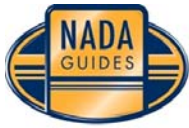


# Guidelines

NADAguides

Recreation Vehicle Industry Update

November – December, 2013



# Industry Overview

All indicators support that the recreation vehicle industry had a strong Fall. Ultimately, the industry expects to end the year with a 10.5% increase over 2012 shipments.

Contrary to the positive industry reports, surveyed dealers in both towable and motorized state that the Fall Selling Season was weaker than expected. Leading this category are the Truck Campers with 61.3% of respondents stating that Fall was weaker than they expected. Dealers also report that travel trailers continue to be weaker than motorized in many areas of the country.

## Snapshot: Opinion of Fall Selling Season Strength

(Full List of Categorized Statistics Available at Bottom of Page)

Motorhomes  
Exceeded Expectations

**7.9%**

As Anticipated

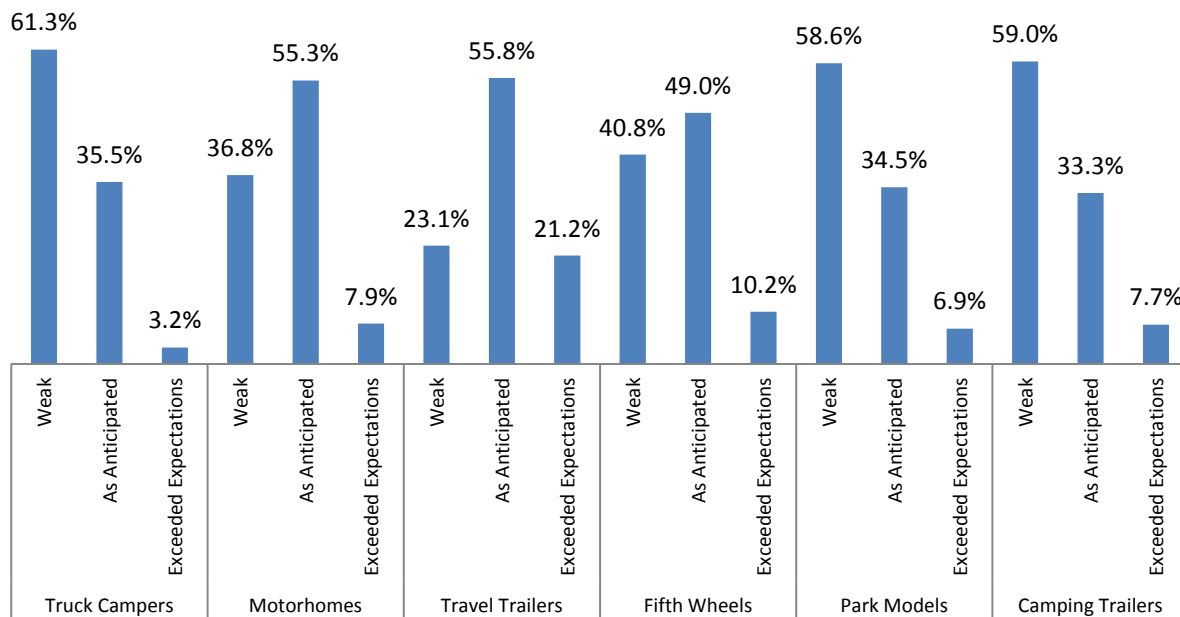
**55.3%**

Weaker than Expected

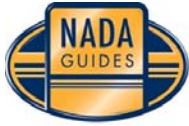
**36.8%**

Source: NADAguides, Inc.

## Dealers Opinion of Fall Selling Season



Source: NADAguides, Inc.



# NADAguides Data Overview

Various marketplace indicators and dealer survey input supported moderate seasonal downward pressure on used prices for the November 2013 update of NADAguides recreation vehicle data.

## Average Update-to-Update Change by Category

Towable Units

**-2.3%**

Motorized Units

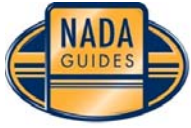
**-6.2%**

Source: NADAguides, Inc.

NADAguides Average Update-Over-Update Percent of Change by Unit Type			
Category	Body Type	Used Wholesale Trade-In	Used Retail
Camping Trailer	All	↘ -1.3	↘ -2.3
Motorhomes	Mini Motorhome	↘ -4.0	↘ -5.0
Motorhomes	Micro Mini Motorhome	↘ -4.0	↘ -5.0
Motorhomes	Motorhome	↘ -4.0	↘ -4.7
Motorhomes	Towing Motorhome	↘ -4.0	↘ -4.7
Motorhomes	Van Motorhome	↓ -9.8	↓ -11.8
Park Models	All	↘ -2.0	↘ -3.0
Tow Vehicles	All	↘ -2.0	↘ -3.0
Travel Trailers	Standard	↘ -2.3	↘ -3.3
Travel Trailers	Fifth Wheel	↘ -2.0	↘ -3.0
Truck Camper	All	↘ -1.0	→ 0.0

Figures represent the percent change, on average based on unit type, between the September 2013 update and the November 2013 update of the NADAguides Recreation Vehicle CONNECT.

Source: NADAguides, Inc.



# NADAguides Data Overview

Dealers were surveyed about Used Retail pricing in the November through December 2013 NADAguides recreational vehicle data. The chart below displays the results of dealer opinion about where the NADAguides Used Retail values fall as compared to their local marketplace for motorized units.

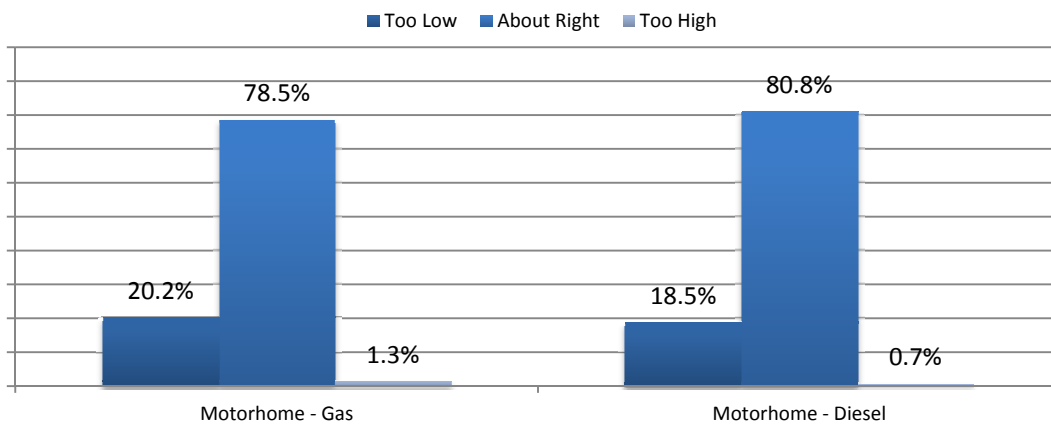
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## 80.8%

of retailers believe the  
NADAguides Used Retail  
Diesel Motorhome Values  
are About Right

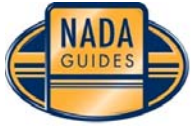
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### Used Retail in the NADAguides Recreation Vehicle CONNECT



This chart reflects the percentage of dealers that feel, by segment, if the NADAguides Used Retail values are too low, about right, or too high, as compared to their local market area.

Source: NADAguides, Inc.



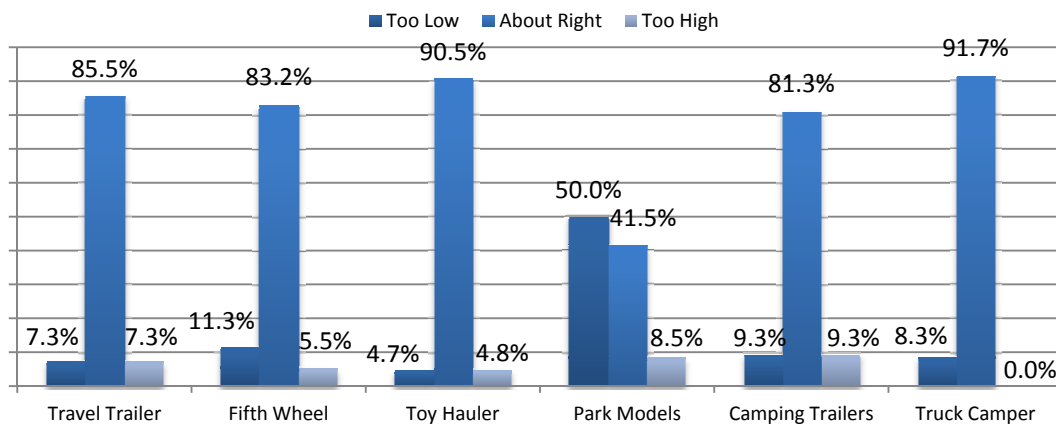
# NADAguides Data Overview

Dealers were surveyed about Used Retail pricing in November through December 2013 NADAguides recreational vehicle data. The chart below displays the results of dealer opinion about where the NADAguides Used Retail values fall as compared to their local marketplace for towable units.

# 91.7%

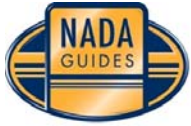
of retailers believe the NADAguides Used Retail Truck Camper Values are About Right

**Used Retail in the NADAguides Recreation Vehicle CONNECT**



This chart reflects the percentage of dealers that feel, by segment, if the NADAguides Used Retail values are too low, about right, or too high, as compared to their local market area.

Source: NADAguides, Inc.



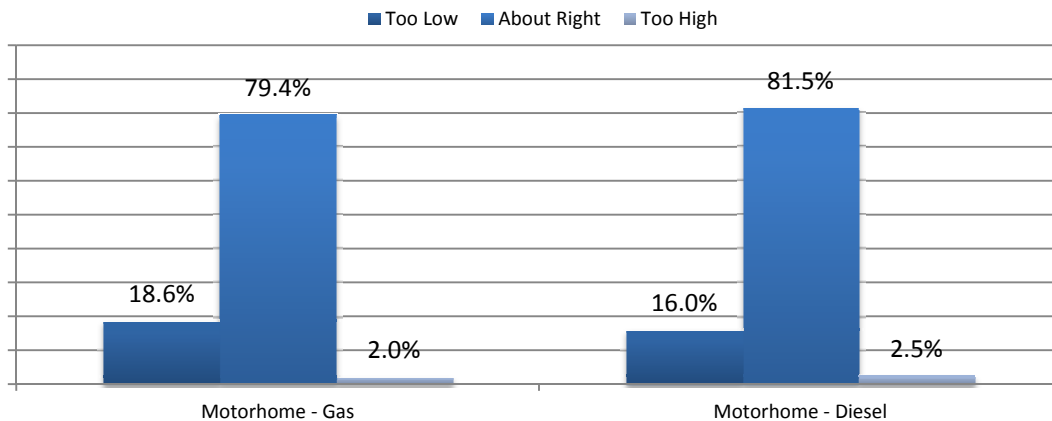
# NADAguides Data Overview

Dealers were surveyed about Used Wholesale/Trade-In pricing in the November through December 2013 NADAguides recreation vehicle data. The chart below displays the results of dealer opinion about where the NADAguides Used Wholesale/Trade-In values fall as compared to their local marketplace for motorized units.

# 81.5%

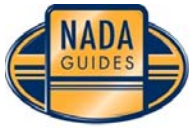
of retailers believe the NADAguides Used Wholesale/Trade-In Diesel Motorhome Values are About Right

## Used Wholesale/Trade-In in the NADAguides Recreation Vehicle CONNECT



This chart reflects the percentage of dealers that feel, by segment, if the NADAguides Used Wholesale/Trade-In values are too low, about right, or too high, as compared to their local market area.

Source: NADAguides, Inc.



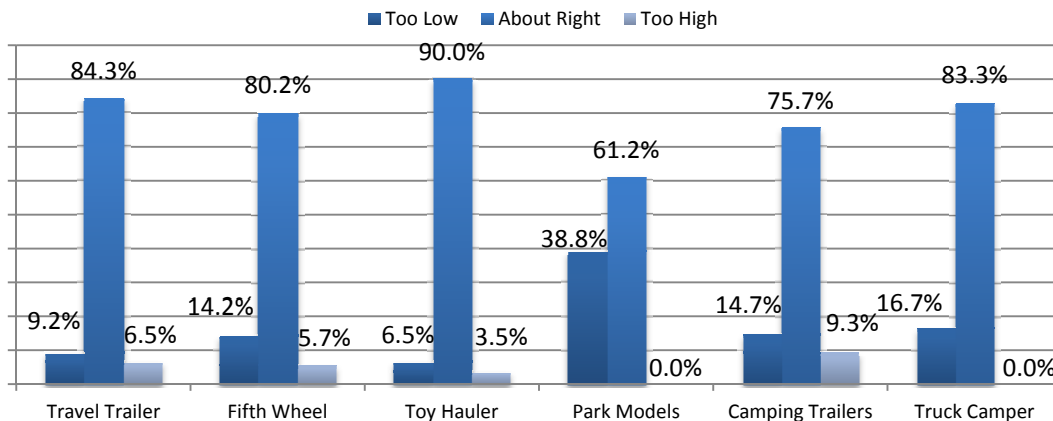
# NADAguides Data Overview

Dealers were surveyed about Used Wholesale/Trade-In pricing in the November through December 2013 NADAguides recreation vehicle data. The chart below displays the results of dealer opinion about where the NADAguides Used Wholesale/Trade-In values fall as compared to their local marketplace for towable units.

# 90%

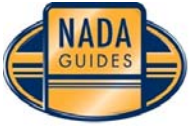
of retailers believe the NADAguides Used Wholesale/Trade-In Toy Hauler Values are About Right

### Used Wholesale/Trade-In in the NADAguides Recreation Vehicle CONNECT

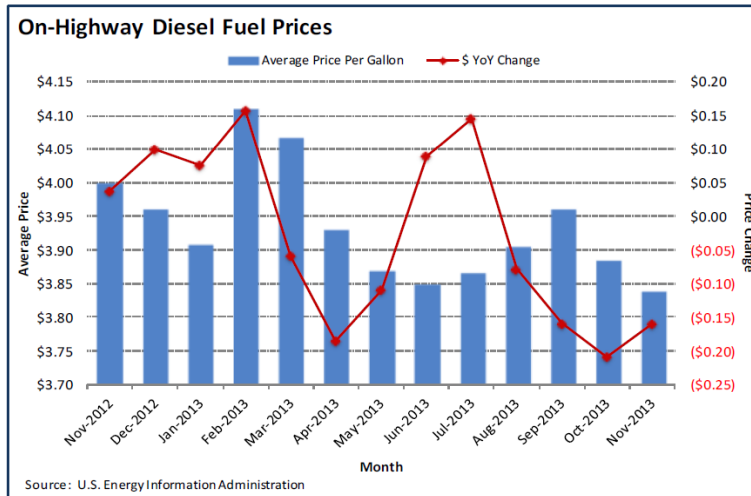
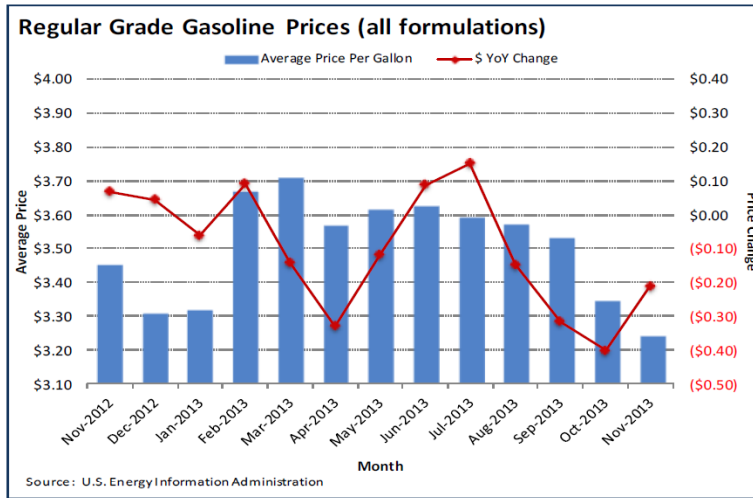


This chart reflects the percentage of dealers that feel, by segment, if the NADAguides Used Wholesale/Trade-In values are too low, about right, or too high, as compared to their local market area.

Source: NADAguides, Inc.

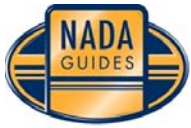


# NADAguides Fuel Price Data



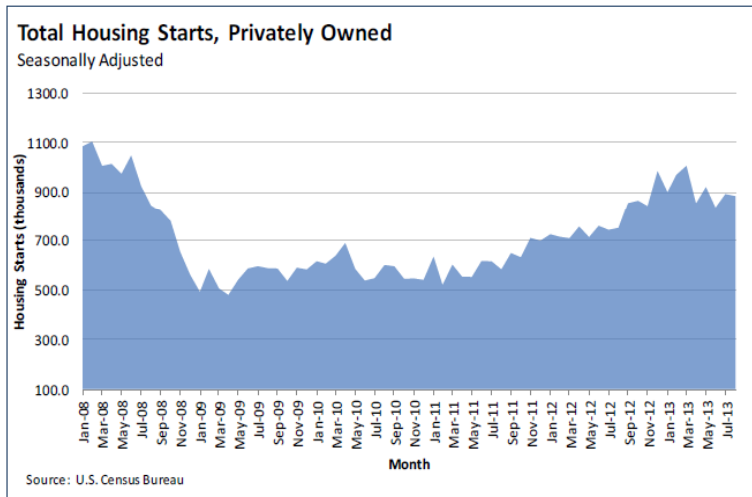
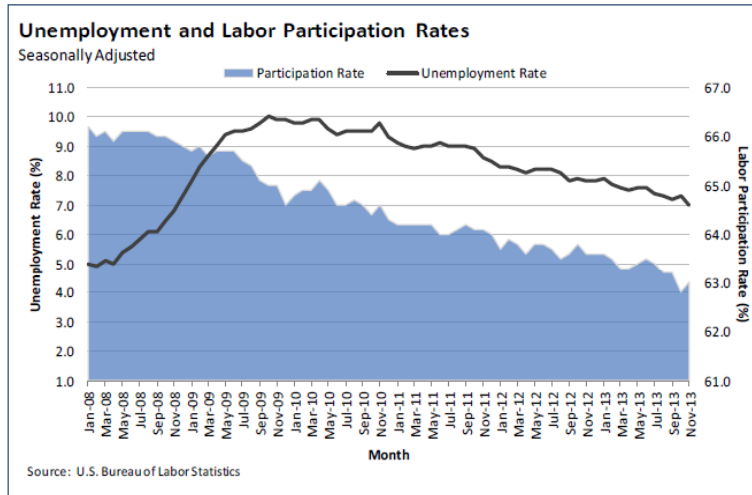
A view of the national average gas price is supplied to provide support to longer-term strategic planning.

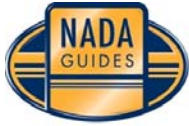




# NADAguides Economic Data

Economic Factors: A number of important factors affect the recreation vehicle market, including the unemployment rate and the housing market. These factors can be interpreted to represent the consumer's ability and willingness to make a new or used recreation vehicle purchase.





# NADAguides

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