

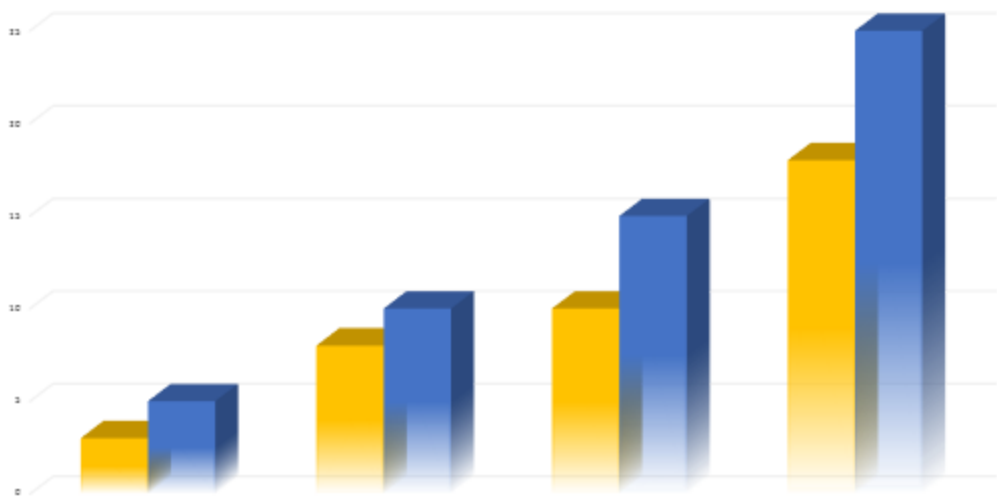
2nd Quarter 2018

NADAguides **RECREATIONAL VEHICLES** MARKET INSIGHTS

J.D. POWER

NADAguides is a division of J.D. Power

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



J.D. POWER



Industry Overview

RV Market Update

Camping trailers and truck campers led the RV industry in terms of value growth year-over-year, as younger buyers enter the market in greater numbers. Camping trailers brought about 4% more money in the May-June period of 2018 compared to 2017, while truck campers brought about 7% more.

In the larger segments, standard hitch trailers performed on par with the 4-year average, recovering from early 2017 but still about 10% behind the 2015 peak. Fifth wheel trailers performed similarly to 2017, leaving the segment about 18% behind the 2015 peak.

Moving over to motorhomes, Class A and Class C units enjoyed a seasonal bump. Class As are bringing about 3% more money than 2017, but are well off their 2015 peak. Class Cs look relatively strong, with only the most recent period showing any notable decrease compared to previous years.

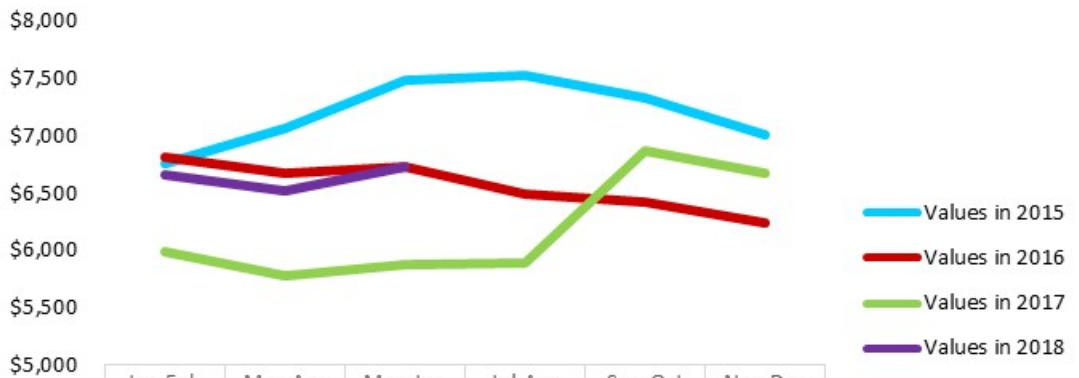
With the job market continuing to improve and discretionary income increasing, the demand outlook for motorhomes and campers is positive.



Travel Trailer Values

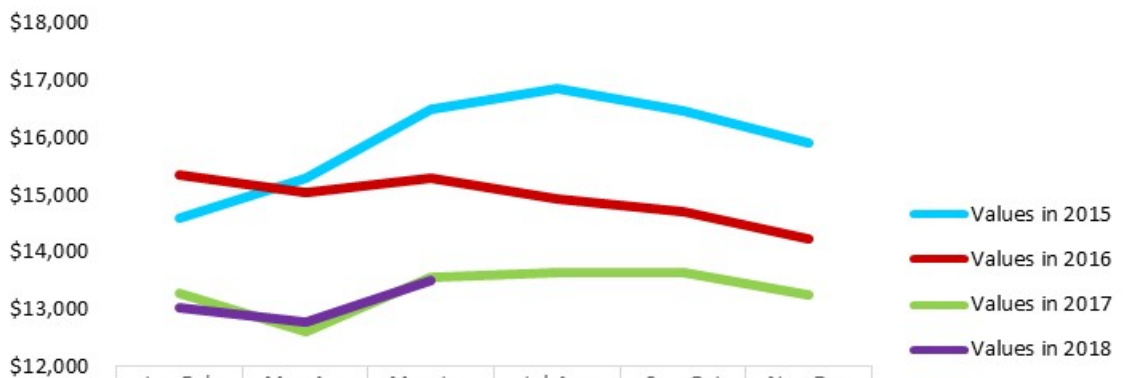
Used Retail Value by Category

Standard Hitch



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
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	\$6,673
Values in 2018	\$6,667	\$6,529	\$6,731			

Fifth Wheel



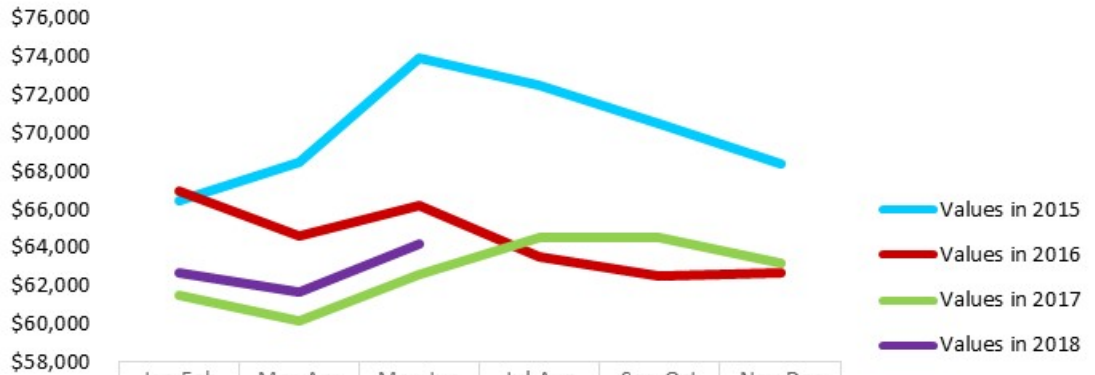
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2015	\$14,597	\$15,305	\$16,508	\$16,854	\$16,482	\$15,925
Values in 2016	\$15,363	\$15,041	\$15,303	\$14,939	\$14,712	\$14,221
Values in 2017	\$13,279	\$12,619	\$13,559	\$13,659	\$13,645	\$13,265
Values in 2018	\$13,025	\$12,778	\$13,517			



Motorhome Values

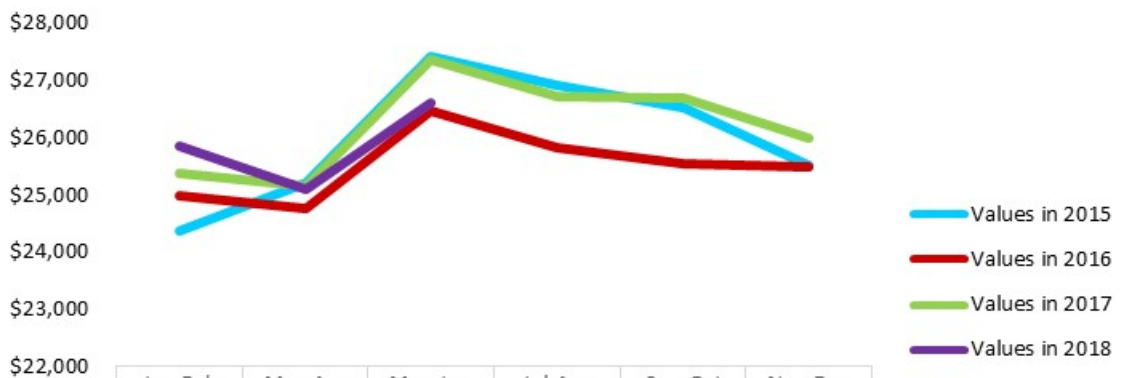
Used Retail Value by Category

Class A



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
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	\$63,170
Values in 2018	\$62,713	\$61,643	\$64,173			

Class C



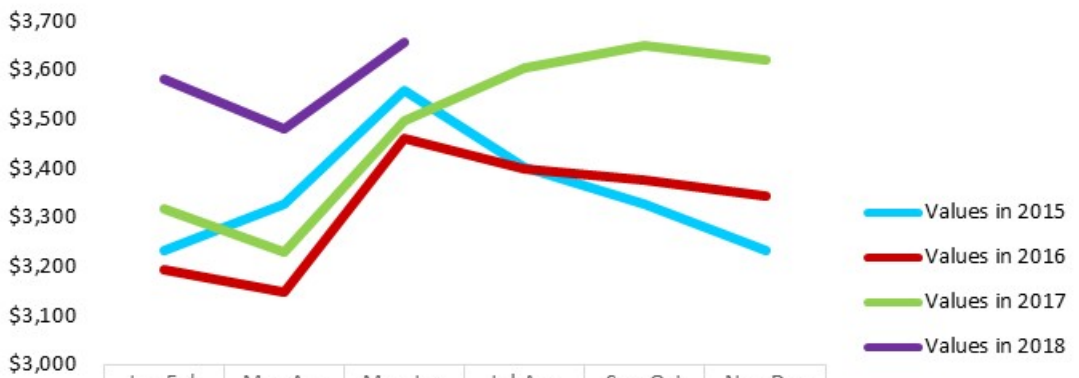
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2015	\$24,363	\$25,199	\$27,414	\$26,927	\$26,518	\$25,515
Values in 2016	\$24,984	\$24,774	\$26,463	\$25,824	\$25,561	\$25,481
Values in 2017	\$25,377	\$25,143	\$27,371	\$26,727	\$26,703	\$25,999
Values in 2018	\$25,858	\$25,104	\$26,618			



Camping Trailer & Truck Camper Values

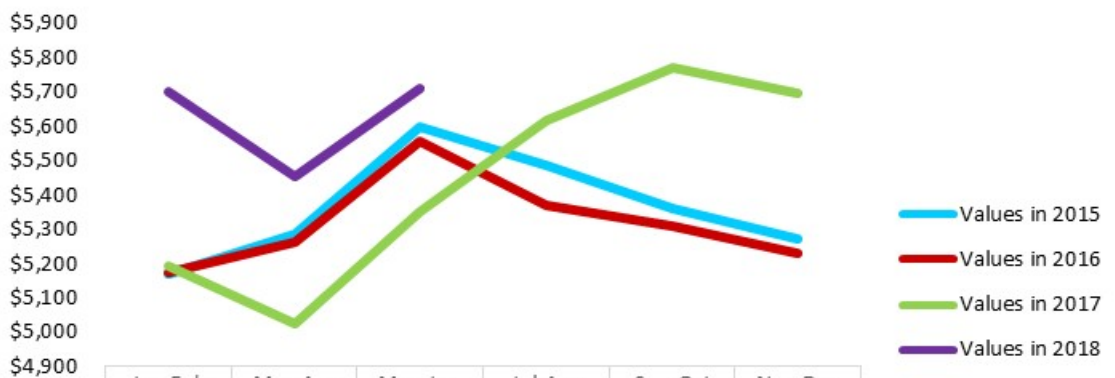
Used Retail Value by Category

Camping Trailer



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 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	\$3,620
Values in 2018	\$3,582	\$3,481	\$3,657			

Truck Camper



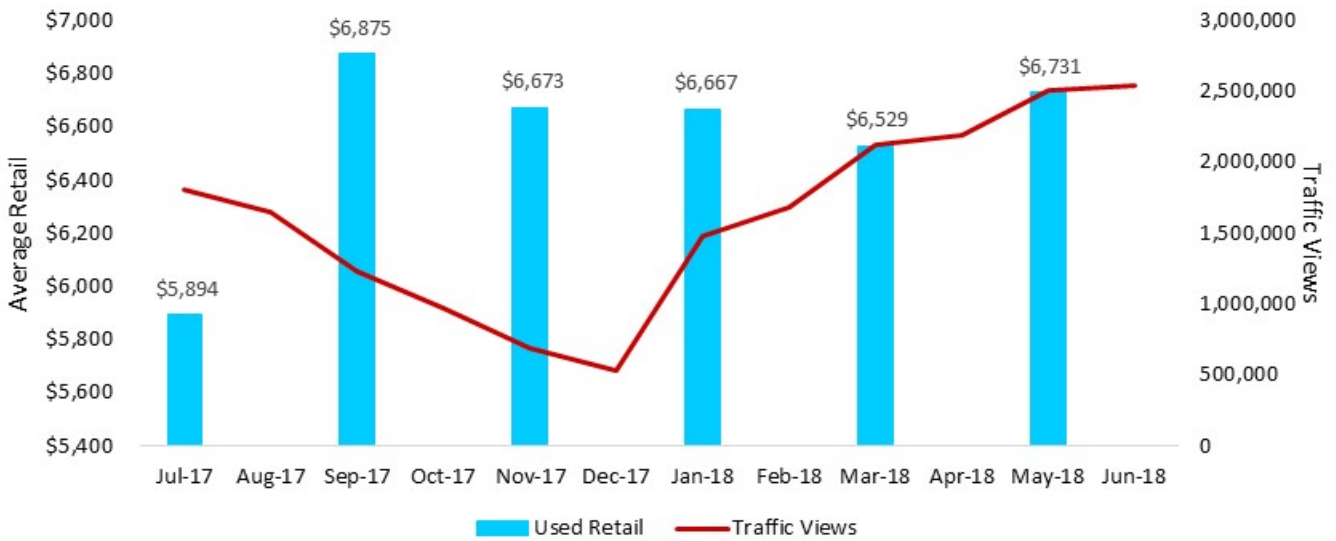
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2015	\$5,172	\$5,287	\$5,598	\$5,485	\$5,363	\$5,270
Values in 2016	\$5,176	\$5,261	\$5,557	\$5,371	\$5,310	\$5,232
Values in 2017	\$5,194	\$5,024	\$5,351	\$5,616	\$5,773	\$5,697
Values in 2018	\$5,700	\$5,454	\$5,712			



Travel Trailer Values vs. Traffic

Used Retail Value and Traffic Views by Category

Standard Hitch



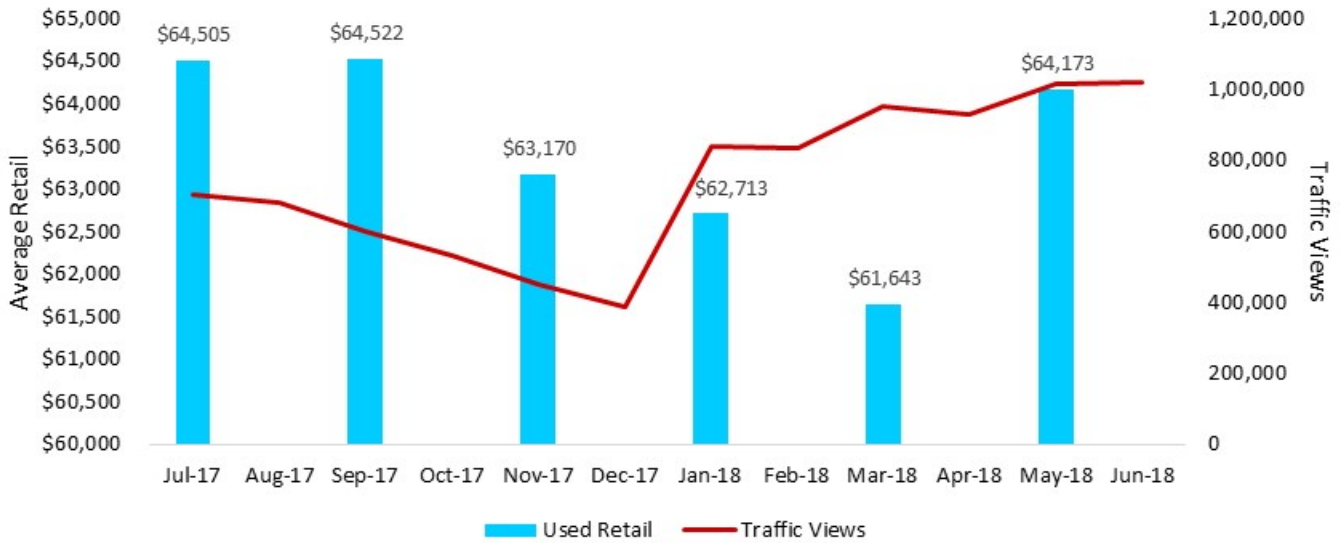
Fifth Wheel



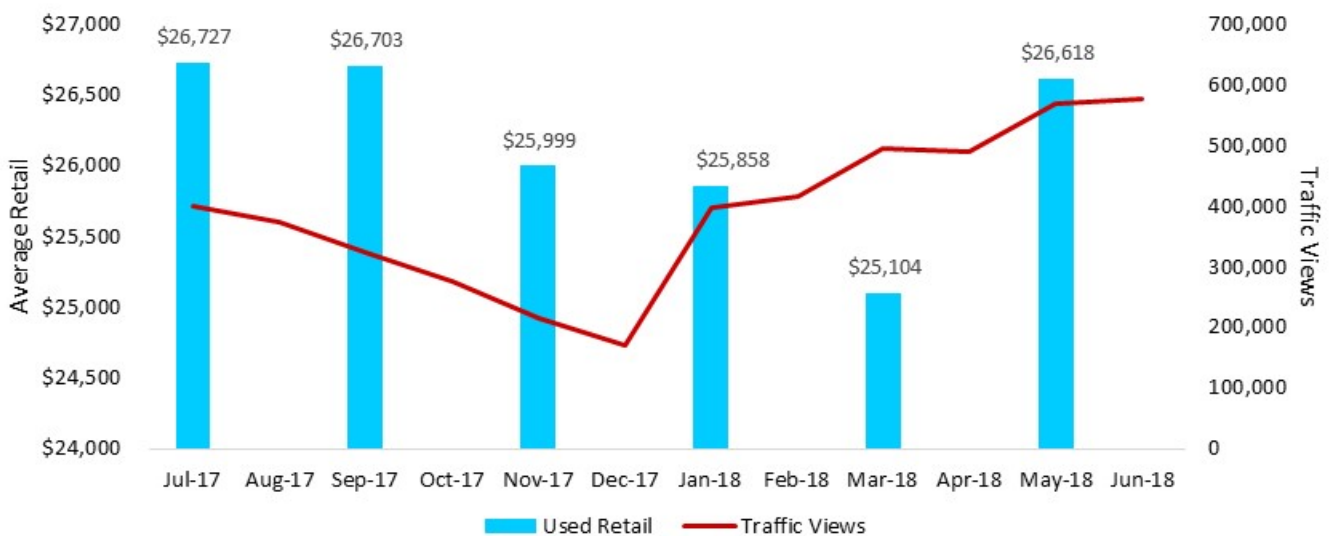
Motorhome Values vs. Traffic

Used Retail Value and Traffic Views by Category

Class A



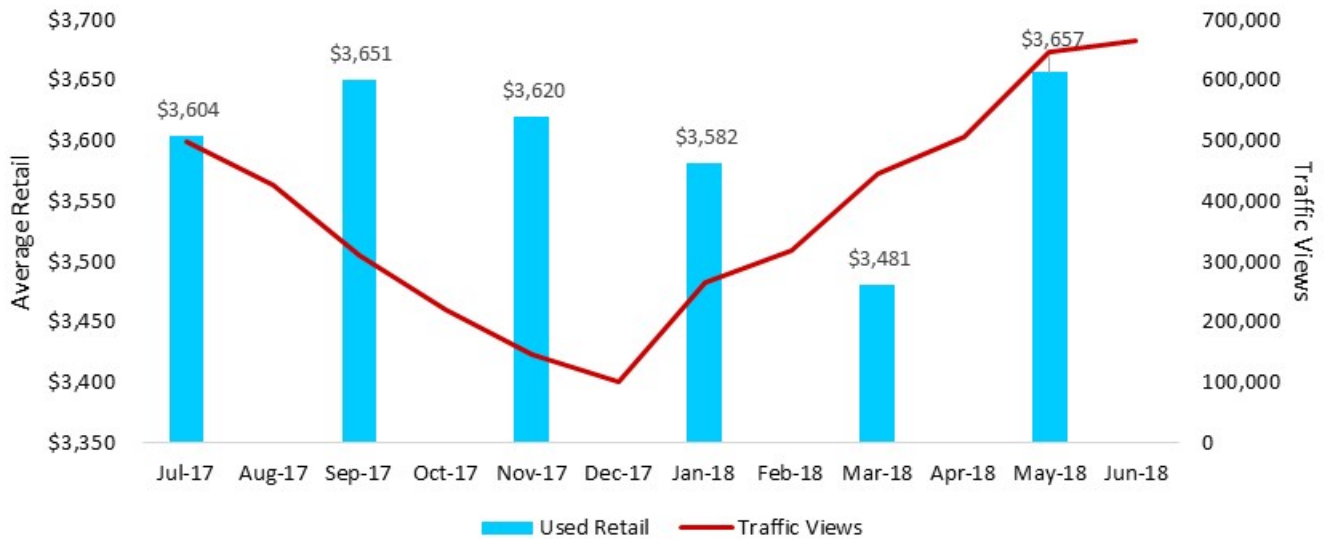
Class C



Camping Trailer & Truck Camper Values vs. Traffic

Used Retail Value and Traffic Views by Category

Camping Trailer

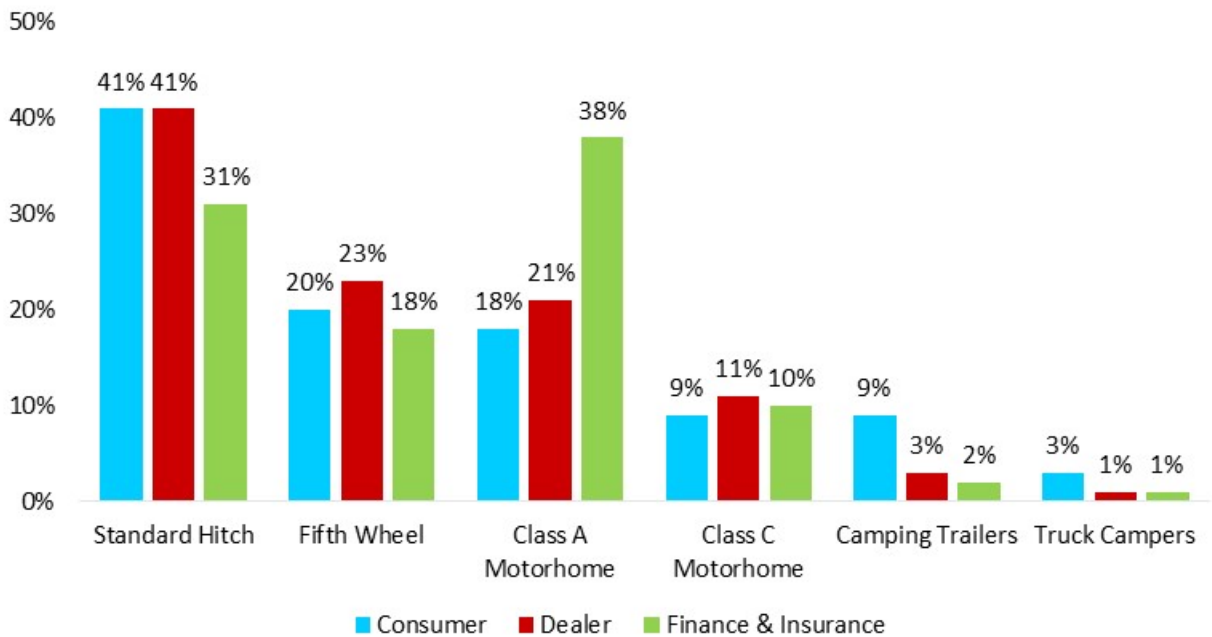


Truck Camper



RV Categories

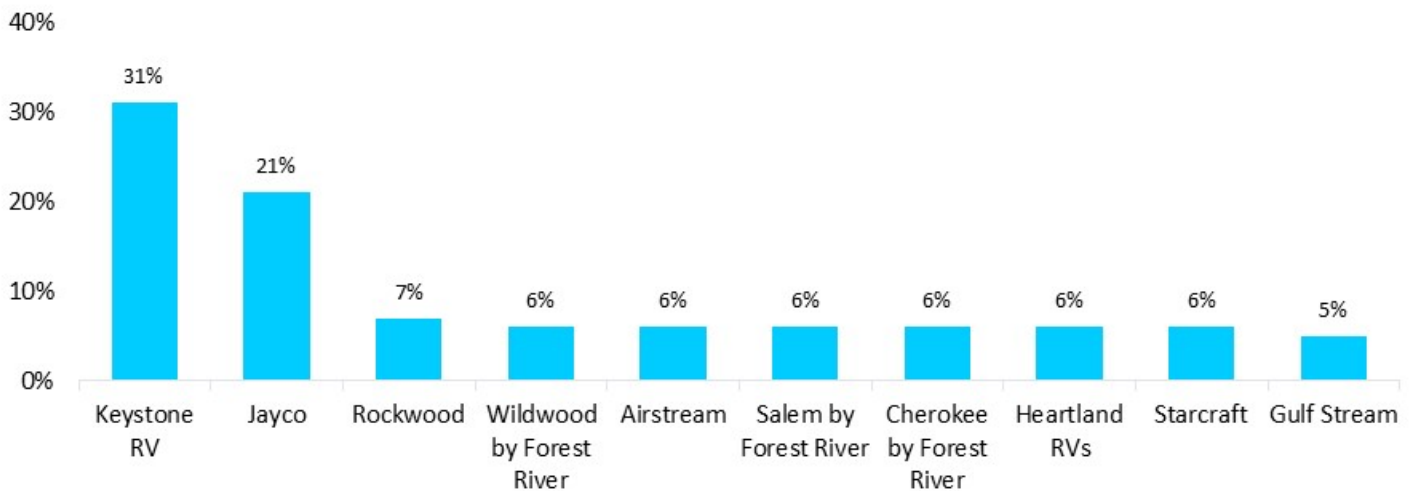
Category Views Among Consumers, Dealers, and Finance & Insurance Institutions in 2018 Q1-Q2



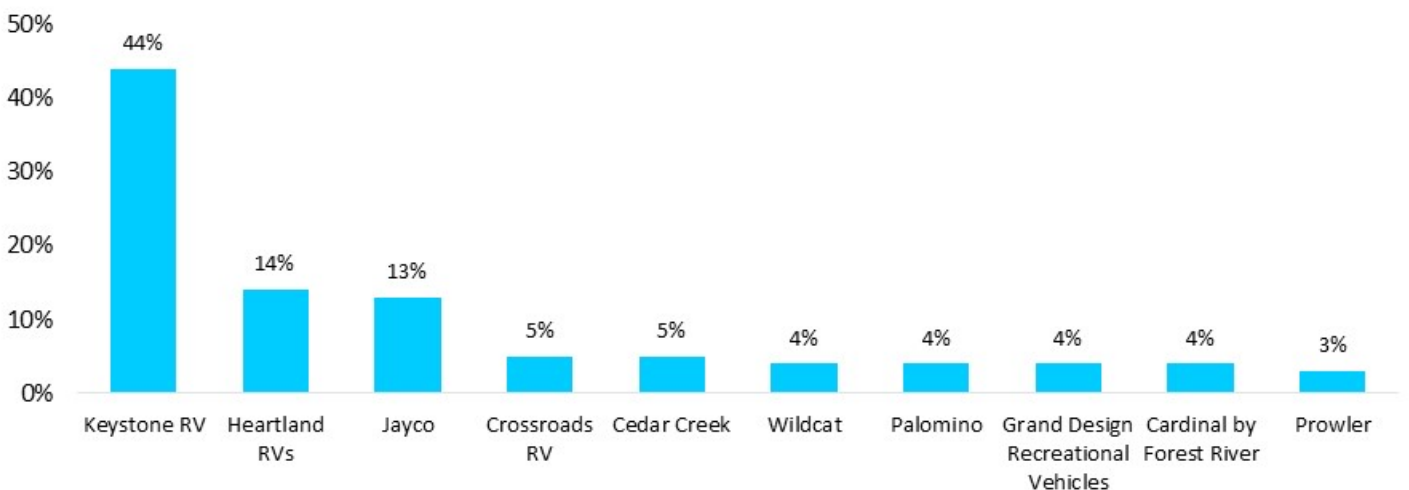
Travel Trailer Brands

NADAGuides.com Top Researched Brands in 2018 Q1-Q2

Standard Hitch Brands



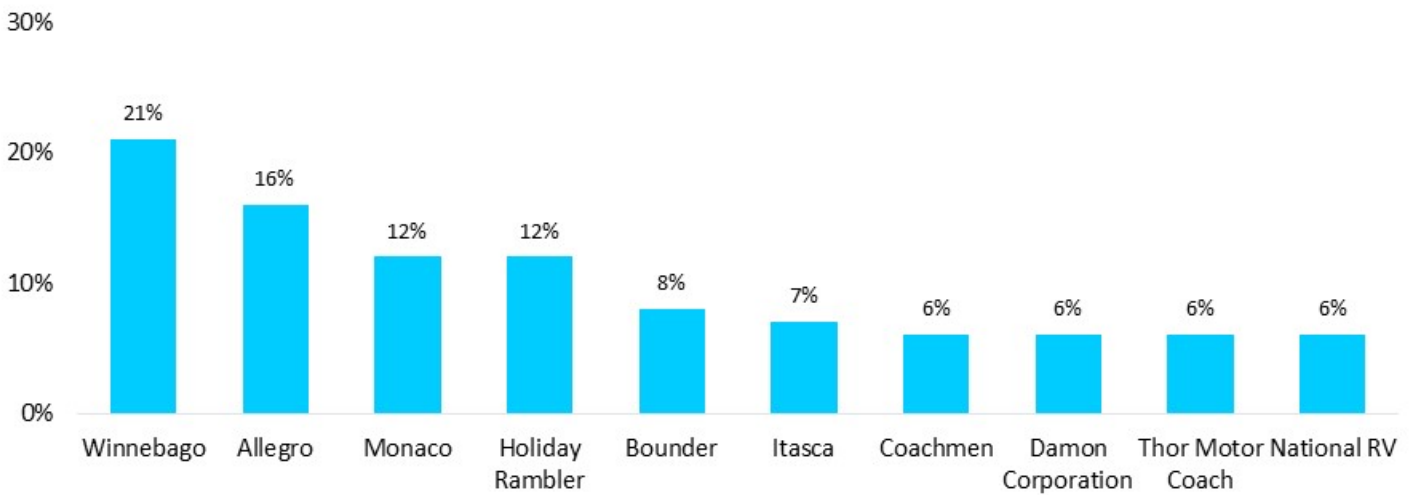
Fifth Wheel Brands



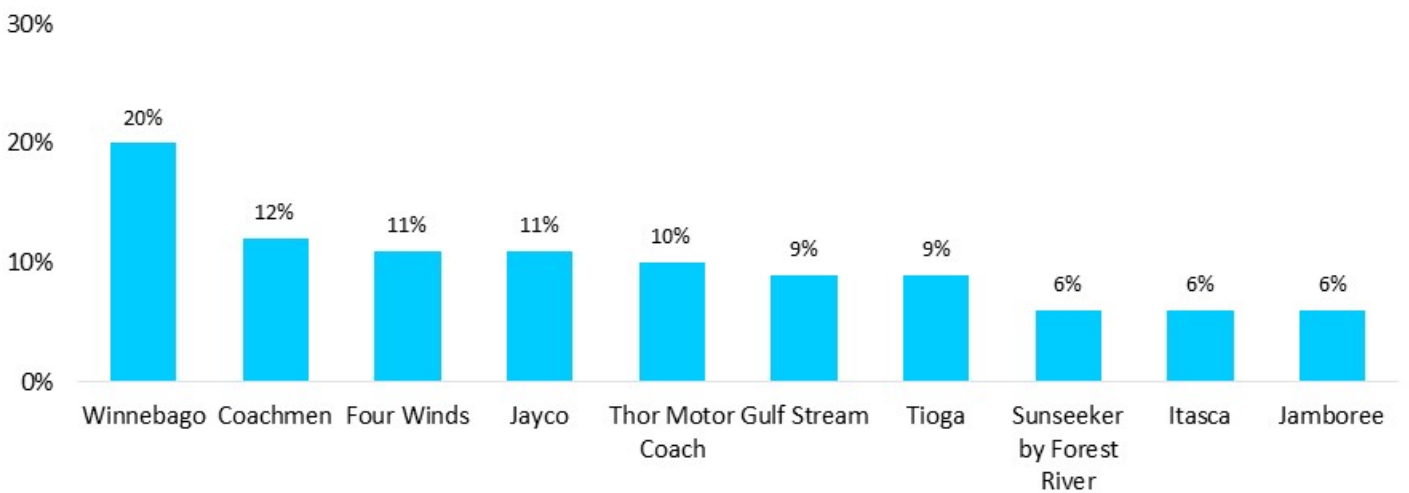
Motorhome Brands

NADAguides.com Top Researched Brands in 2018 Q1-Q2

Class A Brands



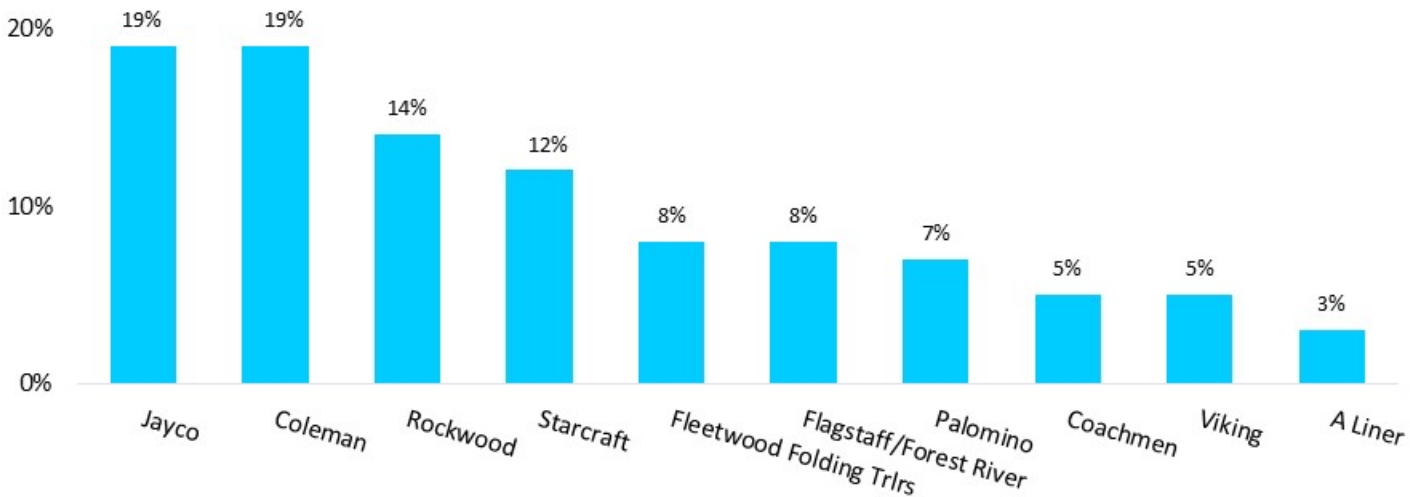
Class C Brands



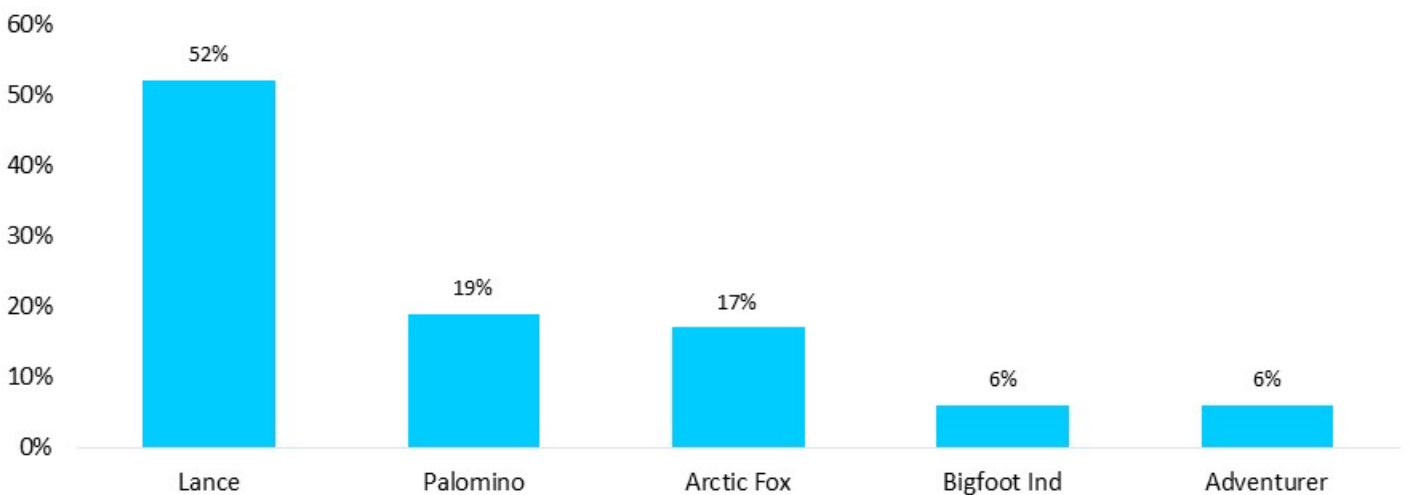
Camping Trailer & Truck Camper Brands

NADAGuides.com Top Researched Brands in 2018 Q1-Q2

Camping Trailer Brands



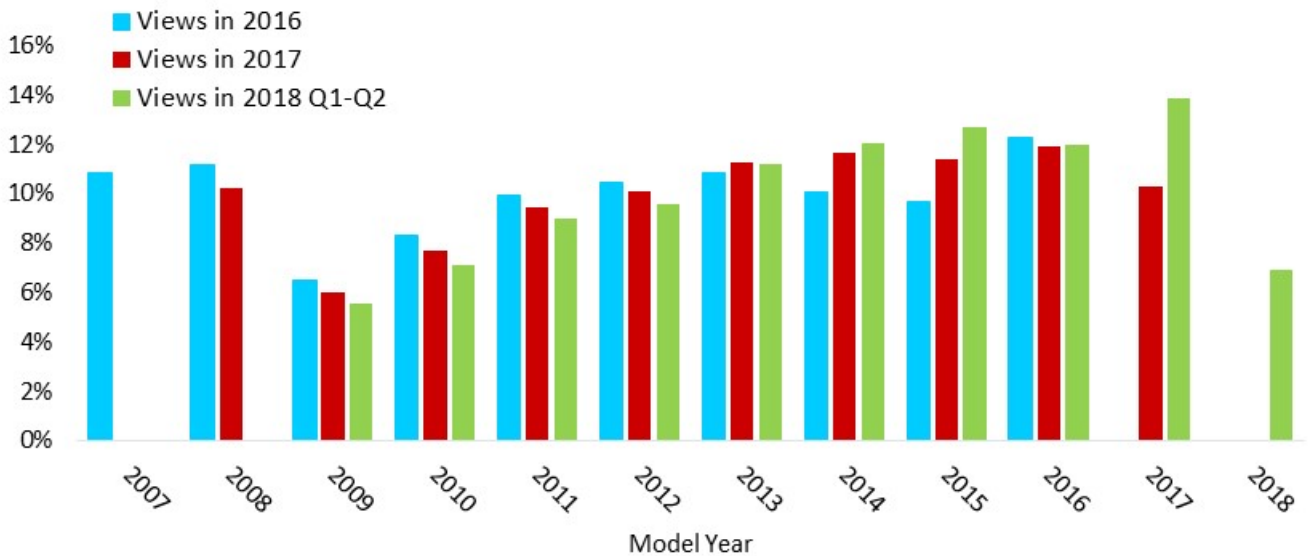
Truck Camper Brands



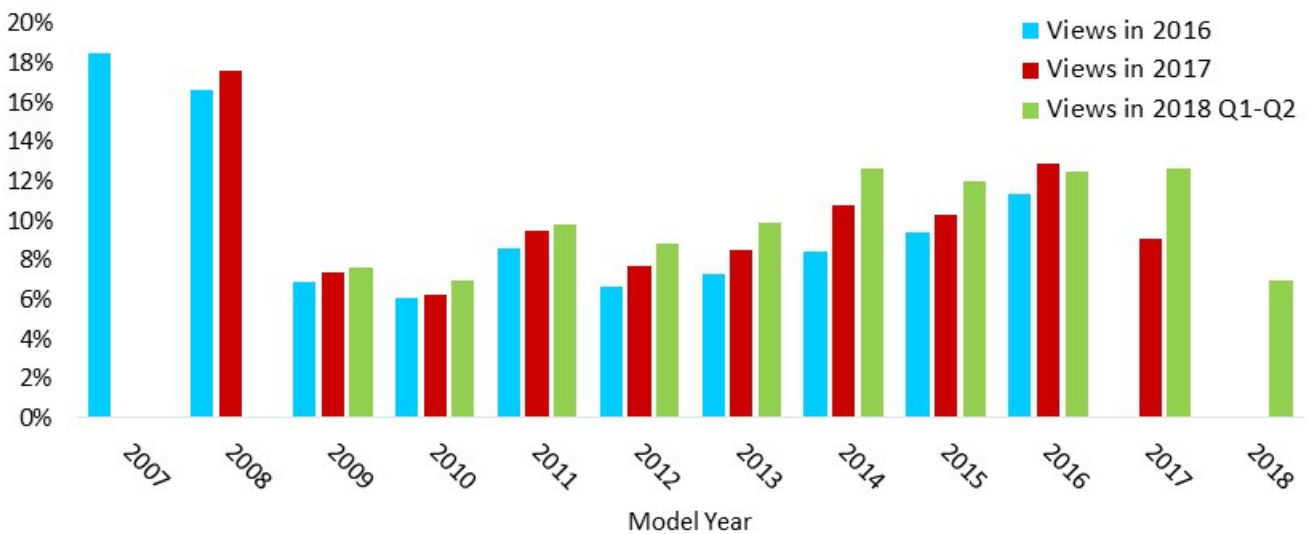
Model Years

NADAguides.com Top Researched Model Years by Category

Standard Hitch Travel Trailer



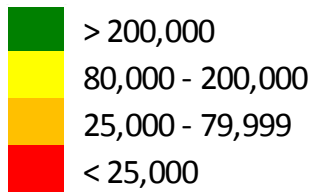
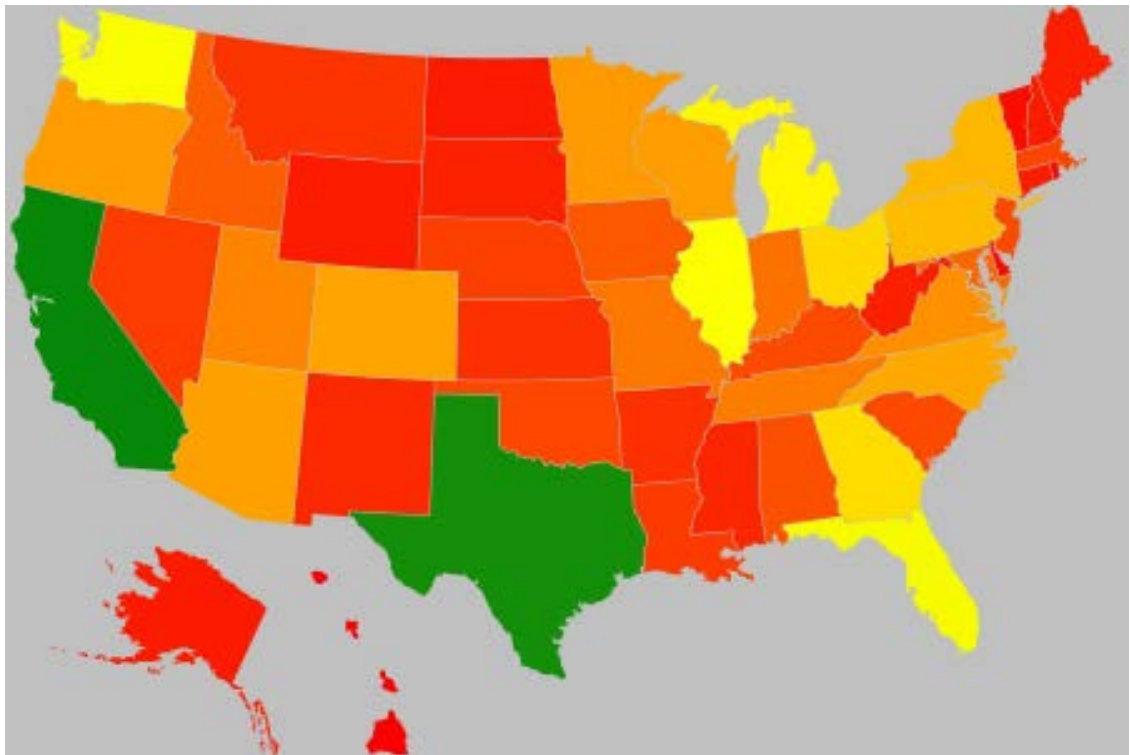
Class A Motorhome



Web Traffic by State

NADAguides.com Traffic by State in 2018 Q1-Q2

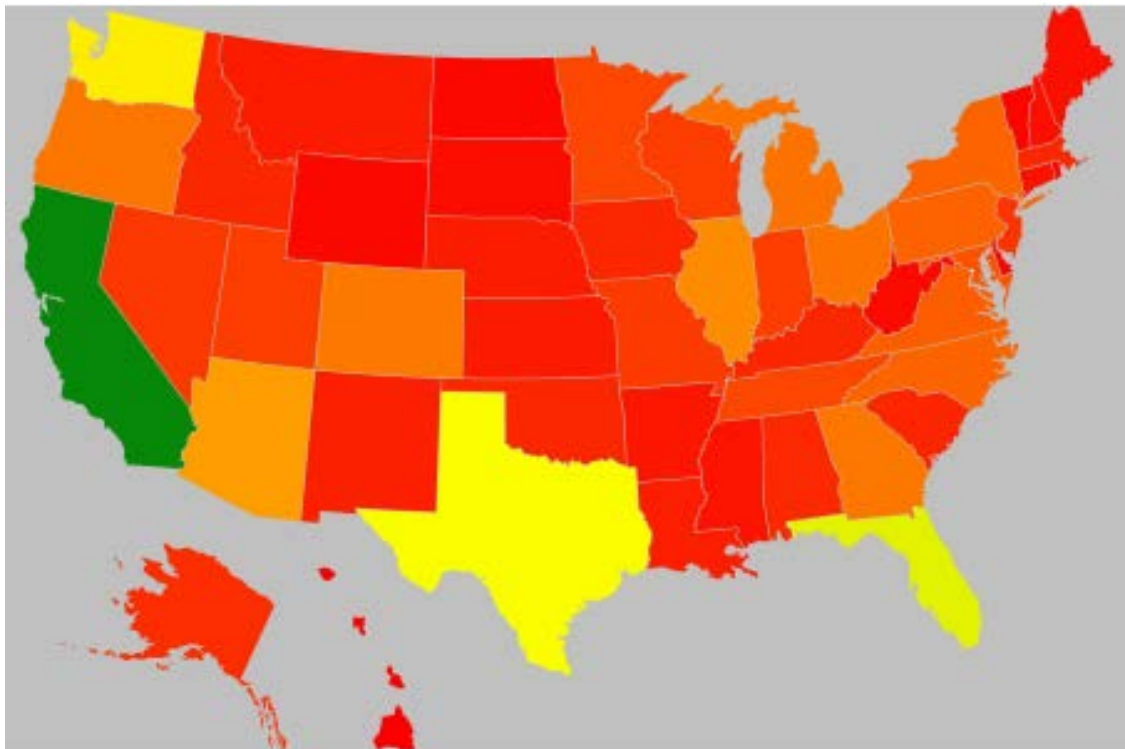
Travel Trailers



Web Traffic by State

NADAguides.com Traffic by State in 2018 Q1-Q2

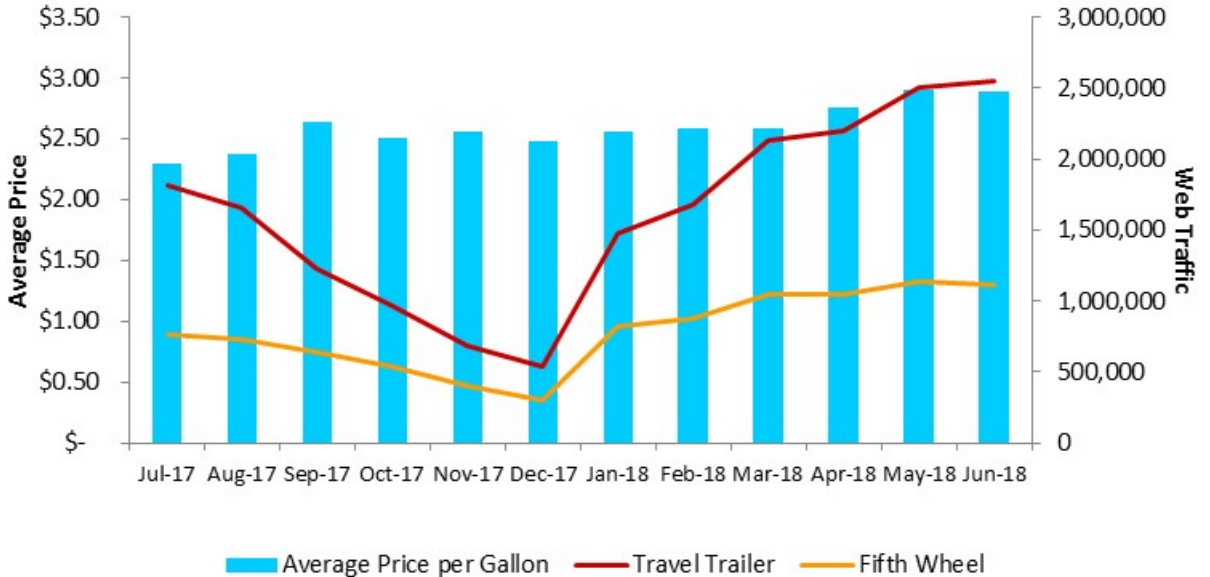
Class C Motorhomes



Fuel Price Data

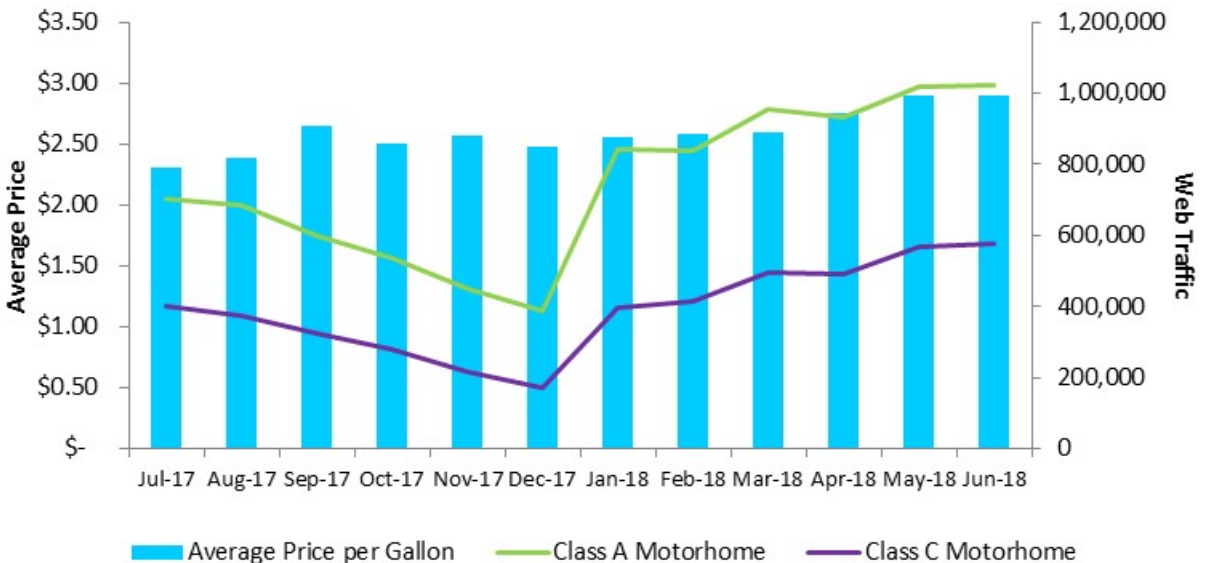
Regular Grade Gasoline Prices vs. Consumer Traffic by Category

Travel Trailer / Fifth Wheel



Source: U.S. Energy Information Administration

Motorhomes

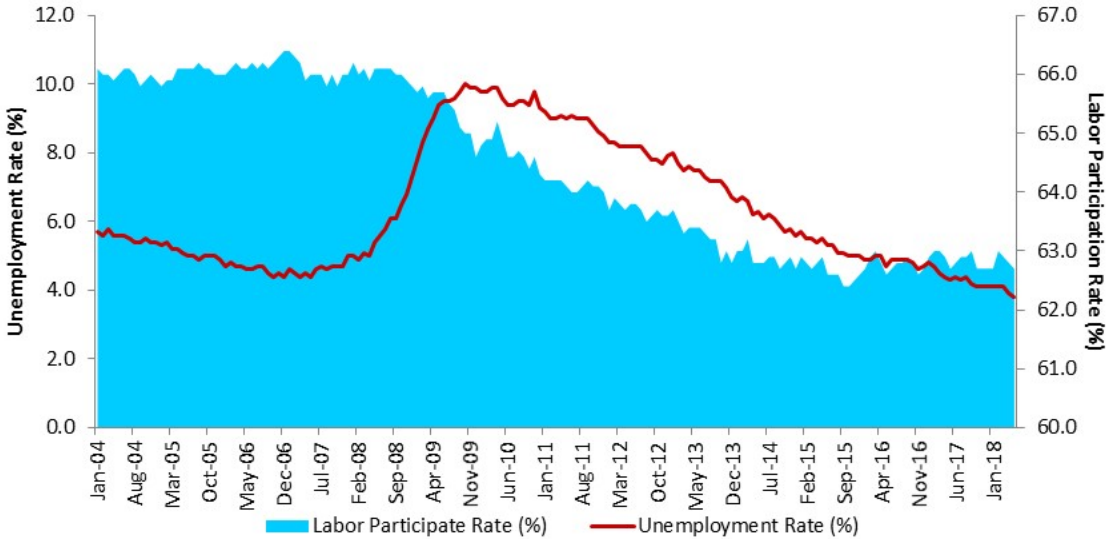


Source: U.S. Energy Information Administration



Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



Source: Bureau of Labor Statistics (BLS)



NADAguides

Disclaimer

National Appraisal Guides, Inc., a division of J.D. Power, makes no representations about future performance or results based on the data and the contents available in this report (“Market Insights”). Market Insights is provided for informational purposes only and is provided AS IS without warranty or guarantee of any kind. By accessing Market Insights via email or the NADAguides website, you agree not to reprint, reproduce, or distribute Market Insights without the express written permission of National Appraisal Guides, Inc.

About NADAguides.com

NADAguides.com, the largest publisher of the most market-reflective vehicle pricing and information available for new and used cars, classic cars, motorcycles, boats, RVs and manufactured homes, offers in-depth shopping and research tools including a broad range of data, products and service and informational articles as well as tips and advice.

NADAguides.com also produces electronic products, mobile applications, raw data, web services, web-syndicated products and print guidebooks. NADAguides.com is operated by National Appraisal Guides, Inc., a division of J.D. Power.

J.D. Power / National Appraisal Guides, Inc.

3200 Park Center Drive, 13th Floor

Costa Mesa, CA 92626

(800) 966-6232

Fax (714) 556-8715

