

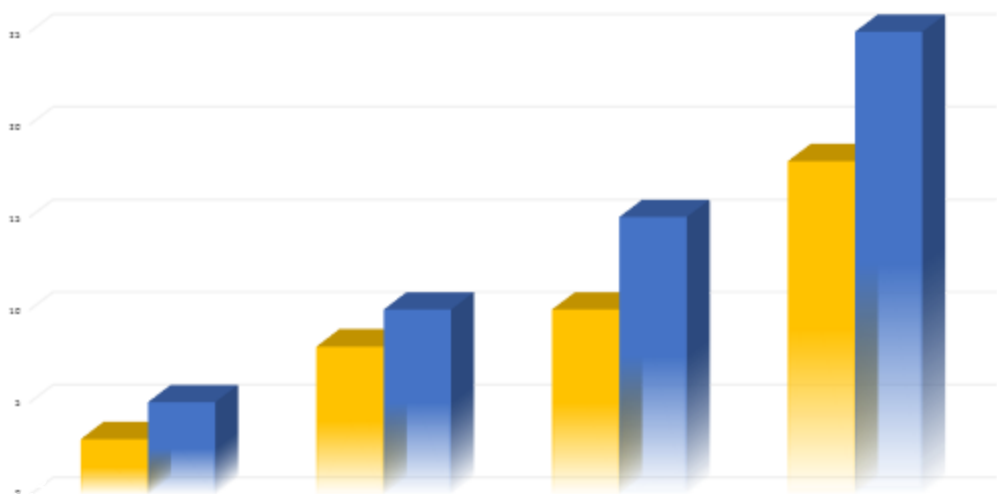
# 3<sup>rd</sup> Quarter 2017

## NADAguides

# RECREATIONAL VEHICLES

## MARKET INSIGHTS

A look at NADAguides.com consumer traffic trends, used values, dealer and financial institution focus, and more



# Industry Overview

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## RV Market Update

Based on RV shipments, forecast, and industry indicators, 2017 looks to be headed for another record year. Dealers have expressed optimism heading into the winter season as they look to carry the strong sales momentum seen over summer and fall. Everyone will undoubtedly be preparing for the colder winter season which will put downward pressure on used values.

We see the market softening for large fifth wheels. This is mainly due to slower inventory turn-over and continued interest in the smaller, lighter, and more functional trailers. This has helped buoy used travel trailer prices. We've also seen six months of increased values for truck campers, camping trailers, and park models. Used values will begin to decrease as we enter the slower and colder months.

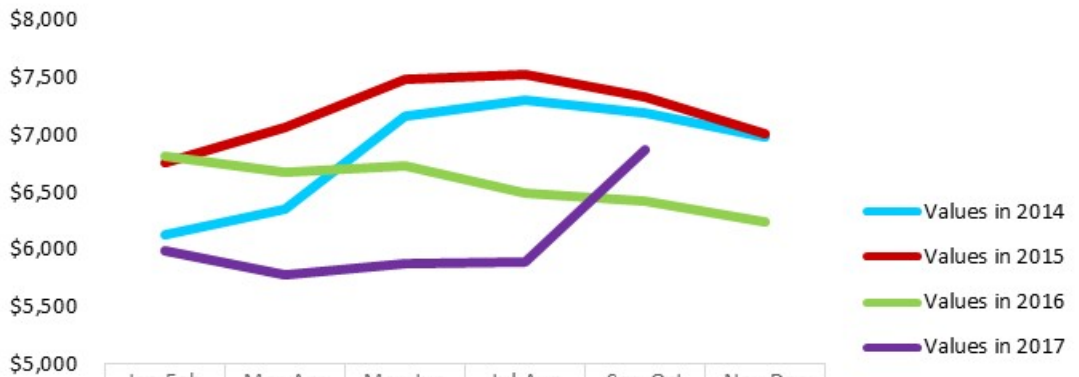
As we head into winter, there are some headwinds to keep an eye on. California will see fuel prices increase by .12 cents by Nov. 1, 2017, gas prices overall are higher than last year, and interest rates will edge higher. With that said, business conditions continue to support a robust RV market with low unemployment, consumers feeling good about the economy, low interest rates, and inflation in check. This has dealers feeling extremely upbeat that 2017 will be another banner year!



# Travel Trailer Values

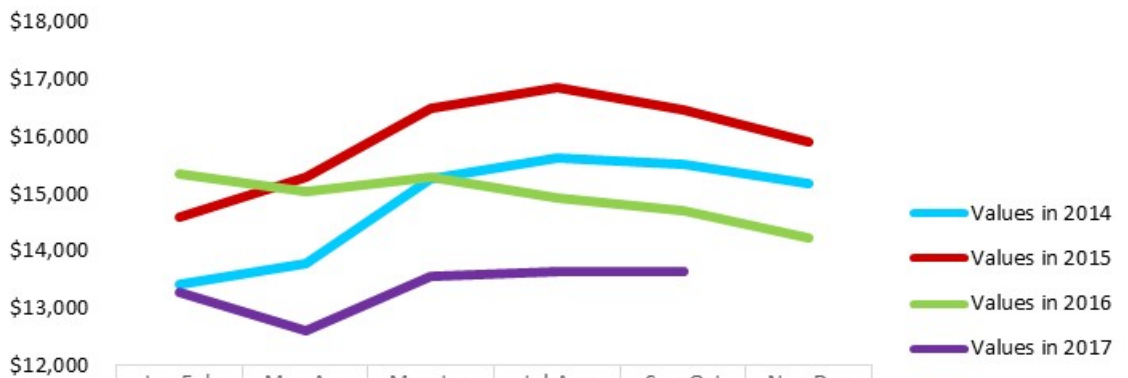
## Used Retail Value by Category

### Standard Hitch



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$6,133	\$6,359	\$7,159	\$7,306	\$7,192	\$6,986
Values in 2015	\$6,758	\$7,070	\$7,491	\$7,525	\$7,332	\$7,016
Values in 2016	\$6,814	\$6,678	\$6,732	\$6,497	\$6,419	\$6,247
Values in 2017	\$5,989	\$5,787	\$5,874	\$5,894	\$6,875	

### Fifth Wheel



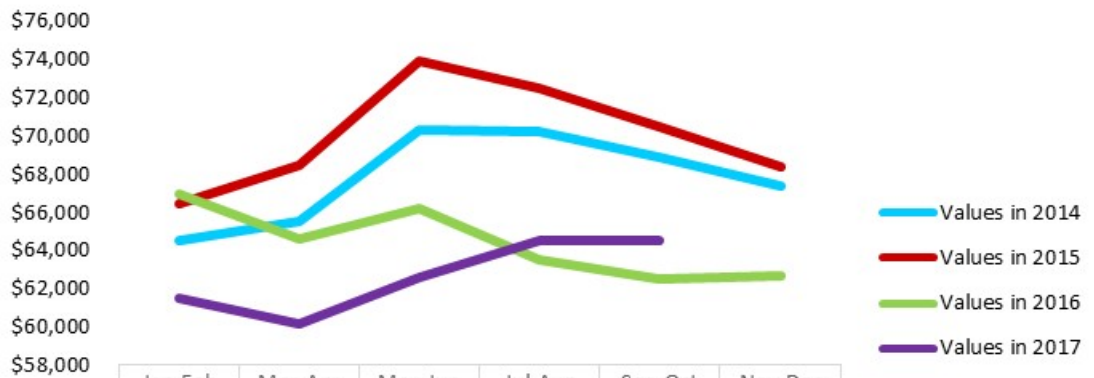
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$13,411	\$13,773	\$15,271	\$15,635	\$15,516	\$15,188
Values in 2015	\$14,597	\$15,305	\$16,508	\$16,854	\$16,482	\$15,925
Values in 2016	\$15,363	\$15,041	\$15,303	\$14,939	\$14,712	\$14,221
Values in 2017	\$13,279	\$12,619	\$13,559	\$13,659	\$13,645	



# Motorhome Values

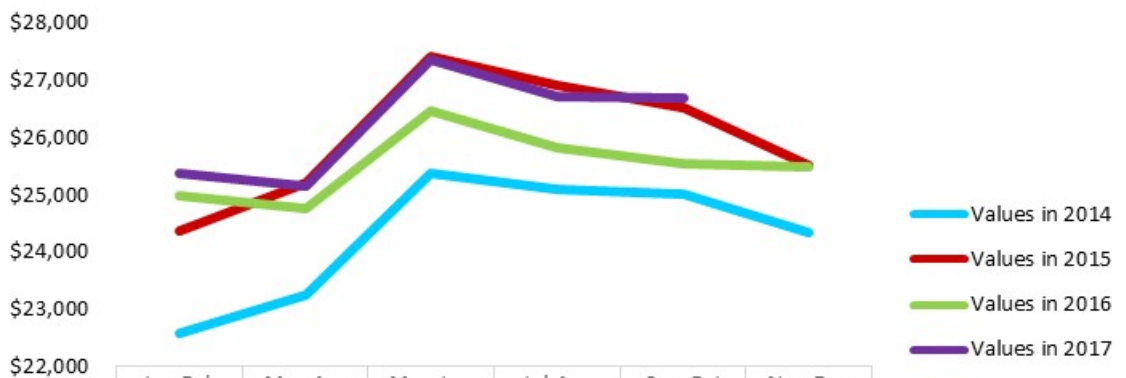
## Used Retail Value by Category

### Class A



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$64,530	\$65,504	\$70,350	\$70,202	\$68,929	\$67,379
Values in 2015	\$66,475	\$68,456	\$73,913	\$72,537	\$70,460	\$68,407
Values in 2016	\$66,953	\$64,612	\$66,193	\$63,517	\$62,523	\$62,693
Values in 2017	\$61,500	\$60,191	\$62,563	\$64,505	\$64,522	

### Class C



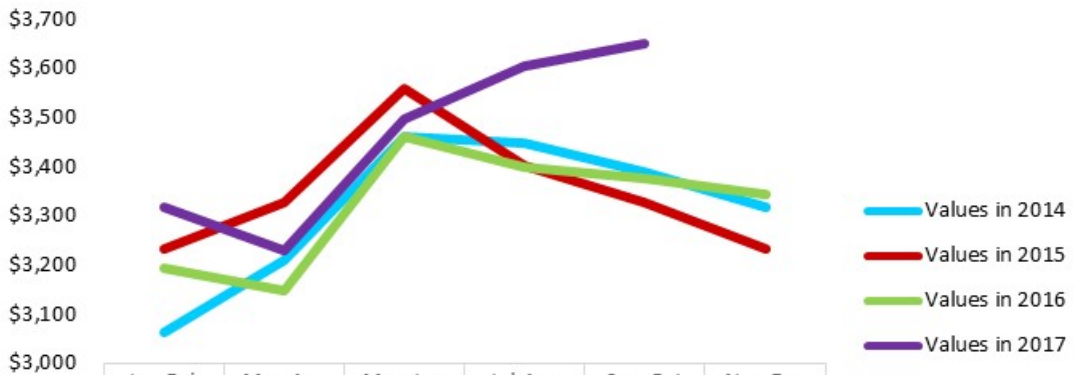
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$22,597	\$23,258	\$25,367	\$25,101	\$25,005	\$24,333
Values in 2015	\$24,363	\$25,199	\$27,414	\$26,927	\$26,518	\$25,515
Values in 2016	\$24,984	\$24,774	\$26,463	\$25,824	\$25,561	\$25,481
Values in 2017	\$25,377	\$25,143	\$27,371	\$26,727	\$26,703	



# Camping Trailer & Truck Camper Values

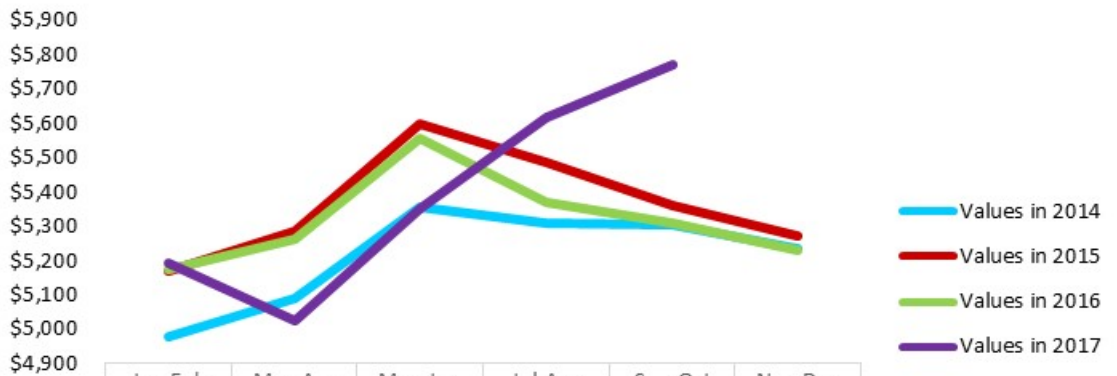
## Used Retail Value by Category

### Camping Trailer



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$3,064	\$3,209	\$3,462	\$3,447	\$3,388	\$3,318
Values in 2015	\$3,234	\$3,328	\$3,557	\$3,402	\$3,326	\$3,233
Values in 2016	\$3,192	\$3,146	\$3,459	\$3,398	\$3,375	\$3,342
Values in 2017	\$3,316	\$3,228	\$3,495	\$3,604	\$3,651	

### Truck Camper



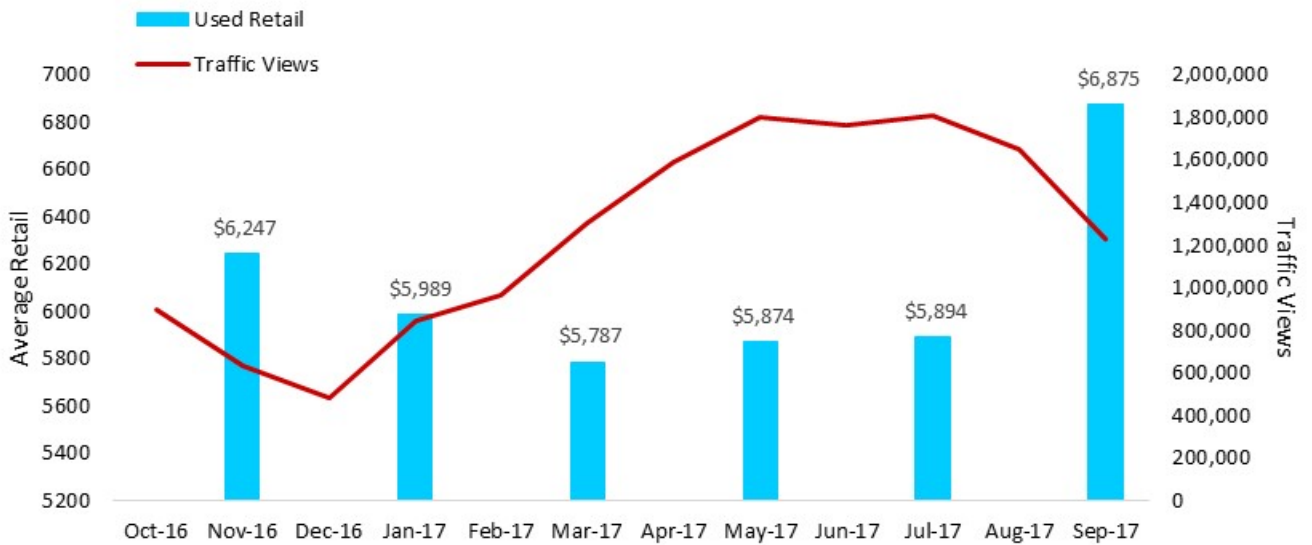
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2014	\$4,977	\$5,092	\$5,355	\$5,309	\$5,305	\$5,237
Values in 2015	\$5,172	\$5,287	\$5,598	\$5,485	\$5,363	\$5,270
Values in 2016	\$5,176	\$5,261	\$5,557	\$5,371	\$5,310	\$5,232
Values in 2017	\$5,194	\$5,024	\$5,351	\$5,616	\$5,773	



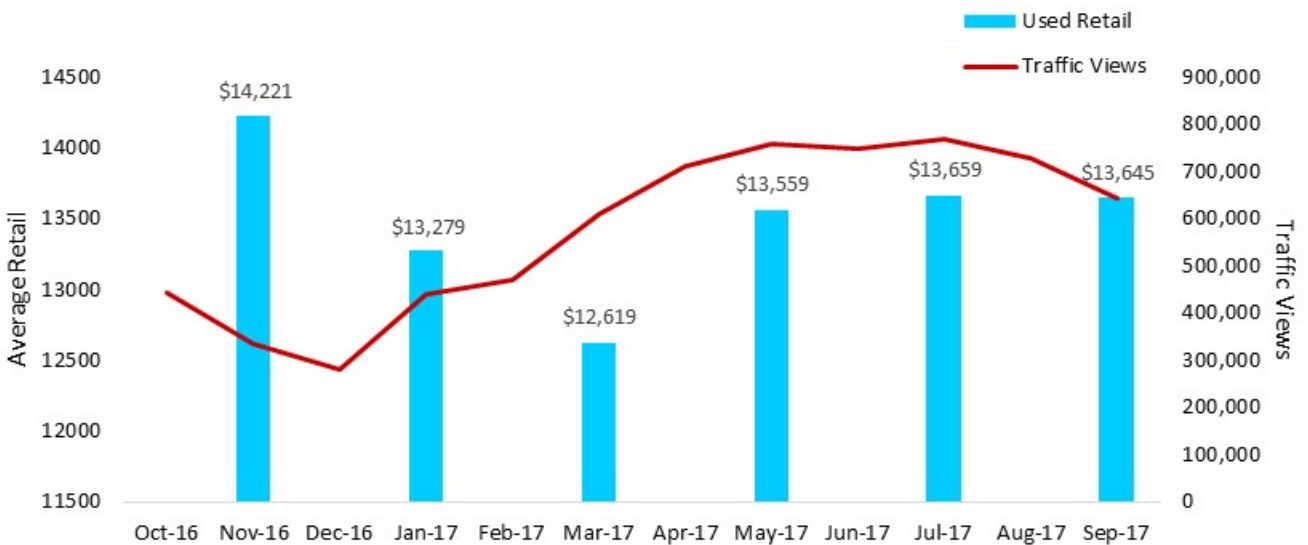
# Travel Trailer Values vs. Traffic

## Used Retail Value and Traffic Views by Category

### Standard Hitch



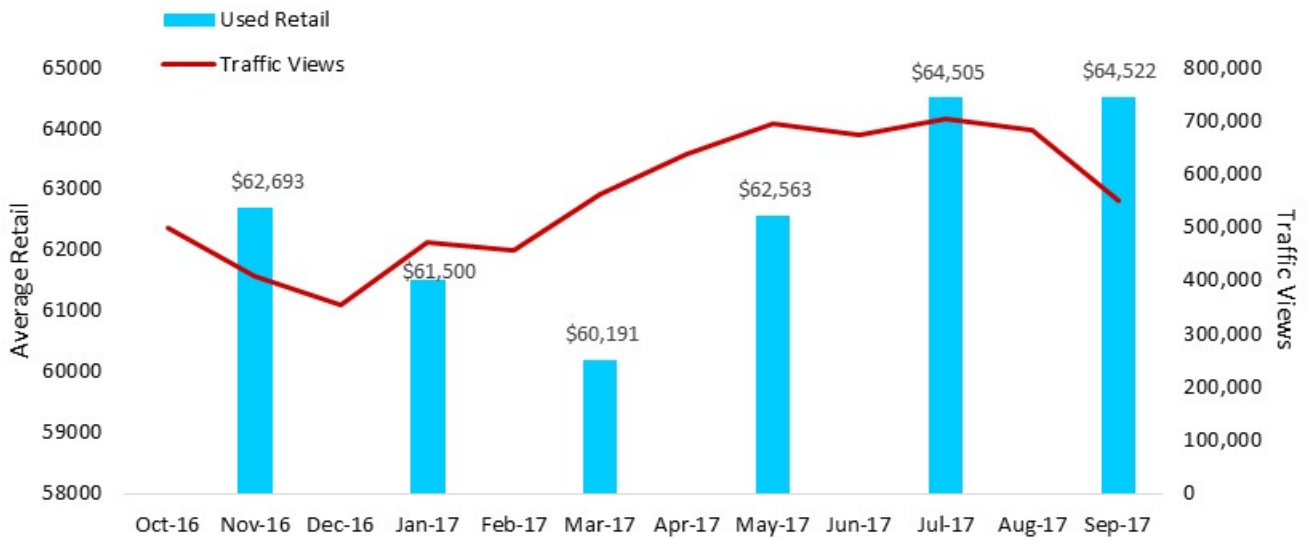
### Fifth Wheel



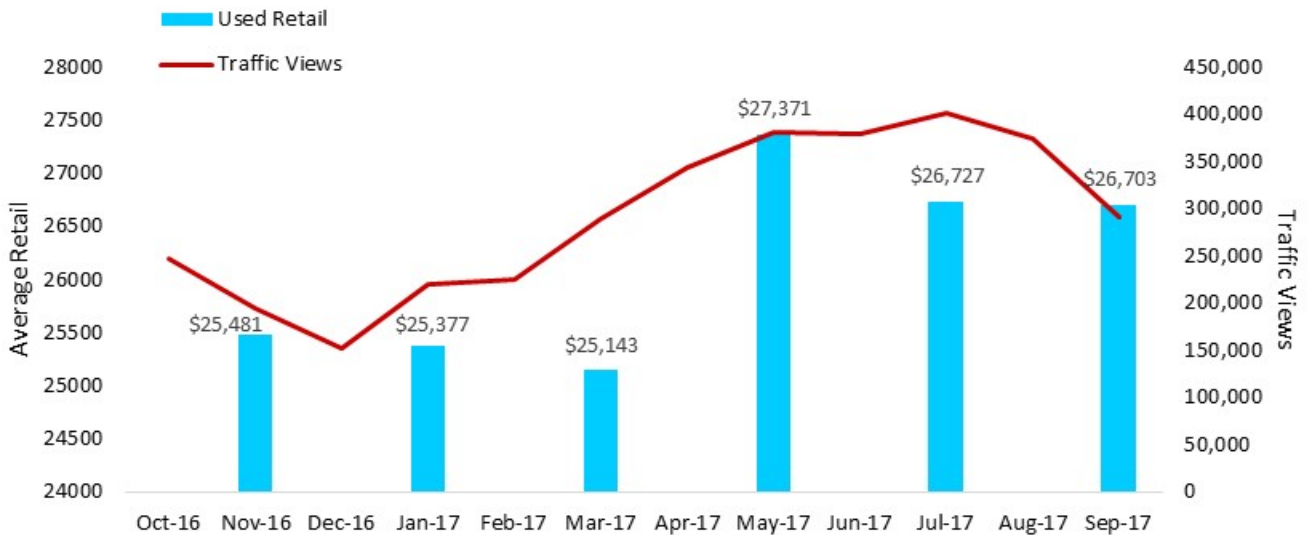
# Motorhome Values vs. Traffic

## Used Retail Value and Traffic Views by Category

### Class A



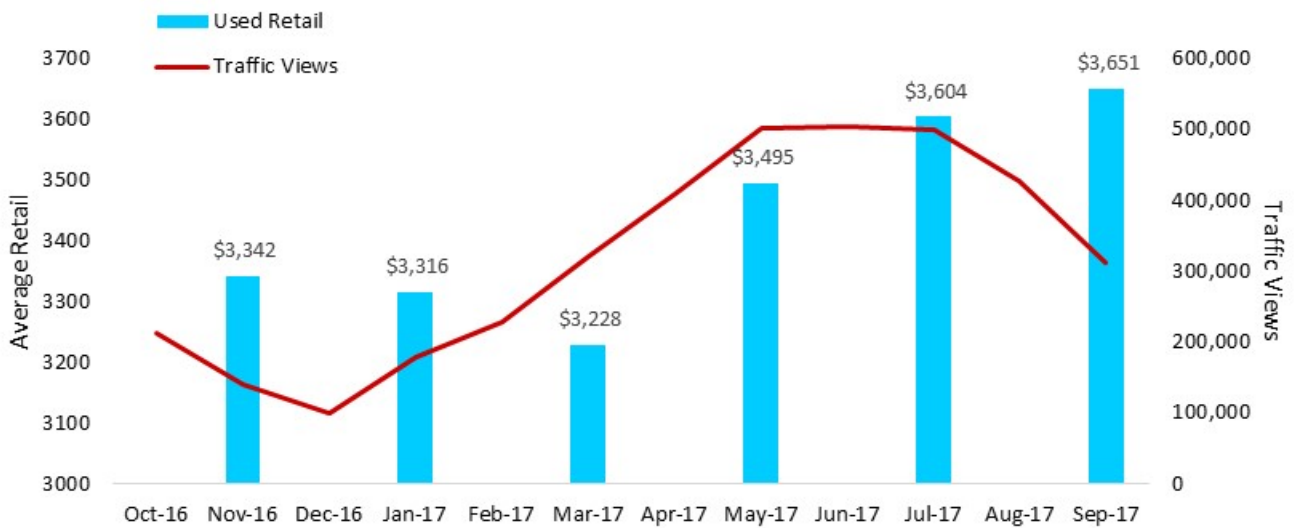
### Class C



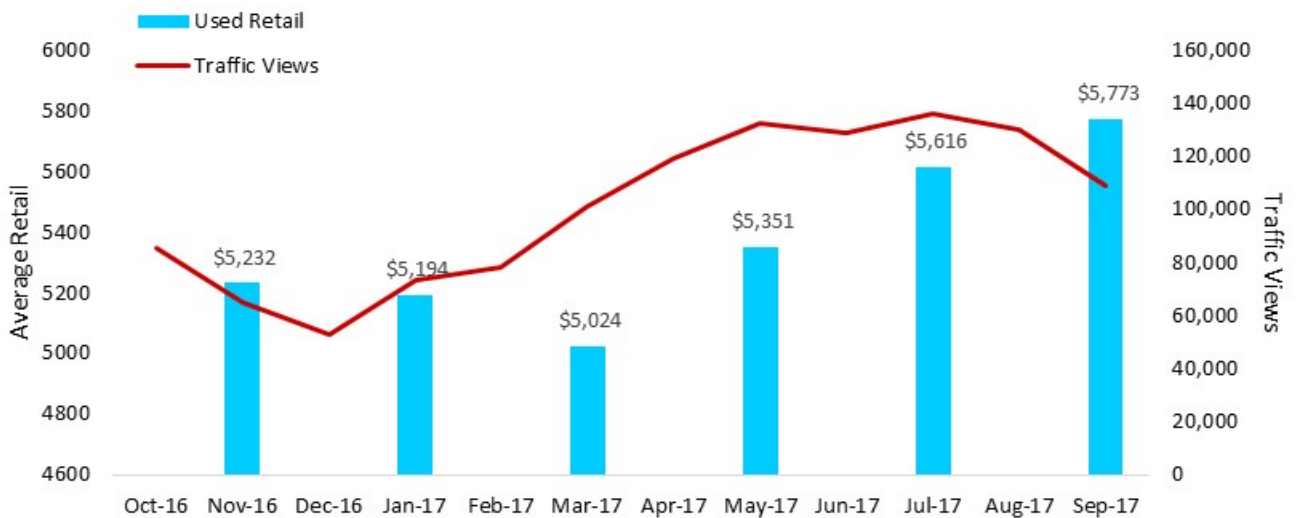
# Camping Trailer & Truck Camper Values vs. Traffic

## Used Retail Value and Traffic Views by Category

### Camping Trailer



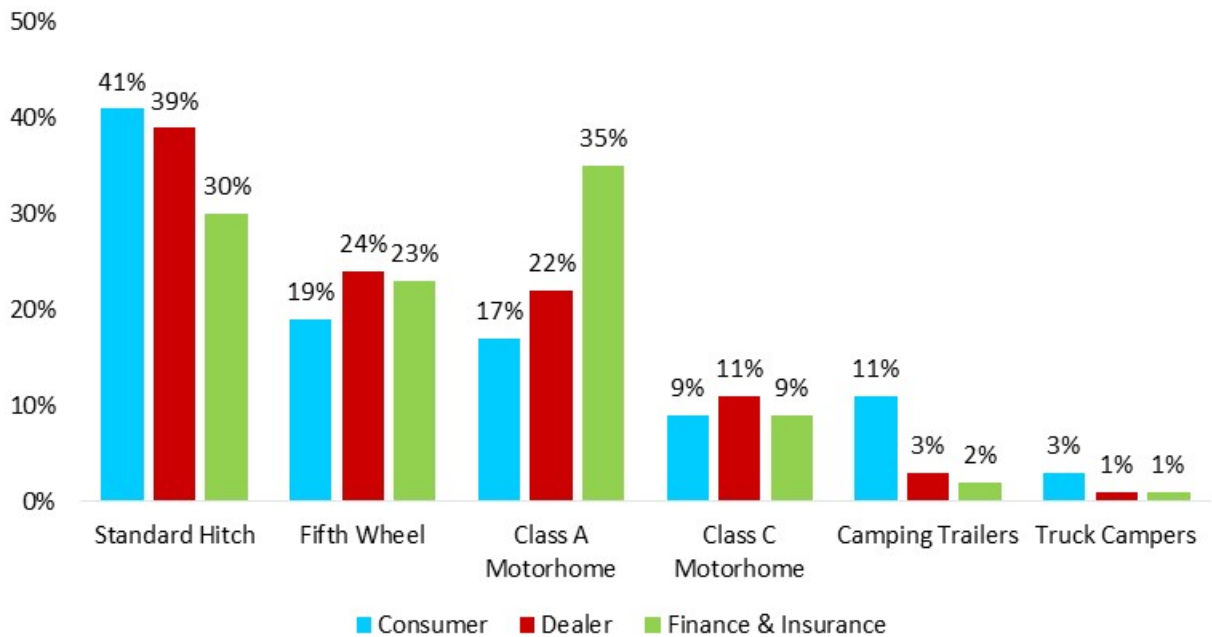
### Truck Camper





# RV Categories

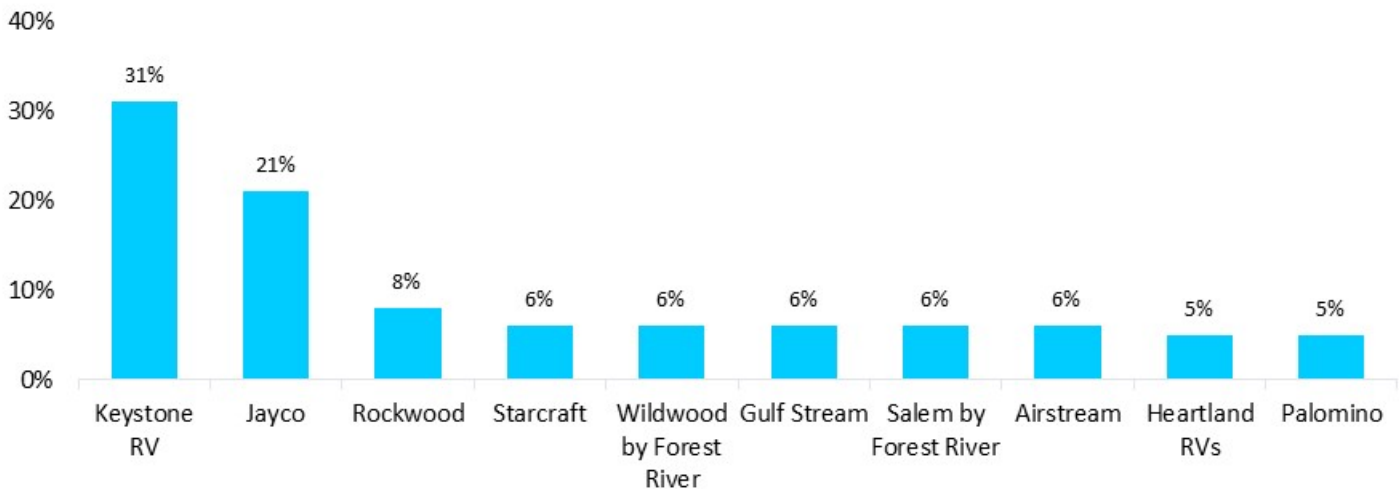
Category Views Among Consumers, Dealers, and Finance & Insurance Institutions in 2017 Q1-Q3



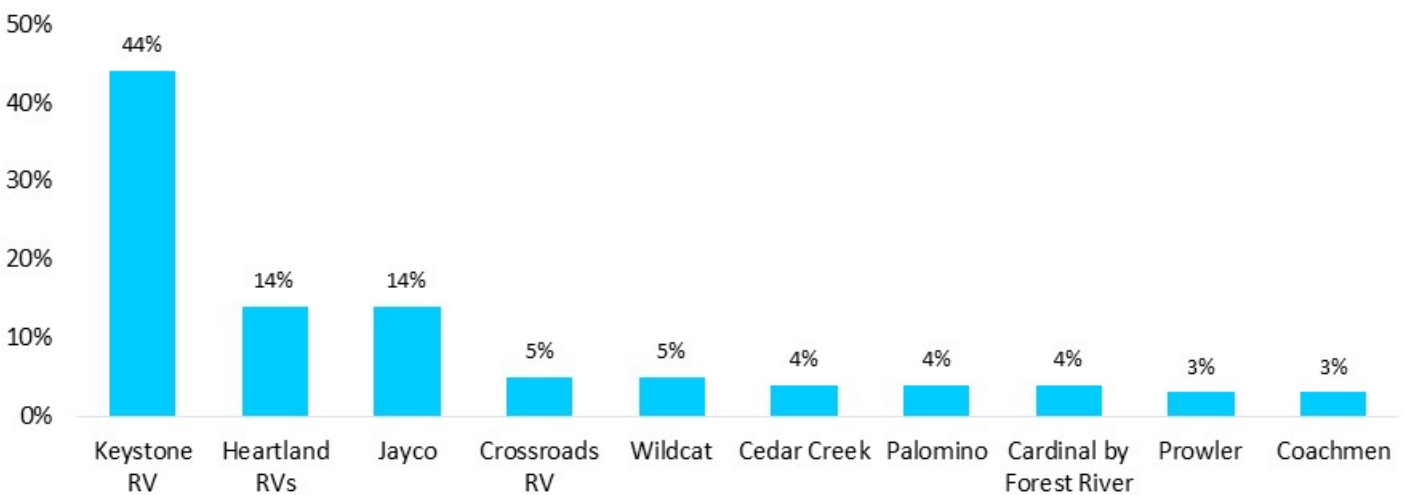
# Travel Trailer Brands

NADAGuides.com Top Researched Brands in 2017 Q1-Q3

## Standard Hitch Brands



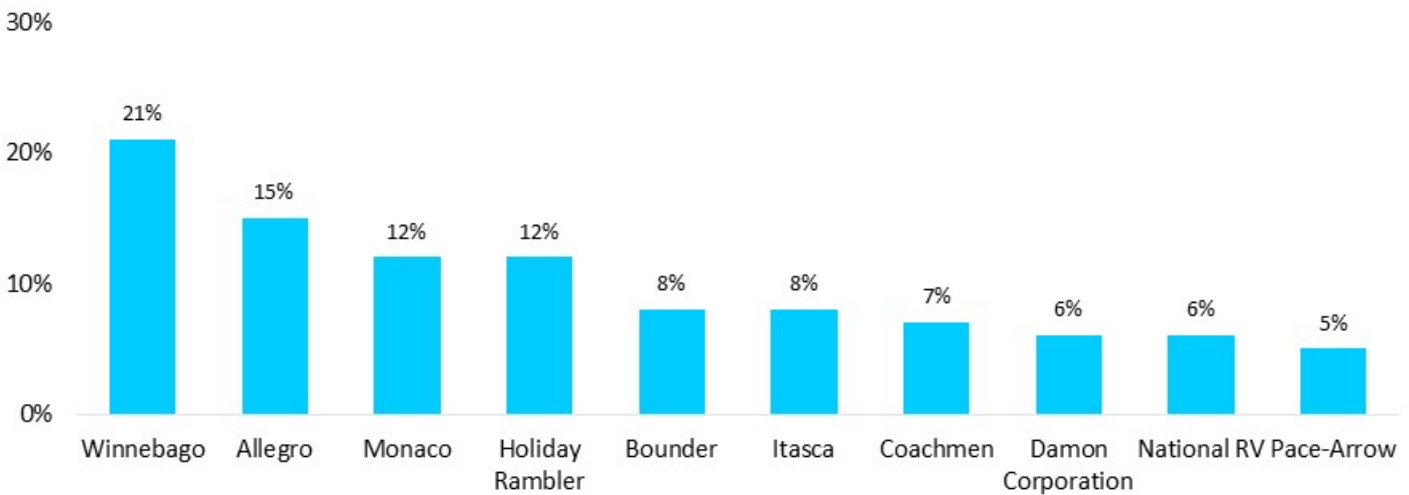
## Fifth Wheel Brands



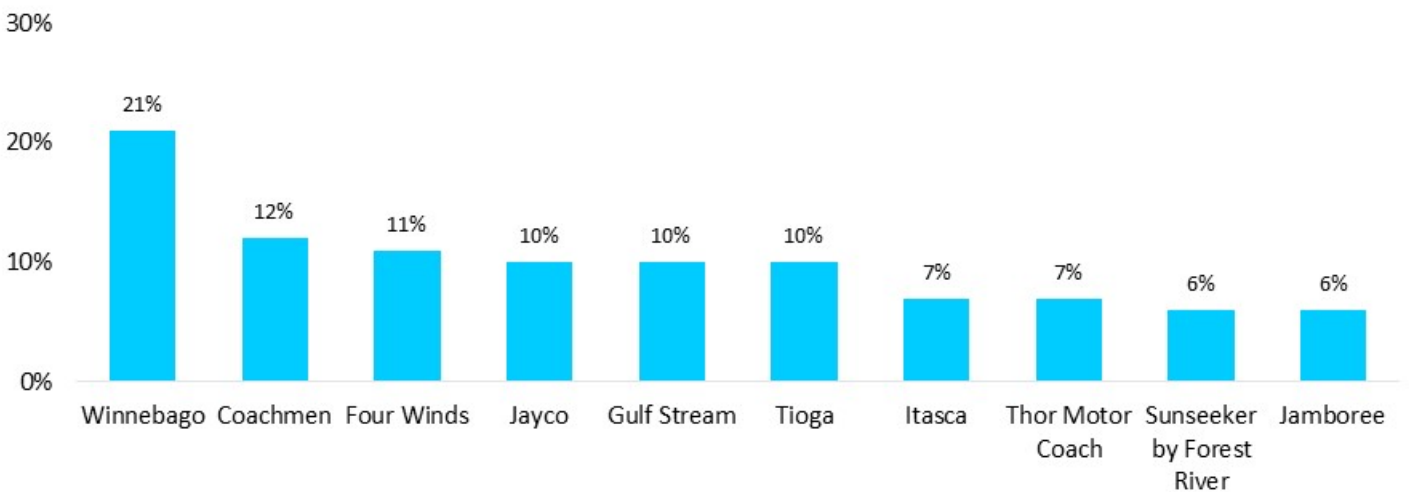
# Motorhome Brands

NADAguides.com Top Researched Brands in 2017 Q1-Q3

## Class A Brands



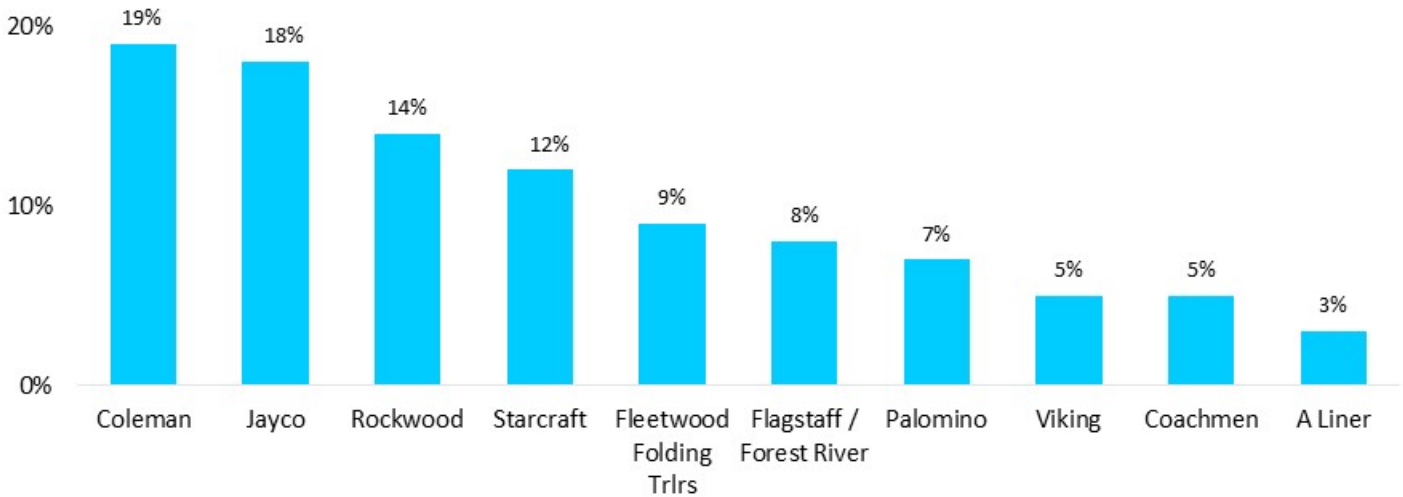
## Class C Brands



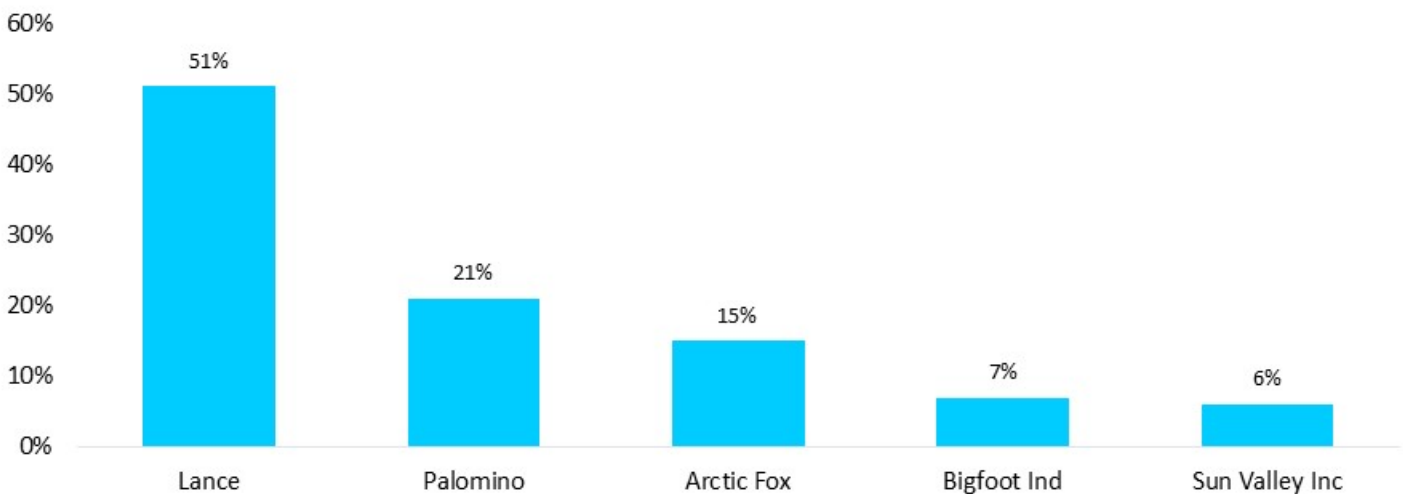
# Camping Trailer & Truck Camper Brands

NADAGuides.com Top Researched Brands in 2017 Q1-Q3

## Camping Trailer Brands



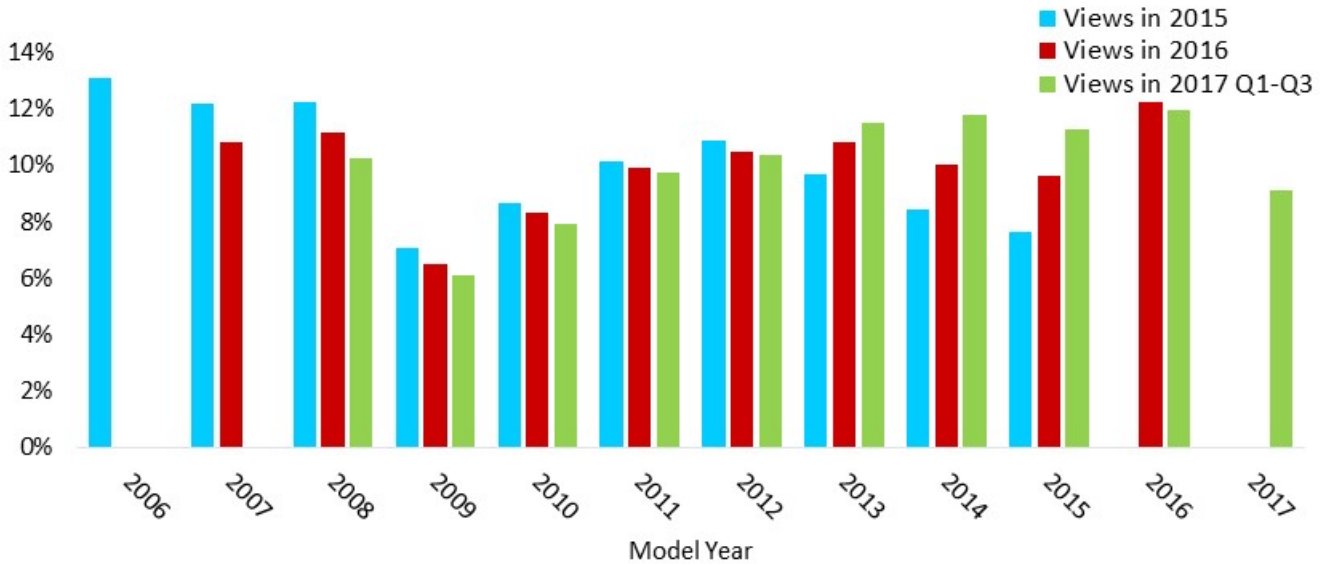
## Truck Camper Brands



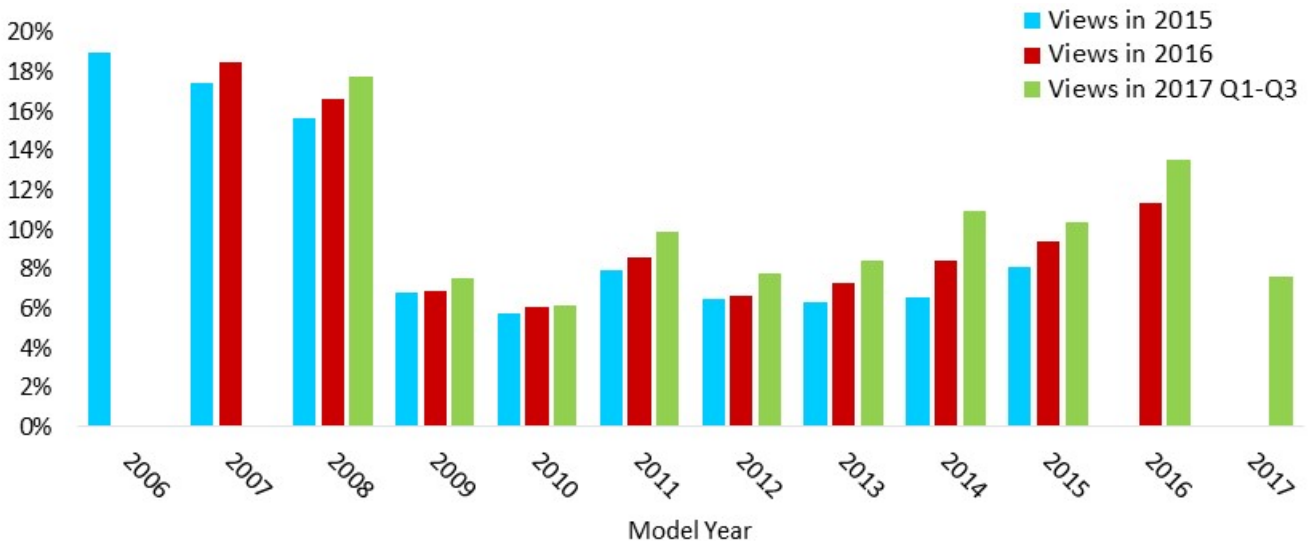
# Model Years

## NADAguides.com Top Researched Model Years by Category

### Standard Hitch Travel Trailer



### Class A Motorhome

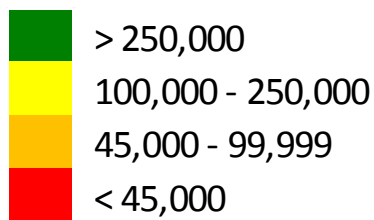
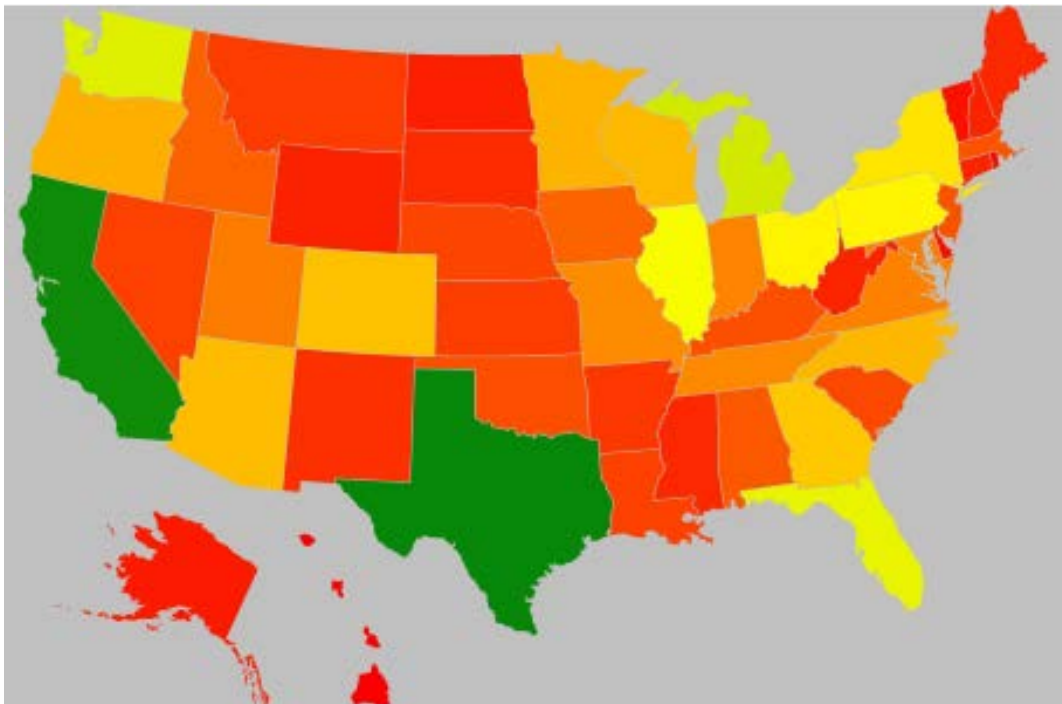


# Web Traffic by State

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NADAguides.com Traffic by State in 2017 Q1-Q3

## Travel Trailers

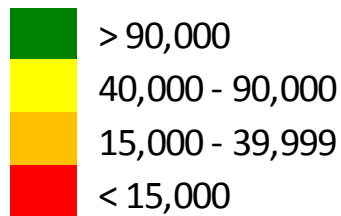
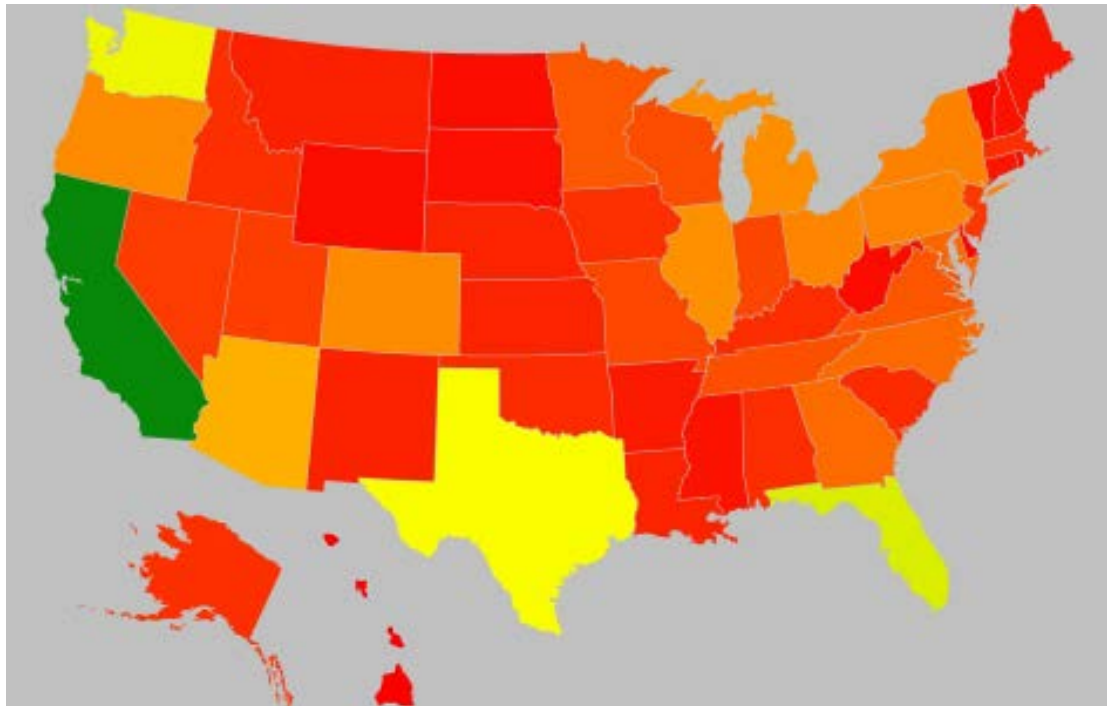


# Web Traffic by State

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NADAguides.com Traffic by State in 2017 Q1-Q3

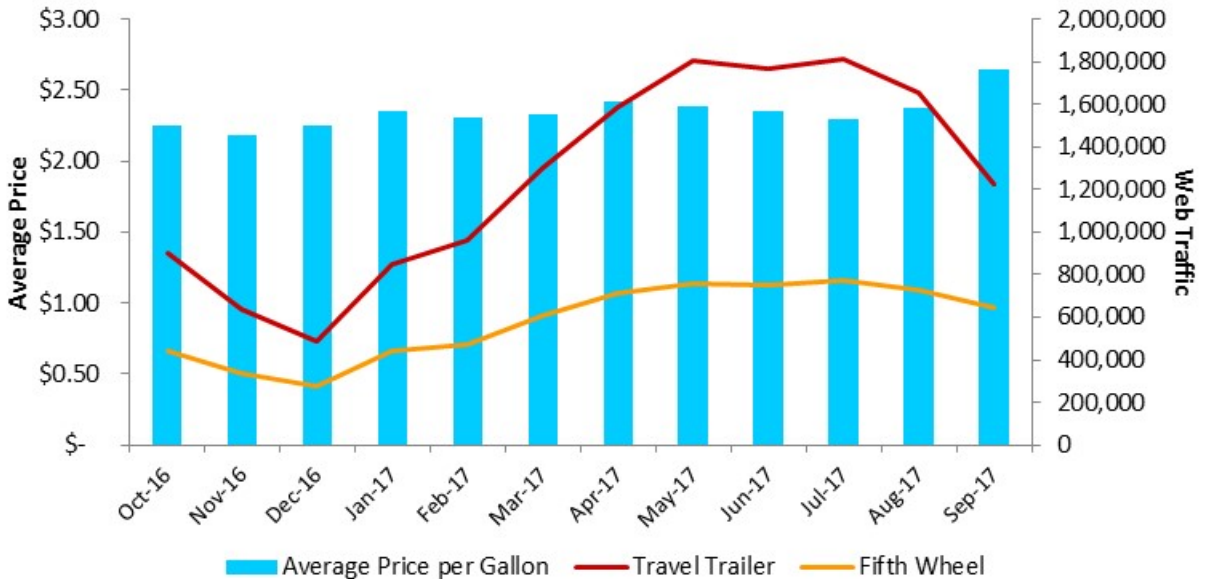
Class C Motorhomes



# Fuel Price Data

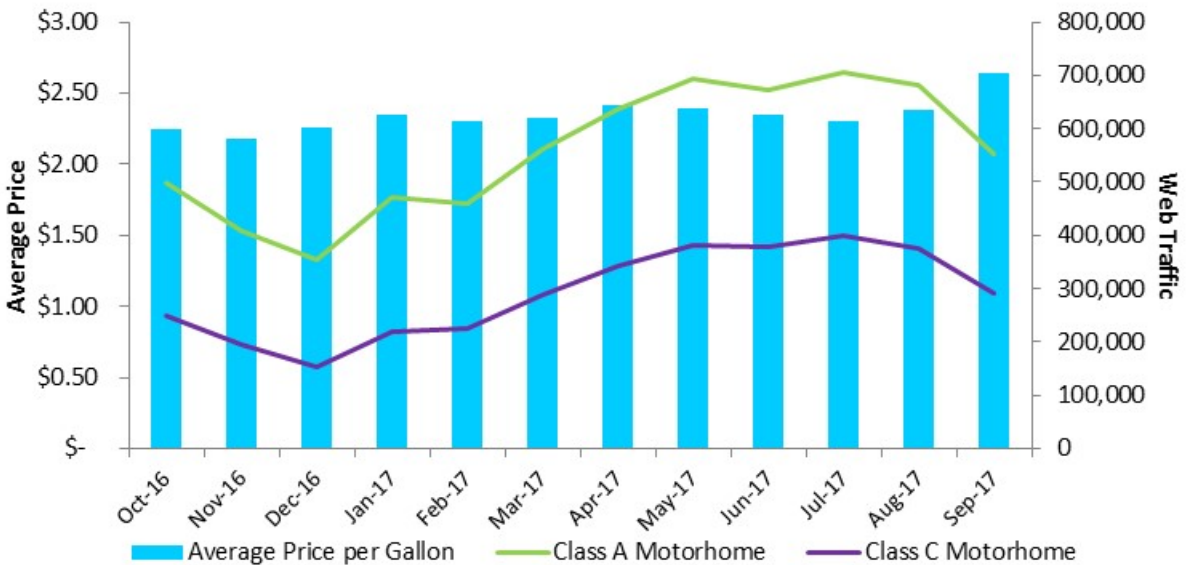
## Regular Grade Gasoline Prices vs. Consumer Traffic by Category

### Travel Trailer / Fifth Wheel



Source: U.S. Energy Information Administration

### Motorhomes



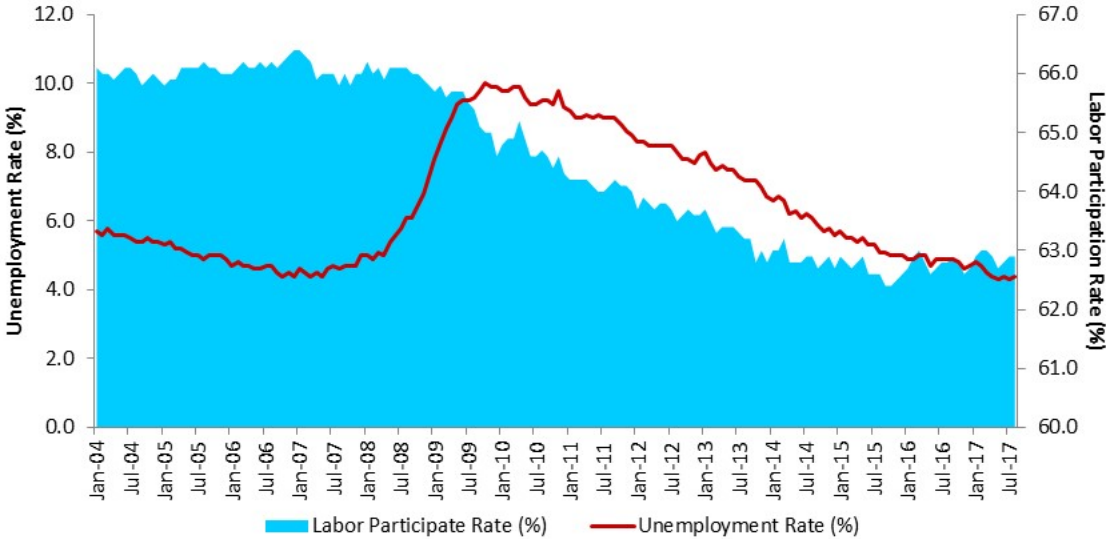
Source: U.S. Energy Information Administration





# Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



Source: Bureau of Labor Statistics (BLS)



# NADAguides

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National Appraisal Guides, Inc.

PO Box 7800

Costa Mesa, CA 92628

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

Fax (714) 556-8715

