Understanding RV Consumer and Product Trends

Chris Bornemann – Senior Manager, Government Affairs
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One key element of RVIA’s Mission Statement is:

To create a positive experience for the RV consumer
RV Shipments Trend, 1980-2018

RVIA Shipments Data


106.9 110 196.6 140.6 215.7 211.2 258.1 227.8 259.5 247.2 254.5 292.7 300.1 321.2 370.1 374.2 430.6 504.6 525
**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

**Travel Trailers - **↑20%
**Fifth-Wheel Trailers – **↑17%
**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

Type A - ↑2.3%
Type B - ↑32%
Type C - ↑22%
(2017 shipment data)
RV Industry Economic Indicators - 2018

- **Interest Rates**
- **New Housing**
- **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 Ownership

- Type A motor home: 14%
- Type B motor home: 9%
- Type C motor home: 9%
- Conventional travel trailer: 22%
- Fifth-wheel travel trailer: 14%
- Folding camping trailer: 10%
- Truck Camper: 6%
- Park Model RV: 12%
- Other: 4%
89% 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
Help Facilitate the Adventure

- More RV accessible sites
- Pull-through RV campsites
- Group camping sites
- Fully equipped RVs and Park Model RVs
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
- Mobile food trucks or other dining options
- Recreational opportunities such as zip lines, guided rock climbing tours, ATV courses, watersports and boat, fishing gear or bike rentals
- RV storage areas and concierge services near campsites for those who return often
Is there an app for that?
The RV Market is Evolving!
Park Model RVs
Park Model RVs
Park Model RVs
Park Model RVs
RVIA Resources
NFPA 1194

This Standard provides the minimum construction requirements for safety and health for occupants using facilities supplied by RV parks and campgrounds offering temporary living sites for use by recreational vehicles, park model RVs, and other camping units.

www.rvia.org -> Store
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FIGURE B.1(a)  Optional Arrangement for a Recreational Vehicle Park or Campground Standard Pull-Through Site Showing Water, Sewer, and Electrical Utility Connection Points.
• 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

TOTAL DIRECT ECONOMIC OUTPUT
$27.0 Billion

22,797
# of RV BUSINESSES

3,001
# of RV DEALERSHIPS

$5.7 Billion
TOTAL TAXES PAID by RV Industry

$7.9 Billion
DIRECT WAGES

155,608
DIRECT JOBS

OVERALL INDUSTRY IMPACT

$49.7B
Total Economic Output

$15.8B
Total Wages

289,852
Total Jobs

RV Manufacturers and Suppliers
$15.8 Billion

RV Sales and Service
$4.9 Billion

RV Campgrounds and Travel
$6.3 Billion

RV Manufacturers and Suppliers
$2.9 Billion

RV Sales and Service
$2.4 Billion

RV Campgrounds and Travel
$2.6 Billion

RV Manufacturers and Suppliers
43,867

RV Sales and Service
39,247

RV Campgrounds and Travel
72,494
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.
Recreation Vehicle Industry Grows the U.S. Economy

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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
Consumer feedback gathered to identify the ‘effective marketing strategies’
Typically use their RV for camping trips at a variety of destinations.
Active Family Adventurers

Highest opportunity

Likely to have rented a camper/trailer or cabin in past 2 years

Children have a lot of influence on leisure trip decisions

Most active
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
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<th>Active Family Adventurers</th>
<th>Nature Lovers</th>
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<tr>
<td>Travel &amp; Leisure</td>
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<td>Traditional travelers</td>
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<tr>
<td></td>
<td>Family-Focused</td>
<td>Environmentally Conscious</td>
<td>Environmentally Conscious</td>
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<tr>
<td>Electronics &amp; Tech</td>
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<td>Social techies</td>
<td>Tech novices</td>
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<tr>
<td>Online</td>
<td>Above Average</td>
<td>Above Average</td>
<td>Below Average</td>
</tr>
<tr>
<td>Television</td>
<td>Average</td>
<td>Below Average</td>
<td>Above Average</td>
</tr>
<tr>
<td>Radio</td>
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<td>Print</td>
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Visit RVIA.org for the executive summary of the Go RVing Nielsen Study
Go RVing 2017 and Beyond

Combined, the three segments identified in the Nielsen study represent 40% of the total US population.

The data was utilized in determining the $17MM, 2017 Media Strategy focusing on:

• Millennials/Gen Xers
• Hispanic and African American consumers
• Active Outdoor Adventurers
Go RVing Reaching New Consumers

Increased awareness across digital and social media channels
• 105Mill total impressions
• 763K total followers ↑9%
• Instagram engagement ↑183%
• Blog site visits ↑143%
• Facebook video views ↑5,113%
Ready to Buy

• Millennials (ages 21-37) now surpass the Boomers in numbers

• 53% of Millennials (44M) are interested in buying an RV

• 26% or 21M call themselves highly-likely buyers!

• More than half (55%) wish they had one!
Inclusive

• By 2040, minorities will be the majority
• Millennials are highly diverse, 44% are non-white ( Boomers are 81% white.)
• 45% are urban dwellers
• 33% live in suburban areas
• 22% from rural regions
Experiential

• Prefer to be associated with the creation of culture
• Never forget that we are in the meaningful experience business
• We sell meaningful experiences, exciting adventures and memories that last a lifetime
Are you Future Ready?
Are you Future Ready?
Are you Future Ready?
Are you Future Ready?

CONCEPTUAL RENDERING
Recap: How Can RVIA Help you Down the Road?

- 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
- NFPA 1194 Campground Standard – Best Practices
- Attend the New 2019 Spring RV Show
- Utilize RVIA as a partner on desperately needed campground modernization and expansion projects
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