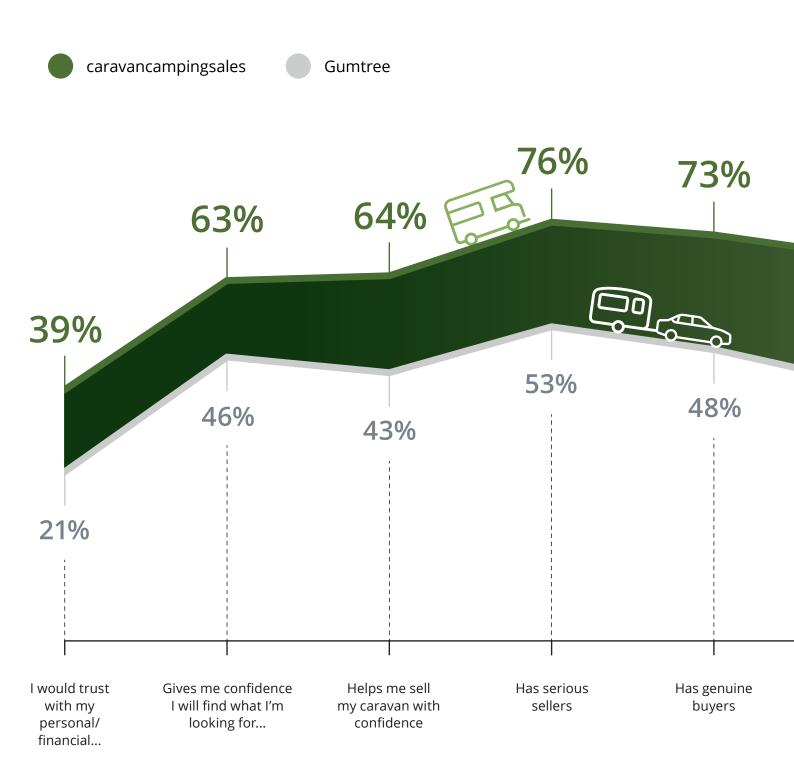
RAM 2500 Vs Ford F-250  $\rightarrow$ 

Two locally-converted American pick-ups go head-to-head in a three tonne towing duel.

better tow vehicle than before?

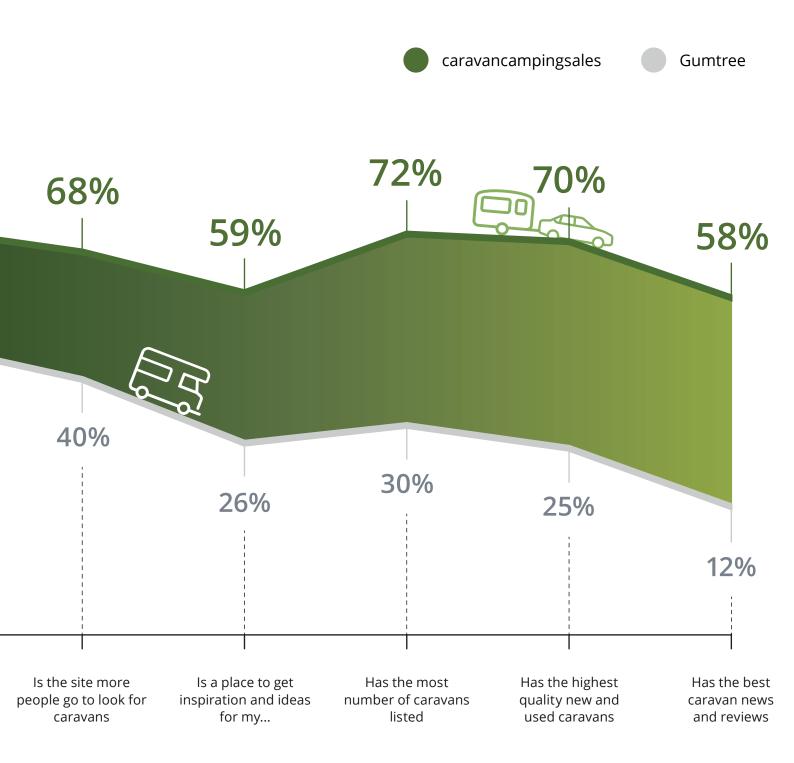
# Consumer sentiment for online caravan and camping classified websites

We asked Australian consumers a few questions about where they like to shop for their next purchase. When it comes to the key brand perception statements below, it's clear consumers prefer **caravancampingsales**.



Source: Research conducted by Nature Pty Ltd (April 2017).

Base Question: Aware of caravancampingsales (N=417), Aware of Gumtree (N=554). Question: "Which brands would you associate with each of the statements above?"



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Question: "Which brands would you associate with each of the statements above?"

# Caravan buyers extend their search

Caravan buyers are taking up the opportunity to enquire on stock items far beyond their local area or capital city, as evidenced by caravancampingsales' latest analysis on interstate leads.

Below are some key insights on interstate leads across different stock categories.

For information on how you can maximise this opportunity, speak to your Account Manager.

#### **CARAVAN** leads sent on stock in another state

				DEALER	STATE			
		NSW	VIC	QLD	WA	SA	TAS	NT
BUYER BY STATE	NSW	64.6%	17.6%	12.7%	1.5%	3.4%	0.1%	0.0%
	VIC	19.4%	65.0%	7.9%	1.2%	6.3%	0.1%	
	QLD	24.8%	12.7%	57.7%	1.3%	3.3%	0.1%	0.1%
	WA	12.1%	15.8%	8.2%	56.0%	7.7%		0.2%
	SA	14.5%	22.8%	8.9%	2.5%	51.2%	0.1%	
	ACT	52.5%	24.9%	12.7%	4.4%	5.5%		
	TAS	35.3%	33.3%	13.2%	2.5%	3.9%	11.3%	0.5%
	NT	16.5%	22.7%	26.8%	4.1%	15.5%		14.4%

DEALER BY STATE

RIVER BY STATE

Source: caravancampingsales internal data, leads on dealer stock November 2015–December 2016

caravancampingsales.com.au

		NSW	VIC	QLD	WA	SA	TAS	NT
BUYER BY STATE	NSW	65.4%	21.7%	6.9%	0.3%	5.8%		
	VIC	7.9%	76.2%	7.1%	0.4%	8.3%		
	QLD	19.8%	20.5%	52.3%	0.4%	7.1%		
	WA	1.9%	28.7%	2.8%	60.2%	5.6%		0.9%
	SA	7.1%	19.3%	2.1%	0.7%	70.7%		
	ACT	38.9%	50.0%	5.6%		5.6%		
	TAS	7.1%	50.0%			7.1%	28.6%	7.1%
	NT		11.5%	30.8%	3.8%	11.5%		42.3%

DEALER BY STATE

#### **CAMPER TRAILER** leads sent on stock in another state

#### **MOTORHOME** leads sent on stock in another state

	DEALER BY STATE						
		NSW	VIC	QLD	WA	SA	TAS
	NSW	74.8%	9.2%	11.4%	3.3%	1.2%	0.1%
	VIC	45.7%	38.0%	9.7%	3.1%	3.1%	0.3%
STATE	QLD	51.3%	7.9%	36.1%	3.1%	1.5%	0.1%
BUYER BY STATE	WA	25.8%	8.1%	9.7%	53.0%	3.4%	
	SA	47.6%	18.2%	9.1%	9.1%	16.1%	
	ACT	69.2%	7.7%	11.5%	7.7%	3.8%	
	TAS	53.8%	19.8%	14.3%	4.4%		7.7%
	NT	66.7%	11.1%		11.1%	11.1%	

#### DEALER BY STATE

Source: caravancampingsales internal data, leads on dealer stock November 2015–December 2016

caravancampingsales.com.au

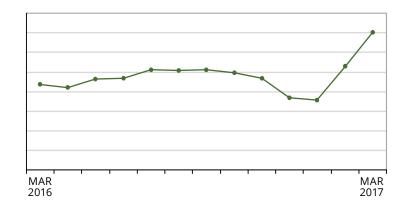
# THE CARAVAN AND CAMPING MARKET LANDSCAPE

Actionable insights to make better decisions that drive better results.

#### CARAVANCAMPINGSALES VISITS<sup>1</sup>



#### DEALER LEADS ON CARAVANCAMPINGSALES<sup>2</sup>



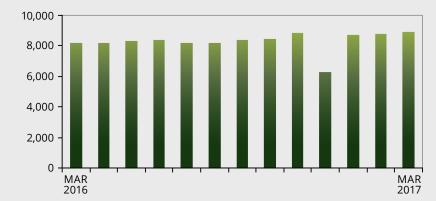
Dealer leads on caravancampingsales have increased year-on-year by:

**61**%

#### INVENTORY LISTED ON CARAVANCAMPINGSALES<sup>3</sup>

Total inventory listed on **caravancampingsales** has increased year-on-year by:

9%



Sources: 1. caravancampingsales internal data, Webtrends, March 2016–March 2017. 2. caravancampingsales internal data, March 2016–March 2017. 3. caravancampingsales internal data, March 2016–March 2017.



#### AUSTRALIA'S INSATIABLE APPETITE FOR MOBILE<sup>4</sup>

**1hr 36mins** average time spent by <u>Australians</u> each day using the

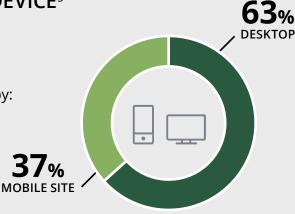
internet via mobile phone

**60%** Australians bought something online in the past month 40% year-on-year growth of Australians buying online via their mobile

#### **TRAFFIC SPLIT BY DEVICE<sup>5</sup>**

Visits to the caravancampingsales mobile website have increased year-on-year by:

**40**%

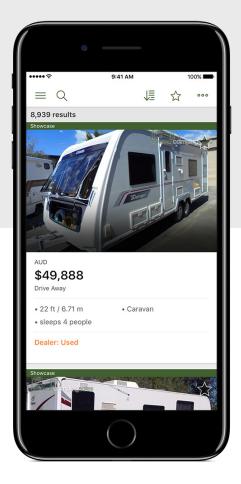


#### CARAVANCAMPINGSALES APP TAKES OFF<sup>6</sup>



caravancampingsales iOS app

**5,170** app downloads as of April 30, 2017.

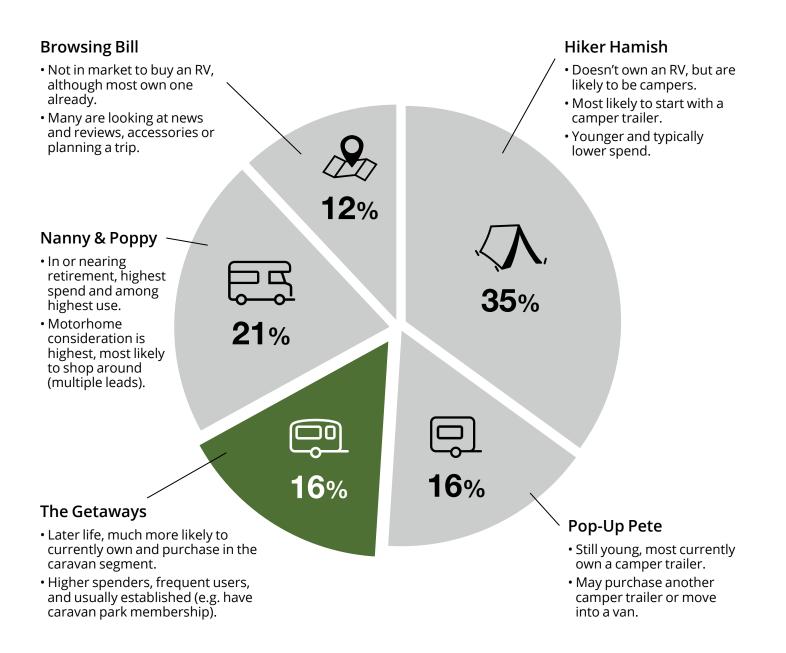




# Meet the caravancampingsales buying family

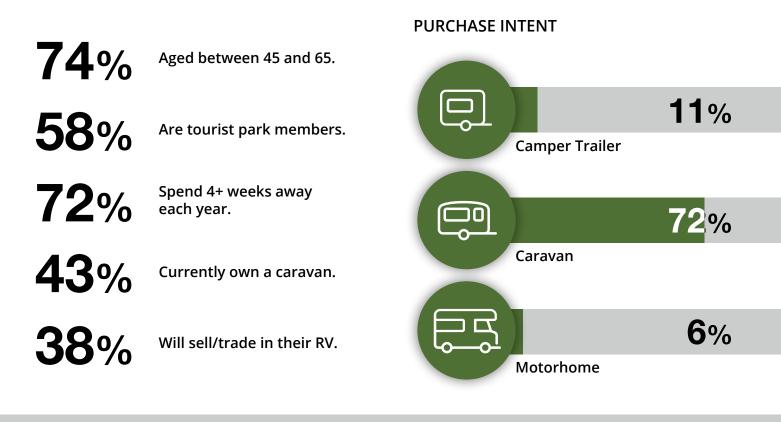
Get a deeper understanding of the different buyer personas in the market and how they behave online. **To find out more about the entire family, speak to your Account Manager.** 

#### How caravancampingsales buyers are split by personas:





Experienced owners who have been caravanning for a while and are re-purchasing in the caravan segment. Whilst a little later in life, they are by no means reaching retirement. Most are established families taking regular trips. This segment also sees the highest rate of tourist/caravan park membership.



	el Agents Stability Control Buy Motorhome Tablet			
Visit to Sell Dealerships Visit to Buy Mobile Satellite Dish Annexe/Awning Audio System	Security System Word of Mouth Visit for Accessories Buy Tow Vehicle Power Accessories			
Generator Watch Buy Caravan	WN Caravan Plan Trips Online Few trips Boat Travel Shows Portable Fridge Tyres			
Frequent Users Suspension Components Wireless Internet BBQ High Spension Spension Components Visit for News + Reviews Travel Ma				
Visit for Travel Tips Brand Con Magazines Towing Equipment B 4WD Accesso	ories And			

# 360° elevation of the customer experience

360° interactive photography is the next frontier for OEMs and dealers looking to deliver a more engaging experience for buyers.

A showroom-quality experience direct from the palm of the buyer's hand – anytime and anywhere.

That's what Australian dealers and OEMs can expect from the exciting next generation of 360° interactive photography - available soon on caravancampingsales.com.au.

## Greater differentiation and transparency

With the flexibility to explore the interior of a caravan like never before, 360° interactive photography will enable buyers to experience caravans with greater depth, confidence and transparency - and all at their own convenience.

The smallest details—from kitchen appliances, lighting fixtures, storage solutions, colour

schemes and more—will appear with showroomlike detail on a customer's desktop computer or mobile device.

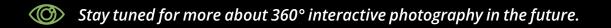
For the first time, OEMs will be empowered to deliver more immersive digital brand experiences that better highlight key value propositions and unique details of each caravan interior.

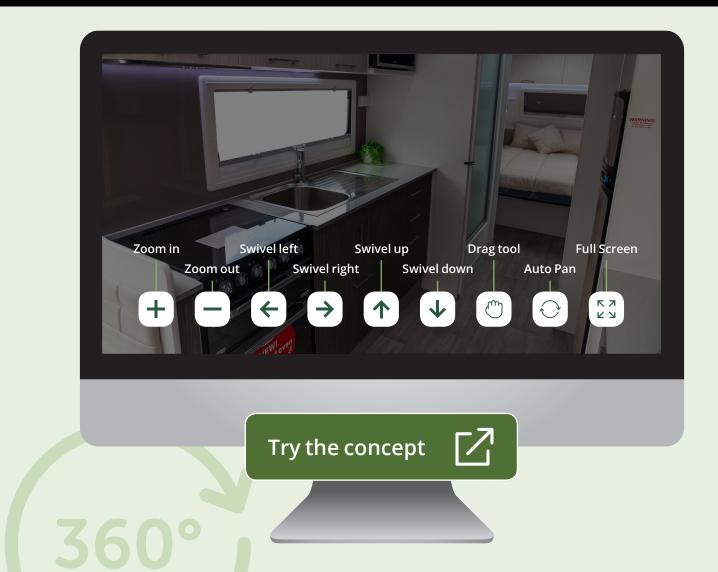
#### More qualified leads for dealers

The benefits of 360° interactive photography are not limited to OEMs and buyers.

For dealers; 360° interactive photography will help provide more qualified leads as buyers are able to better ascertain whether a particular caravan meets their needs and requirements before they make an enquiry.



















# Family vanning reaches new heights

Caravan manufacturers are meeting the needs of buyers prepared to pay a premium for more luxurious family holidays.

It seems 'family' and 'prestige' are no longer mutually exclusive.

> **R**egular visitors to caravan shows will have noticed the trend – more and more young couples, often with kids in tow, crawling through caravans to see whether they can accommodate their growing families and their increasingly fussy requirements.

> While couple or 'grey nomad' layouts remain the most popular options in the caravan market, cashed-up family buyers are on the march, looking beyond the traditional, entry-point into the market provided by relatively cheap tent trailers and wind-out camper trailers.

While 'expanding' and pop-top vans remain popular, the biggest change in the market is the number of bunk and family-friendly layouts offered by the major and not so major manufacturers.

#### Increased spend for more space

Two out of four layouts in Jayco's new off-road Adventurer range cater to growing families,

including the range-topping, six berth 19ft double bunk model with dinette that converts to another double bed. Even Jayco's top-spec Silverline now has a double or triple bunk bed option, albeit at a pricey \$80,000-plus making it one of Jayco's most expensive models.

The decision by Jayco to use the largest 25ft Silverline slide-out as a base for an up-spec family van came down to field research indicating that the extra living space was not only wanted, but that buyers were prepared to pay a premium for more enjoyable family holidays.

We know of one cashed-up buyer of a Nova family caravan, who had fitted not one but two roof-top air-conditioners so that little Johnny and Emily could stay cool in the 'kids' room' while Mum and Dad enjoyed a sweat-free movie experience up front.

It seems 'family' and 'prestige' are no longer mutually exclusive, with the most expensive caravan at this year's Victorian Caravan





The biggest change in the market is the number of bunk and familyfriendly layouts offered by the major and not so major manufacturers.

Supershow a 20ft Bushtracker family caravan with triple bunks and a sticker price of more than \$170,000.

Not to be outdone, composite specialist Zone RV's first 22ft 6in family bunk van won't provide any change from \$120,000 once the optional satellite TV system and self-levelling airbag suspension are fitted.

# Buyer preferences driving innovation

It's not just opulent, over-sized vans aimed at families with big budgets feeding the fad, with smaller family vans priced under \$50,000 also growing in numbers.

To cater for growing demand from families not wanting to sacrifice either comforts or conveniences on the road, some manufacturers are getting inventive in the way they manage to squeeze bunk beds together with a wellequipped kitchen, queen-sized bed, roomy dinette/lounge—and in many cases, a shower and toilet—into more compact layouts.

Jurgens has just released a family bunk version of its lightweight, compact Jindabyne pop-top, and the new European-built, 15ft Adria Aviva van not only caters to families with smaller tow vehicles, but has most of the features of a much bigger van but with an ATM of just 1530kg. Even the pint-sized, featherweight, Italian-built Wingamm Rookie imported by Melbourne's Roma now comes in a family bunk version.

There's also plenty of action in the family camper market, with Cub Campers' new forward-fold Frontier off-road camper already proving a hit with young families, thanks to a \$30,000 price tag and a spacious lounge area that easily converts to bedding for two or three kids.

Perhaps most innovative is Melbourne-based Mars Campers, which is about to introduce a 13ft hybrid off-road caravan with industry-first suspended 'trampoline' double bed that hovers above the main living area below the highclearance, pop-top roof.

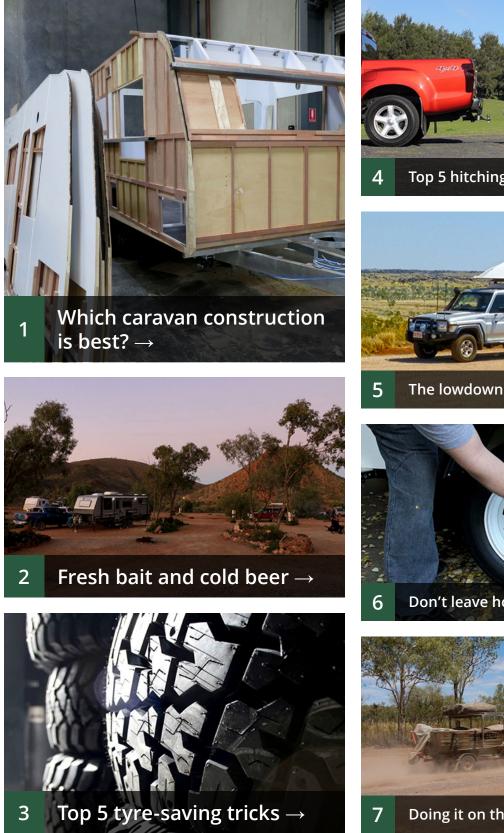
#### Straddling market needs

Perhaps a sign of things to come, the unique West Australian-built Heatseeker tries to be all things to all people, combining a five berth camper trailer with quad bike carrying rear platform that doubles as an off-the-ground living area, all with a payload in excess of two tonnes.

The desire to house all family members comfortably under the one mobile roof is perhaps why RV appliances like washing machines and fridges keep getting bigger, to the point where Jayco is increasingly fitting 190 litreplus fridges to many of its family models, and 4kg and even 7kg washing machines are now common sights in New Age caravans.

# Tips, tricks and advice

Strengthen relationships with your current and prospective customers by sharing these key tips, tricks and advice.







The lowdown on car toppers  $\rightarrow$ 





# Top 10 makes by enquiry

Discover which makes have received the most new and used enquiries over the December 2016 to March 2017 period.



Source: caravancampingsales internal data, Top makes by enquiry, December 2016–March 2017

# Top off-road vehicle reviews



Australian Off Road's re-take on its camper trailer origins is now complete with new baby hard shell model.



New hard shell camper resets the parameters for micro hybrids.



Torn between a caravan and camper trailer? This new Brisbane-built family hybrid could be the answer.



New Chinese-built, Aussie-assembled hard-floor family camper delivers bang for your bucks.



Solidly built camper gets you out there for a ridiculously cheap price.

# Top on-road vehicle reviews



New locally-built, lightweight composite caravan impresses straight out of the box.



Melbourne manufacturer celebrates 30 years in business with stylish new, smooth-sided caravan.



Got a family that doesn't like to rough it? Try this triple bunk glamour-van on for size...



Hyundai iLoad conversion delivers classy and cheap campervan option.



New Aussie-built Bailey Comet resets slide-out standard.



#### Industry Market Watches

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