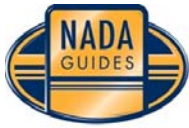


# Market Insights

**NADAguides**

**Recreation Vehicle Market Update**

November-December, 2014



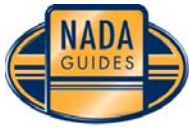
# Industry Overview

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Based on a year-over-year comparison of new unit sales, overall RV industry sales are expected to end the year up in 2014. Of the various RV segments, van motorhomes (class B) units continue to have the largest percentage of production.

Year-to-date, NADAguides.com consumer traffic is up 13%, with the most significant increase coming from research on standard-hitch travel trailers.

In early 2015, we expect to see continuing downward pressure on values, as the winter is forecasted to be colder and wetter than normal. Additionally, increased demand and production for new units will weaken the used market, as we move into the New Year.



# NADAguides Data Overview

For the November 2014 update of NADAguides recreation vehicle data, various marketplace indicators and dealer survey input supported slight downward movement of used prices in most of the motorized and towable unit categories. However, Van Motorhomes are continue to show resistance to downward seasonal pressure.

## Average Update-to-Update Change by Category

Towable Units

**-2.1%**

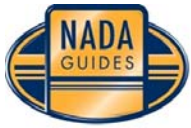
Motorized Units

**-0.9%**

Source: NADAguides

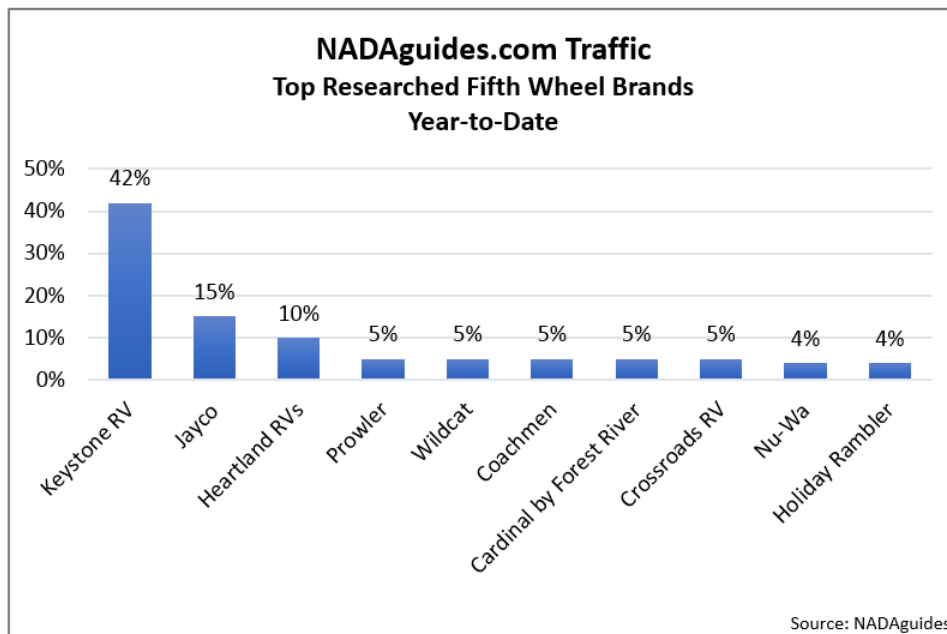
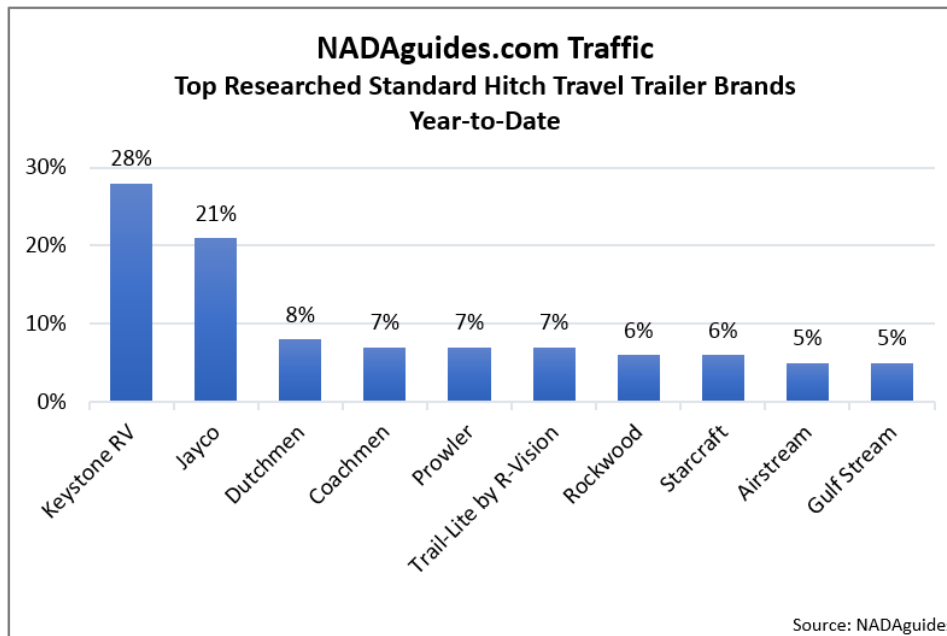
| NADAguides Average Edition-Over-Edition Percent of Change by Unit Type |                                 |                         |             |
|------------------------------------------------------------------------|---------------------------------|-------------------------|-------------|
| Category                                                               | Body Type                       | Used Wholesale Trade-In | Used Retail |
| CAMPING TRAILER                                                        | ALL                             | ↓ -4.1%                 | ↓ -2.1%     |
| MOTORHOME                                                              | MICRO MINI MOTOR HOME (CLASS C) | ↓ -6.7%                 | ↓ -3.7%     |
| MOTORHOME                                                              | MINI MOTOR HOME (CLASS C)       | ↓ -4.7%                 | ↓ -2.7%     |
| MOTORHOME                                                              | MOTOR HOME (CLASS A)            | ↓ -5.4%                 | ↓ -2.2%     |
| MOTORHOME                                                              | TOWING MOTOR HOME (CLASS A)     | ↓ -6.6%                 | ↓ -3.9%     |
| MOTORHOME                                                              | VAN MOTOR HOME (CLASS B)        | ↑ 6.3%                  | ↑ 7.8%      |
| PARK MODEL                                                             | ALL                             | ↓ -3.7%                 | ↓ -1.7%     |
| TRAVEL TRAILER                                                         | FIFTH WHEEL                     | ↓ -4.0%                 | ↓ -2.1%     |
| TRAVEL TRAILER                                                         | STANDARD HITCH                  | ↓ -4.4%                 | ↓ -2.9%     |
| TRUCK CAMPER                                                           | ALL                             | ↓ -3.6%                 | ↓ -1.3%     |

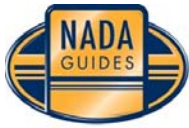
Source: NADAguides



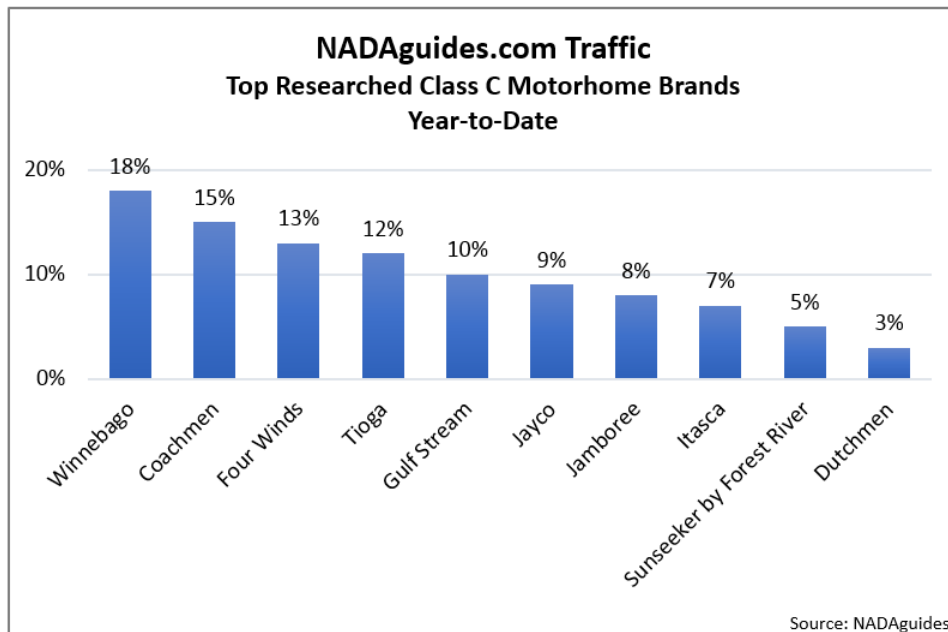
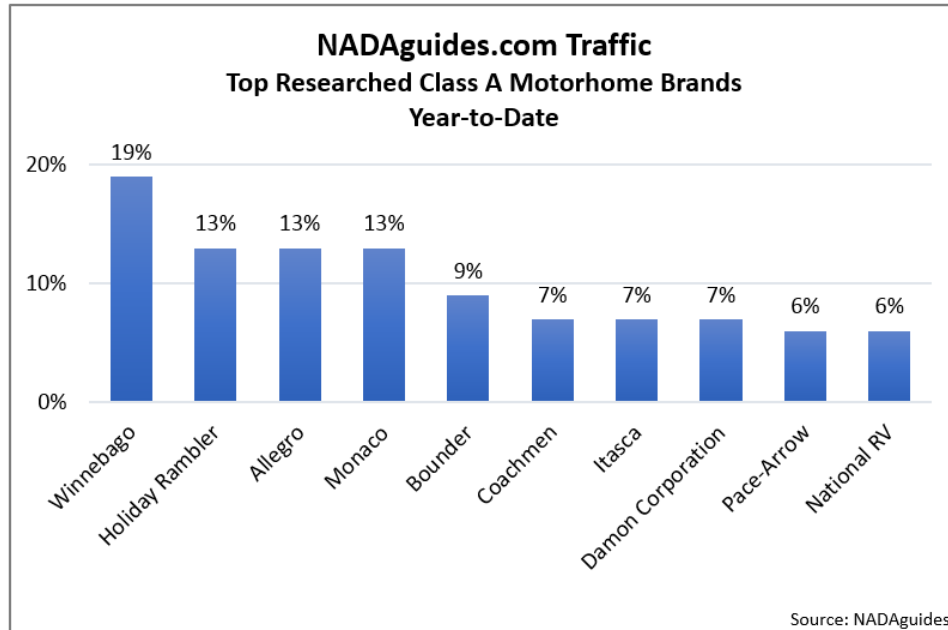
# NADAGuides Consumer Overview

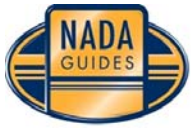
NADAGuides.com offers a broad range of information and services to consumers in the market to buy, sell, trade, or simply shop for a recreation vehicle. Consumer behavior is a key indicator in predicting market activity. Included in the Consumer Overview section of the NADAGuides Market Insights, readers will find the most researched brands by category and regional activity for January-November 2014.



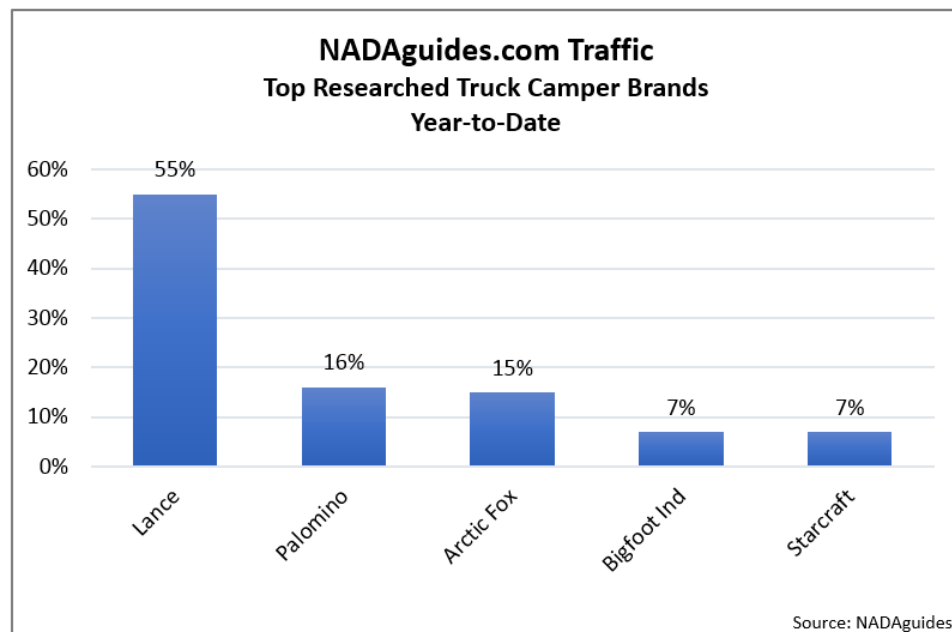
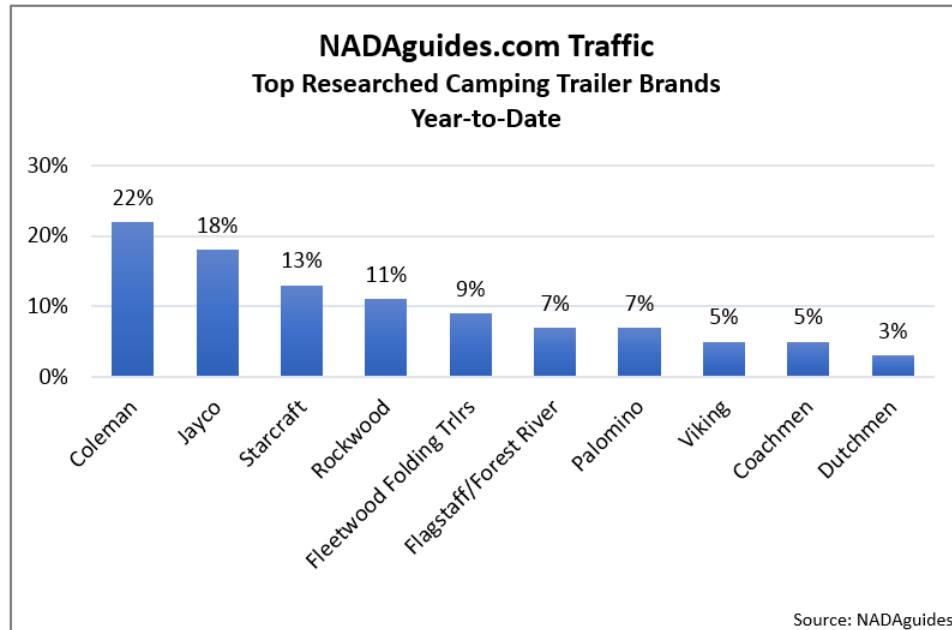


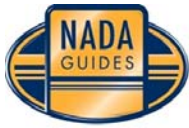
# NADAguides Consumer Overview





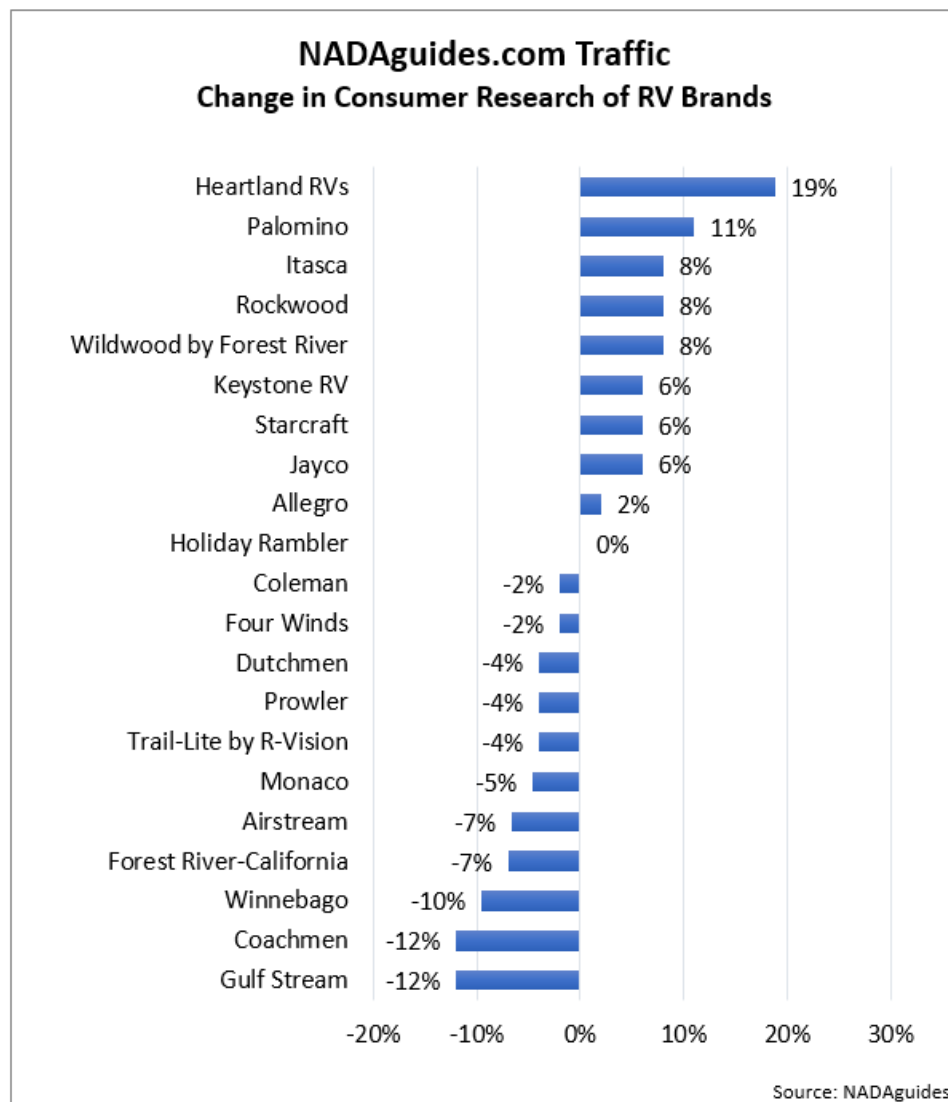
# NADAguides Consumer Overview

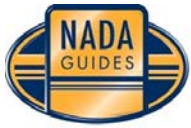




## NADAguides Consumer Overview

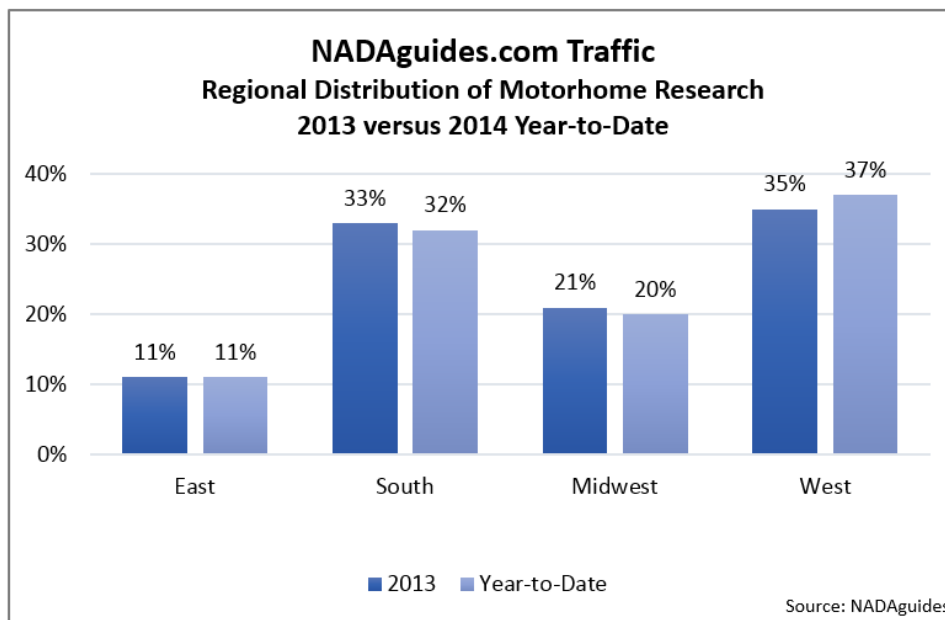
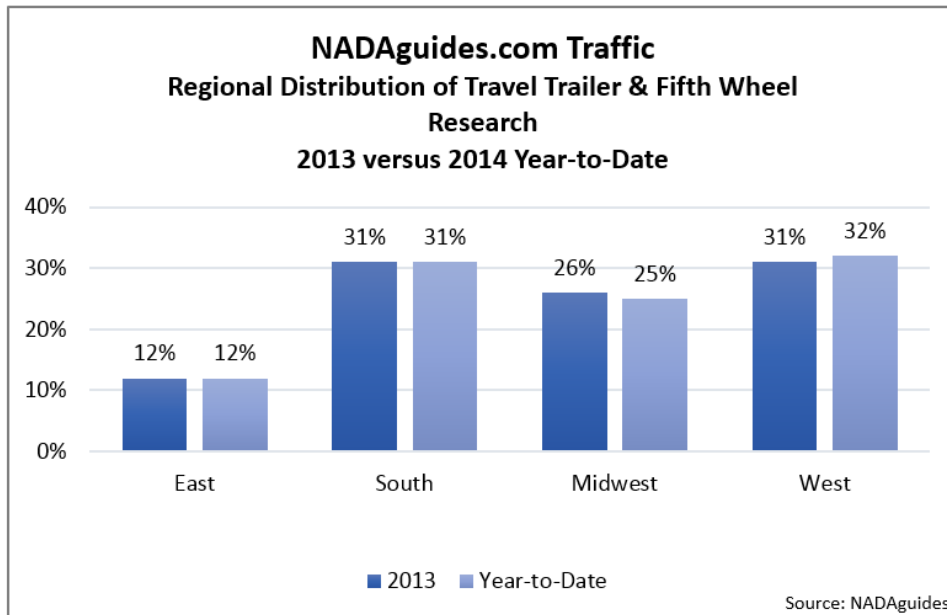
The figures below are based on consumer RV traffic on NADAguides.com and are calculated by comparing the change in percentage of lookups, for the top 20 researched manufacturers, January-November 2013 as compared to January-November 2014.

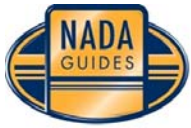




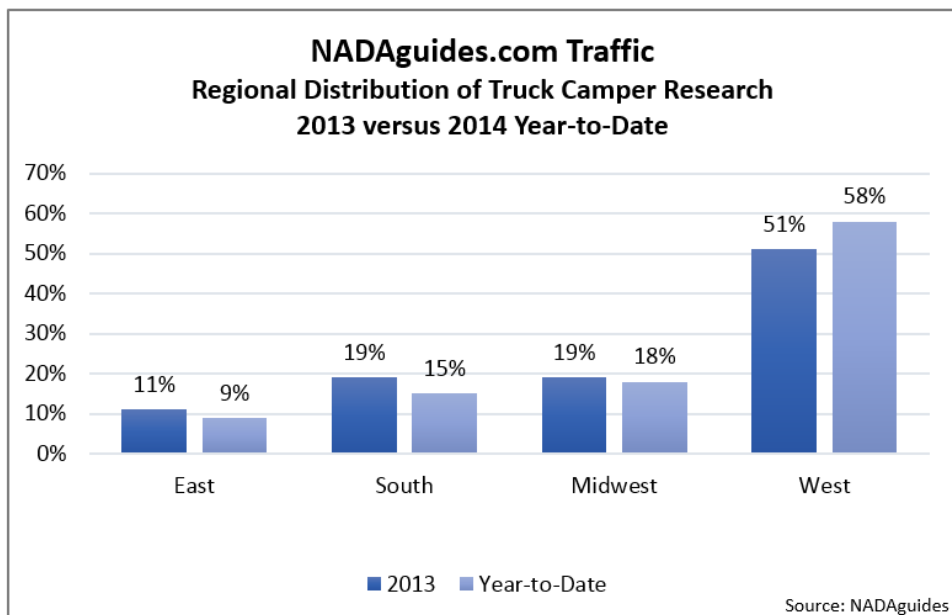
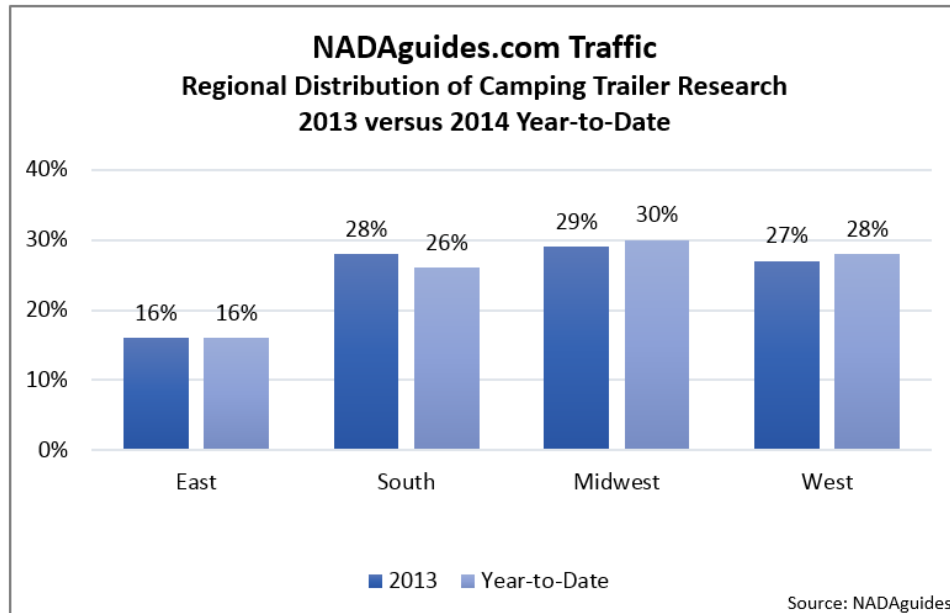
# NADAguides Consumer Overview

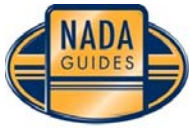
The NADAguides recreation vehicle data is based on national averages; however, our analysts recognize the significance of regional variance by unit type. The following charts represent consumer traffic based on four regions. Traffic percentages for 2013 are offered as a comparison to the year-to-date 2014 traffic.





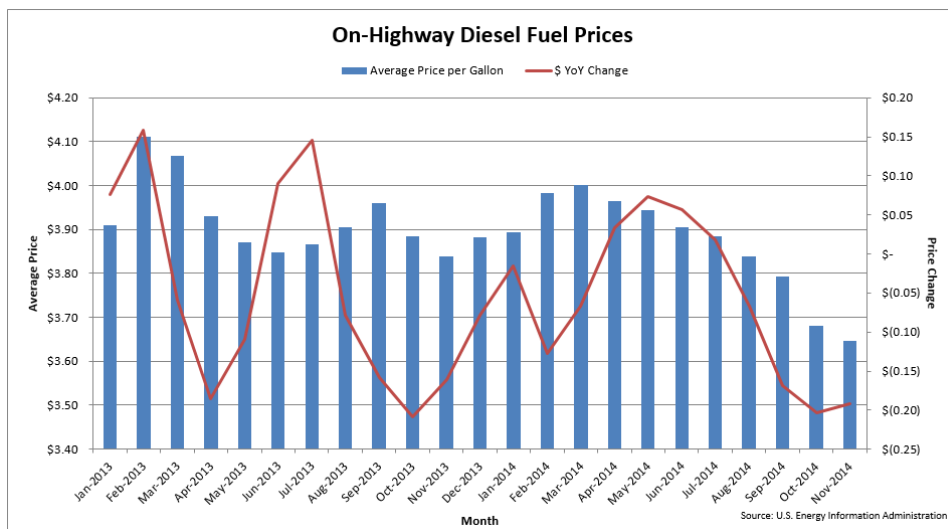
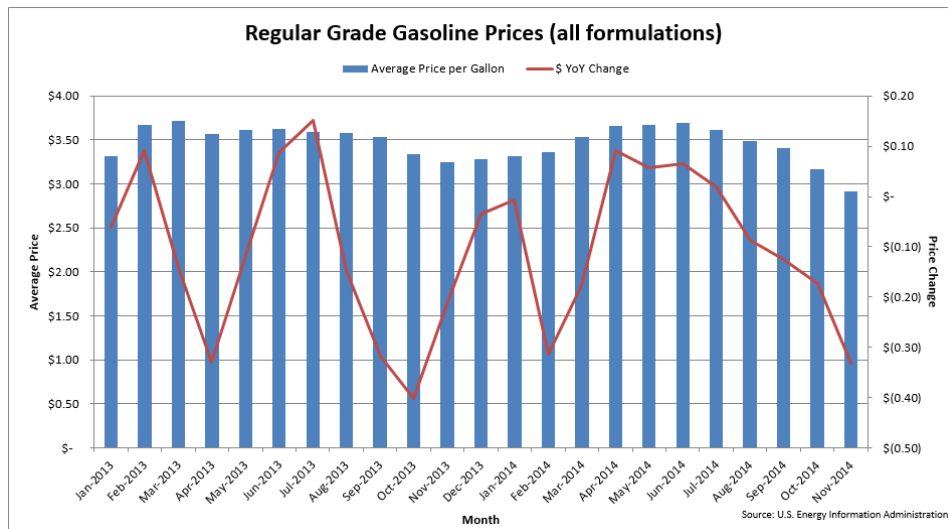
# NADAguides Consumer Overview

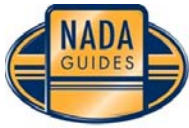




# Fuel Price Data

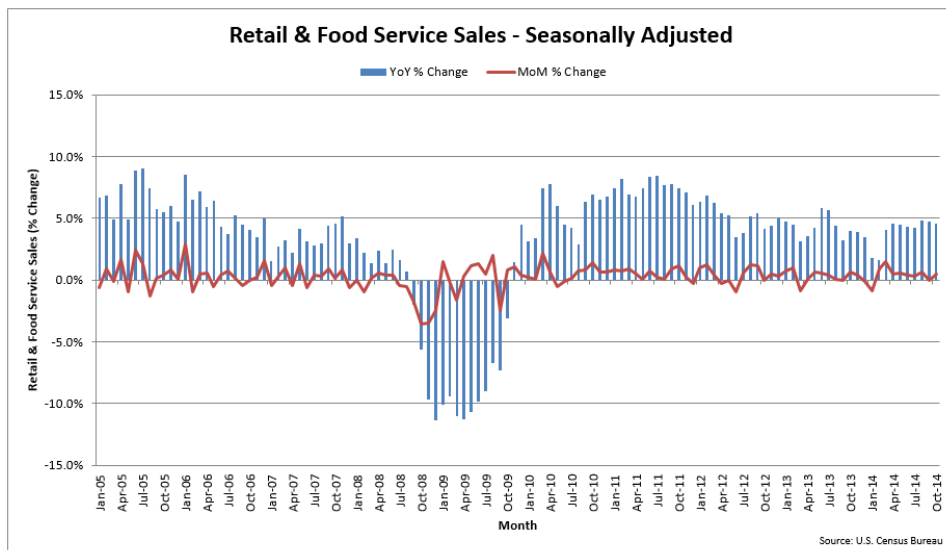
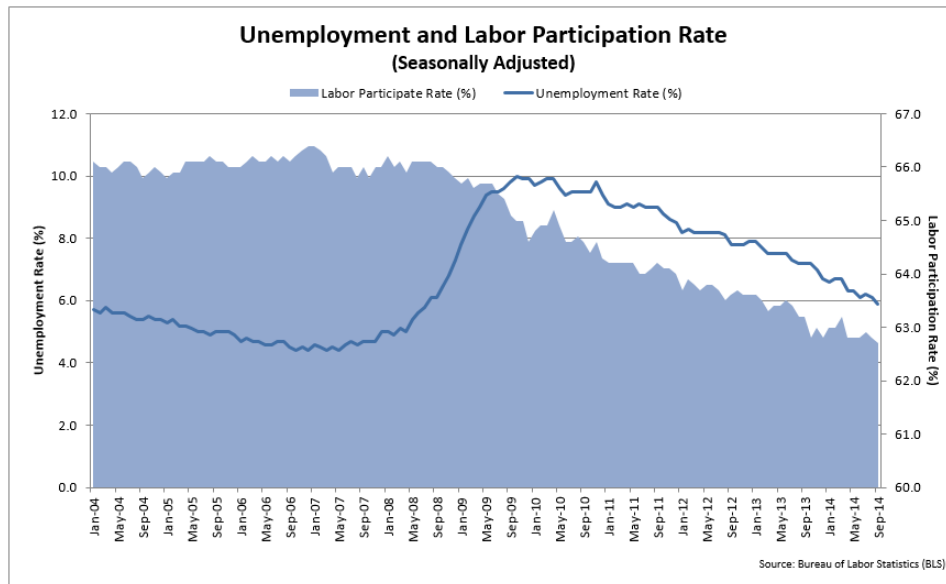
A view of the national average gasoline prices and year-over-year change is supplied to provide support for longer-term strategic planning.

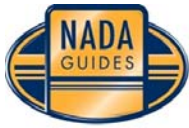




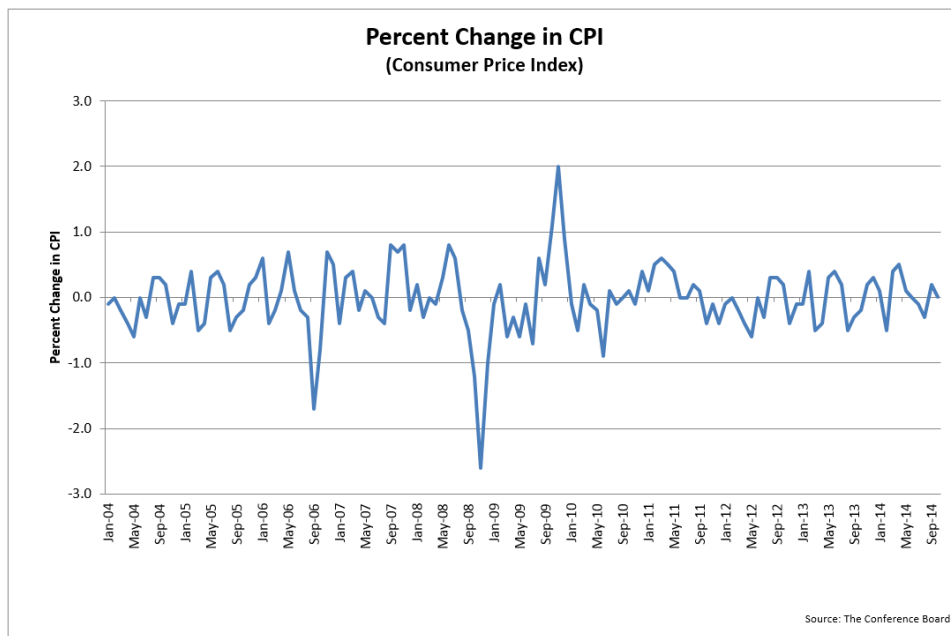
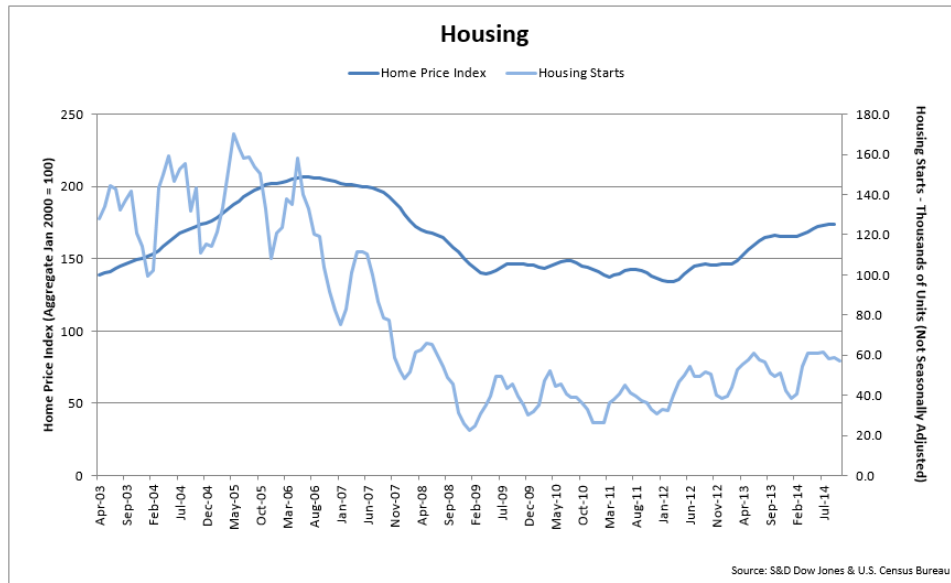
# Economic Data

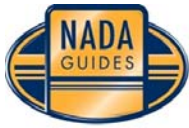
A number of important economic factors affect the recreation vehicle market, including the unemployment rate, retail sales, the housing market, and the Consumer Price Index (a measure of inflation). These factors can be interpreted to represent the consumer's ability and willingness to make a new or used recreation vehicle purchase.





# Economic Data





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## **NADAguides**

PO Box 7800

Costa Mesa, CA 92628

(800) 966-6232 | (714) 556-8511

Fax (714) 556-8715

[marketinsights@nadaguides.com](mailto:marketinsights@nadaguides.com)