

Understanding RV Consumer and Product Trends



AIANTA

American Indian Alaska Native
Tourism Association

September 18, 2018

Michael Ochs
Director of Government Affairs

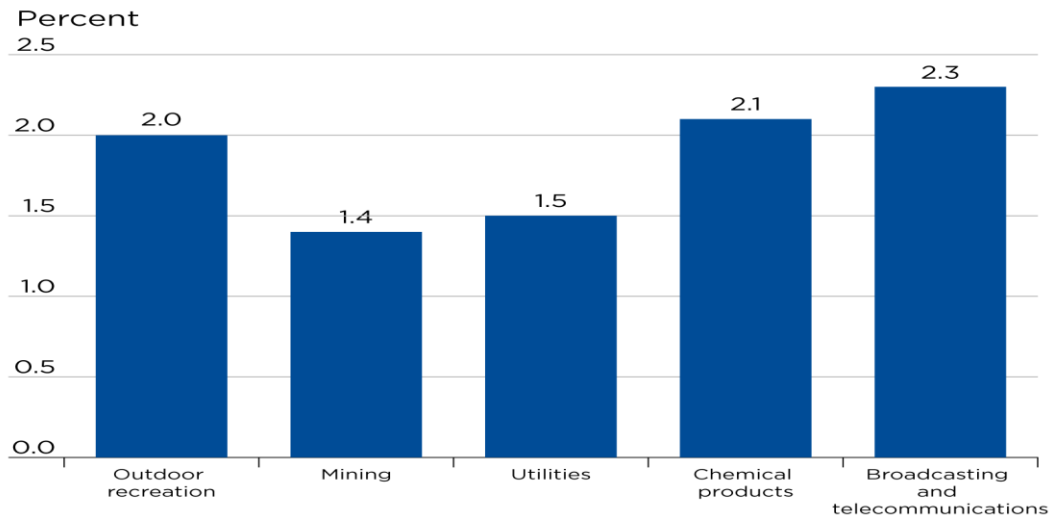


One key element of RVIA's Mission Statement is:

To create a positive
experience for the RV
consumer



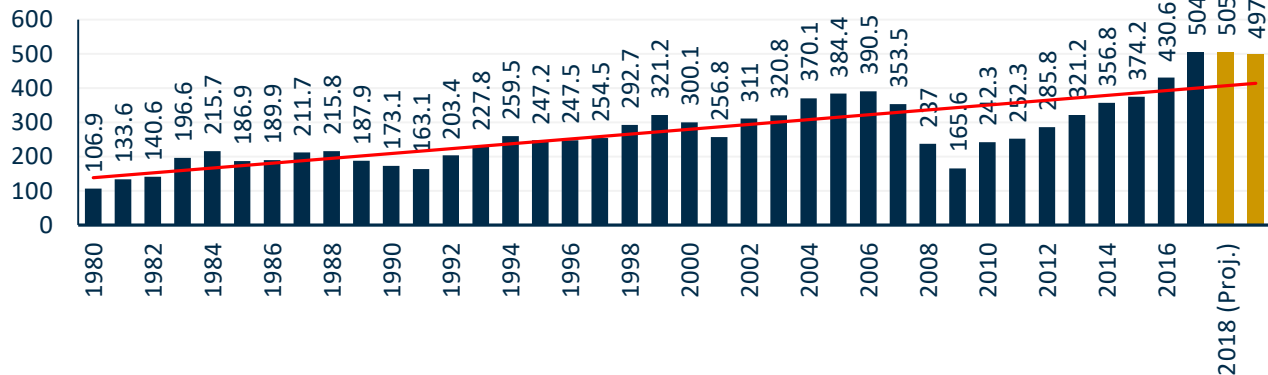
Chart 1. Outdoor Recreation as a Percent of GDP with Comparable Industries, 2016



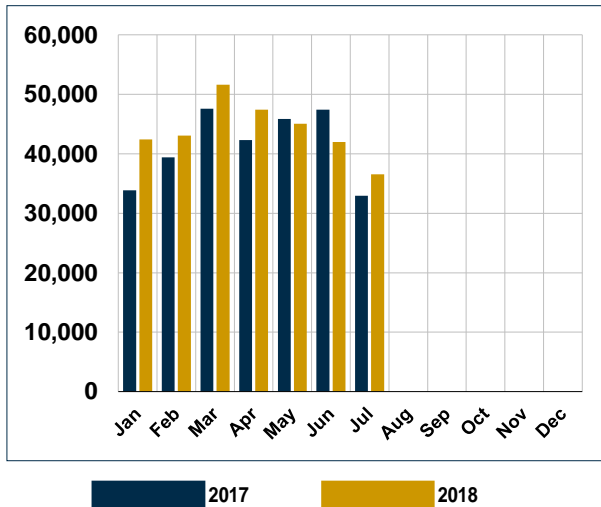
U.S. Bureau of Economic Analysis (BEA)

RV Shipments Trend, 1980-2017

RVIA Shipments Data

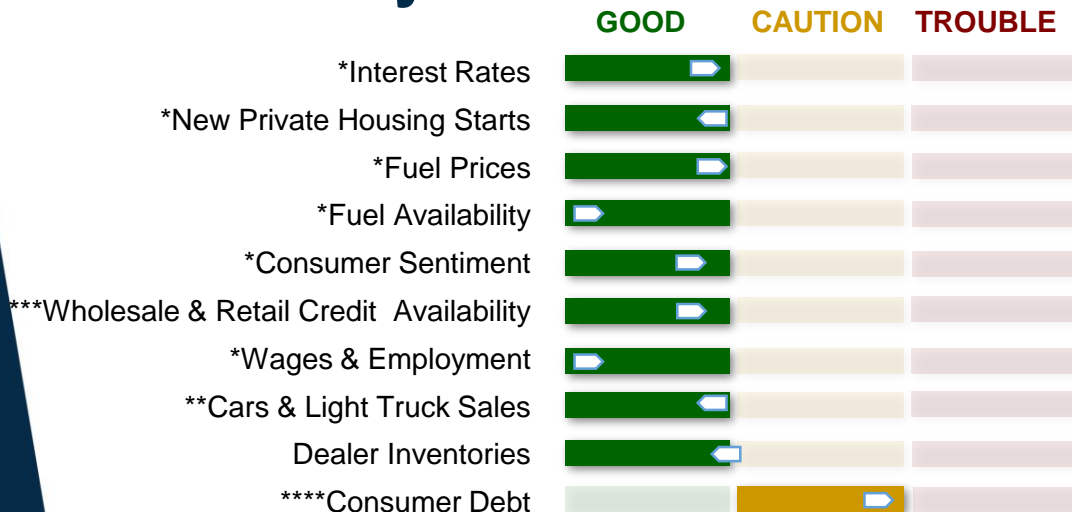


The RV Business Holding Strong



- 2017: Best comparable performance since 1980
- Average annual compounded growth rate of 10%+ since 2010
- RV inventory reducing due to strong reported sales.
- Production capacity is improving
- RV mobility is growing as a consumer lifestyle choice

RV Industry Economic Indicators - 2018



Sources:

* U.S. Department of Commerce

** U.S. Department of the

Treasury

*** Dunn & Bradstreet

**** Center for Microeconomic Data

RV Types and Terms

Towable RVs

Designed to be towed by family car, van or pickup truck. Can be unhitched and left at the campsite while you explore in your auto.

TRAVEL TRAILERS

Conventional Travel Trailer

Wide range of floor plans and sizes
Affordable homelike amenities
Sleep up to 10



Fifth-Wheel Travel Trailers

Spacious two-level floor plans
Towed with a pickup truck
Sleep up to six



Travel Trailers with Expandable Ends

Ends pull out for roomy sleeping
Lightweight Towing
Sleep up to eight



FOLDING CAMPING TRAILERS

Fold for lightweight towing
Fresh-air experience with RV comfort
Sleep up to eight



Towable RVs – ↑18.2%

Travel Trailers - ↑20%

Fifth-Wheel Trailers – ↑16.9%

Folding Camping Trailers – ↓9%

Truck Campers – ↑ 6%
(2017 shipment data)

SPORT UTILITY RVs

Available motorized and towable (as travel trailers or fifth-wheels).

Built-in garage for hauling
cycles, ATVs, and other sports
equipment
Sleep up to eight



TRUCK CAMPERS

Mount on pickup bed or chassis
Go wherever your truck can go
Sleep up to six



PARK MODEL RVs

Movable resort unit designed
exclusively for part-time recreational use



RV Types and Terms

Living quarters are accessible from the driver's area in one convenient unit.

MOTORHOMES

Type A Motorhomes

Generally roomiest of all
RVs Luxurious amenities
Sleep up to six



Type B Motorhomes

Commonly called van
campers Drive like the
family van
Sleep up to four



Type C Motorhomes

Similar amenities to Type As
Optional sleeping space over the
cab Sleep up to eight



Motorhomes currently represent
13% of the RVs shipped in 2017

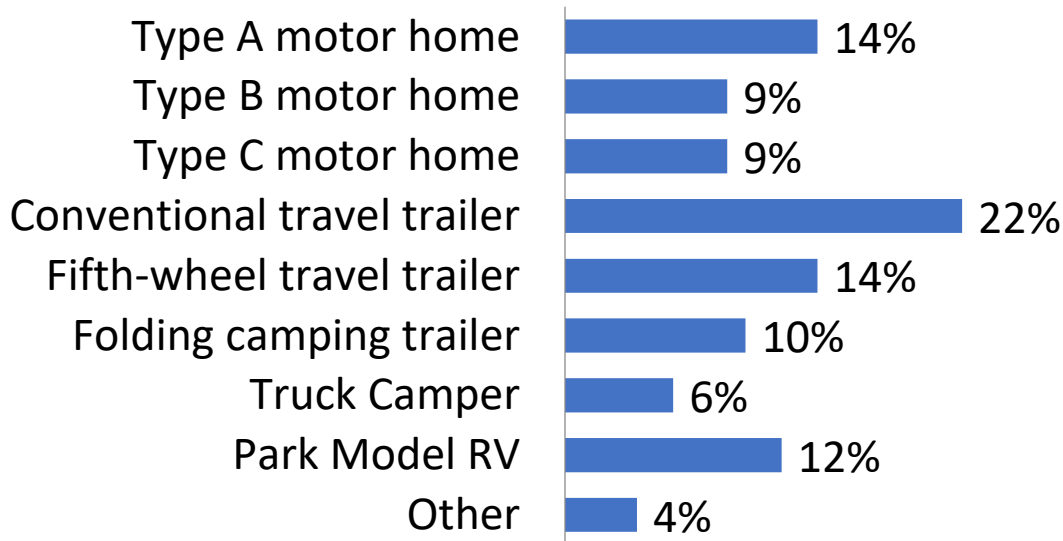
Type A - ↑2.3%

Type B - ↑32%

Type C - ↑22%

(2017 shipment data)

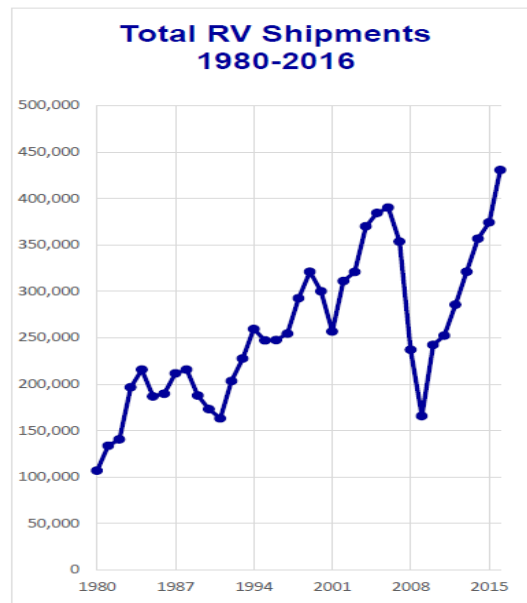
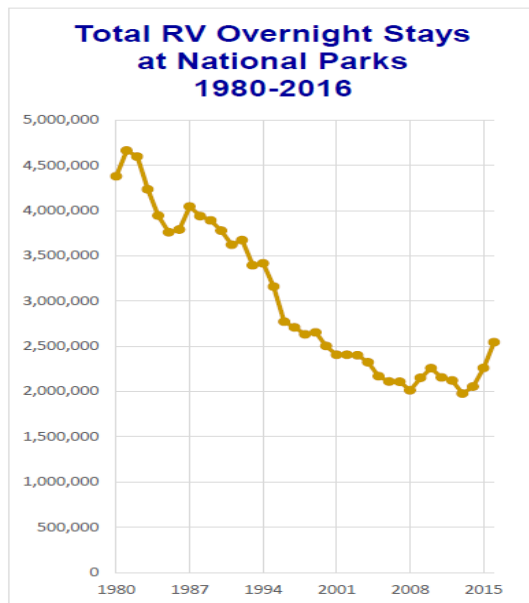
RV Ownership






98% of consumers
purchase RVs for camping

Campground Modernization & Expansion



The Need: Campground Modernization and Expansion

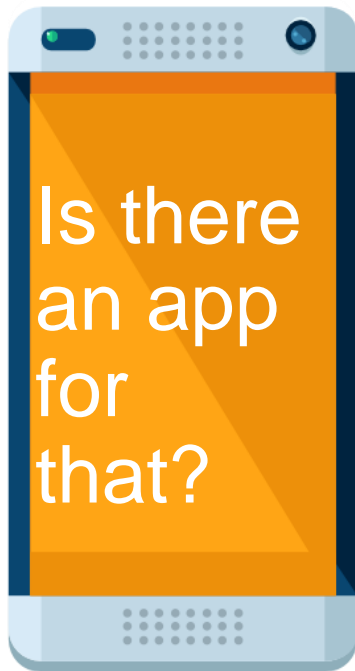


**What do Modern RVers
want in a
Campground?**

Help Facilitate the Adventure

- **Amenities!**
- **Strong Wi-Fi – Millennials/Gen-X/Baby Boomers/Mobile Professionals**
- **50 AMP Service**
- **Site-specific Electric, Water, and Sewer hook-ups**
- **Improved Dump Stations**

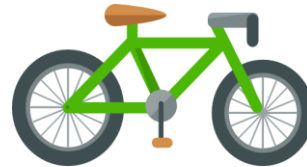




January 24, 2018

Help Facilitate the Adventure

- Improved bathing facilities with hot showers, sinks, and flush toilets
- Camp stores to purchase essentials and restock necessary supplies before their next journey
- Recreational opportunities such as zip lines, guided rock climbing tours, ATV courses, watersports and boat, fishing gear or bike rentals
- RV storage areas near campsites for those who return often



Help Facilitate the Adventure

- **More RV accessible sites**
- **Pull-through RV campsites**
- **Group camping sites**
- **Destination camping sites**



A blue-tinted photograph of a campsite. In the foreground, a body of water reflects the scene. Two large, mature trees with thick trunks and dense foliage frame the central area. Behind the trees, two recreational vehicles are parked on a grassy clearing. On the left is a white travel trailer with a dark stripe and a small awning. On the right is a white motorhome with a dark stripe and a small awning. The text "RVs are Growing!" is overlaid in white, bold, sans-serif font across the middle of the image.

RVs are Growing!

















Park Model RVs



Park Model RVs



Park Model RVs



Park Model RVs

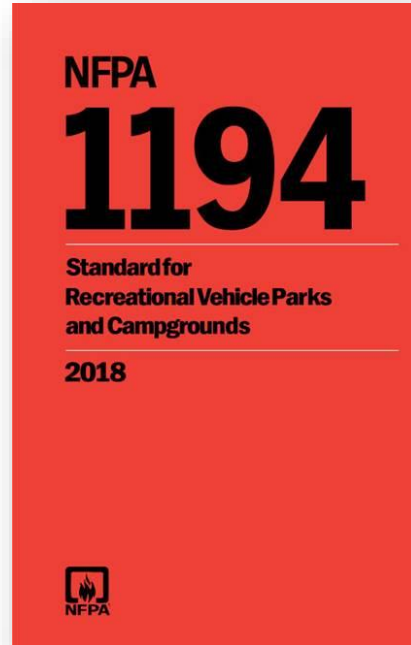


A blue-tinted photograph of a campsite with a white Airstream trailer and a white motorhome parked among large trees near a body of water. The text "RVIA Resources" is overlaid in white.

RVIA Resources

NFPA 1194

- This Standard provides the minimum construction requirements for safety and health for occupants using facilities supplied by recreational vehicle parks and campgrounds offering temporary living sites for use by recreational vehicles, recreational park trailers, and other camping units.
- www.rvia.org -> Store



NFPA 1194

1194-4		RECREATIONAL VEHICLE PARKS AND CAMPGROUNDS	
Contents			
Chapter 1 Administration	1194-5	Chapter 6 Fire Safety	1194-9
1.1 Scope	1194-5	6.1 Fire Detection and Alarm Services	1194-9
1.2 Purpose	1194-5	6.2 Fire Safety Rules and Regulations for Recreational Vehicle Parks and Campgrounds — Posting of Emergency Information	1194-9
1.3 Application	1194-5	6.3 Propane Containers	1194-9
1.4 Retroactivity	1194-5		
1.5 Equivalency	1194-5		
1.6 Units	1194-5		
Chapter 2 Referenced Publications	1194-5	Chapter 7 Environmental Health and Sanitation	1194-9
2.1 General	1194-5	7.1 General	1194-9
2.2 NFPA Publications	1194-5	7.2 Potable Water Supply and Distribution	1194-9
2.3 Other Publications	1194-6	7.3 Potable Water Connections at Individual Sites	1194-10
2.4 References for Extracts in Mandatory Sections	1194-6	7.4 Drinking Fountains	1194-10
		7.5 Sanitary Conveniences	1194-10
		7.6 Number, Location, and Arrangement of Toilets, Urinals, and Lavatories	1194-11
Chapter 3 Definitions	1194-6	7.7 Showers	1194-11
3.1 General	1194-6	7.8 Sewerage Facilities	1194-11
3.2 NFPA Official Definitions	1194-6	7.9 Sanitary Disposal Stations	1194-12
3.3 General Definitions	1194-6	7.10 Potable Water Supply Stations	1194-13
		7.11 Refuse Disposal	1194-13
Chapter 4 General Requirements	1194-7	Annex A Explanatory Material	1194-13
4.1 Differing Standards	1194-7	Annex B Typical Recreational Vehicle Park or Campground Site Plans	1194-14
4.2 U.S. Federal Regulations	1194-7	Annex C Glossary	1194-22
4.3 Electrical Requirements	1194-7	Annex D Operations Guidelines	1194-23
4.4 Wildland/Urban Interface Areas	1194-7	Annex E Informational References	1194-23
4.5 Park Model RV	1194-7	Index	1194-25
Chapter 5 General Design Criteria for Recreational Vehicle Parks and Campgrounds	1194-8		
5.1 Park Design and Construction	1194-8		
5.2 Recreational Vehicle Site	1194-8		
5.3 Recreational Park Trailer Site	1194-9		
5.4 Camping Unit Site	1194-9		

NFPA 1194

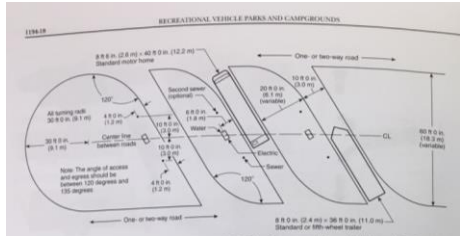


FIGURE B.1(b) Optimal Arrangement for a Recreational Vehicle Park or Campground Reverse Pull-Through Site Showing Water, Sewer, and Electrical Utility Connection Points.

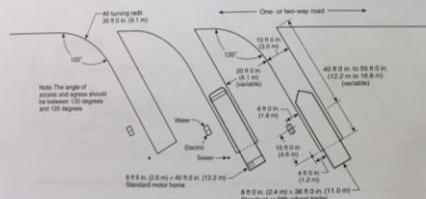
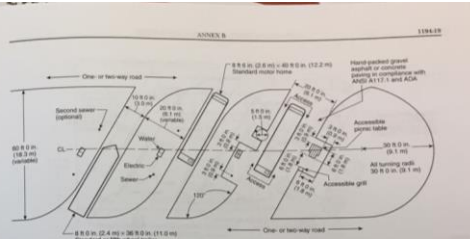
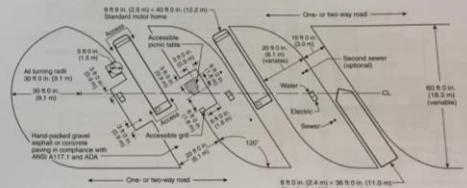


FIGURE B.1(c) Optimal Arrangement in a Recreational Vehicle Park or Campground Reverse Pull-Through Site for a Recreational Vehicle or Park Trailer Showing Water, Sewer, and Electrical Utility Connection Points.



Notes:
1. The utilities are located in the same place as they are in the standard pull-through site.
2. The angle of access and egress should be between 120 degrees and 135 degrees.

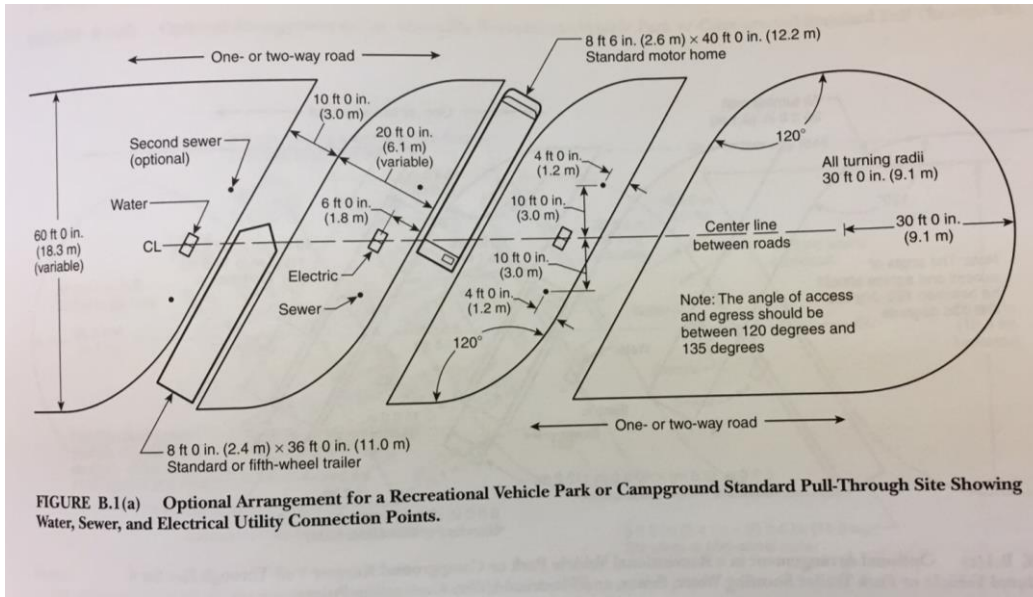
FIGURE B.1(d) Optimal Arrangement for an Accessible Recreational Vehicle Park or Campground Standard Pull-Through Site.



Notes:
1. The utilities are located in the same place as they are in the reverse pull-through site.
2. The angle of access and egress should be between 120 degrees and 135 degrees.

FIGURE B.1(e) Optimal Arrangement for an Accessible Recreational Vehicle Park or Campground Reverse Pull-Through Site.

NFPA 1194



Available at www.rvia.org and click on the “Store” icon at the top of the page

RVs MOVE AMERICA

ECONOMIC IMPACT OF THE RV INDUSTRY

United States

- First ever economic impact study of the entire RV industry was completed in 2016.



RVs MOVE AMERICA

ECONOMIC IMPACT OF THE RV INDUSTRY

United States



22,797

of RV
BUSINESSES



3,001

of RV
DEALERSHIPS



\$5.7 Billion
TOTAL TAXES PAID
by RV Industry



TOTAL DIRECT ECONOMIC OUTPUT

\$27.0 Billion

RV Manufacturers
and Suppliers
\$15.8 Billion

RV Sales
and Service
\$4.9 Billion

RV Campgrounds
and Travel
\$6.3 Billion



\$7.9 Billion

DIRECT WAGES

RV Manufacturers and Suppliers

\$2.9 Billion

RV Sales and Service

\$2.4 Billion

RV Campgrounds and Travel

\$2.6 Billion



155,608

DIRECT JOBS

RV Manufacturers and Suppliers

43,867

RV Sales and Service

39,247

RV Campgrounds and Travel

72,494

OVERALL INDUSTRY IMPACT

\$49.7B

Total Economic
Output

\$15.8B

Total Wages

289,852

Total Jobs



RV
INDUSTRY
ASSOCIATION

RVs MOVE AMERICA

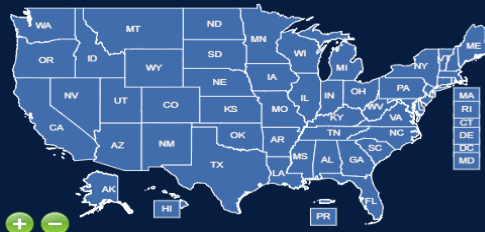
ECONOMIC IMPACT OF THE RV INDUSTRY

United States

Login

Recreation Vehicle Industry Grows the U.S. Economy

The map below provides detailed information about the economic contributions generated by the U.S. recreation vehicle industry. To see how the industry creates jobs in your state or congressional district, click on the map or on the drop-down boxes below. For more information on the methodology, click [here](#).



NATION

STATE

Select state...

☒ Fact Sheet ☐ Impact Data Table

Enter email address to send copy of selected report

View/Send

CONGRESSIONAL DISTRICT

RVs MOVE AMERICA

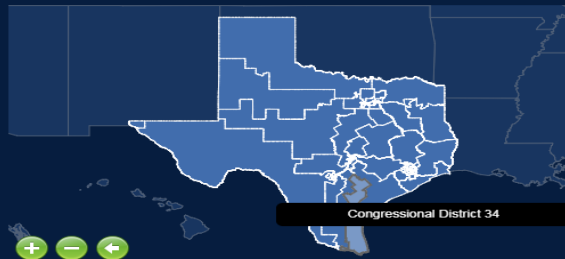
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NATION		▼
STATE		▼
CONGRESSIONAL DISTRICT		▲
Texas ▼	Select district... ▼	
<input checked="" type="radio"/> Fact Sheet <input type="radio"/> Impact Data Table		
Enter email address to send copy of selected report		View/Send

Additional Resources

- RV Quarterly Forecast (RV RoadSigns)
- Business Indicators
- RV Ownership Trends
- Vacation Costs
- RV Travel Forecast
- Marketing to RV Travelers
- RV Perceptions & Purchase Motivators Study
- Annual Report

A monochromatic blue-toned photograph of a group of people camping at night. They are gathered around a fire pit, with some sitting on chairs and others on the ground. In the background, there are tents and RVs parked in a wooded area. A dog is visible in the foreground. The overall atmosphere is cozy and social.

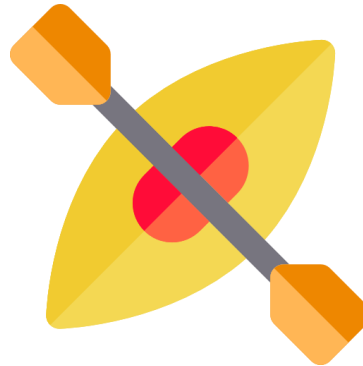
The Go RVing Nielsen Study

Active Family Adventurers



- **Children have a lot of influence on leisure trip decisions**
- **Most active**

- **Highest opportunity**
- **Likely to have rented a camper/trailer or cabin in past 2 years**



Nature Lovers

- **Most likely to consider RV rental within a campground**
- **High likelihood to have gone tent camping or rented a cabin in the past two years**




- **Natural beauty/lesser known destinations, outdoor sports/recreation**
- **High usage of travel-related apps**

Kid-Free Adult Adventurers

- **Moderate opportunity segment**
- **Learning opportunities, romantic getaways, lesser known destinations, visiting family, spending time in nature, attending sporting events**





	Active Family Adventurers	Nature Lovers	Kid-Free Adult Adventurers
Travel & Leisure	Domestic travelers Family-Focused	Independent travelers Environmentally Conscious	Traditional travelers Environmentally Conscious
Electronics & Tech	Tech savvy	Social techies	Tech novices
Online	Above Average	Above Average	Below Average
Television	Average	Below Average	Above Average
Radio	Average	Above Average	Above Average
Print	Above Average	Above Average	Average

**Visit RVIA.org for the executive
summary of the Go RVing Nielsen
Study**

Are you Future Ready?



Are you Future Ready?



Are you Future Ready?



Are you Future Ready?



Recap: How Can RVIA Help you Down the Road?

- NFPA 1194 Campground Standard – Best Practices
- RVs Move America Economic Impact Study – RVsMoveAmerica.org
- Research on RV Industry, Next Generation of RVer and Future Trends
- [GoRVing](http://GoRVing.com) Social Media Campaign – www.GoRVing.com
- Attend RVX in Salt Lake City March 12-14, 2019 – See the Latest and Greatest Products and Network with RV Industry Stakeholders
- Utilize RVIA as a partner when working on campground modernization and expansion projects



Questions?