

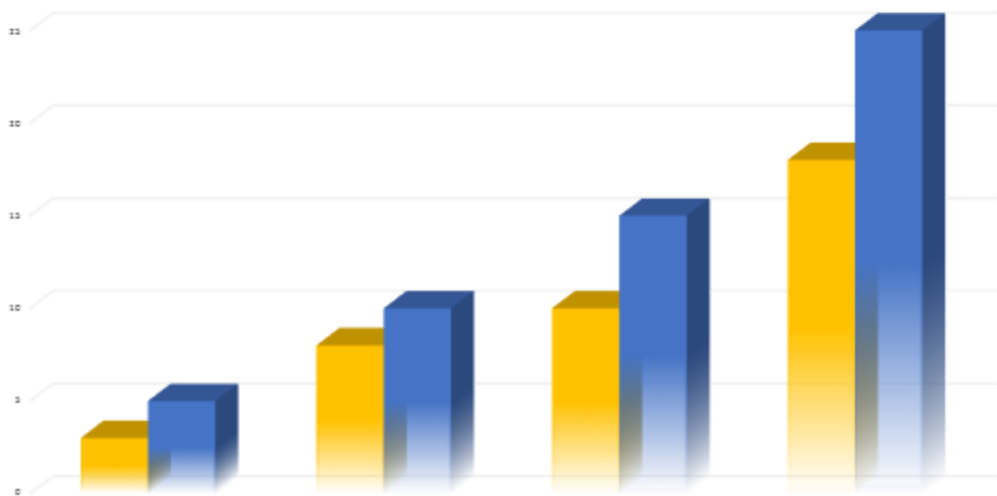
2nd Quarter 2019

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

The second quarter was strong for most segments of the recreational vehicle market. Please note that we are only including the most recent 10 model years in our graphs now, so this edition's figures will look different than previous results.

Starting with travel trailers, standard hitch units are performing essentially identically to last year, with a seasonal bump in the May-June period. Fifth wheel trailers had an extremely strong quarter, increasing 8.5% year-over-year in the most recent valuation period.

Looking at motorhomes, Class As are bringing 2.4% more money this year to date compared to the same period of last year, with a stronger seasonal bump. The Class C market continues to moderate, with year-to-date results currently performing 3.4% behind the same period of 2018.

Camping trailers and truck campers have been mixed, with camping trailers bringing 1.9% more money year-over-year, and truck campers underperforming last year by 4.2%.

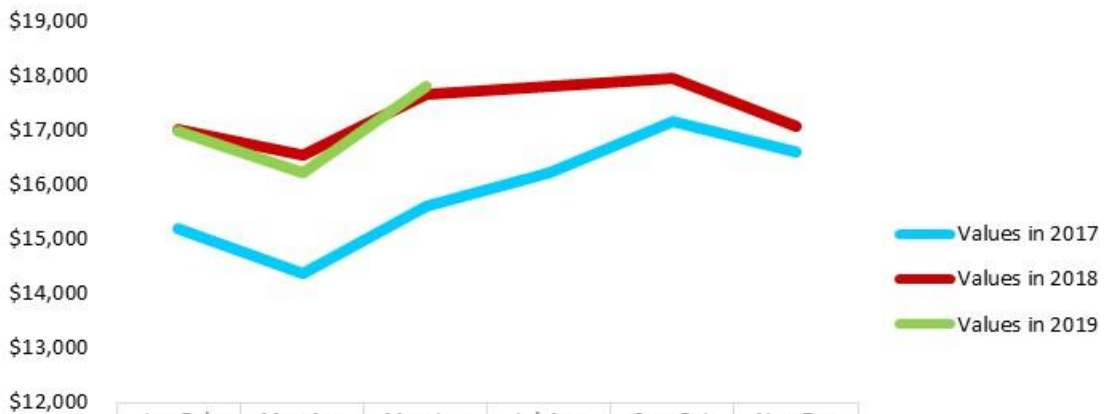
Looking forward, the economy has pulled back from its full-on expansion mode, but consumer-focused measures remain extremely strong. The stronger segments of the recreational vehicle market still have the wind at their back for the time being.



Travel Trailer Values

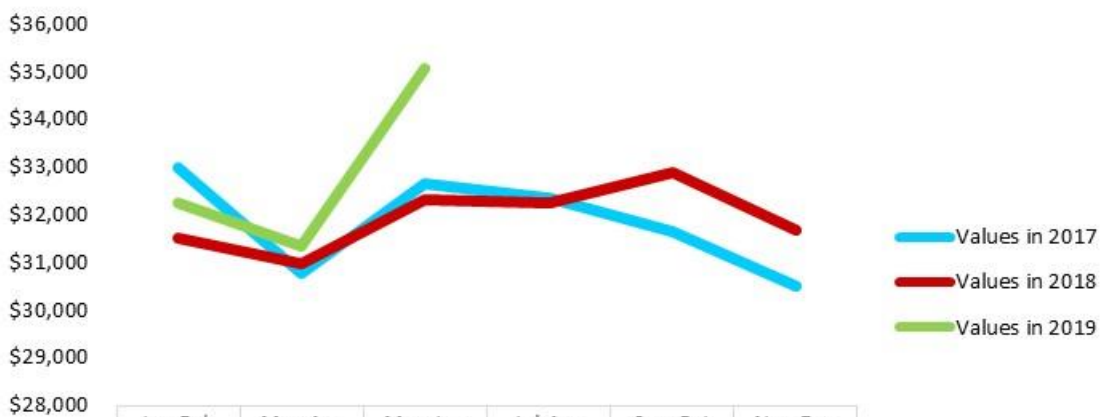
Used Retail Value by Category - Values for the Last 10 Model Years

Standard Hitch



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$15,195	\$14,370	\$15,614	\$16,224	\$17,152	\$16,593
Values in 2018	\$17,022	\$16,537	\$17,640	\$17,807	\$17,939	\$17,070
Values in 2019	\$16,985	\$16,208	\$17,816			

Fifth Wheel



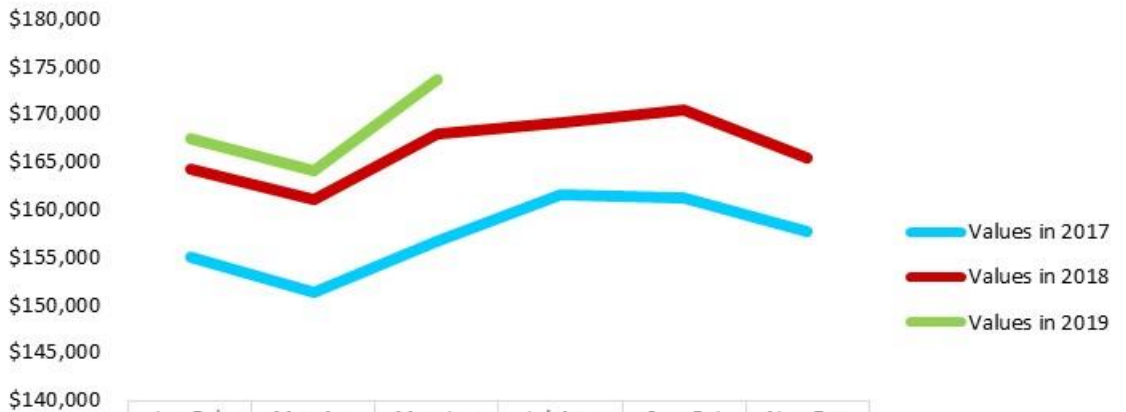
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$32,971	\$30,767	\$32,651	\$32,339	\$31,634	\$30,508
Values in 2018	\$31,501	\$30,980	\$32,313	\$32,254	\$32,881	\$31,678
Values in 2019	\$32,263	\$31,344	\$35,072			



Motorhome Values

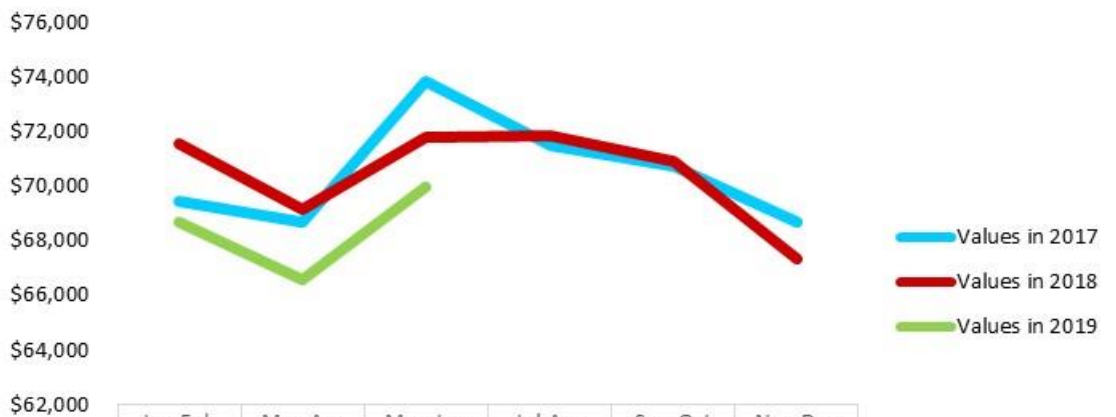
Used Retail Value by Category - Values for the Last 10 Model Years

Class A



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$155,091	\$151,341	\$156,701	\$161,659	\$161,184	\$157,637
Values in 2018	\$164,224	\$161,049	\$167,989	\$169,081	\$170,409	\$165,410
Values in 2019	\$167,476	\$164,029	\$173,716			

Class C



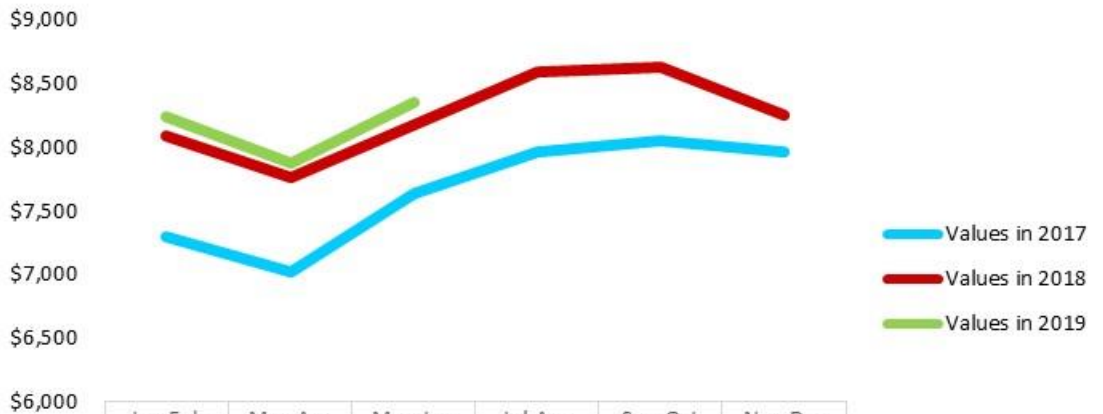
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$69,457	\$68,690	\$73,854	\$71,519	\$70,754	\$68,721
Values in 2018	\$71,552	\$69,194	\$71,805	\$71,871	\$70,907	\$67,361
Values in 2019	\$68,695	\$66,587	\$69,998			



Camping Trailer & Truck Camper Values

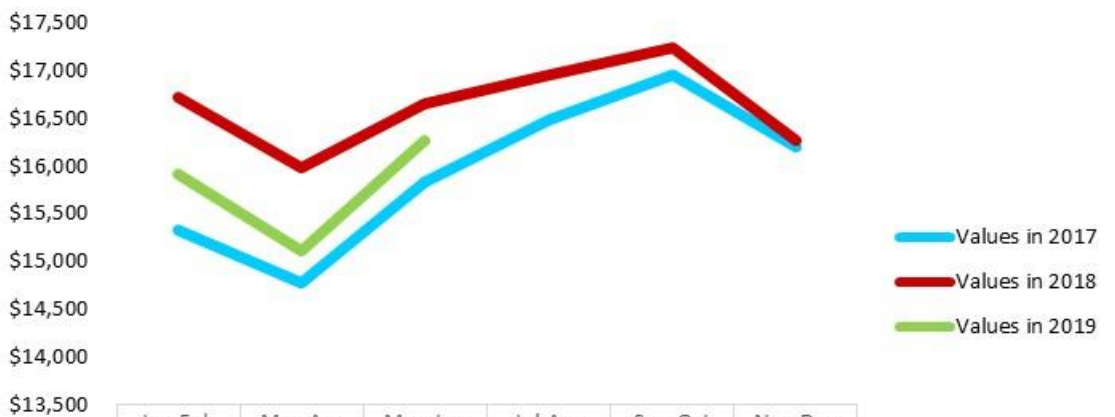
Used Retail Value by Category - Values for the Last 10 Model Years

Camping Trailer



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$7,303	\$7,027	\$7,638	\$7,961	\$8,057	\$7,971
Values in 2018	\$8,087	\$7,764	\$8,175	\$8,596	\$8,630	\$8,257
Values in 2019	\$8,250	\$7,880	\$8,362			

Truck Camper



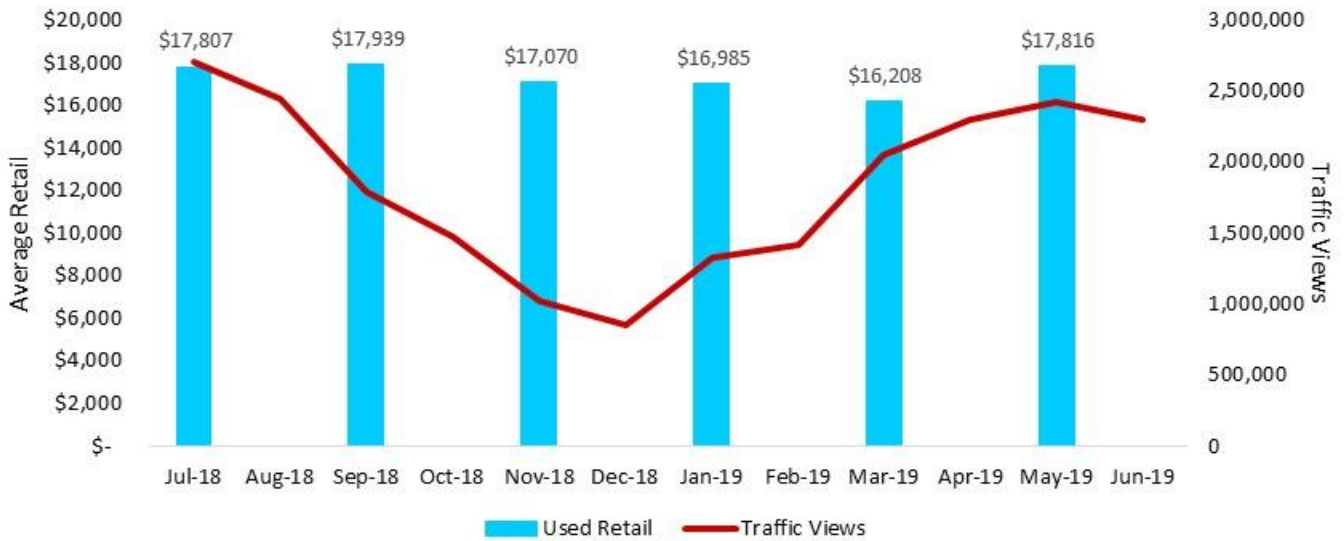
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2017	\$15,326	\$14,769	\$15,827	\$16,483	\$16,953	\$16,202
Values in 2018	\$16,719	\$15,988	\$16,661	\$16,950	\$17,247	\$16,268
Values in 2019	\$15,921	\$15,113	\$16,274			



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

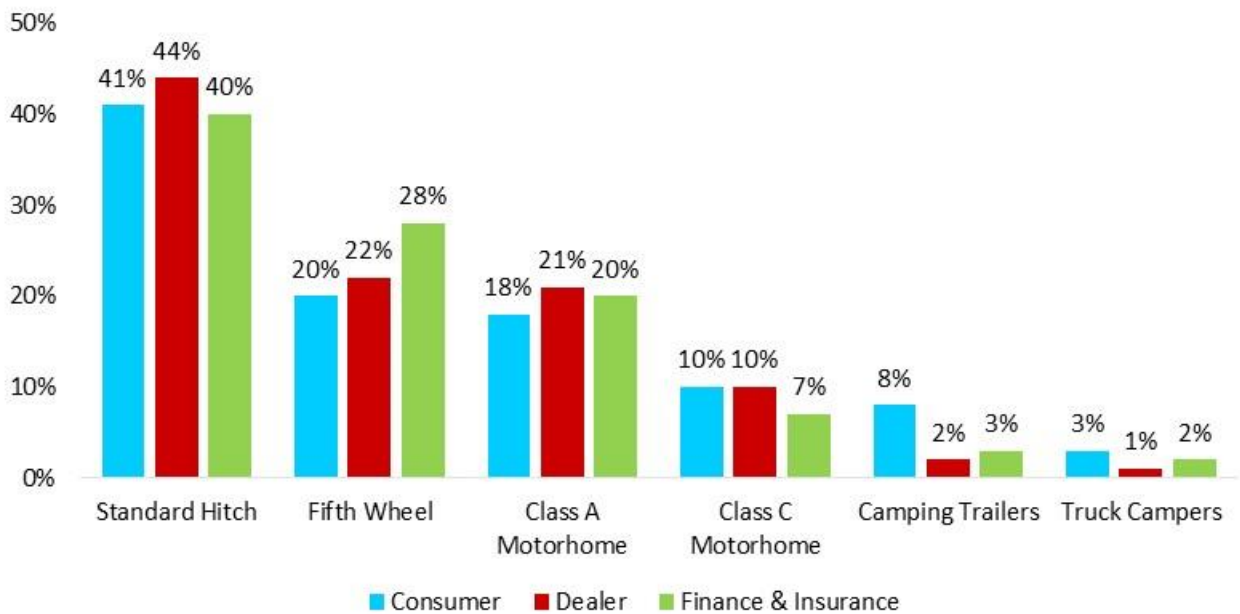


Truck Camper



RV Categories

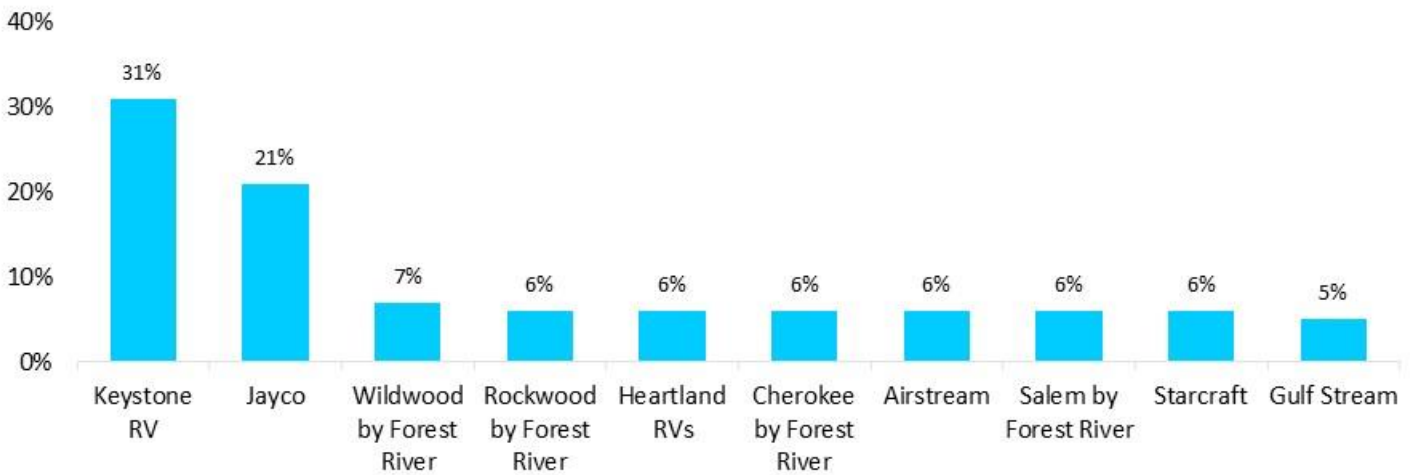
Category Views Among Consumers, Dealers, and Finance & Insurance Institutions in 2019 Q1-Q2



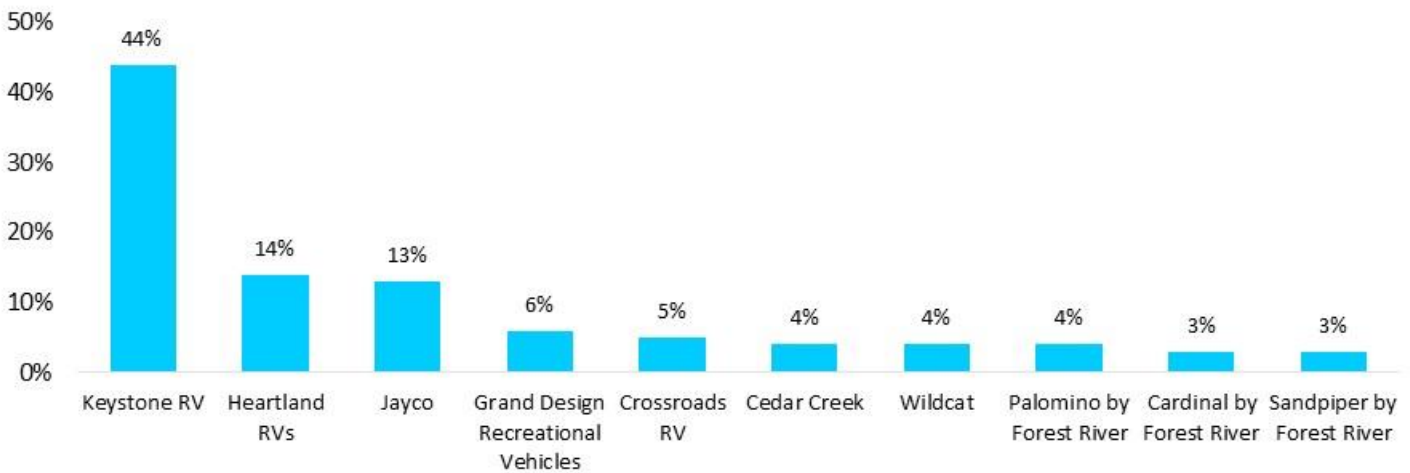
Travel Trailer Brands

NADAguides.com Top Researched Brands in 2019 Q1-Q2

Standard Hitch Brands



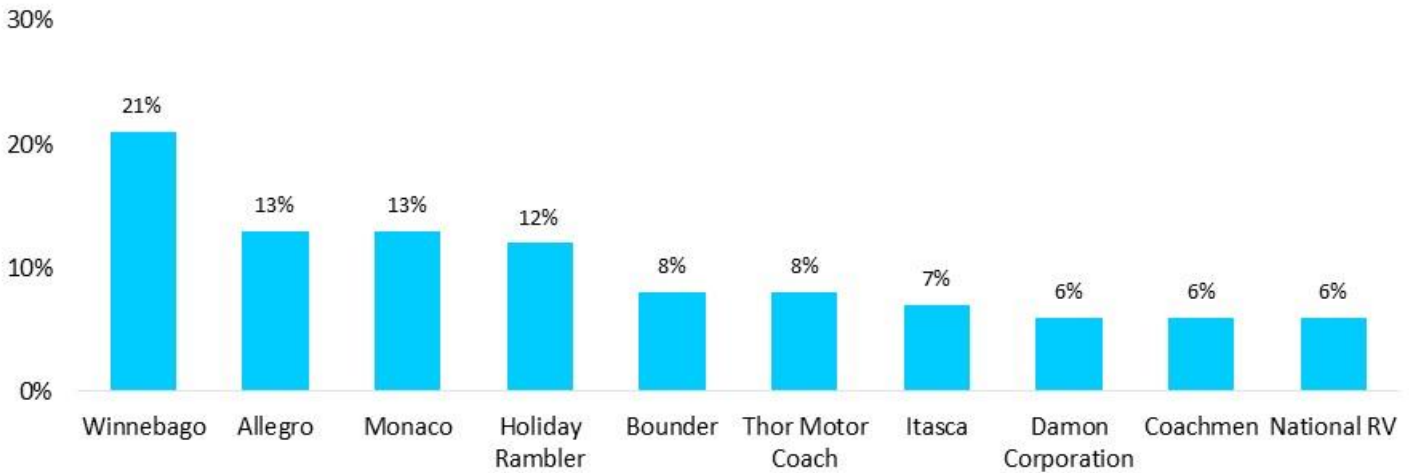
Fifth Wheel Brands



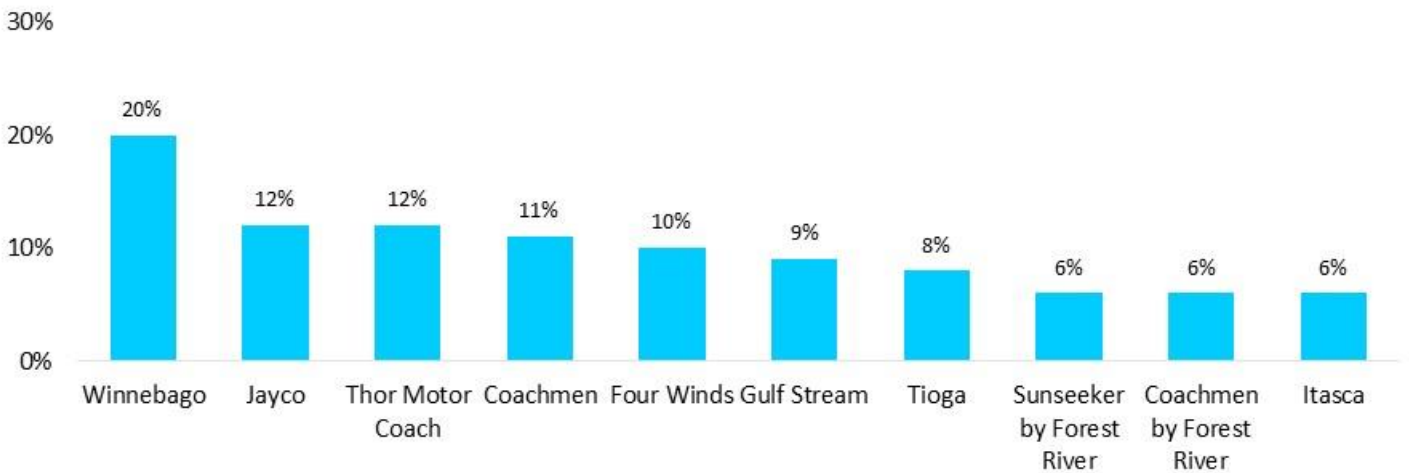
Motorhome Brands

NADAguides.com Top Researched Brands in 2019 Q1-Q2

Class A Brands



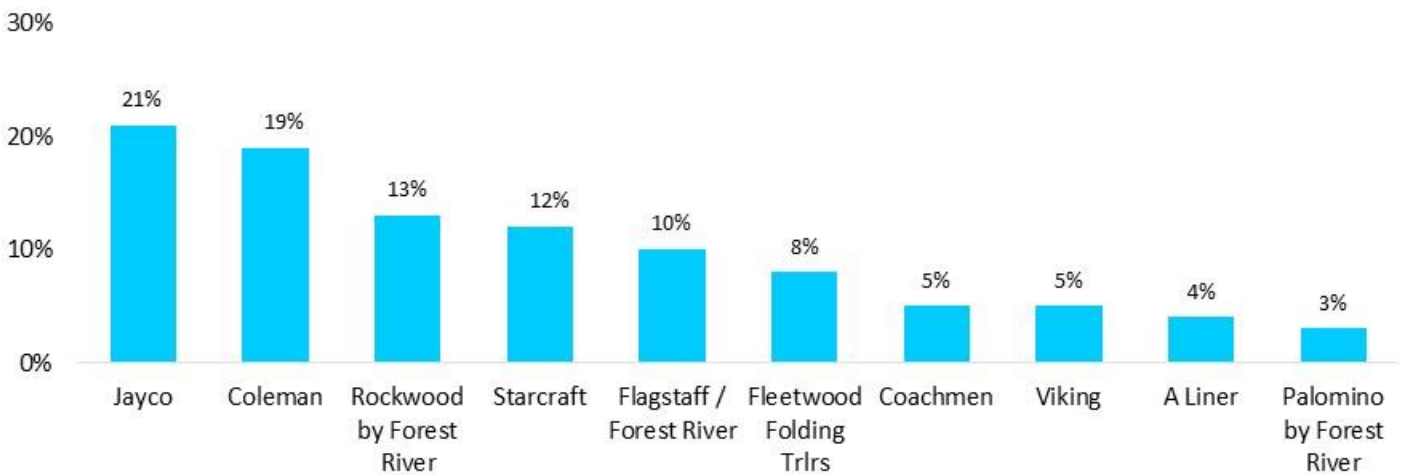
Class C Brands



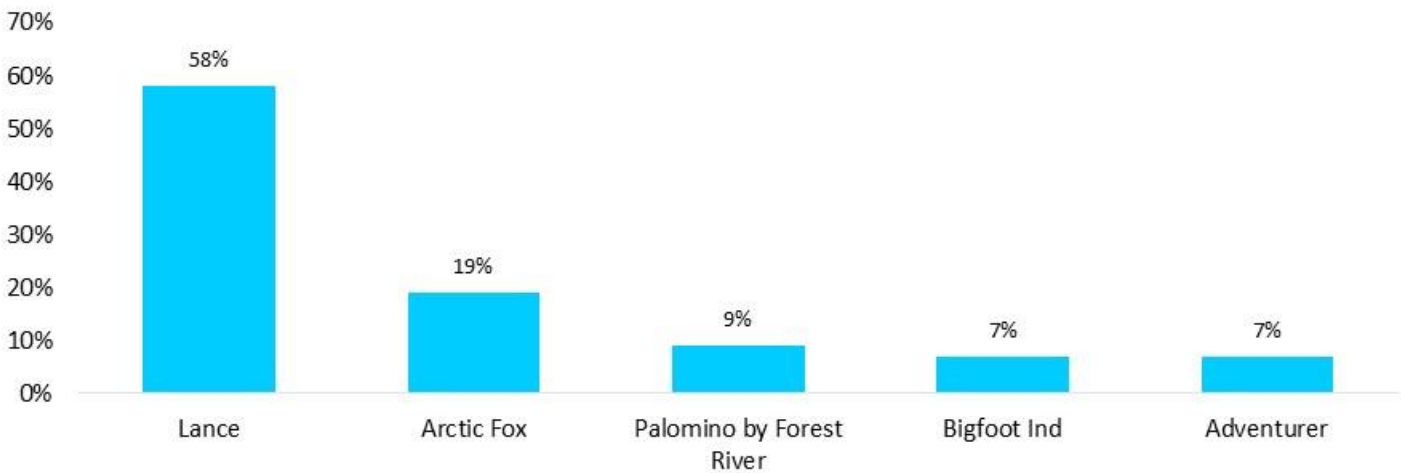
Camping Trailer & Truck Camper Brands

NADAguides.com Top Researched Brands in 2019 Q1-Q2

Camping Trailer Brands



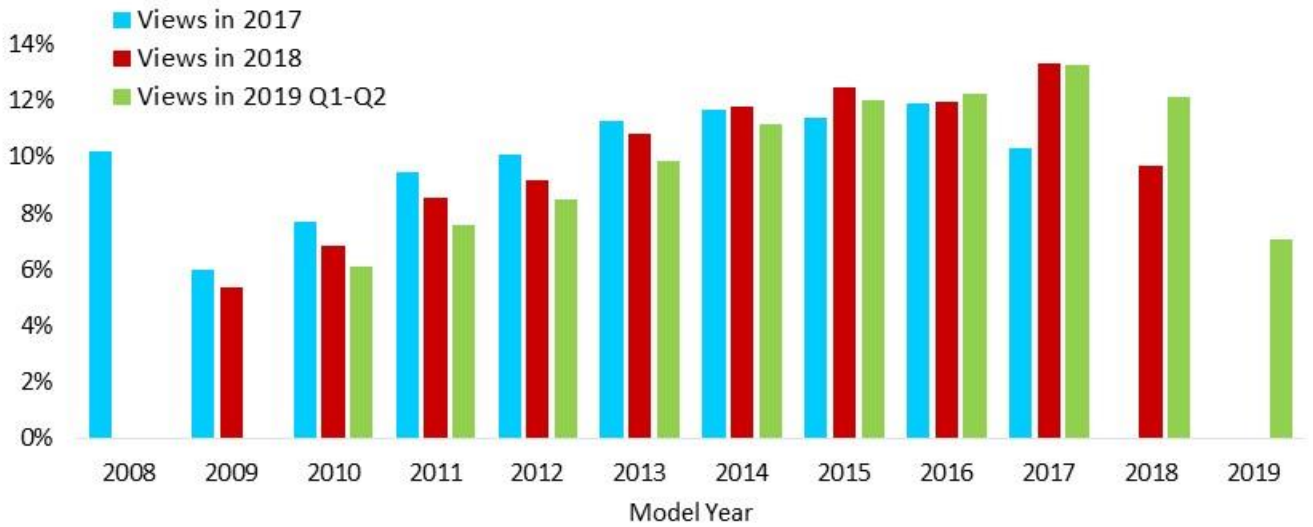
Truck Camper Brands



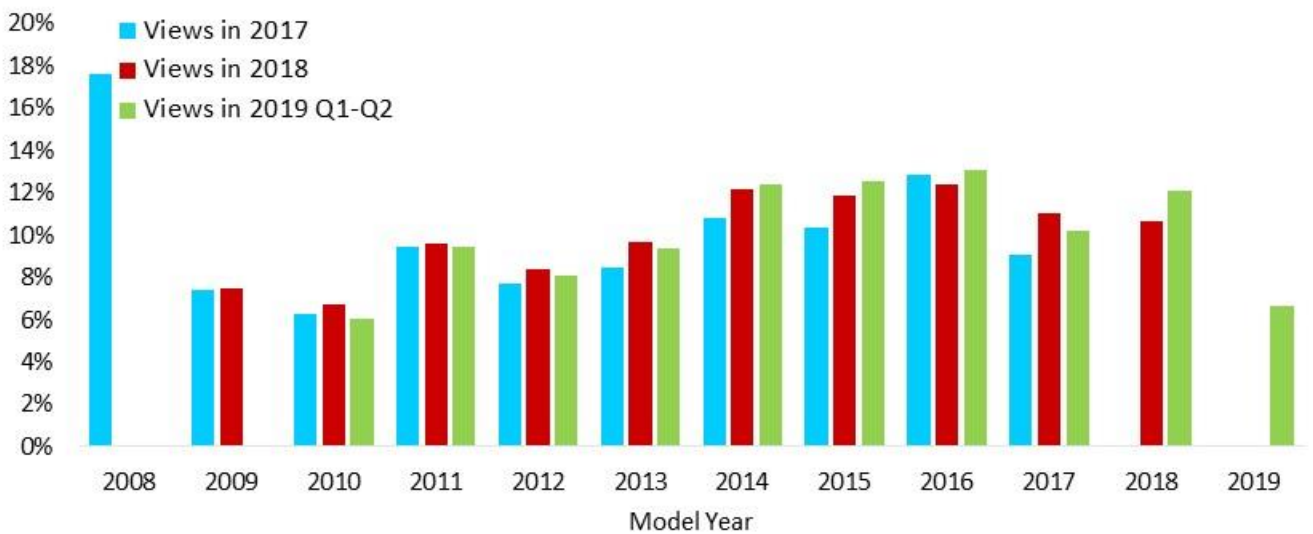
Model Years

NADAguides.com Top Researched Model Years by Category

Standard Hitch Travel Trailer



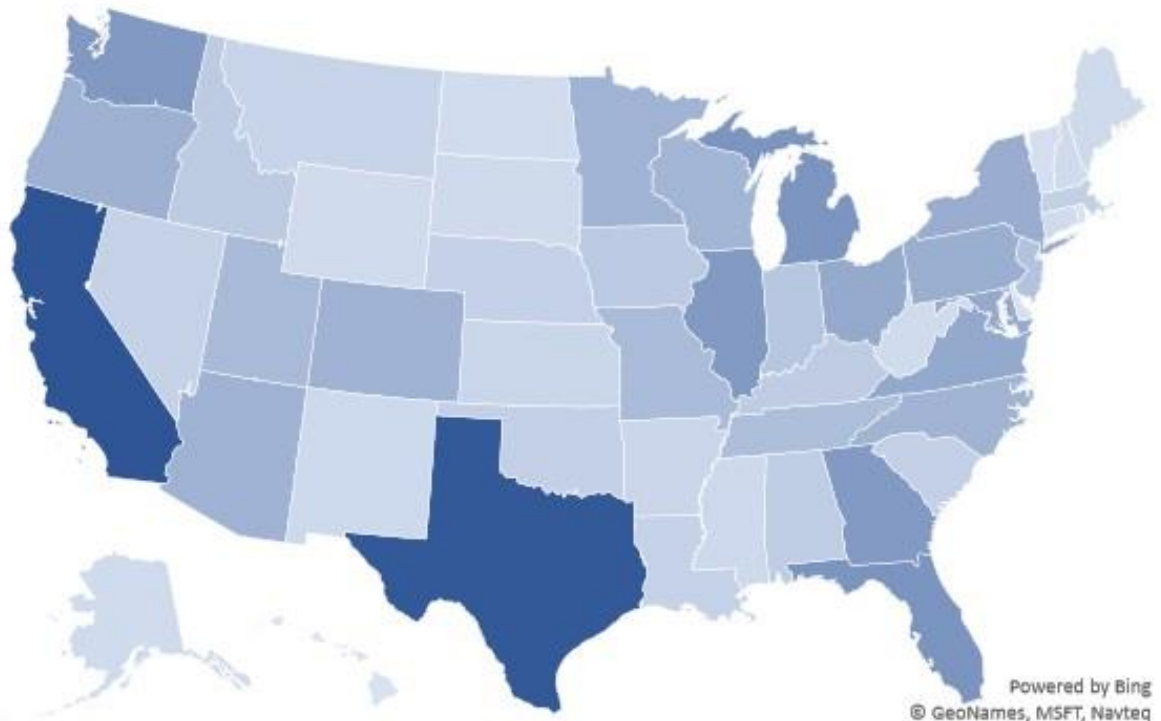
Class A Motorhome



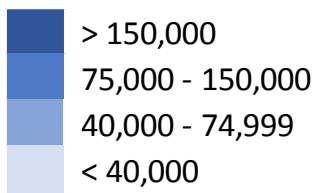
Web Traffic by State

NADAguides.com Traffic by State in 2019 Q1-Q2

Travel Trailers



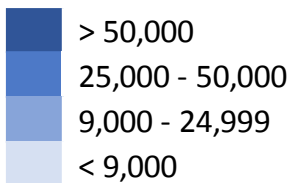
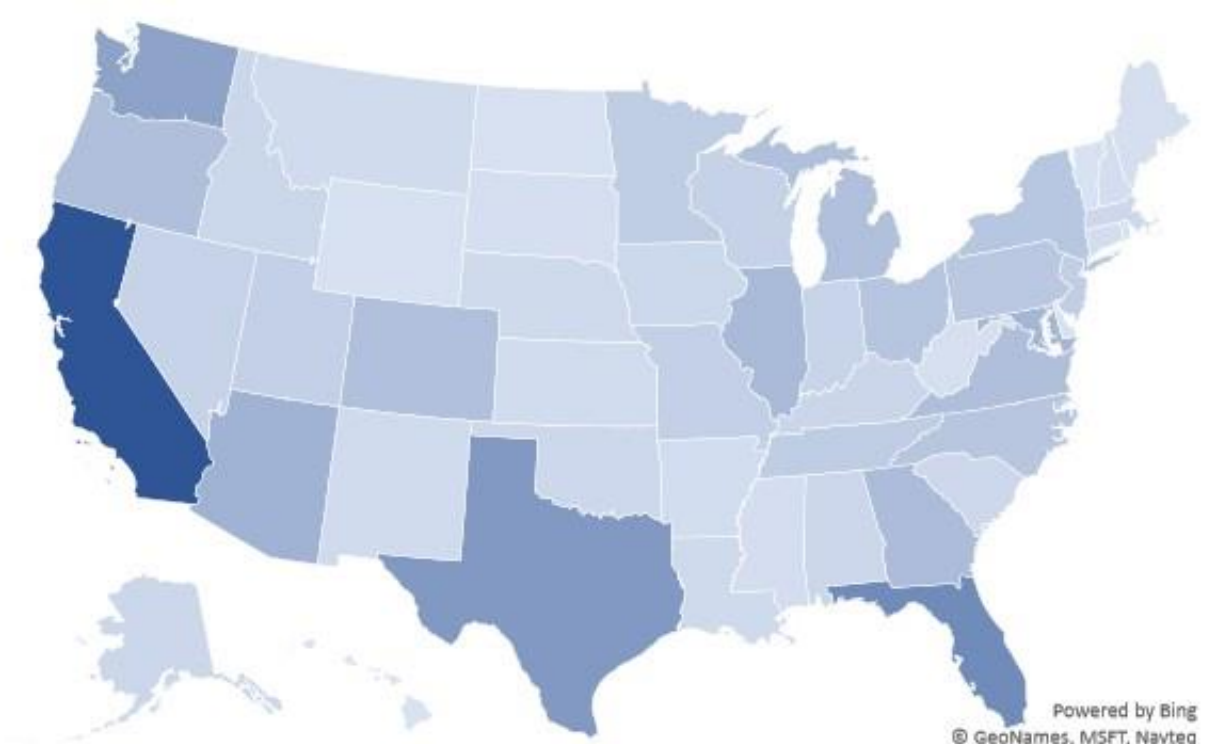
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Web Traffic by State

NADAguides.com Traffic by State in 2019 Q1-Q2

Class C Motorhomes



Fuel Price Data

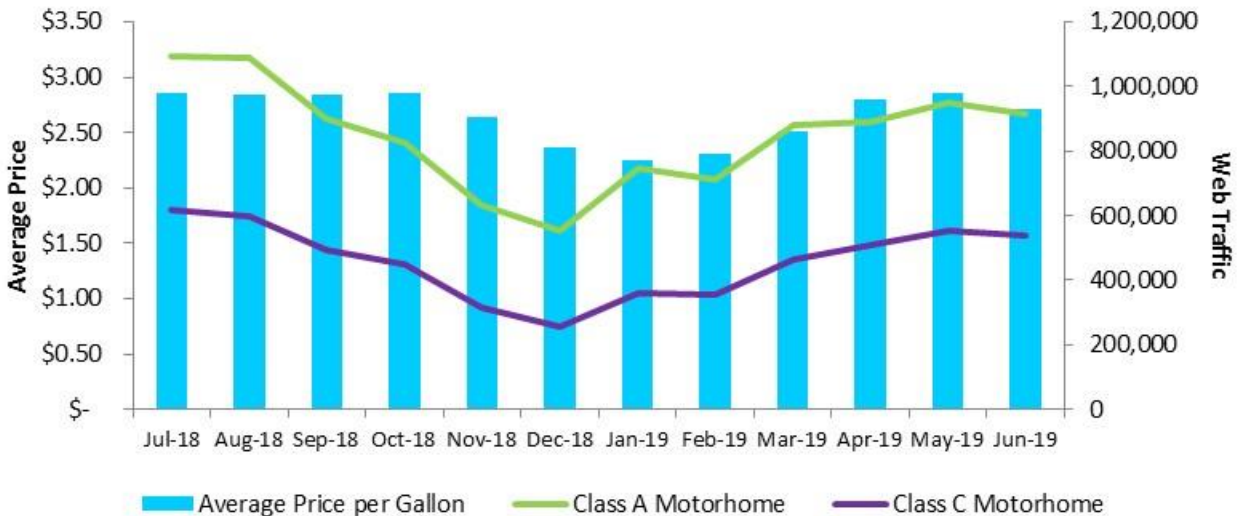
Regular Grade Gasoline Prices vs. Consumer Traffic by Category

Travel Trailer / Fifth Wheel



Source: U.S. Energy Information Administration

Motorhomes

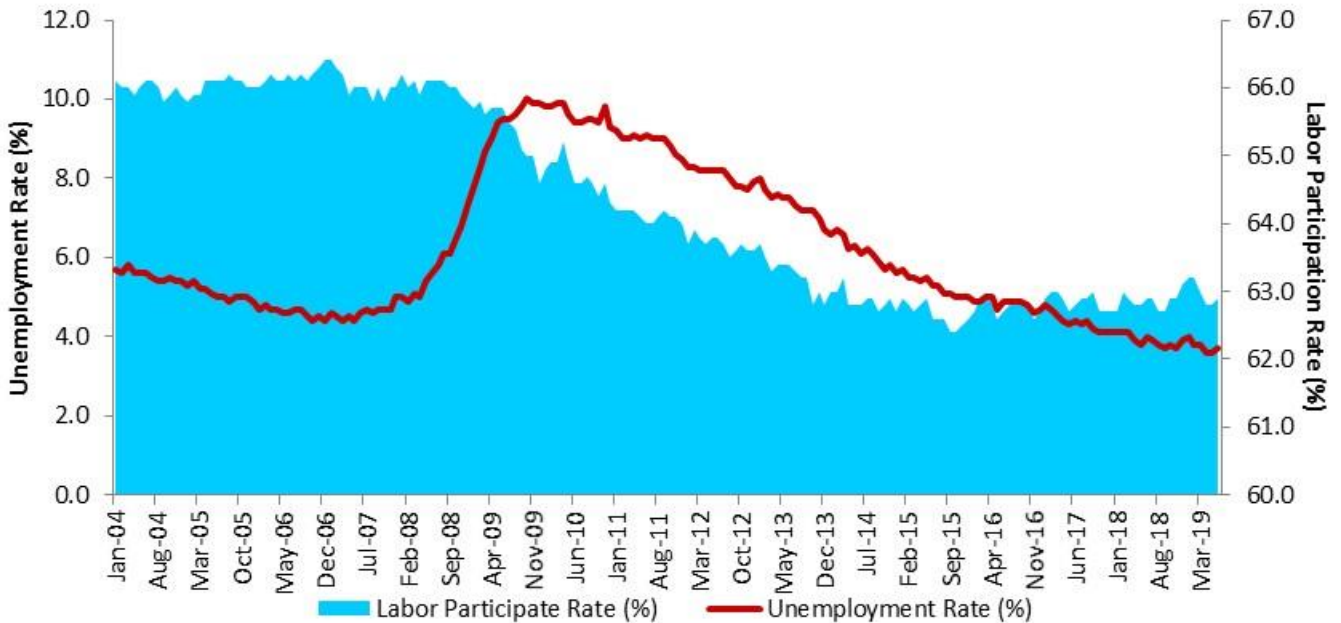


Source: U.S. Energy Information Administration



Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



Source: Bureau of Labor Statistics (BLS)



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