Understanding RV Consumer and Product Trends

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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

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor recreation</td>
<td>2.0</td>
</tr>
<tr>
<td>Mining</td>
<td>1.4</td>
</tr>
<tr>
<td>Utilities</td>
<td>1.5</td>
</tr>
<tr>
<td>Chemical products</td>
<td>2.1</td>
</tr>
<tr>
<td>Broadcasting and telecommunications</td>
<td>2.3</td>
</tr>
</tbody>
</table>

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

*Interest Rates
*New Private Housing Starts
*Fuel Prices
*Fuel Availability
*Consumer Sentiment
***Wholesale & Retail Credit Availability
*Wages & Employment
**Cars & Light Truck Sales
Dealer Inventories
****Consumer Debt

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

**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

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**Towable RVs – ↑18.2%**

**Travel Trailers - ↑20%**

**Fifth-Wheel Trailers – ↑16.9%**

**Folding Camping Trailers – ↓9%**

**Truck Campers – ↑ 6%**

(2017 shipment data)
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

<table>
<thead>
<tr>
<th>Type</th>
<th>Ownership Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type A motor home</td>
<td>14%</td>
</tr>
<tr>
<td>Type B motor home</td>
<td>9%</td>
</tr>
<tr>
<td>Type C motor home</td>
<td>9%</td>
</tr>
<tr>
<td>Conventional travel trailer</td>
<td>22%</td>
</tr>
<tr>
<td>Fifth-wheel travel trailer</td>
<td>14%</td>
</tr>
<tr>
<td>Folding camping trailer</td>
<td>10%</td>
</tr>
<tr>
<td>Truck Camper</td>
<td>6%</td>
</tr>
<tr>
<td>Park Model RV</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>
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
Is there an app for that?
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
RVs are Growing!
Park Model RVs
Park Model RVs
Park Model RVs
Park Model RVs
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](http://www.rvia.org) -> Store
NFPA 1194
Available at www.rvia.org and click on the “Store” icon at the top of the page
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
RVs MOVE AMERICA
ECONOMIC IMPACT OF THE RV INDUSTRY
United States

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.
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
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
<table>
<thead>
<tr>
<th></th>
<th>Active Family Adventurers</th>
<th>Nature Lovers</th>
<th>Kid-Free Adult Adventurers</th>
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<tbody>
<tr>
<td><strong>Travel &amp; Leisure</strong></td>
<td>Domestic travelers Family-Focused</td>
<td>Independent travelers Environmentally Conscious</td>
<td>Traditional travelers Environmentally Conscious</td>
</tr>
<tr>
<td><strong>Electronics &amp; Tech</strong></td>
<td>Tech savvy</td>
<td>Social techies</td>
<td>Tech novices</td>
</tr>
<tr>
<td><strong>Online</strong></td>
<td>Above Average</td>
<td>Above Average</td>
<td>Below Average</td>
</tr>
<tr>
<td><strong>Television</strong></td>
<td>Average</td>
<td>Below Average</td>
<td>Above Average</td>
</tr>
<tr>
<td><strong>Radio</strong></td>
<td>Average</td>
<td>Above Average</td>
<td>Above Average</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>Above Average</td>
<td>Above Average</td>
<td>Average</td>
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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
  - Go RVing 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?