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Market Insights

RECREATIONAL VEHICLE
2020 Year-End Review

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RV Market Industry Overview

The RV and travel trailer industry benefited from the shift from air travel to road travel in 2020. Every segment of our industry saw values increase in 2020, with most segments not seeing any seasonal pullback in values.

Looking at travel trailers, standard hitch units brought 7.4% more money in 2020 than 2019, and that gap widened in the second half of the year. Fifth-wheel units had already started the year strong before COVID hit, and really took off as the year progressed, averaging 13.7% more money year-over-year.

Motorhomes beat 2019 by a notable margin, with Class A vehicles coming in 4.9% higher year-over-year, and Class C units 5.4% higher.

Smaller vehicles were also stronger in 2020, with camping trailers averaging 2.6% more money in 2020, and truck campers 7.1% ahead. Both of these segments saw values continue to increase through the 4th quarter, with no traditional seasonal pullback.

The RV industry continues to benefit from the shift to experience-oriented road travel. 2021 begins on strong footing.
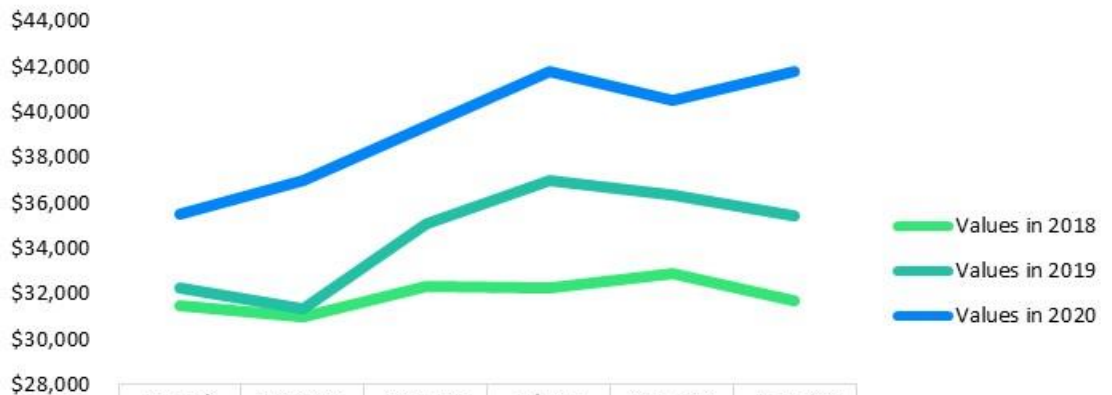
Travel Trailer Values

Average Retail Value by Category – Values for the Last 10 Model Years

Standard Hitch
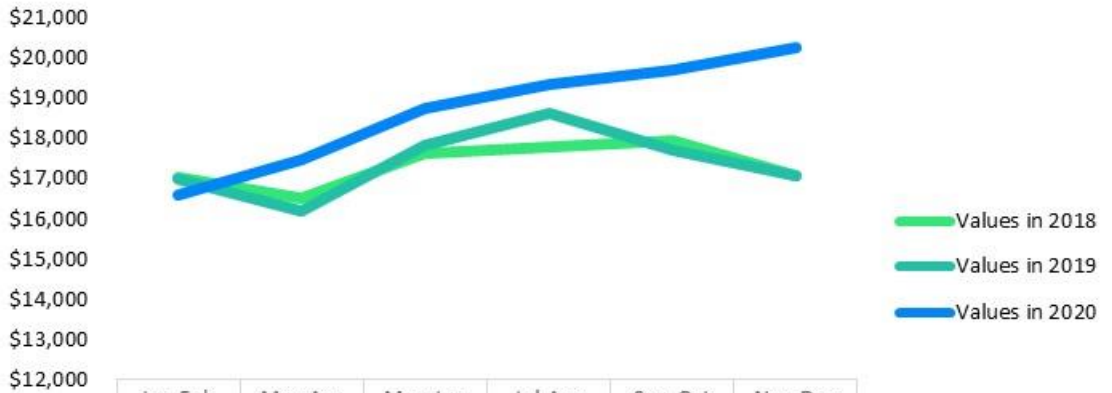
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$17,022	$16,537	$17,640	$17,807	$17,939	$17,070
Values in 2019	$16,985	$16,208	$17,816	$18,624	$17,711	$17,095
Values in 2020	$16,613	$17,477	$18,742	$19,346	$19,686	$20,260

Fifth Wheel

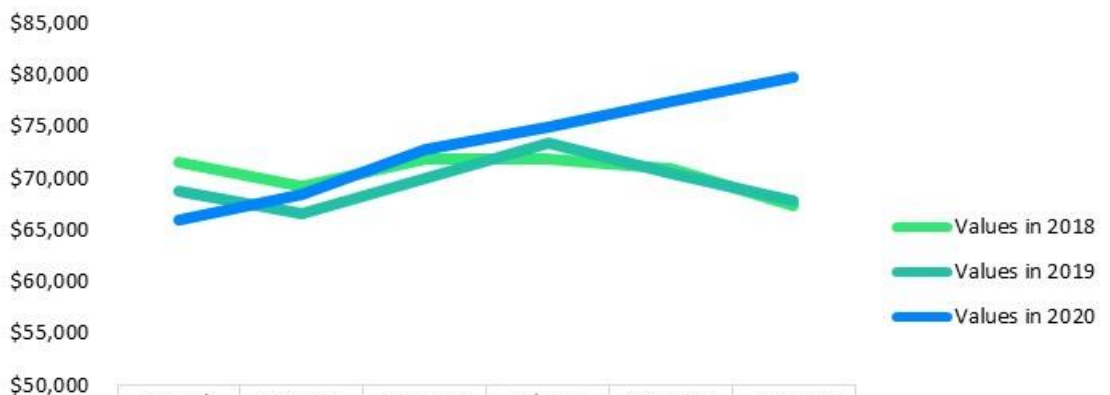|	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$31,501	$30,980	$32,313	$32,254	$32,881	$31,678
Values in 2019	$32,263	$31,344	$35,072	$36,984	$36,352	$35,440
Values in 2020	$35,503	$36,969	$39,368	$41,795	$40,496	$41,822

Motorhome Values

Average Retail Value by Category – Values for the Last 10 Model Years

Class A
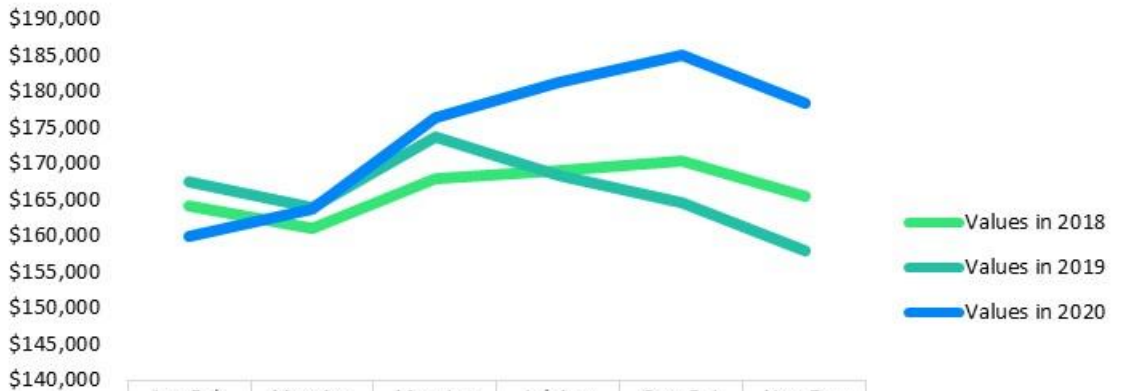
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$164,224	$161,049	$167,989	$169,081	$170,409	$165,410
Values in 2019	$167,476	$164,029	$173,716	$168,400	$164,622	$157,971
Values in 2020	$159,926	$163,803	$176,396	$181,217	$184,975	$178,380

Class C

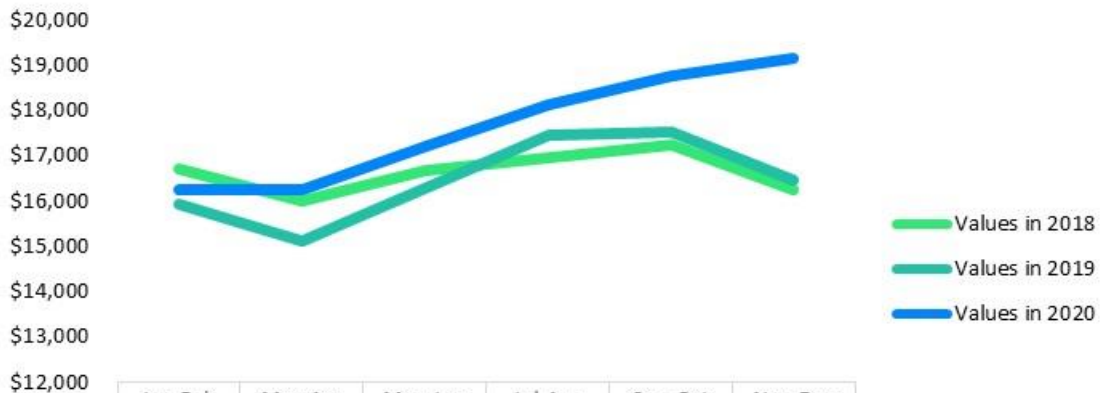|	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$71,552	$69,194	$71,805	$71,871	$70,907	$67,361
Values in 2019	$68,695	$66,587	$69,998	$73,359	$70,418	$67,847
Values in 2020	$65,964	$68,416	$72,849	$74,885	$77,477	$79,737

Camping Trailer & Truck Camper Values

Average Retail Value by Category – Values for the Last 10 Model Years

Camping Trailer
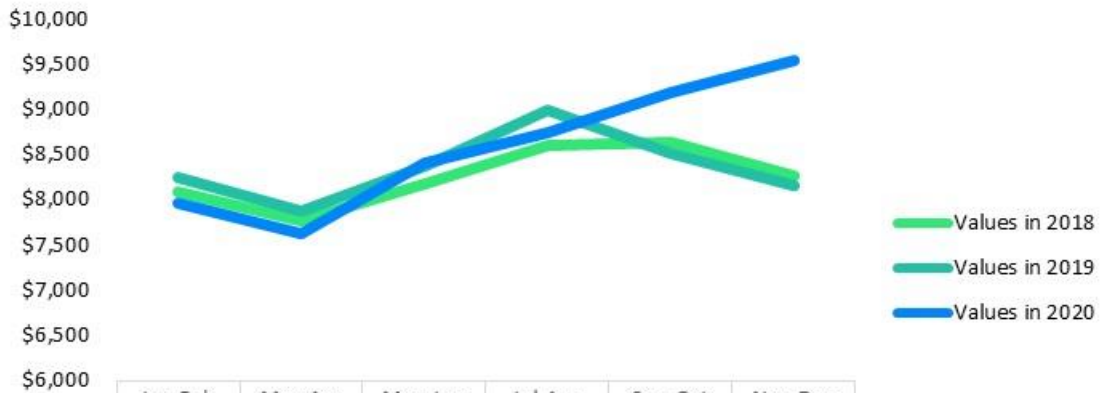
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$8,087	$7,764	$8,175	$8,596	$8,630	$8,257
Values in 2019	$8,250	$7,880	$8,362	$8,994	$8,520	$8,164
Values in 2020	$7,956	$7,620	$8,409	$8,737	$9,194	$9,537

Truck Camper

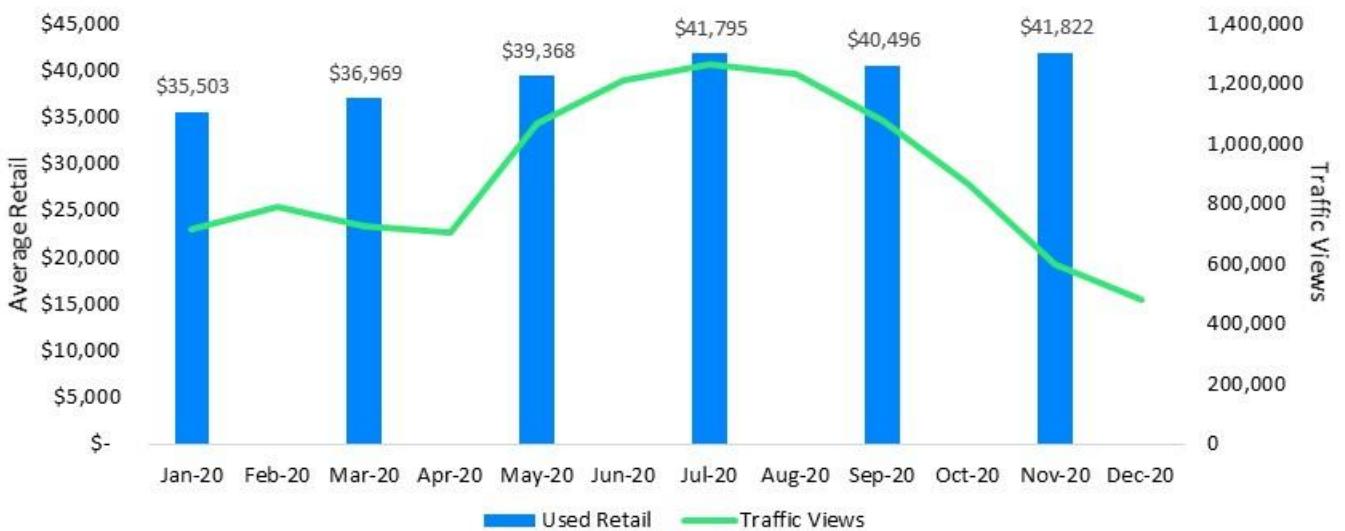|	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	$16,719	$15,988	$16,661	$16,950	$17,247	$16,268
Values in 2019	$15,921	$15,113	$16,274	$17,467	$17,517	$16,452
Values in 2020	$16,253	$16,269	$17,195	$18,125	$18,771	$19,168

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Travel Trailer Values vs. Traffic

Average Retail Value and Traffic View by Category

Standard Hitch
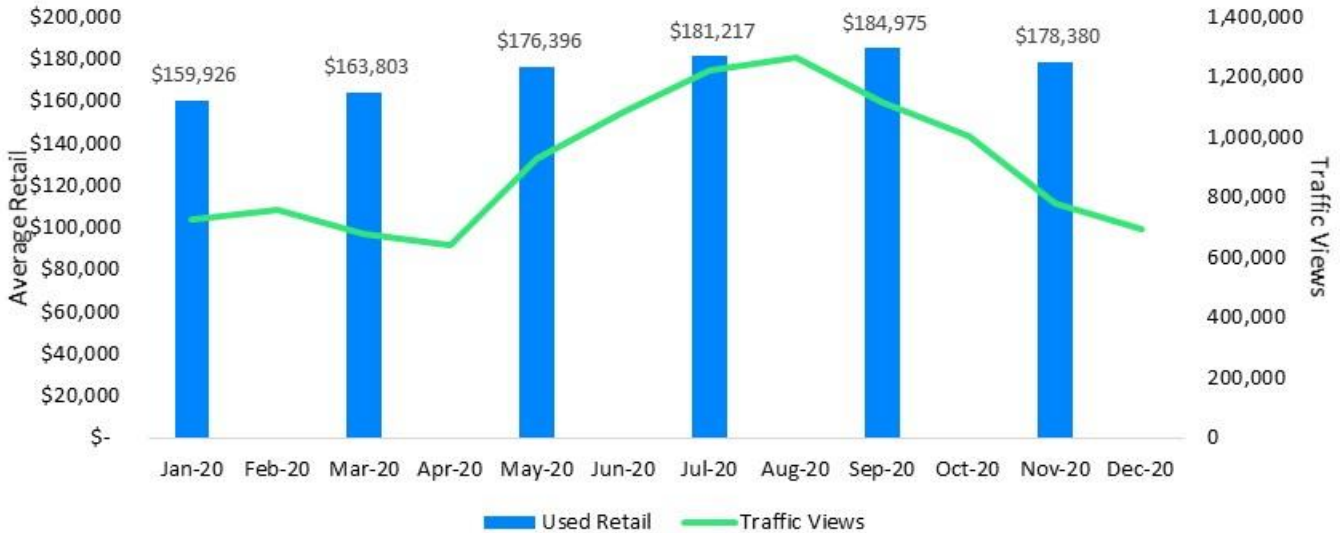

Fifth Wheel

Motorhome Values vs. Traffic

Average Retail Value and Traffic View by Category

Class A

Class C

Camping Trailer & Truck Camper Values vs. Traffic
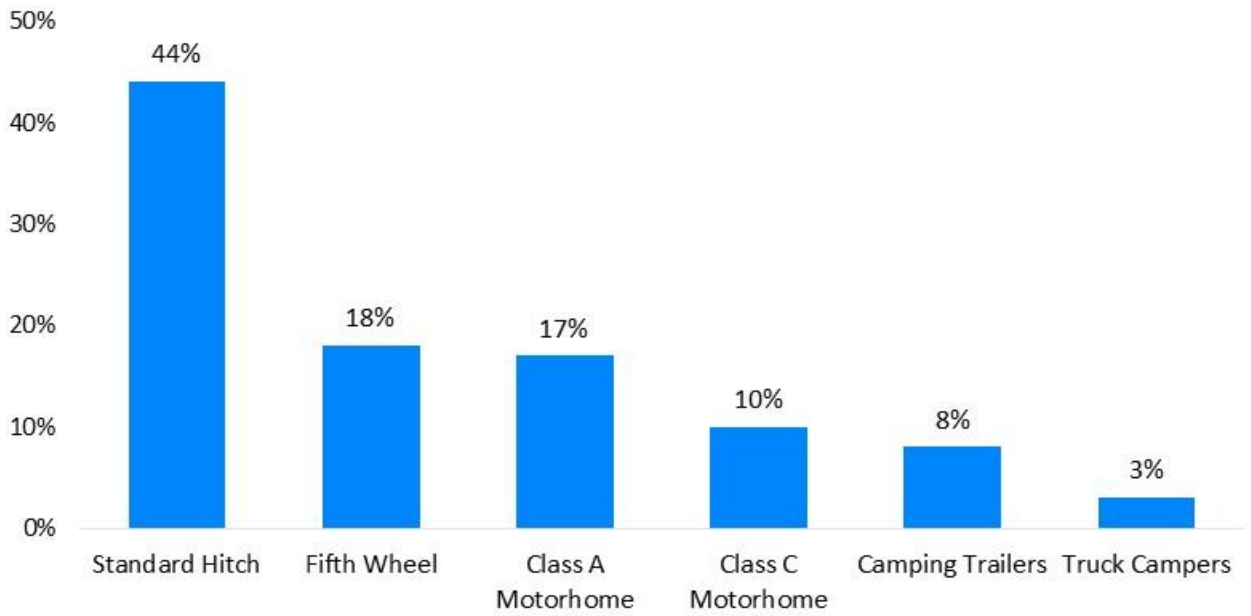
Average Retail Value and Traffic View by Category

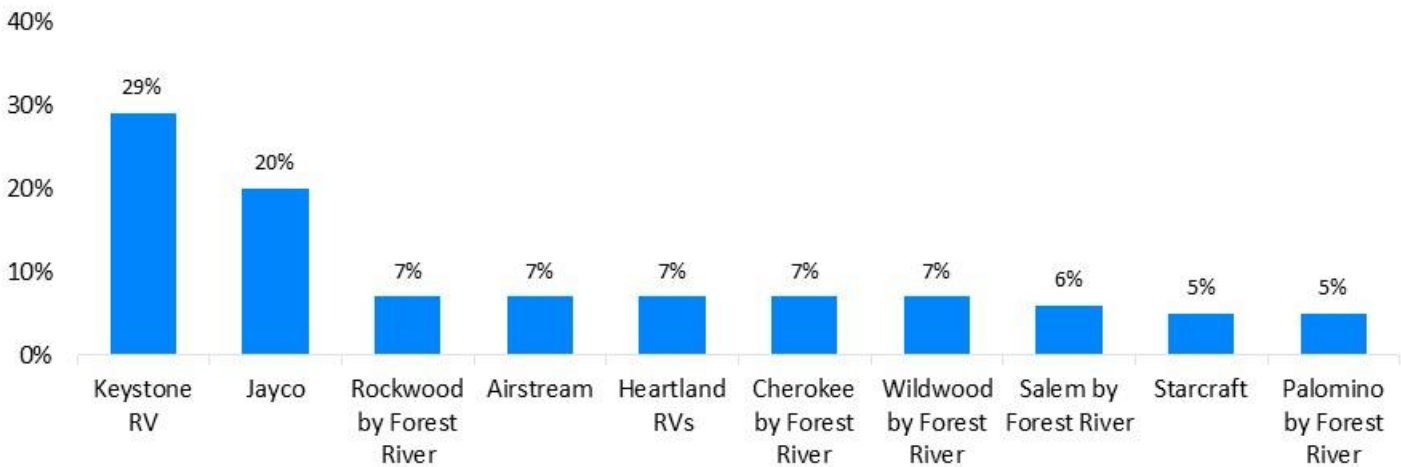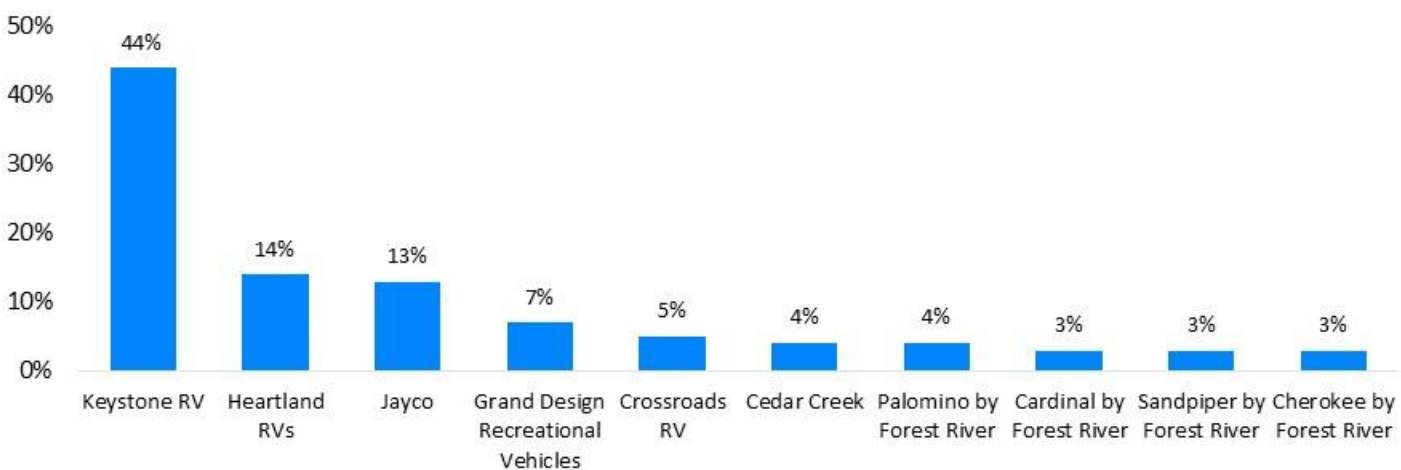### Camping Trailer

Truck Camper

RV Categories

Views in 2020

50%	
	44%
40%	
30%	
20%	18% 17%
10%	10% 8%
	3%
0%	
	Standard Hitch Fifth Wheel Class A Motorhome Class C Motorhome Camping Trailers Truck Campers

Travel Trailer Brands

Top Researched Brands in 2020

Standard Hitch Brands

Brand	%
Keystone RV	29%
Jayco	20%
Rockwood by Forest River	7%
Airstream	7%
Heartland RVs	7%
Cherokee by Forest River	7%
Wildwood by Forest River	7%
Salem by Forest River	6%
Starcraft	5%
Palomino by Forest River	5%

Fifth Wheel Brands

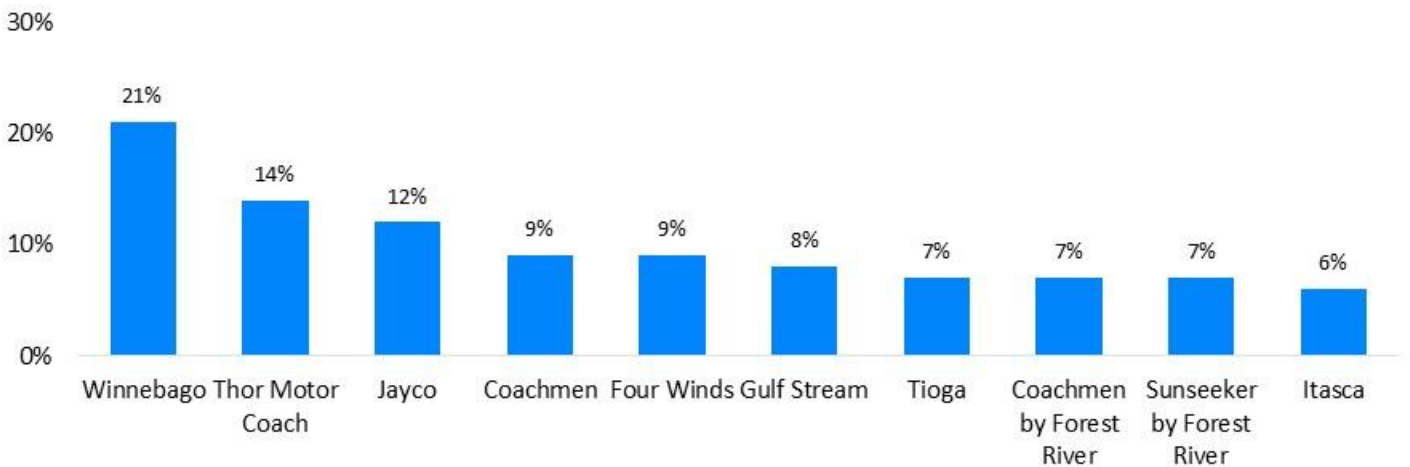| Brand	%
Keystone RV	44%
Heartland RVs	14%
Jayco	13%
Grand Design Recreational Vehicles	7%
Crossroads RV	5%
Cedar Creek	4%
Palomino by Forest River	4%
Cardinal by Forest River	3%
Sandpiper by Forest River	3%
Cherokee by Forest River	3%

Motorhome Brands

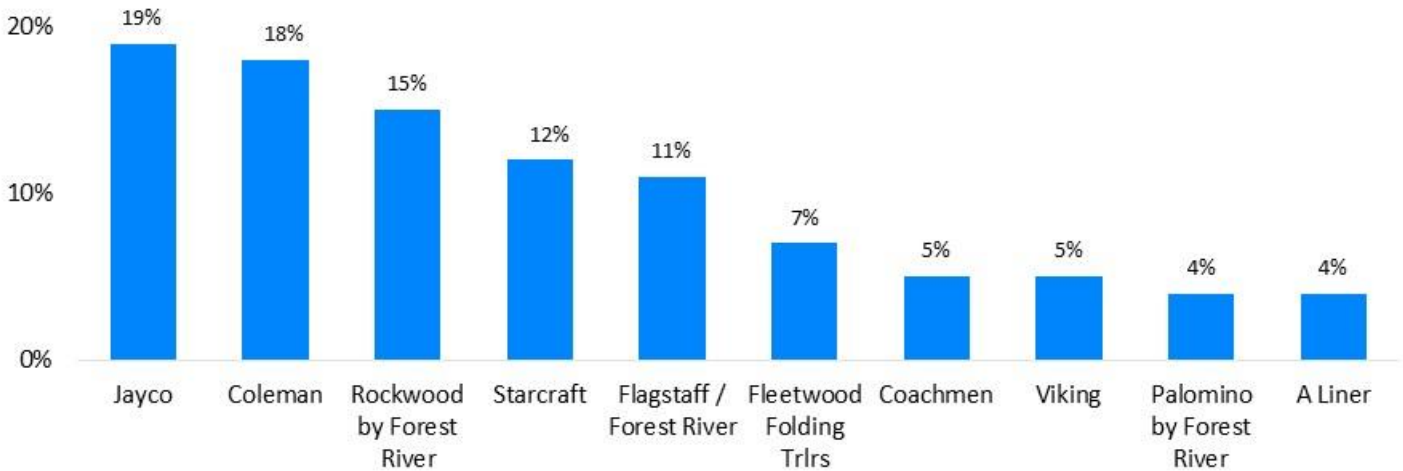## Top Researched Brands in 2020

Class A Brands
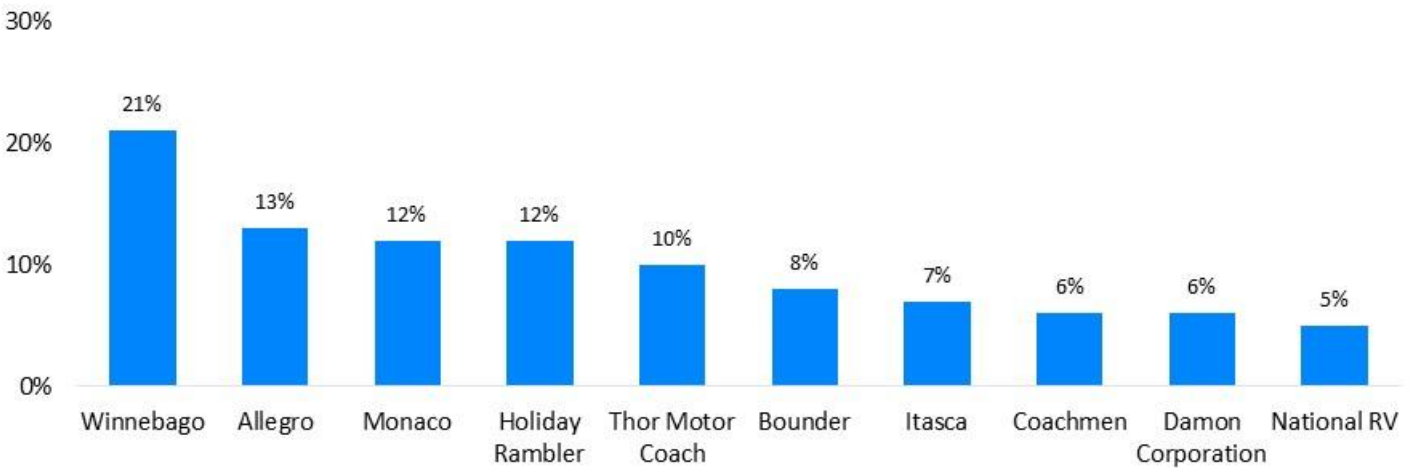
Class C Brands

Camping Trailer & Truck Camper Brands

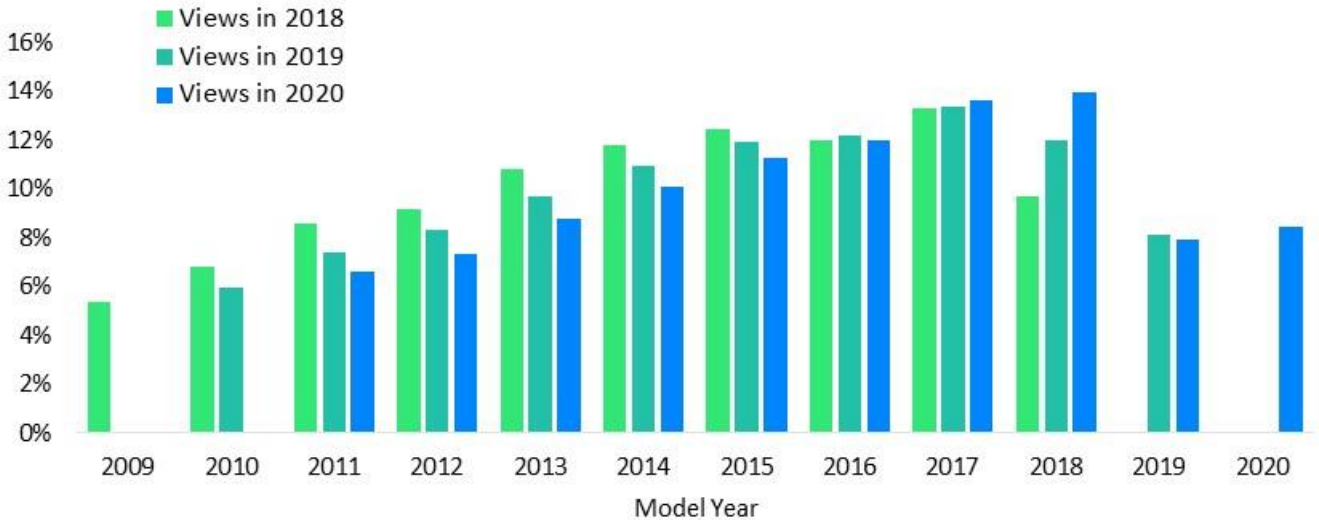## Top Researched Brands in 2020

Camping Trailer Brands

Brand	%
Jayco	19%
Coleman	18%
Rockwood by Forest River	15%
Starcraft	12%
Flagstaff / Forest River	11%
Fleetwood Folding Trlrs	7%
Coachmen	5%
Viking	5%
Palomino by Forest River	4%
A Liner	4%

Truck Camper Brands

Brand	%
Lance	56%
Arctic Fox	18%
Palomino by Forest River	12%
Adventurer	7%
Travel Lite	7%
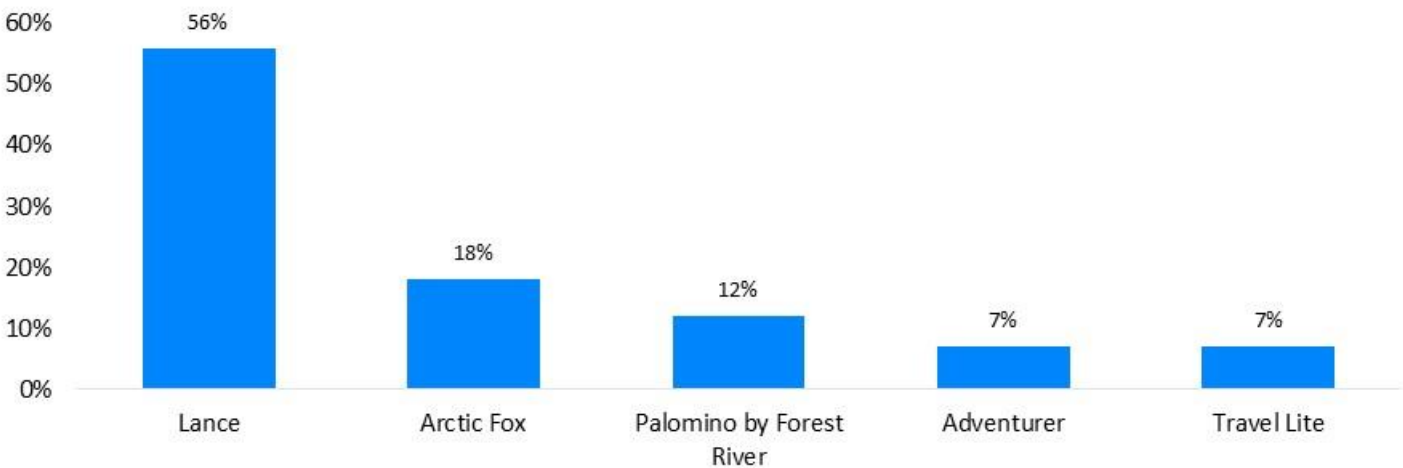
Model Years

Top Researched Model Years by Category

Standard Hitch Travel Trailer

Class A Motorhome

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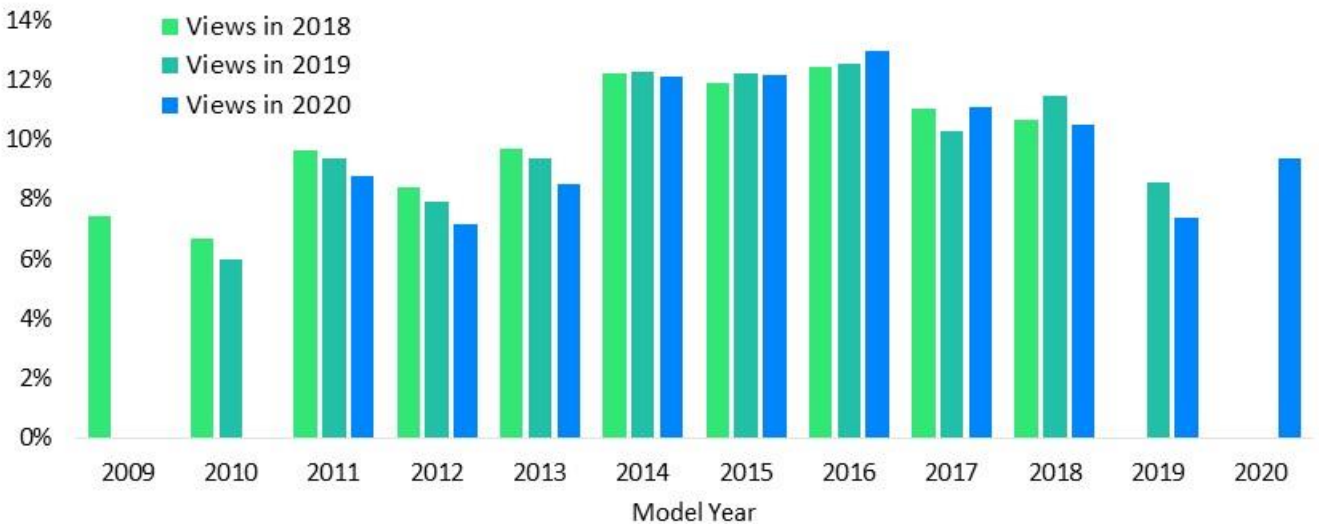
Web Traffic by State

Traffic by State in 2020

Travel Trailers

Powered by Bing
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> 450,000
200,000 - 450,000
100,000 - 199,999
< 100,000
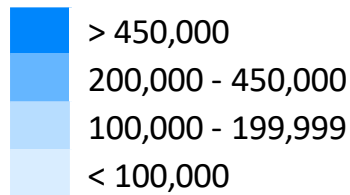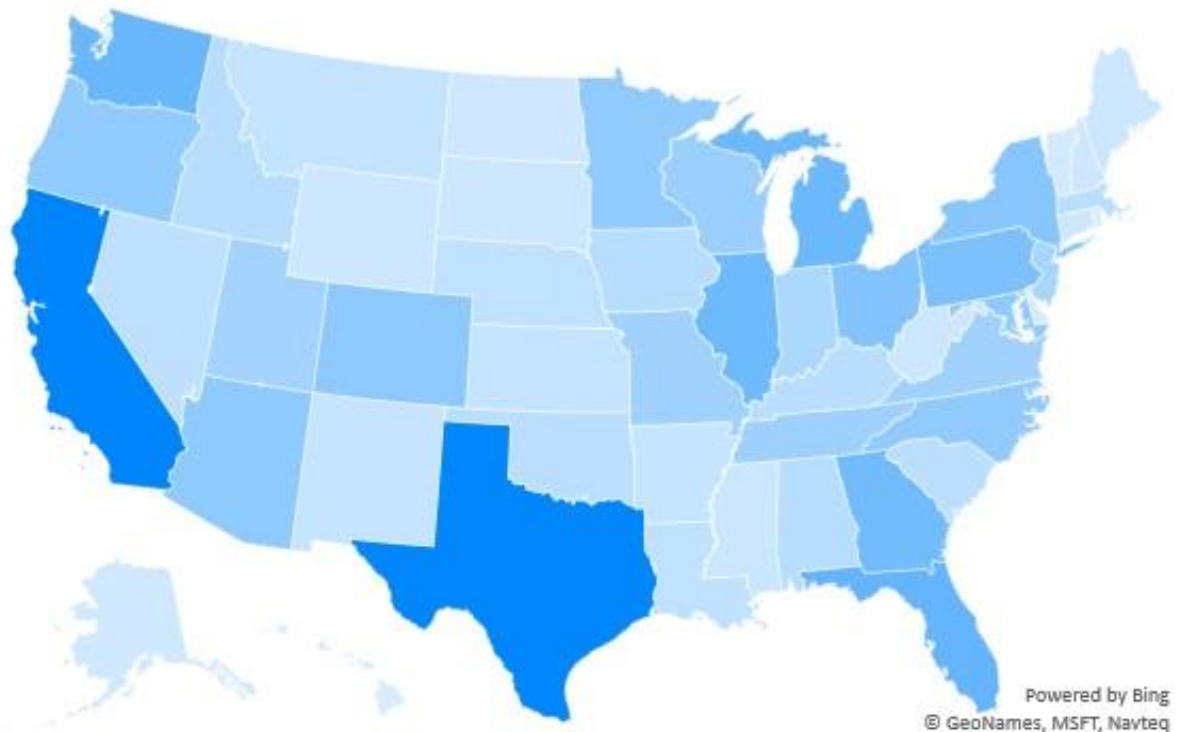
Web Traffic by State

Traffic by State in 2020

Class C Motorhomes

Powered by Bing
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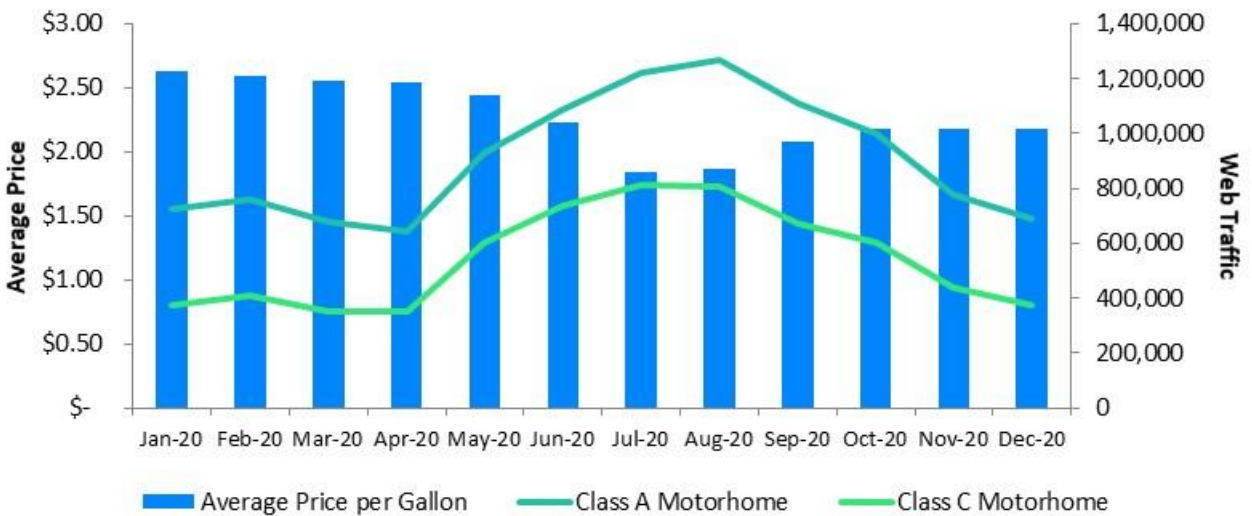|	
■	> 250,000
■	120,000 - 250,000
■	50,000 - 119,999
■	< 50,000
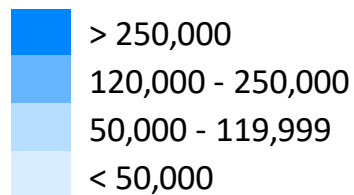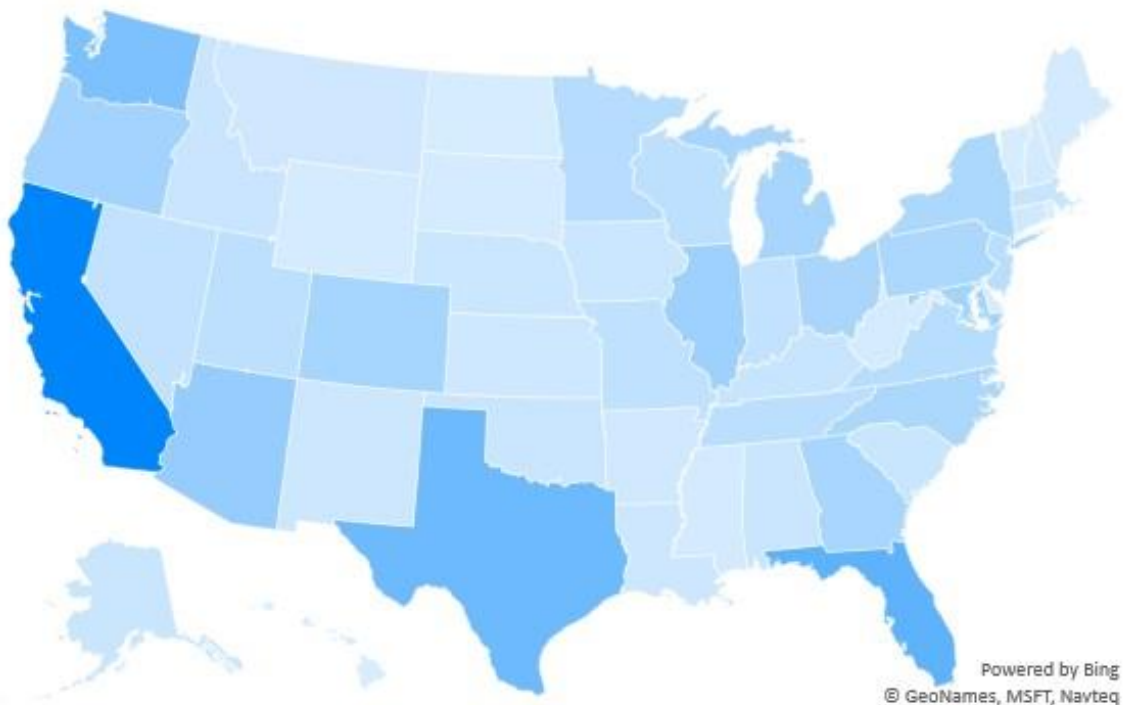
Fuel Price Data

Regular Grade Gasoline Prices vs. Consumer Traffic by Category

Travel Trailer / Fifth Wheel
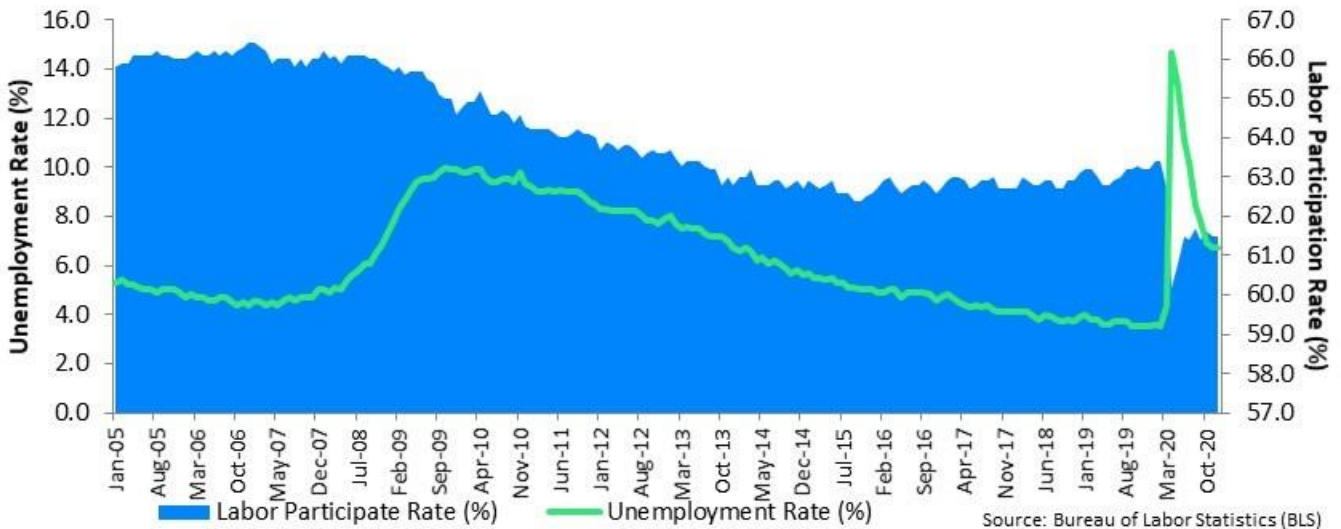

Source: U.S. Energy Information Administration

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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