Understanding RV Consumer and Product Trends

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January 24, 2018
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SORP is the voice for advancing the outdoor recreation profession.
Today’s Presenter

Chris Bornemann
- RV Industry Association
- Senior Manager Government Affairs
Poll Question…

As it relates to RV camping in your park(s) which of the following is a **primary** concern:

A. Can’t accommodate demand/not enough RV sites

B. Issues accommodating larger RVs

C. Not enough funding for modernization and expansion projects
One key element of RVIA’s Mission Statement is:

To create a positive experience for the RV consumer
RV Shipments Trend, 1980-2017

RVIA Shipments Data

January 24, 2018
RV Industry Economic Indicators - 2018

- **Interest Rates**
- **New Housing**
- **Fuel Prices**
- **Fuel Availability**
- **Consumer Sentiment**

***Wholesale & Retail Credit Availability***

**Wages & Employment**

**Cars & Light Truck Sales**

Dealer Inventories

****Consumer Debt

Sources:
* U.S. Department of Commerce
** U.S. Department of the Treasury
*** Dunn & Bradstreet
**** Center for Microeconomic Data
RV Types and Terms

**Towable RVs**

*Designed to be towed by family car, van or pickup truck. Can be unhitched and left at the campsite while you explore in your auto.*

**TRAVEL TRAILERS**

*Conventional Travel Trailer*
Wide range of floor plans and sizes
Affordable homelike amenities
Sleep up to 10

**Fifth-Wheel Travel Trailers**
Spacious two-level floor plans
Towed with a pickup truck
Sleep up to six

**Travel Trailers with Expandable Ends**
Ends pull out for roomy sleeping
Lightweight Towing
Sleep up to eight

**FOLDING CAMPING TRAILERS**
Fold for lightweight towing
Fresh-air experience with RV comfort
Sleep up to eight

**SPORT UTILITY RVs**
*Available motorized and towable (as travel trailers or fifth-wheels).*
Built-in garage for hauling cycles, ATVs, and other sports equipment
Sleep up to eight

**TRUCK CAMPERS**
*Mount on pickup bed or chassis*
Go wherever your truck can go
Sleep up to six

**PARK MODEL RVs**
*Movable resort unit designed exclusively for part-time recreational use*

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Towable RVs – 88% (↑18.2%)
Travel Trailers - 66% (↑20%)
Fifth-Wheel Trailers – 18% (↑16.9%)
Folding Camping Trailers – 2% (↓9%)
Truck Campers – 1% (↑6%)

(2017 shipment data)
RV Types and Terms

Living quarters are accessible from the driver’s area in one convenient unit.

**MOTORHOMES**
Type A Motorhomes
Generally roomiest of all RVs Luxurious amenities
Sleep up to six

Type B Motorhomes
Commonly called van campers Drive like the family van
Sleep up to four

Type C Motorhomes
Similar amenities to Type A Optional sleeping space over the cab
Sleep up to eight

Motorhomes currently represent 13% of the RVs shipped in 2017

Type A - 88% 2.3% (↑2.3%)
Type B - 66% (↑32%)
Type C - 18% (↑22%)
(2017 shipment data)
RV Ownership

- Type A motor home: 14%
- Type B motor home: 9%
- Type C motor home: 9%
- Conventional travel trailer: 22%
- Fifth-wheel travel trailer: 14%
- Folding camping trailer: 10%
- Truck Camper: 6%
- Park Model RV: 12%
- Other: 4%
89% of consumers purchase RVs for camping
Campground Modernization & Expansion

The Need: Campground Modernization and Expansion
What do Modern RVers want in a Campground?
Help Facilitate the Adventure

Amenities!

- Strong Wi-Fi – Millennials/Gen-X/Baby Boomers/Mobile Professionals
- 50 AMP Service
- Site-specific Electric, Water, and Sewer hook-ups
- Improved Dump Stations
Is there an app for that?
Help Facilitate the Adventure

- Improved bathing facilities with hot showers, sinks, and flush toilets
- Camp stores to purchase essentials and restock necessary supplies before their next journey
- Recreational opportunities such as zip lines, guided rock climbing tours, ATV courses, watersports and boat, fishing gear or bike rentals
- RV storage areas near campsites for those who return often
Help Facilitate the Adventure

- More RV accessible sites
- Pull-through RV campsites
- Group camping sites
- Destination camping sites
RVs are Growing!
Park Model RVs
Park Model RVs
Park Model RVs
Park Model RVs
NFPA 1194

This Standard provides the minimum construction requirements for safety and health for occupants using facilities supplied by recreational vehicle parks and campgrounds offering temporary living sites for use by recreational vehicles, recreational park trailers, and other camping units.

www.rvia.org -> Store
# NFPA 1194

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**Title:** RECREATIONAL VEHICLE PARKS AND CAMPGROUNDS

**Author:** RECREATION VEHICLE INDUSTRY ASSOCIATION

**Date:** January 24, 2018

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FIGURE B.1(a) Optional Arrangement for a Recreational Vehicle Park or Campground Standard Pull-Through Site Showing Water, Sewer, and Electrical Utility Connection Points.
First ever economic impact study of the entire RV industry was completed in 2016.
RVs MOVE AMERICA

ECONOMIC IMPACT OF THE RV INDUSTRY

United States

TOTAL DIRECT ECONOMIC OUTPUT

$27.0 Billion

- RV Manufacturers and Suppliers: $15.8 Billion
- RV Sales and Service: $4.9 Billion
- RV Campgrounds and Travel: $6.3 Billion

22,797
# of RV BUSINESSES

3,001
# of RV DEALERSHIPS

$5.7 Billion TOTAL TAXES PAID by RV Industry

$7.9 Billion DIRECT WAGES
- RV Manufacturers and Suppliers: $2.9 Billion
- RV Sales and Service: $2.4 Billion
- RV Campgrounds and Travel: $2.6 Billion

155,608 DIRECT JOBS
- RV Manufacturers and Suppliers: 43,867
- RV Sales and Service: 39,247
- RV Campgrounds and Travel: 72,494

OVERALL INDUSTRY IMPACT

$49.7B Total Economic Output
$15.8B Total Wages
289,852 Total Jobs
Recreation Vehicle Industry Grows the U.S. Economy

The map below provides detailed information about the economic contributions generated by the U.S. recreation vehicle industry. To see how the industry creates jobs in your state or congressional district, click on the map or on the drop-down boxes below. For more information on the methodology, click here.
Recreation Vehicle Industry Grows the U.S. Economy

The map below provides detailed information about the economic contributions generated by the U.S. recreation vehicle industry. To see how the industry creates jobs in your state or congressional district, click on the map or on the drop-down boxes below. For more information on the methodology, click here.
Additional Resources

- RV Quarterly Forecast (RV RoadSigns)
- Business Indicators
- RV Ownership Trends
- Vacation Costs
- RV Travel Forecast
- Marketing to RV Travelers
- RV Perceptions & Purchase Motivators Study
- Annual Report
The Go RVing Nielsen Study
Consumer feedback gathered to identify the ‘effective marketing strategies’
5 trips per year
14 days, 3,000 miles

Typically use their RV for camping trips at a variety of destinations
Active Family Adventurers

Children have a lot of influence on leisure trip decisions

Most active

Highest opportunity

Likely to have rented a camper/trailer or cabin in past 2 years

March 13, 2017
Nature Lovers

Most likely to consider RV rental within a campground

High likelihood to have gone tent camping or rented a cabin in the past two years

Natural beauty/lesser known destinations, outdoor sports/recreation

High usage of travel-related apps
Kid-Free Adult Adventurers

Moderate opportunity segment

Learning opportunities, romantic getaways, lesser known destinations, visiting family, spending time in nature, attending sporting events
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Visit RVIA.org for the executive summary of the Go RVing Nielsen Study
Go RVing 2017 and Beyond

Combined, the three segments identified in the Nielsen study represent 40% of the total US population

The data was utilized in determining the $17MM, 2017 Media Strategy focusing on:

- Millennials/Gen Xers
- Hispanic and African American consumers
- Active Outdoor Adventurers
Increased awareness across digital and social media channels

- 105Mill total impressions
- 763K total followers ↑9%
- Instagram engagement ↑183%
- Blog site visits ↑143%
- Facebook video views ↑5,113%
Ready to Buy

- Millennials (ages 21-37) now surpass the Boomers in numbers
- 53% of Millennials (44M) are interested in buying an RV
- 26% or 21M call themselves highly-likely buyers!!!
- More than half (55%) wish they had one!
Inclusive

- By 2040, minorities will be the majority
- Millennials are highly diverse, 44% are non-white (Boomers are 81% white.)
- 45% are **urban** dwellers
- 33% live in suburban areas
- 22% from rural regions
Experiential

- Prefer to be associated with the creation of culture
- Never forget that we are in the meaningful experience business
- We sell meaningful experiences, exciting adventures and memories that last a lifetime
Are you Future Ready?
Are you Future Ready?
Are you Future Ready?
Are you Future Ready?
Recap: How Can RVIA Help you Down the Road?

- RVs Move America Economic Impact Study – RVsMoveAmerica.org
- Research on RV Industry, Next Generation of RVer and Future Trends
- Go RVing® Social Media Campaign – www.GoRving.com
- NFPA 1194 Campground Standard – Best Practices
- Attend the National RV Trade Show for FREE – See the Latest and Greatest Products and Network with RV Industry Stakeholders
- Utilize RVIA as a partner when working on campground modernization and expansion projects
To promote, advance, and serve outdoor recreation professionals in research, planning, management, and policy development.
Watch for a follow up email and survey about this webinar.

Check out the SORP website (www.RecPro.org) for more outdoor recreation technical resources.

Join us for Webinar 3: Best Practices in Cabin, Glamping, and Bike Camping – February 14, 2018, 11a.m. PST

Questions about SORP?
Contact Administrator@RecPro.org