

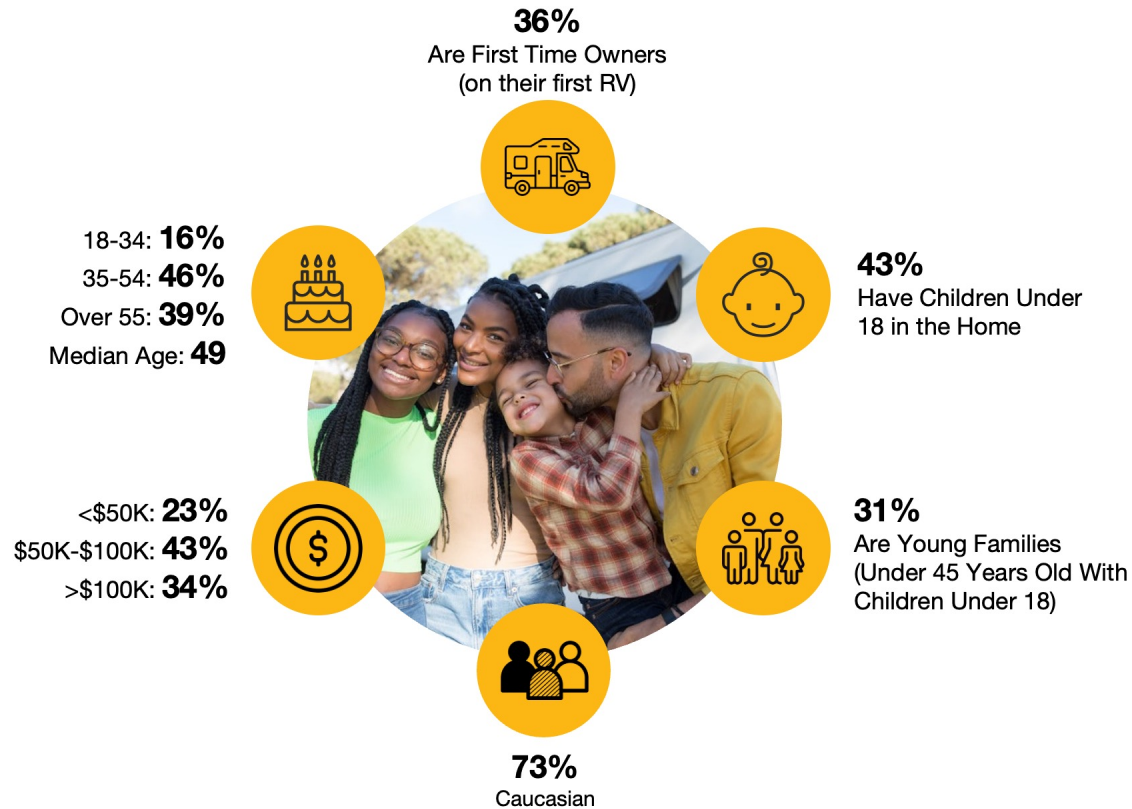


2025 RV Owner Demographic Profile Overview

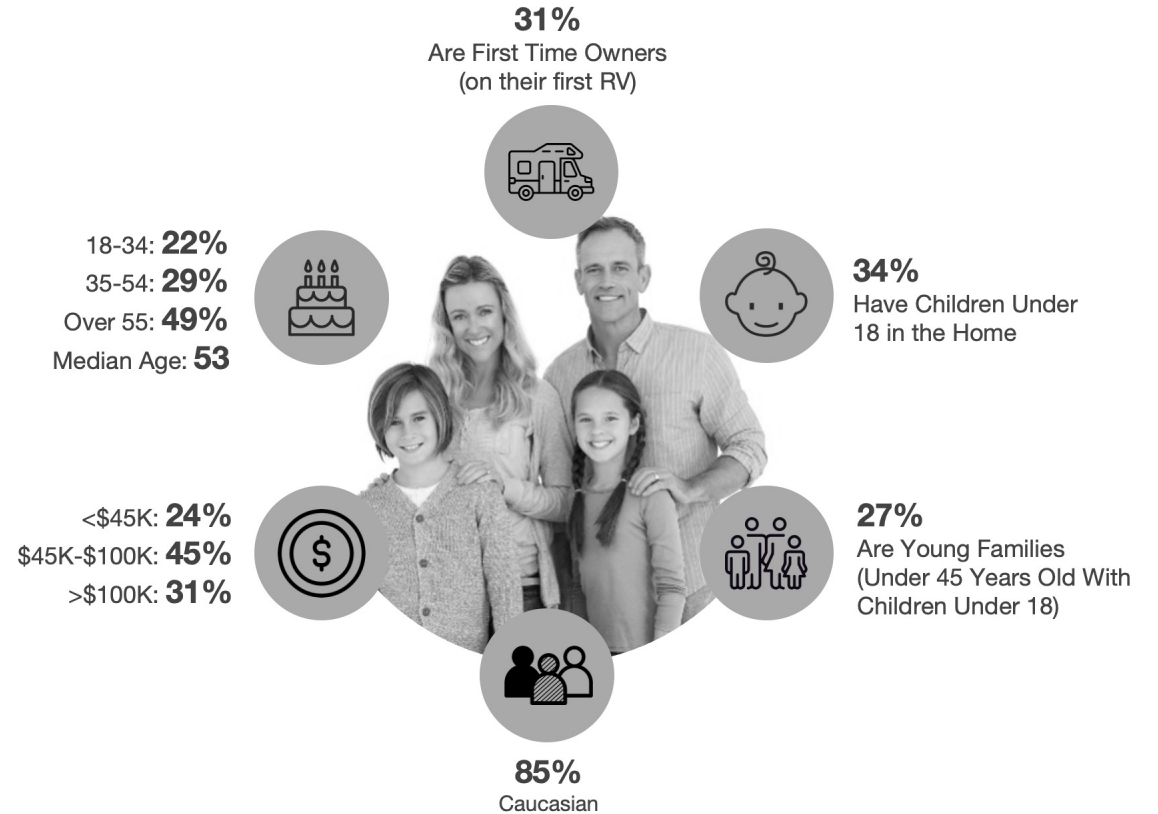
Owners have seen strong changes in demographics since 2021.

Compared to 2021 results, Current RV Owners are younger and more diverse, increasing the number of young families and first-time owners in the process.

2025 RV Owner Profile



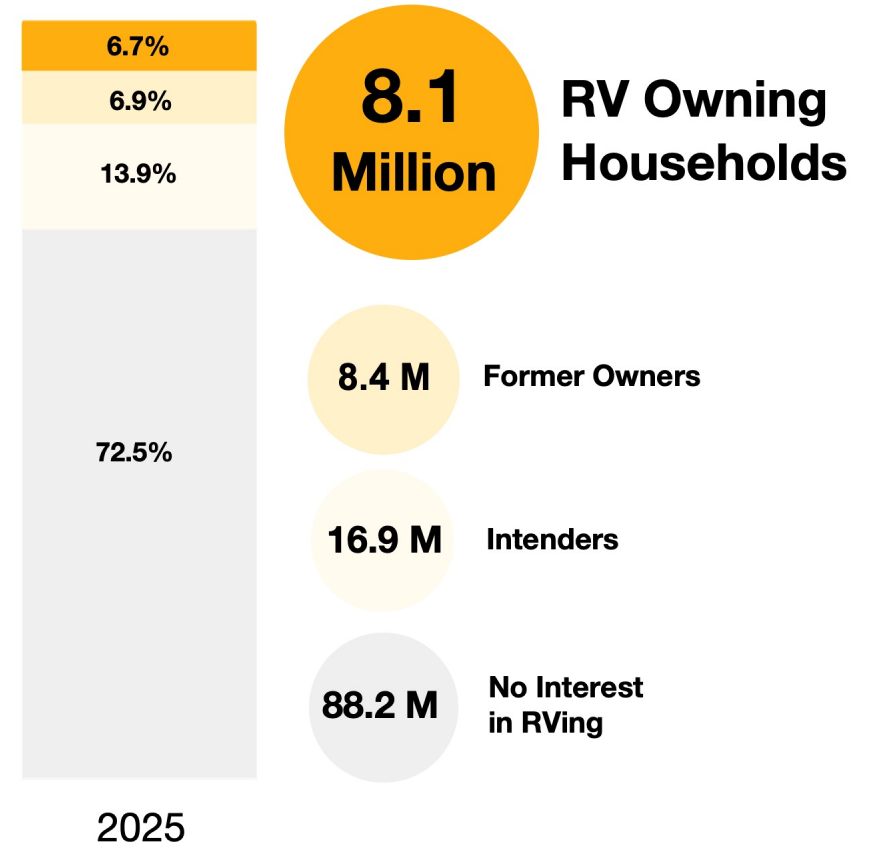
2021 RV Owner Profile



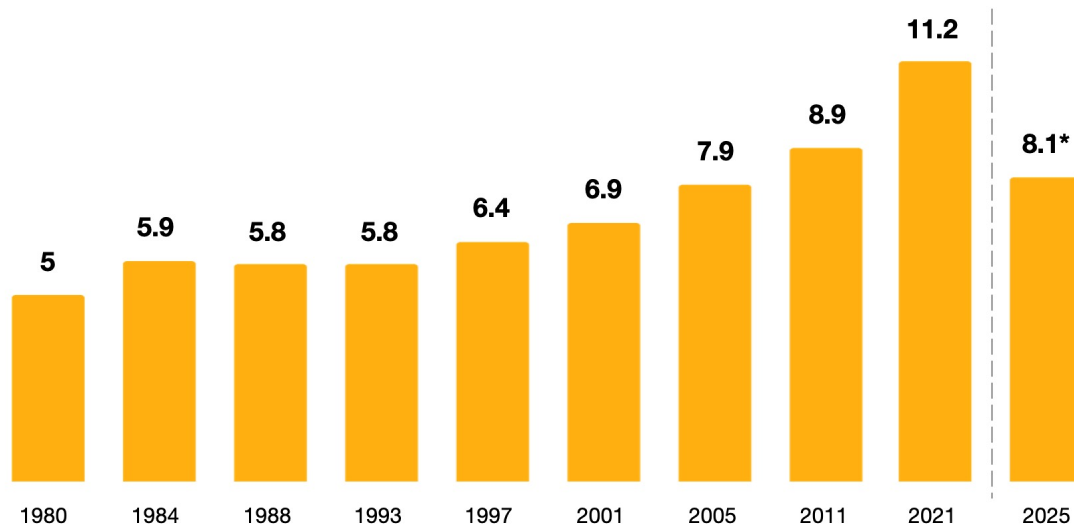
8.1 Million American Households Currently Own An RV.

This represents 6.7% of vehicle owning households. Importantly, 16.9 million households show interest in owning an RV in the next 5 years. At more than double the number of current RV-owning households, these intenders highlight the market opportunity for the RV industry.

121.6 Million US Vehicle-Owning Households
(in millions)



Number of US Households that Own RVs
(in millions)



*In 2025, there was a significant change in survey methodology to more accurately account for the number of RV owning households. This number better aligns with other industry data such as shipments and registrations.

Today's RVers are more enamored with their RV than ever, and their usage follows suit.

Current owners typically utilize their RV for 30 days per year regardless of type, a 50% increase over 2021 results. 86% of current RV owners indicate that they are utilizing their unit as or more than expected, a strong increase over 2021 results. Owners self-report taking an average of 9 annual RV trips per year, with each trip a median distance of 250 miles.

Median Number of Days RV is Used



30 DAYS 
Up from 20 days in 2021

Median of Total RV Trips Per Year and Distance



9 TRIPS
250 MILES

Despite shifts in demographics, the motivators of RV ownership remain tried and true.

When making the decision to enter the RV lifestyle, Current Owners have largely rooted this decision in the ability for the industry to provide a means of relaxation, exploring the great outdoors, and lessening the stress of travel (i.e., costs, pet accommodations, etc.).

Important Motivators to RV Ownership n=3000



58%

Simply unwinding
and relaxing



57%

Spending time in
nature/explore the
outdoors



53%

Visiting a
location with
natural beauty



43%

Saving money
on travel costs



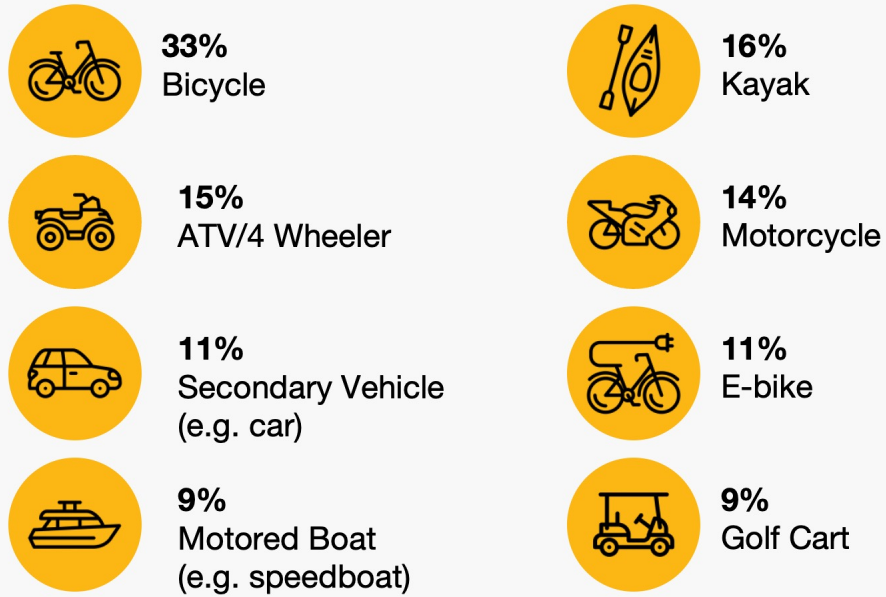
43%

Bringing my
pet with me

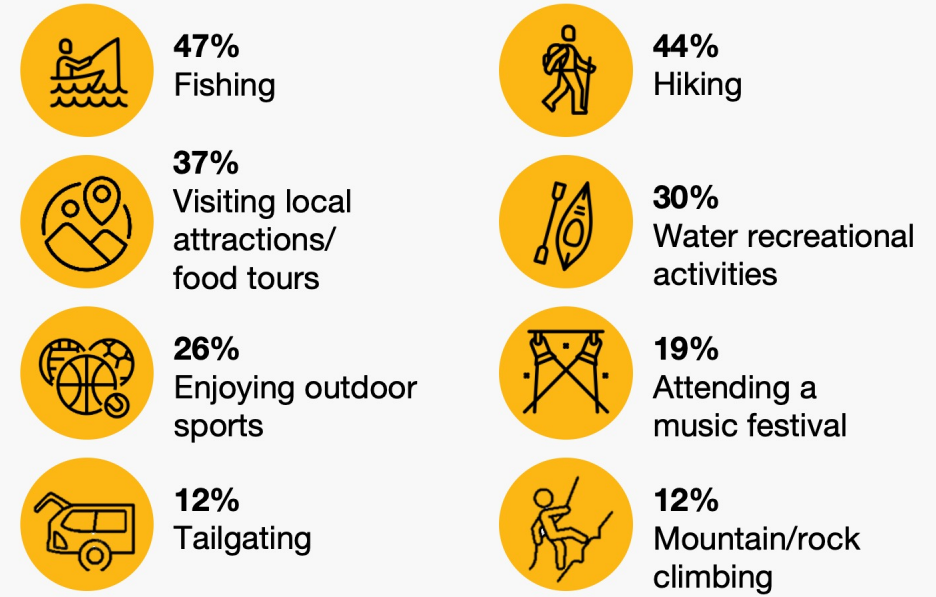
Owners continue to take full advantage of the benefits of RVing by engaging in outdoor recreational activities while traveling and bringing their own items along to facilitate.

Recreational products show a slight increase in RV travel prevalence among Current Owners (Bring At Least One Item: 66% vs. 62% 2021), with bicycles, kayaks, ATVs, and motorcycles the most commonly brought recreational products. Similarly, 90% of Current RVers indicate that they participate in at least one recreational hobby while traveling – an increase over 2021 results (85%).

What Comes With You? n=3000



Hobbies While RVing n=3000



CURRENT RV OWNER

ANALYSIS



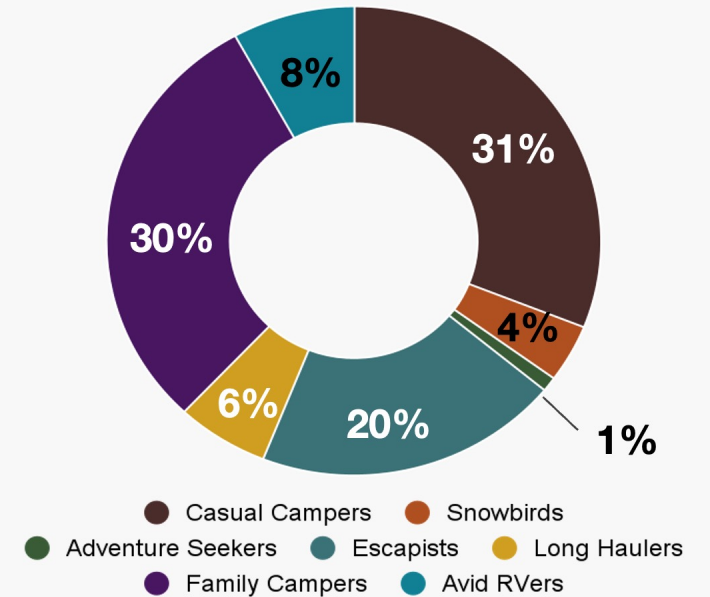
GO RVING™

Current RV Owners



While RV Owners are an incredibly varied group in demographics, lifestyle, and motivation, they are united by their love of nature and the freedom their RVs provide to explore the great outdoors on their own terms.

Segment Breakdown



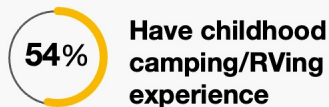
CURRENT OWNER PROFILE

Key Demos

- Age Range:**
61% 18 to 54
39% 55+
- Average Annual Income:**
53% over 75K
- Employment:**
50% Employed Full Time
24% Retired
- 43%** Live with children in the home



- 18% Hispanic-American
- 5% African American
- 6% LGBTQ
- 2% Asian-American



Hobbies



69% Camping



48% Cooking



46% Fishing

RV USAGE HABITS



30 Days used (median)



55% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)

62%
Conventional
Travel Trailer

15%
Fifth-Wheel
Travel Trailer

8%
Class C
Motorhome

RV BRAND LOYALTY



83% Likely to purchase same brand for next RV



Reasons

- 38% Good experience with brand
- 32% Strong quality
- 24% Provides desired features



17% Unlikely to purchase same brand for next RV



Reasons

- 27% Brand does not sell units in the type I would like to purchase next
- 22% Quality Issues
- 20% Lack of desired layouts/floor plans

RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- 47% Fishing
- 44% Hiking
- 37% Visiting Local Attractions

Stuff Brought with You

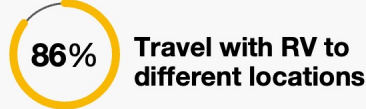
- 33% Bicycle
- 16% Kayak
- 15% ATV/4 Wheeler

Commonly Travel With

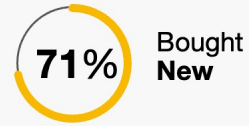
- 82% Spouse
- 41% Children Under 18
- 31% Pets
- 16% Friends

Top 3 Campsites (out of last 10 camping locations)

- 2 State Park/Rec Area Campground
- 2 Private Campground
- 1 RV Resort



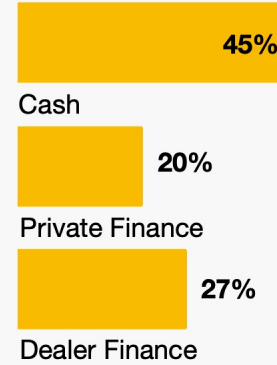
BUYING PROCESS



How was it Purchased?

- 94% In person
- 5% Virtually

Financing Option Used



Sources used to Gather RV Info During Buying Process

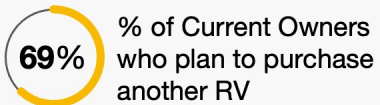
Digital/Print Resources

- 41% Dealership Websites
- 37% Manufacturer/Brand Websites
- 34% RV Sales Listings

Experiential Resources

- 51% Dealerships
- 42% Talking to Others
- 33% RV/Outdoor Shows

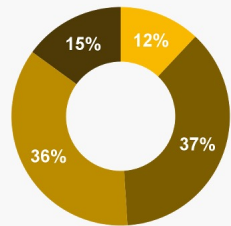
PURCHASE INTENTION



Type of RV Intended

- 28% Conventional Travel Trailer
- 18% Class C Motorhome
- 51% Class C | 44% Super C
- 17% Fifth-Wheel Travel Trailer

Purchase Timing



- <1 year
- 1-2 years
- 3-5 years
- 6+ years

Most Important Features When Considering Next RV

- 1 Solar Panels
- 2 AC/Heat
- 3 Bathroom/Shower

AFTERMARKET PARTS



Sources to Learn About RV Maintenance Parts & Accessories

- 37% Owners' manual
- 30% YouTube video from other RV Owner
- 27% YouTube video from RV maintenance parts/accessories brand

REASONS TO RV

- 58% Simply unwinding and relaxing
- 57% Spending time in nature/explore the outdoors
- 53% Visiting a location with natural beauty
- 43% Saving money on travel costs
- 43% Bringing a pet with me

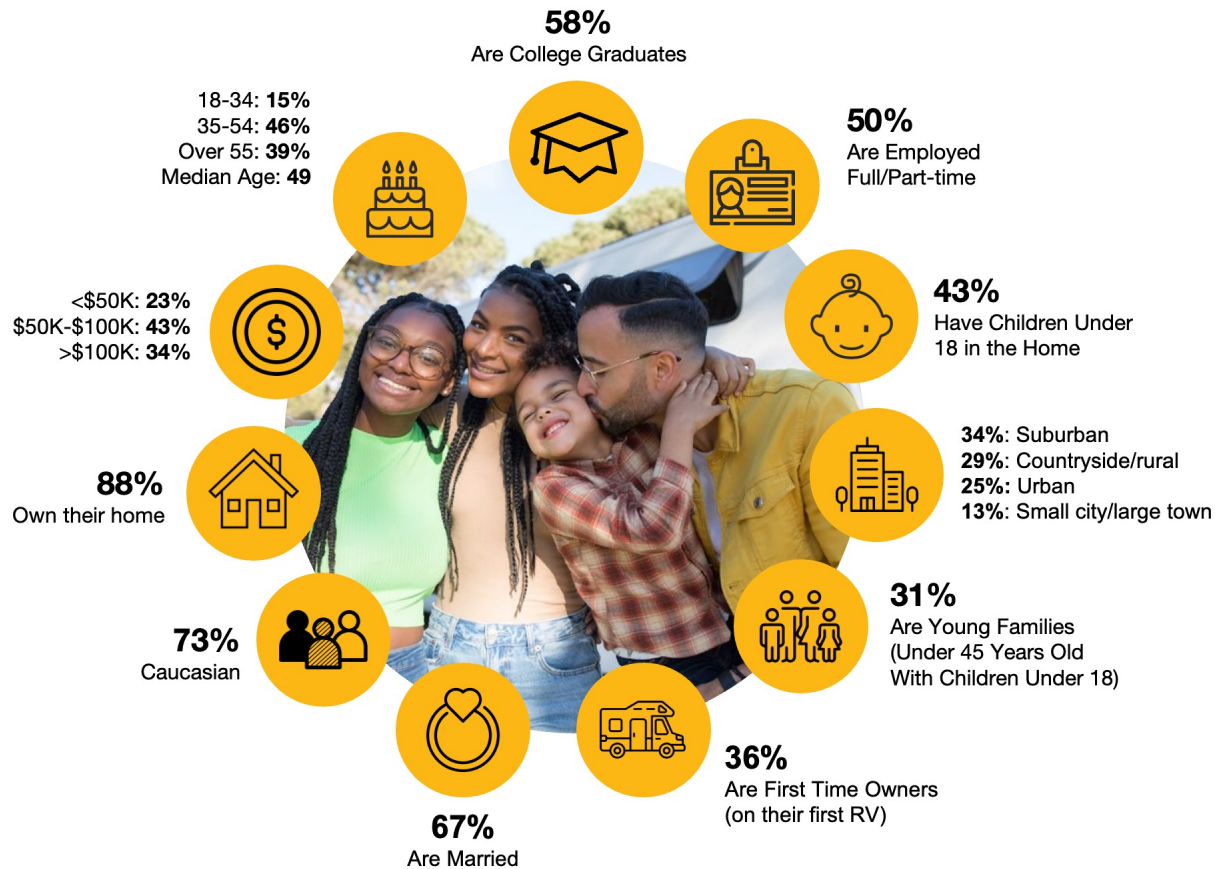
Top 3 Motivators for Purchasing an RV

- 39% Wanting a unit with different options
- 36% Past camping experiences
- 30% Desire for change in camping method

Current RV Owner Profile

RVerS continue to be a diverse audience of Americans spread across ages, races, incomes, and family structures. 22% of RVerS have indicated that someone in their home currently works remotely – higher among Motorhome Owners (29% vs. 21%). Among those working remotely, 54% indicate that work has been done from an RV (65% Motorhome vs. 50% Towable) and 95% expect their time working remotely to remain constant or increase from current levels.

Current RV Owner Profile n=3000

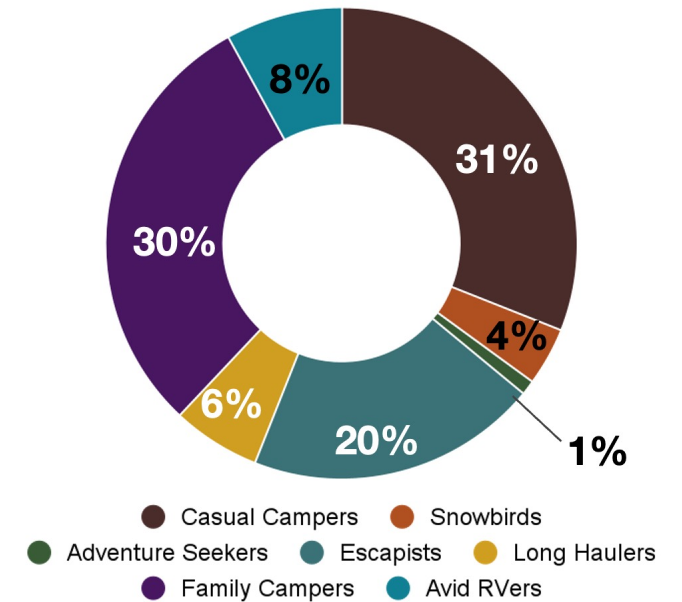


Other Items n=3000



Current RV Owners: Cluster Segmentation n=3000

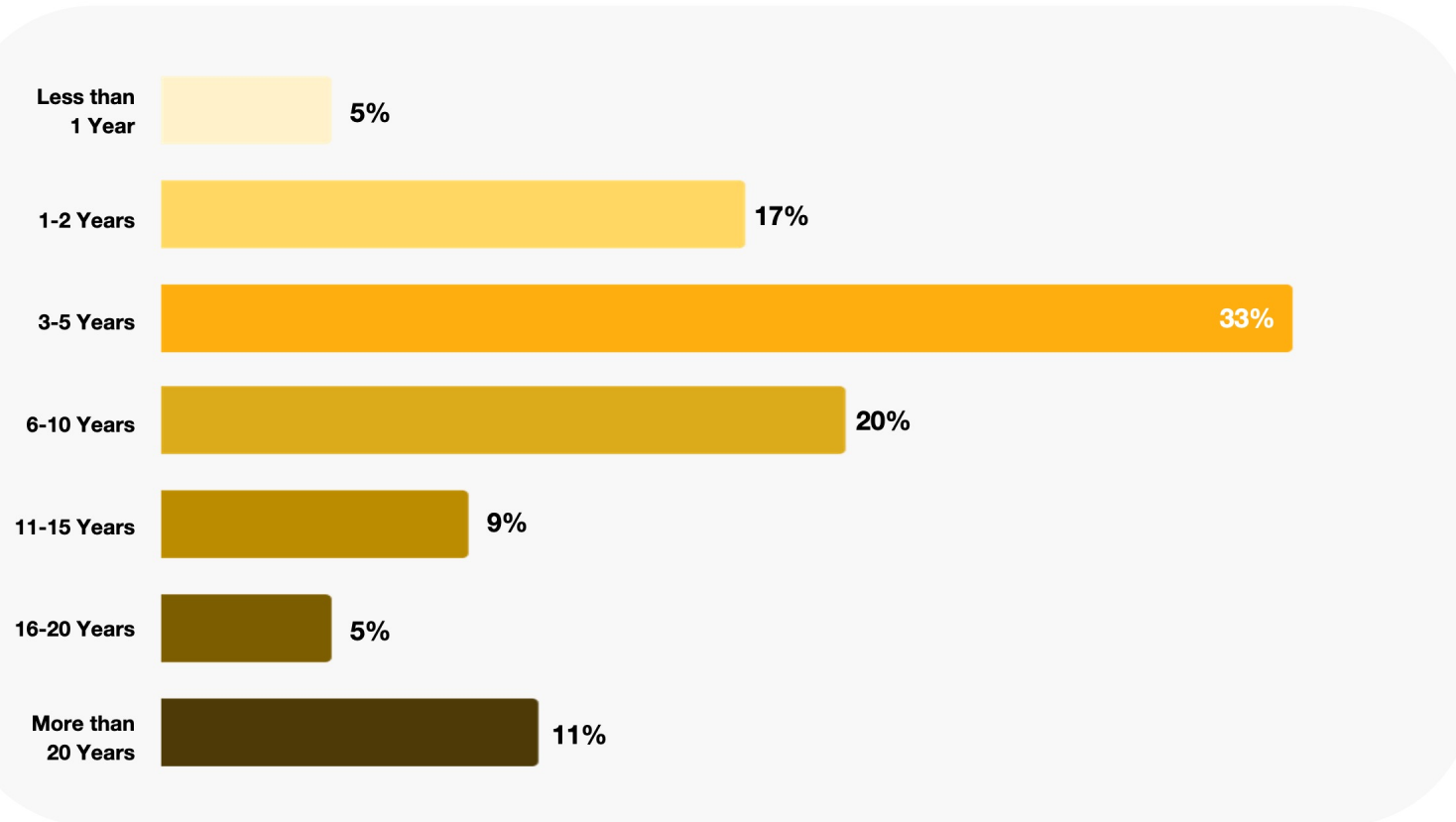
Segment Breakdown



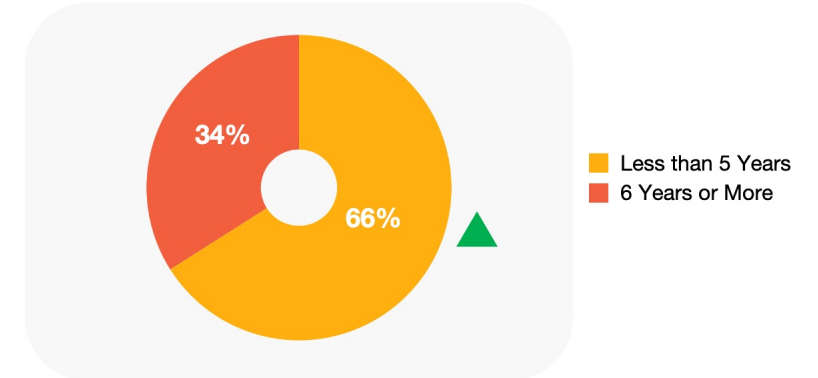
Personal Ownership Status and Length

Current Owners are largely divided on their industry tenure, with 55% becoming an owner within the past five years – particularly for Motorhome Owners (66% vs. 53% Towable Owners).

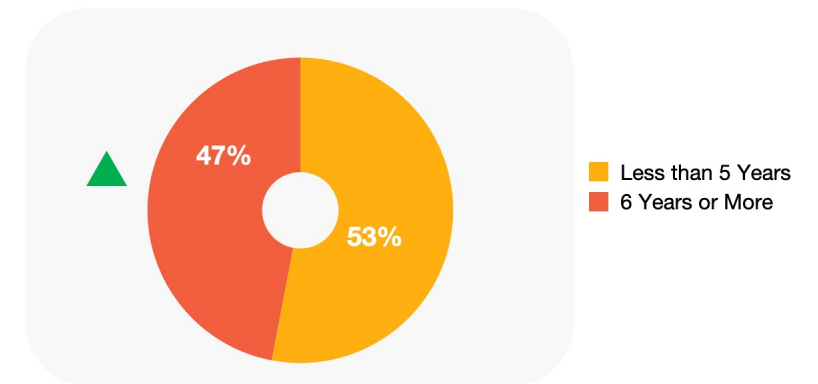
Length of RV Ownership n=3000



Motorhome Owners



Towable Owners

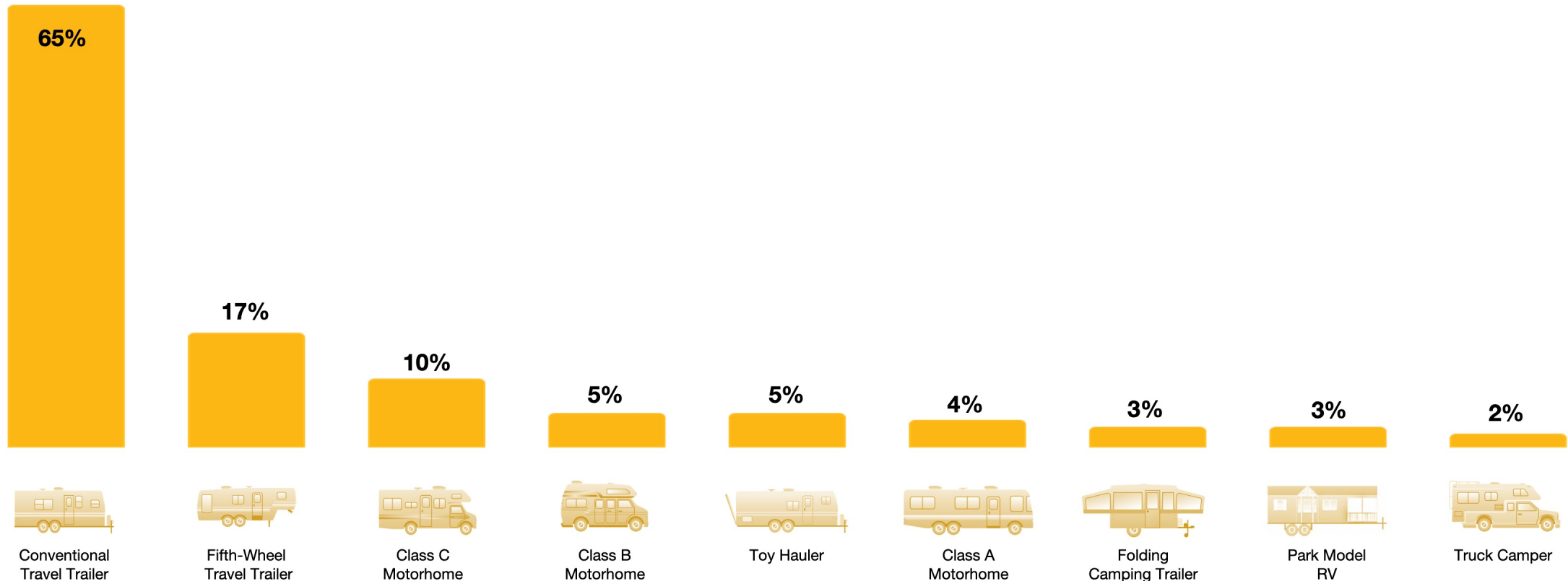


▲ Significantly higher / ▼ Significantly lower than all other segments

Type of RVs Owned

Surveyed RVer ownership mirrors the industry sales volume, with Conventional Travel Trailers comprising nearly two-thirds of all units. In total, Towable Units account for 83% of the RVs used most often (vs. 15% Motorhome).

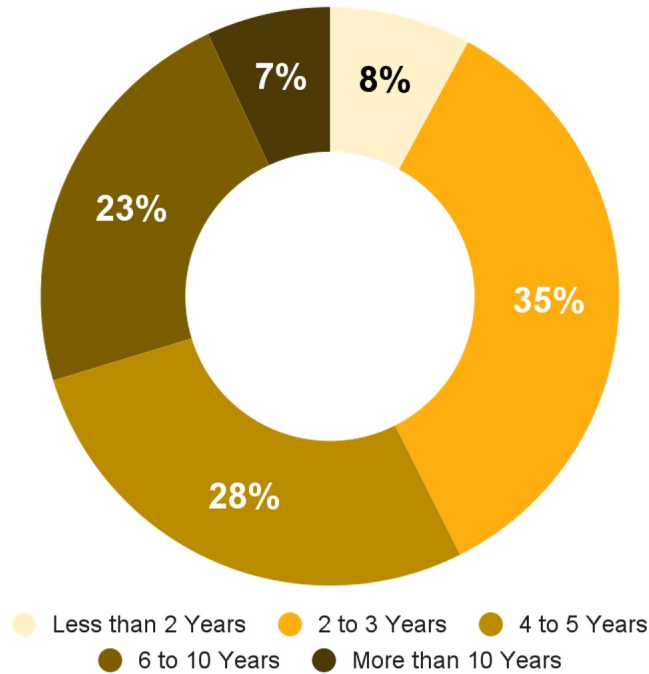
Which Type of RV Do you Currently Own n=3000



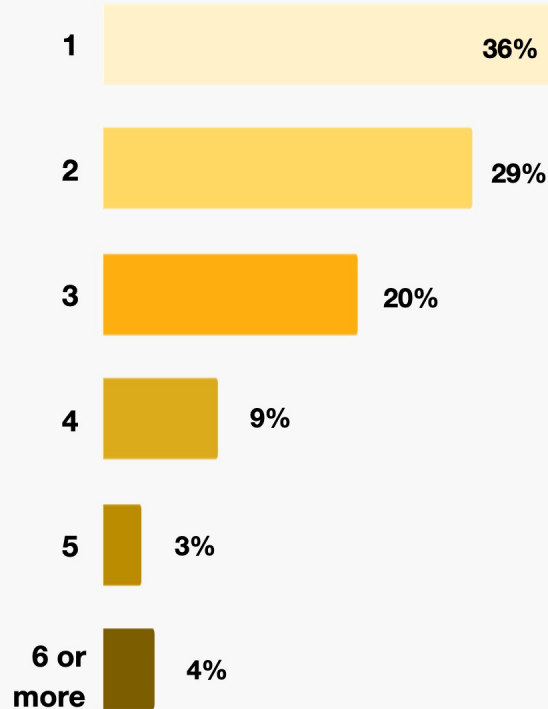
Current Ownership & Replacement RVs

64% of Current Owners report having at least one prior RV – higher among Towable Owners (65% vs. 58% Motorhome). Despite the high-level of investment, RVs are typically replaced every 2-5 years (62%) – particularly among Motorhome Owners (71% vs. 62% Towable Owners) – at a median price of \$27,000 (\$55,000 Motorhome vs. \$25,000 Towable).

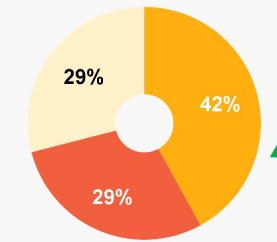
Length of Ownership Before Replacing n=3000



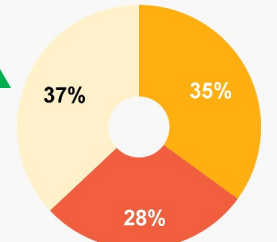
Number of RVs Owned n=3000



Motorhome Owners



Towable Owners



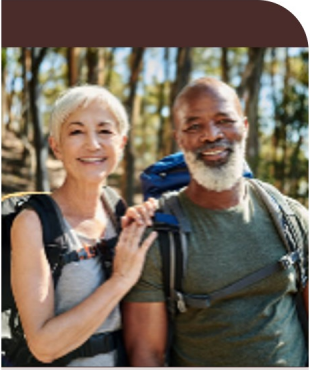
1 2 3 or more

MEDIAN PRICE
\$27,000

▲ Significantly higher / ▼ Significantly lower than all other segments

Current Owner Segments

Established in 2021, these seven unique groups of RVers help to understand variances across more than the unit purchased. Given the diversity of Current RV Owners, these segments help to shed light on similarities that exist between RVers across their motivations, needs, profiles, and attitudes for industry member strategic decision making and capitalization.



Casual Campers

Only using their RV for a few weekends a year in the warmer months, Casual Campers have thoroughly enjoyed the RV lifestyle and its provision of relaxation and an escape in nature for years. While a large and satisfied group in total, their low usage and interest in other travel options makes them least committed to the lifestyle.



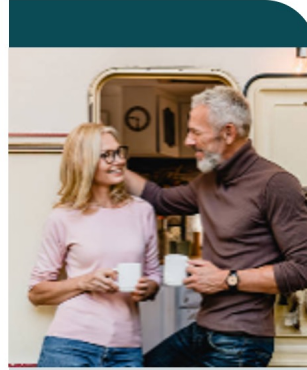
Family Campers

Most often growing up with an RV, Family Camper owners use camping to bond with family and spark the hobby for the next generation. Limited by their full-time employment, summer tends to provide brief periods of escape for these eager young owners.



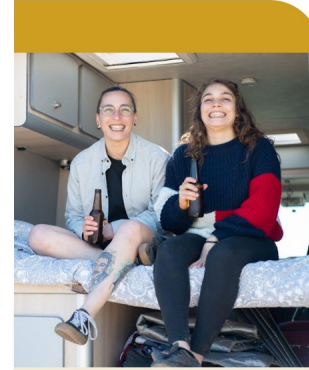
Escapists

Committed to the RV lifestyle, this group of owners enjoy the freedom of exploration camping provides. Traveling as a family for two months of the year, these owners thrive in water-based activities and anywhere with natural beauty to soak in.



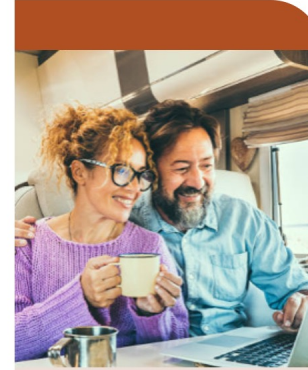
Avid RVers

Avid RVers are committed to RVing every chance they have, using their RV for approximately a season. To this group, RVs provide both an opportunity for a romantic getaway and a chance to see the best nature has to offer.



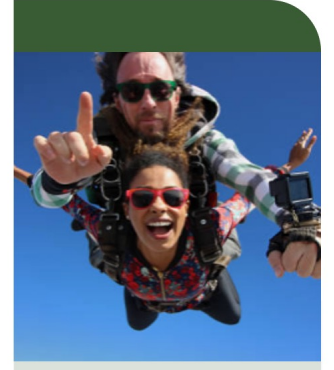
Long Haulers

Long Haulers have embraced the lifestyle to its fullest, spending significant parts of the year traveling in their RV. These nomad owners are set to see the world and appreciate the joys and freedom this lifestyle provides them.



Snowbirds

Snowbirds love RVs and the adventures that they bring. This group uses their RV as an escape for half of the year from both the weather and their household budget. They simply could not imagine their lives without an RV.



Adventure Seekers

Small but mighty, this group of RV owners knows the world is for exploring. As outdoor enthusiasts that thrive on numerous hobbies, you can find them anywhere there is wilderness to tame – hiking one minute and skiing the next.



CASUAL CAMPERS

Only using their RV for a few weekends a year in the warmer months, Casual Campers have thoroughly enjoyed the RV lifestyle and its provision of relaxation and an escape in nature for years. While a large and satisfied group in total, their low usage and interest in other travel options makes them least committed to the lifestyle.

CASUAL CAMPER PROFILE

- **Age Range:**
19% 18 to 54
81% 55+
- **Employment:**
27% Work Full Time
48% Retired ▲
- **Average Annual Income:**
53% over 75K
- 14% Live with children in the home

20%

Growth Audiences ▼

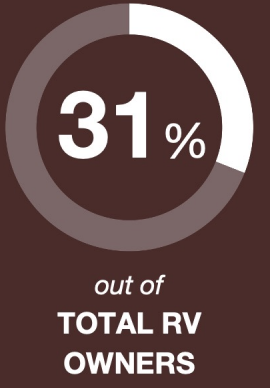
- 3% African American
- 1% Asian-American
- 11% Hispanic-American
- 4% LGBTQ+

44%

Have childhood RVing/camping experience

Hobbies



- ▲ 80% Camping
- 85% Cooking
- 51% Sightseeing



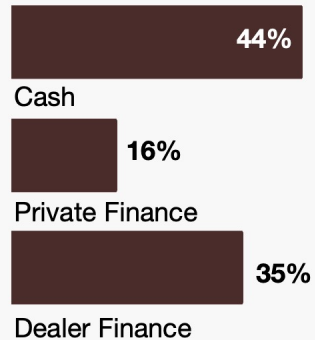
BUYING PROCESS

70% Bought New







How was it Purchased?

96% In person  3% Virtually 


Financing Option Used




Resources used to Gather RV Info During Buying Process

Digital/Print	Experiential
43% Dealership Websites 	54% Dealerships 
37% Manufacturer/Brand Websites 	36% ▼ Talking to Others 
28% RV Sales Listings 	35% RV/Outdoor Shows 

RV USAGE HABITS

 20 Days used (median)

 50% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)

70% ▲ Conventional Travel Trailer  11% Fifth-Wheel Travel Trailer  6% Class C Motorhome 

RV OPINIONS

 Positive

- 95% Convenience of a home away from home
- 84% My family loves RVing
- 66% Convenient for any age/physical condition
- 61% Environmentally friendly form of travel
- ▼ • 61% I will always have an RV as part of my life

 Negative




- 47% Gas prices: Impact on number of trips
- 43% Gas prices: Decreased travel distance
- 29% Cost of ownership more than expected
- 17% Storing/parking where I live is a problem
- ▼ • 9% Parks/campgrounds lack needed amenities

▲ Significantly higher / ▼ Significantly lower than all other segments

REASONS TO RV

- ▲ **22%** Spending time in nature/explore the outdoors
- 17%** Simply unwinding and relaxing
- 10%** Bringing my pet with me
- 7%** Saving money on travel costs
- 7%** Visiting a location with natural beauty

Top 3 Motivators for Purchasing an RV

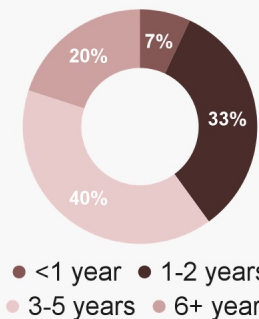
-  **45%** ▲ Past camping experiences
-  **45%** Wanting a unit with different options
-  **34%** Wanting a different model/brand

PURCHASE INTENTIONS




▼ **51%** % of cluster that plan to purchase another RV

61% Plan to purchase **new**

Next Purchase Timing



Type of RV Intended

-  **36%** Conventional Travel Trailer ▲
-  **20%** Class C Motorhome
-  **16%** Fifth Wheel Travel Trailer


Most Important Features When Considering Next RV

- ▲ **1** Solar Panels
- ▲ **2** Slides (Motorized)
- 3** Bathroom/Shower

76% Intend to purchase same brand

RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

-  **49%** Hiking
-  **45%** Fishing
-  **38%** Visiting Local Attractions





Stuff Brought with You

- 27%** Bicycle
- 16%** Kayak
- 50%** None of the above

Top 3 Campsites (out of last 10 camping locations)

- 3** State Park/Rec Area Campground
- 2** Private Campground
- 1** RV Resort





Commonly Travel With

-  **86%** Spouse
-  **34%** Pets
-  **18%** Children Under 18
-  **13%** Friends

91% Travel with RV to different locations

VACATION

Of Last 10 Vacations:

-  **50%** RV Trip ▲
-  **14%** Car Trip
-  **3%** Tent/Backpacking ▼
-  **3%** Resort ▼

- 94%** Enjoy discovering new things
- 94%** Enjoy going to new destinations
- 92%** Before travel I do my research
- ▼ **33%** Extend business trips to include leisure

▲ Significantly higher /
▼ Significantly lower than all other segments



FAMILY CAMPERS

Most often growing up with an RV, Family Camper owners use camping to bond with family and spark the hobby for the next generation. Limited by their full-time employment, summer tends to provide brief periods of escape for these eager young owners.

FAMILY CAMPERS PROFILE

• **Age Range:**
100% 18 to 54
0% 55+

35%

Growth Audiences

• **Employment:**
75% Work Full Time
2% Retired

• **Average Annual Income:**
61% over 75K ▲

• 75% Live with children in the home

• 7% African American

• 3% Asian-American

• 21% Hispanic-American

• 6% LGBTQ+

62%

Have childhood RVing/camping experience

Hobbies



62% Camping



47% Fishing



45% Cooking



30%

out of
TOTAL RV OWNERS

BUYING PROCESS

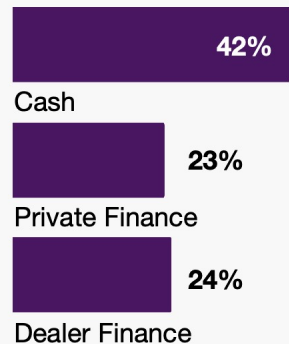
76% Bought New

How was it Purchased?

93% In person

6% Virtually

Financing Option Used



Resources used to Gather RV Info During Buying Process

Digital/Print

49% Dealership Websites

36% YouTube

35% RV Sales Listings

Experiential

47% Dealerships

44% Talking to Other Owners

18% Borrowing an RV

RV USAGE HABITS



20 Days used (median)



50% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)

61% Conventional Travel Trailer



13% Fifth-Wheel Travel Trailer



10% Class C Motorhome



RV OPINIONS



Positive

- 91% My family loves RVing
- 90% Convenience of a home away from home
- 84% Owning an RV simplifies travel
- 81% I fit in with people who use RVs
- 60% RVing is for everyone



Negative

- 53% Gas prices: Impact on number of trips
- 44% Gas prices: Decreased travel distance
- 42% Cost of ownership more than expected
- 36% Too many tasks/maintenance needs
- 33% Storing/parking where I live is a problem ▲

▲ Significantly higher / ▼ Significantly lower than all other segments

REASONS TO RV

- **15%** Spending time in nature/explore the outdoors
- **12%** Simply unwinding and relaxing
- **8%** Adding some adventure and excitement to my life
- **7%** Saving money on travel costs
- **6%** Visiting a location with natural beauty

Top 3 Motivators for Purchasing an RV

- **34%** Desire for a change in camping method
- **33%** Past camping experiences
- **31%** Wanting a unit with different options

PURCHASE INTENTIONS



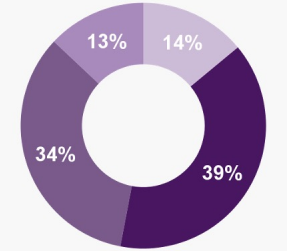
Type of RV Intended

- **25%** Conventional Travel Trailer
- **20%** Class A Motorhome
- **16%** Fifth Wheel Travel Trailer

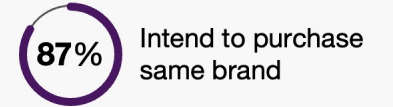
Most Important Features When Considering Next RV

- **1** WiFi
- **2** Bathroom/Shower
- **3** Solar Panels

Next Purchase Timing



- <1 Year
- 1-2 Years
- 3-5 Years
- 6+ Years



RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **51%** Fishing
- **45%** Hiking
- **34%** Visiting Local Attractions



Stuff Brought with You

- **40%** Bicycle
- **21%** Kayak
- **17%** ATV/4 Wheeler

Top 3 Campsites (out of last 10 camping locations)

- **2** State Park/Rec Area Campground
- **1** Private Campground
- **1** RV Resort

Commonly Travel With

- **82%** Spouse
- **70%** Children Under 18
- **27%** Pets
- **21%** Friends

VACATION

Of Last 10 Vacations:

- **32%** RV Trip
- **11%** Car Trip
- **8%** Tent/ Backpacking
- **5%** Explore large US city

- **96%** Enjoy going to new destinations
- **95%** Enjoy discovering new things
- **94%** Before travel I do my research
- **91%** Important to know how much trip will cost

▲ Significantly higher /
▼ Significantly lower than all other segments

ESCAPISTS

Committed to the RV lifestyle, this group of owners enjoy the freedom of exploration camping provides. Traveling as a family for two months of the year, these owners thrive in water-based activities and anywhere with natural beauty to soak in.



ESCAPIST PROFILE

- **Age Range:**
60% 18 to 54
40% 55+
- **Employment:**
55% Work Full Time
25% Retired
- **Average Annual Income:**
59% over 75K
- 43% Live with children in the home

34%

Growth Audiences

- 5% African American
- 1% Asian-American
- 24% Hispanic-American
- 5% LGBTQ+

58%

Have childhood RVing/camping experience

Hobbies

- 74% Camping
- 47% Fishing
- 44% Cooking



out of
TOTAL RV OWNERS

BUYING PROCESS

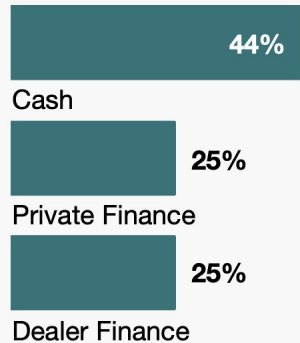
78% Bought New

How was it Purchased?

94% In person

6% Virtually

Financing Option Used



Resources used to Gather RV Info During Buying Process

Digital/Print

- 48% Dealership Websites
- 42% Manufacturer/Brand Websites
- 36% RV Sales Listings

Experiential

- 56% Dealerships
- 44% Talking to Other Owners
- 38% RV/Outdoor Shows

RV USAGE HABITS

50 Days used (median)

64% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)



RV OPINIONS

Positive

- 95% Convenience of a home away from home
- 92% My family loves RVing
- 85% Owning an RV simplifies travel
- 83% I fit in with people who use RVs
- 83% I will always have an RV as part of my life

Negative

- 42% Gas prices: Impact on number of trips
- 39% Gas prices: Decreased travel distance
- 34% Cost of ownership more than expected
- 31% Amount of time to service is excessive
- 29% Quality of RV products is lacking

▲ Significantly higher / ▼ Significantly lower than all other segments

REASONS TO RV

- **16%** Simply unwinding and relaxing
- **13%** Spending time in nature/ explore the outdoors
- **7%** Bringing my pet with me
- **7%** Adding some adventure and excitement to my life
- **6%** Saving money on travel costs

Top 3 Motivators for Purchasing an RV

- **42%** Wanting a unit with different options
- **39%** Past camping experiences
- **34%** Desire for change in camping method

PURCHASE INTENTIONS

79% % of cluster that plan to purchase another RV

77% Plan to purchase **new**

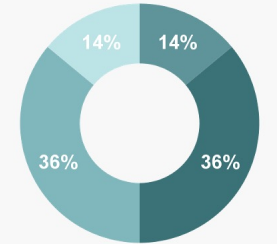
Type of RV Intended

- **26%** Conventional Travel Trailer
- **20%** Class C Motorhome
- **17%** Class A Motorhome

Most Important Features When Considering Next RV

- **1** Solar Panels
- **2** AC/Heat
- **3** Bathroom/Shower

Next Purchase Timing



- <1 Year
- 1-2 Years
- 3-5 Years
- 6+ Years

81% Intend to purchase same brand

RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **54%** Fishing
- **42%** Hiking
- **39%** Visiting Local Attractions

85% Travel with RV to different locations

Stuff Brought with You

- **35%** Bicycle
- **20%** Motorcycle
- **19%** Kayak

Top 3 Campsites (out of last 10 camping locations)

- **2** State Park/Rec Area Campground
- **2** Private Campground
- **1** National Park Campground

Commonly Travel With

- **86%** Spouse
- **41%** Children Under 18
- **33%** Pets
- **17%** Friends

VACATION

Of Last 10 Vacations:

- **46%** RV Trip
- **9%** Car Trip
- **7%** Cabin
- **7%** Beach

- **95%** Enjoy discovering new things
- **94%** Enjoy going to new destinations
- **91%** Before travel I do my research
- **89%** Always thinking about/planning my next vacation

▲ Significantly higher /
▼ Significantly lower than all other segments



AVID RVers

Avid RVers are committed to RVing every chance they have, using their RV for approximately a season. To this group, RVs provide both an opportunity for a romantic getaway and a chance to see the best nature has to offer.

AVID RVers PROFILE

- **Age Range:**
64% 18 to 54
36% 55+
- **Employment:**
55% Work Full Time
24% Retired
- **Average Annual Income:**
56% over 75K
- 47% Live with children in the home

35%

Growth Audiences

- 3% African American
- 2% Asian-American
- 23% Hispanic-American
- 7% LGBTQ+

56%

Have childhood RVing/camping experience

Hobbies

- 71% Camping
- 52% Cooking
- 36% Canoeing/ Kayaking

8%

out of
TOTAL RV OWNERS

BUYING PROCESS

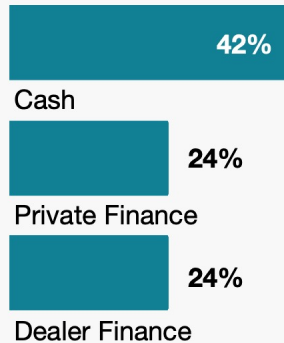
76% Bought New

How was it Purchased?

96% In person

4% Virtually

Financing Option Used



Resources used to Gather RV Info During Buying Process

Digital/Print

- 43% Dealership Websites
- 38% Manufacturer/ Brand Websites
- 35% RV Sales Listings

Experiential

- 56% Dealerships
- 52% Talking to Other Owners
- 32% RV/Outdoor Shows

RV USAGE HABITS

94 Days used (median)

65% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)



RV OPINIONS

Positive

- 90% Convenience of a home away from home
- 86% My family loves RVing
- 85% Owning an RV simplifies travel
- 82% Convenient for any age/physical condition
- 79% I will always have an RV as part of my life

Negative

- 40% Gas prices: Impact on number of trips
- 39% Gas prices: Decreased travel distance
- 31% Too many tasks/maintenance needs
- 30% Cost of ownership more than expected
- 24% Amount of time to service is excessive

▲ Significantly higher / ▼ Significantly lower than all other segments

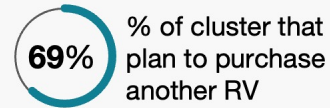
REASONS TO RV

- **13%** Simply unwinding and relaxing
- **13%** Spending time in nature/explore the outdoors
- **10%** Adding some adventure and excitement to my life
- **9%** Visiting a location with natural beauty
- **6%** Saving money on travel costs

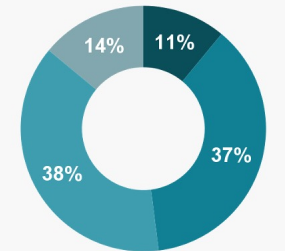
Top 3 Motivators for Purchasing an RV

- **44%** Wanting a unit with different options
- **33%** Past camping experiences
- **32%** Desire to use my RV differently

PURCHASE INTENTIONS



Next Purchase Timing



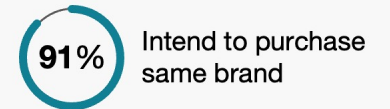
- <1 Year
- 1-2 Years
- 3-5 Years
- 6+ Years

Type of RV Intended

- **23%** Fifth Wheel Travel Trailer
- **22%** Conventional Travel Trailer
- **18%** Class C Motorhome

Most Important Features When Considering Next RV

- **1** Solar Panels
- **2** AC/Heat
- **3** WiFi



RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **46%** Visiting Local Attractions
- **44%** Fishing
- **43%** Hiking



Stuff Brought with You

- **33%** Bicycle
- **18%** Kayak
- **16%** ATV/4 Wheeler

Top 3 Campsites (out of last 10 camping locations)

- **2** Private Campground
- **2** State Park/Rec Area Campground
- **1** National Park Campground

Commonly Travel With

- **83%** Spouse
- **39%** Children Under 18
- **28%** Pets
- **21%** Friends

VACATION

Of Last 10 Vacations:

- **44%** RV Trip
- **9%** Car Trip
- **9%** Beach
- **7%** Cabin

- **96%** Enjoy discovering new things
- **96%** Enjoy going to new destinations
- **91%** When I find a great spot I go back again and again
- **91%** Before travel I do my research

▲ Significantly higher /
▼ Significantly lower than all other segments



LONG HAULERS

Long Haulers have embraced the lifestyle to its fullest, spending significant parts of the year traveling in their RV. These nomad owners are set to see the world and appreciate the joys and freedom this lifestyle provides them.

LONG HAULERS PROFILE

- **Age Range:**
65% 18 to 54
35% 55+

35%

Growth Audiences

- **Employment:**
31% Work Full Time
23% Retired
- **Average Annual Income:**
17% over 75K ▼
- 34% Live with children in the home

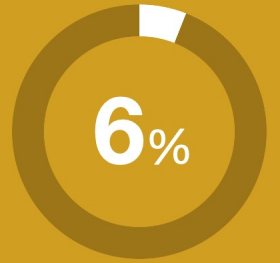
- 6% African American
- 3% Asian-American
- 16% Hispanic-American
- 11% LGBTQ+

54%

Have childhood RVing/camping experience

Hobbies

- ▲ 66% Cooking
- ▲ 60% Fishing
- 52% Swimming

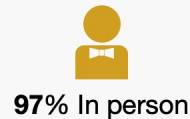


out of
TOTAL RV OWNERS

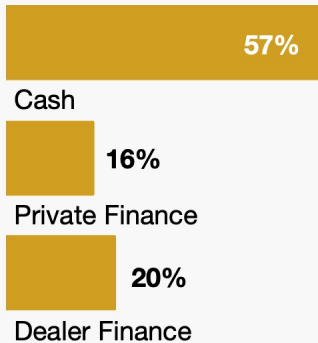
BUYING PROCESS



How was it Purchased?

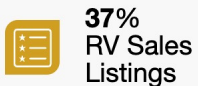


Financing Option Used

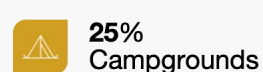


Resources used to Gather RV Info During Buying Process

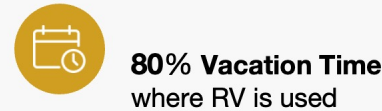
Digital/Print



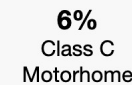
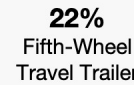
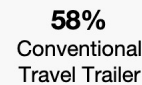
Experiential



RV USAGE HABITS



Types of RVs Most Often Used (top 3 owned)



RV OPINIONS

Positive

- 94% Convenience of a home away from home
- 85% Owning an RV simplifies travel
- 82% I will always have an RV as part of my life
- 74% My family loves RVing
- 74% I fit in with people who use RVs

Negative

- 53% Gas prices: Impact on number of trips
- 52% Gas prices: Decreased travel distance
- 35% Cost of ownership more than expected
- 34% Amount of time to service is excessive
- 31% Accommodations are difficult to find

▲ Significantly higher / ▼ Significantly lower than all other segments

REASONS TO RV

- **12%** Spending time in nature/explore the outdoors
- **11%** Bringing my pet with me
- **10%** Adding some adventure and excitement to my life
- **8%** Getting away from pressures
- **6%** Simply unwinding and relaxing

Top 3 Motivators for Purchasing an RV

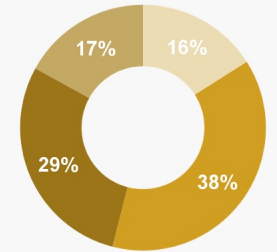
- **66%** Full time living ▲
- **32%** Wanting a unit with different options
- **26%** Change in family dynamic

PURCHASE INTENTIONS

66% % of cluster that plan to purchase another RV

▼ **47%** Plan to purchase new

Next Purchase Timing



● <1 Year ● 1-2 Years
● 3-5 Years ● 6+ Years

Type of RV Intended

- **28%** Conventional Travel Trailer
- **17%** Class A Motorhome
- **15%** Class C Motorhome

Most Important Features When Considering Next RV

- **1** Solar Panels
- **2** AC/Heat
- **3** WiFi

76% Intend to purchase same brand

RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **39%** Fishing
- **35%** Hiking
- **30%** Visiting Local Attractions

Stuff Brought with You

- **24%** Bicycle
- **15%** Secondary vehicle
- **44%** None of the above

Top 3 Campsites

(out of last 10 camping locations)

- ▲ ● **2** Private Land/Campsite
- **1** Private Campground
- **1** State Park/Rec Campground

Commonly Travel With

- **66%** Spouse ▼
- **35%** Pets
- **26%** Children Under 18
- **9%** Friends

VACATION

Of Last 10 Vacations:

- **38%** RV Trip
- **13%** Car Trip
- **13%** Tent/ Backpacking ▲
- **8%** Beach

- **96%** Enjoy discovering new things
- **94%** Enjoy going to new destinations
- **93%** When I find a great spot I go back again and again
- **92%** Important to know how much trip will cost

▼ **61%** Travel with RV to different locations

▲ Significantly higher /
▼ Significantly lower than all other segments



SNOWBIRDS

Snowbirds love RVs and the adventures that they bring. This group uses their RV as an escape for half of the year from both the weather and their household budget. They simply could not imagine their lives without an RV.

SNOWBIRDS PROFILE

- **Age Range:**
73% 18 to 54
27% 55+

31%

Growth Audiences

- **Employment:**
52% Work Full Time
20% Retired
- **Average Annual Income:**
57% over 75K
- **58%** Live with children in the home

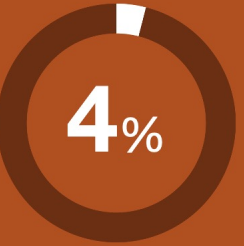
- 8% African American
- 1% Asian-American
- 17% Hispanic-American
- 4% LGBTQ+

59%

Have childhood RVing/camping experience

Hobbies

- 53% Camping
- 47% Cooking
- 41% Running/Walking

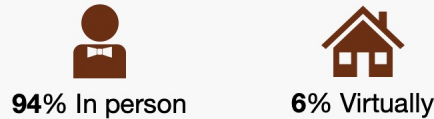


out of
TOTAL RV OWNERS

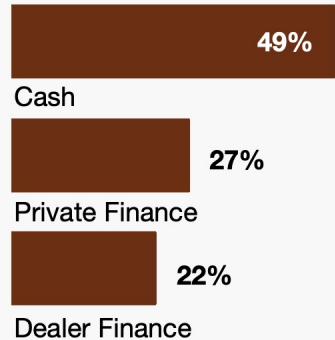
BUYING PROCESS



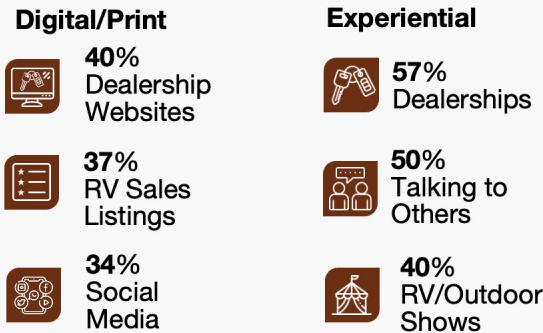
How was it Purchased?



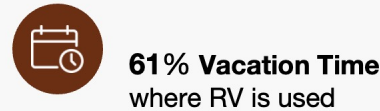
Financing Option Used



Resources used to Gather RV Info During Buying Process



RV USAGE HABITS



Types of RVs Most Often Used (top 3 owned)



RV OPINIONS

Positive

- 95% Convenience of a home away from home
- 84% My family loves RVing
- 81% I will always have an RV as part of my life
- 80% I fit in with people who use RVs
- 78% Owning an RV simplifies travel

Negative

- 42% Gas prices: Impact on number of trips
- 42% Gas prices: Decreased travel distance
- 39% Amount of time to service is excessive
- 36% Quality of RV products is lacking
- 34% Cost of ownership more than expected

▲ Significantly higher / ▼ Significantly lower than all other segments

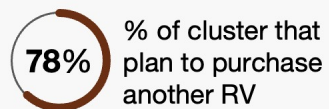
REASONS TO RV

- **12%** Simply unwinding and relaxing
- **12%** Spending time in nature/explore the outdoors
- **10%** Saving money on travel costs
- ▲ **8%** To have a vehicle to travel to job sites
- **6%** Strengthening a relationship

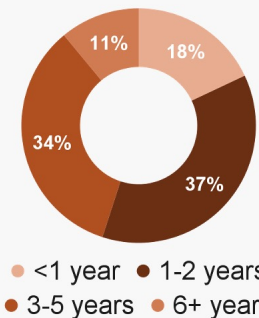
Top 3 Motivators for Purchasing an RV

- **45%** Wanting a unit with different options
- **32%** Desire to use RV differently
- **32%** Past camping experiences

PURCHASE INTENTIONS



Next Purchase Timing

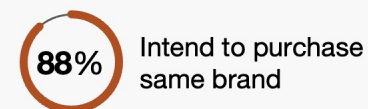


Type of RV Intended

- **30%** Conventional Travel Trailer
- **15%** Fifth-Wheel Travel Trailer
- **15%** Class A Motorhome

Most Important Features When Considering Next RV

- **1** Solar Panels
- **2** AC/Heat
- **3** WiFi



RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **47%** Fishing
- **41%** Visiting Local Attractions
- **35%** Hiking

Stuff Brought with You

- **41%** Bicycle
- **23%** Motorcycle
- **18%** ATV/4 Wheeler

Top 3 Campsites (out of last 10 camping locations)

- **2** RV Resort
- **1** Local Park Campground
- **1** Private Campground

Commonly Travel With

- **81%** Spouse
- **40%** Children Under 18
- **21%** Pets
- **17%** Friends

Of Last 10 Vacations:

- **34%** RV Trip
- **9%** Car Trip
- **8%** Cabin
- **8%** Beach

- **95%** When I find a great spot I go back again and again
- **93%** Enjoy discovering new things
- **92%** Before travel I do my research
- **92%** Enjoy going to new destinations

81% Travel with RV to different locations

▲ Significantly higher /
▼ Significantly lower than all other segments



ADVENTURE SEEKERS

Small but mighty, this group of RV owners knows the world is for exploring. As outdoor enthusiasts that thrive on numerous hobbies, you can find them anywhere there is wilderness to tame – hiking one minute and skiing the next.

ADVENTURE SEEKER PROFILE

- **Age Range:**
72% 18 to 54
28% 55+

40% Growth Audiences

- **Employment:**
52% Work Full Time
26% Retired
- **Average Annual Income:**
51% over 75K
- **50%** Live with children in the home

- **11%** African American
- **0%** Asian-American
- **21%** Hispanic-American
- **5%** LGBTQ+

58% Have childhood RVing/camping experience

Hobbies

- 70%** Camping
- 64%** Running/Walking
- 58%** Swimming

1%
out of
TOTAL RV OWNERS

BUYING PROCESS

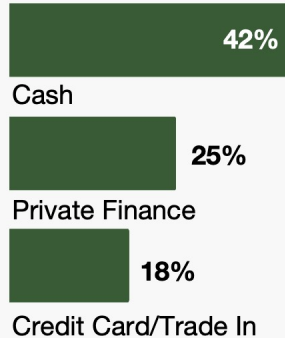
92% Bought New

How was it Purchased?

100% In person

0% Virtually

Financing Option Used



Resources used to Gather RV Info During Buying Process

Digital/Print

- 54%** Dealership Websites
- 53%** Manufacturer/Brand Websites
- 47%** YouTube

Experiential

- 70%** Dealerships
- 47%** Talking to Other Owners
- 31%** RV/Outdoor Shows

RV USAGE HABITS

150 Days used (median)

75% Vacation Time where RV is used

Types of RVs Most Often Used (top 3 owned)



RV OPINIONS

Positive

- **97%** Owning an RV simplifies travel
- **95%** Convenience of a home away from home
- **93%** My family loves RVing
- **82%** I will always have an RV as part of my life
- **80%** I fit in with people who use RVs/ Convenient for any age/ physical condition

Negative

- **46%** The quality of RV products is lacking
- **42%** Gas prices: Decreased travel distance
- **38%** Gas prices: Impact on number of trips
- **38%** Gas prices: Decreased travel distance
- **31%** Parks/campgrounds lack needed amenities

▲ Significantly higher / ▼ Significantly lower than all other segments

REASONS TO RV

- **79%** Spending time in nature/explore the outdoors
- **64%** Saving money on travel costs
- **60%** Having a new way to travel long distances
- **59%** Controlling my own itinerary
- **59%** Visiting a location with natural beauty

Top 3 Motivators for Purchasing an RV

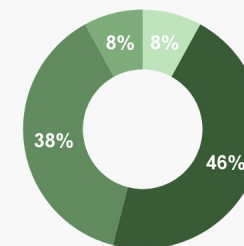
- **56%** Wanting a unit with different options
- **50%** Desire to change RV type
- **46%** Desire for change in camping method

PURCHASE INTENTIONS

78% % of cluster that plan to purchase another RV

90% Plan to purchase **new**

Next Purchase Timing



- <1 Year
- 1-2 Years
- 3-5 Years
- 6+ Years

Type of RV Intended

- **22%** Park Model RV
- **20%** Class C Motorhome
- **17%** Fifth Wheel Travel Trailer

Most Important Features When Considering Next RV

- **1** AC/Heat
- **2** Bathroom/Shower
- **3** WiFi

60% Intend to purchase same brand

RV TRAVEL HABITS AND LIFESTYLE

Hobbies While RVing

- **75%** Hiking
- **54%** Visiting Local Attractions
- **44%** Water recreational activities

Stuff Brought with You

- **45%** Bicycle
- **31%** Secondary vehicle
- **29%** ATV/4 Wheeler/Kayak

81% Travel with RV to different locations

Top 3 Campsites

(out of last 10 camping locations)

- **2** National Park Campground
- **2** Private Campground
- **2** Private Land/Campsite

Commonly Travel With

- **89%** Spouse
- **34%** Children Under 18
- **24%** Pets
- **22%** Friends

VACATION

Of Last 10 Vacations:

- **46%** RV Trip
- **9%** Beach Trip
- **8%** Exploring a large US city
- **3%** Tent/Backpacking

- **100%** Before travel I do my research
- **100%** Always thinking about/planning my next vacation
- **95%** When I find a great spot I go back again and again
- **95%** People often ask my advice when they are considering where to vacation

▲ Significantly higher /
▼ Significantly lower than all other segments

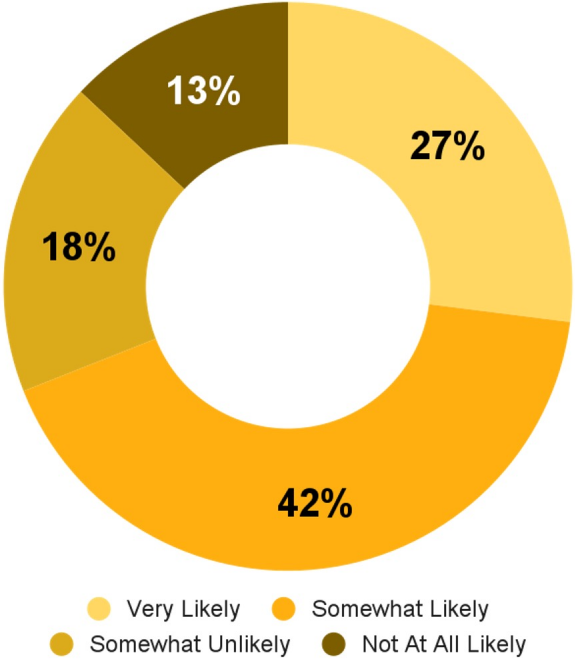
RV INTENDERS



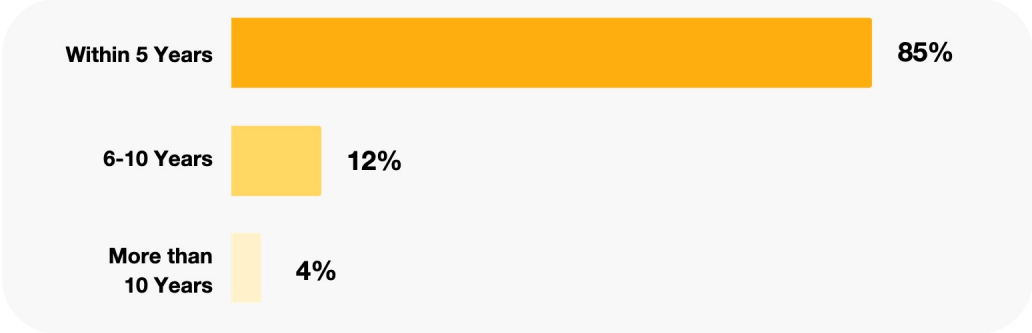
Future RV purchase intention among Current Owners remains strong (69% Somewhat/Very Likely vs. 68% 2021).

Not only is purchase intention strong in total, but 85% of those with plans to repurchase intend to do so within the next 5 years. This timeline largely aligns with their historic ownership patterns, with 70% of Repeat Buyers only owning their former unit for five years or less.

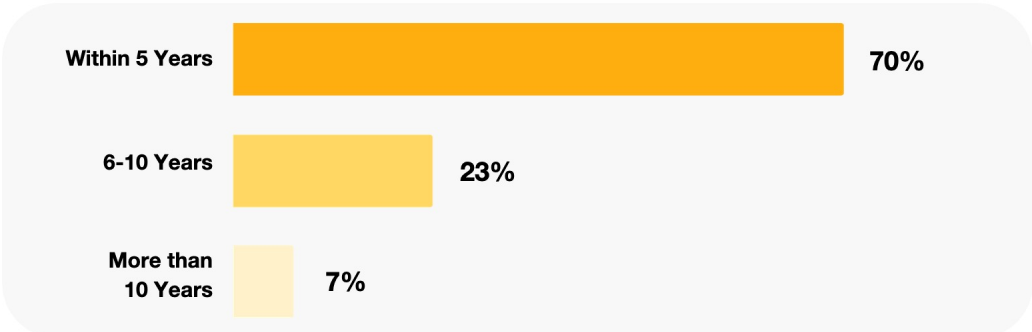
Likelihood to Purchase Another RV



Time Another RV Would Be Acquired

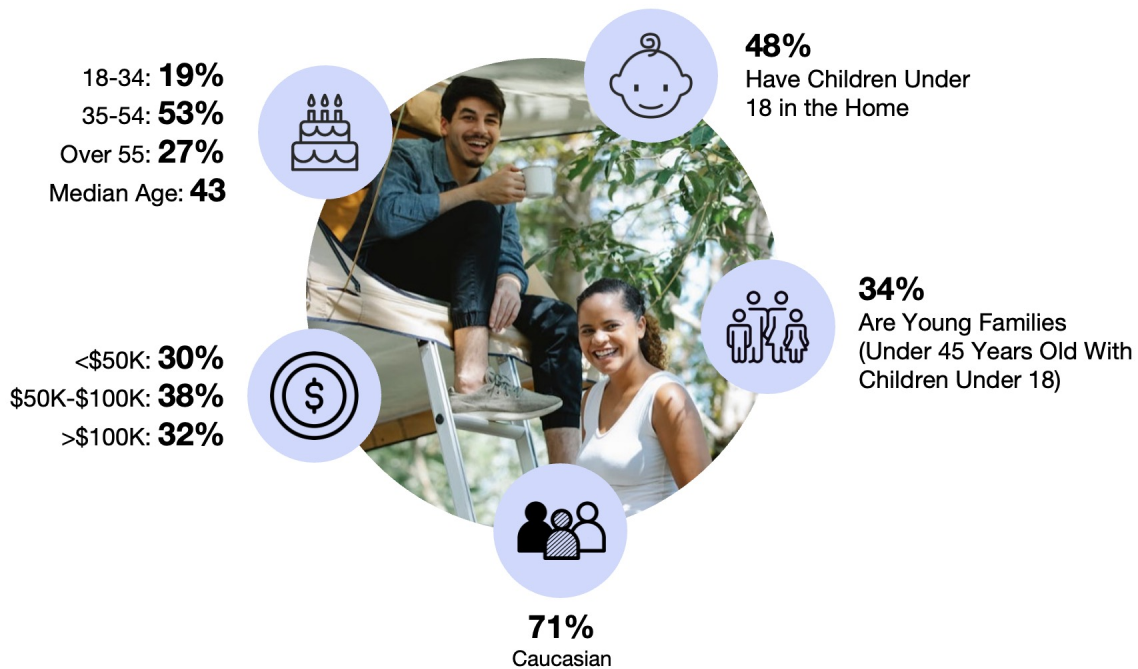


Length of Ownership Before Replacing

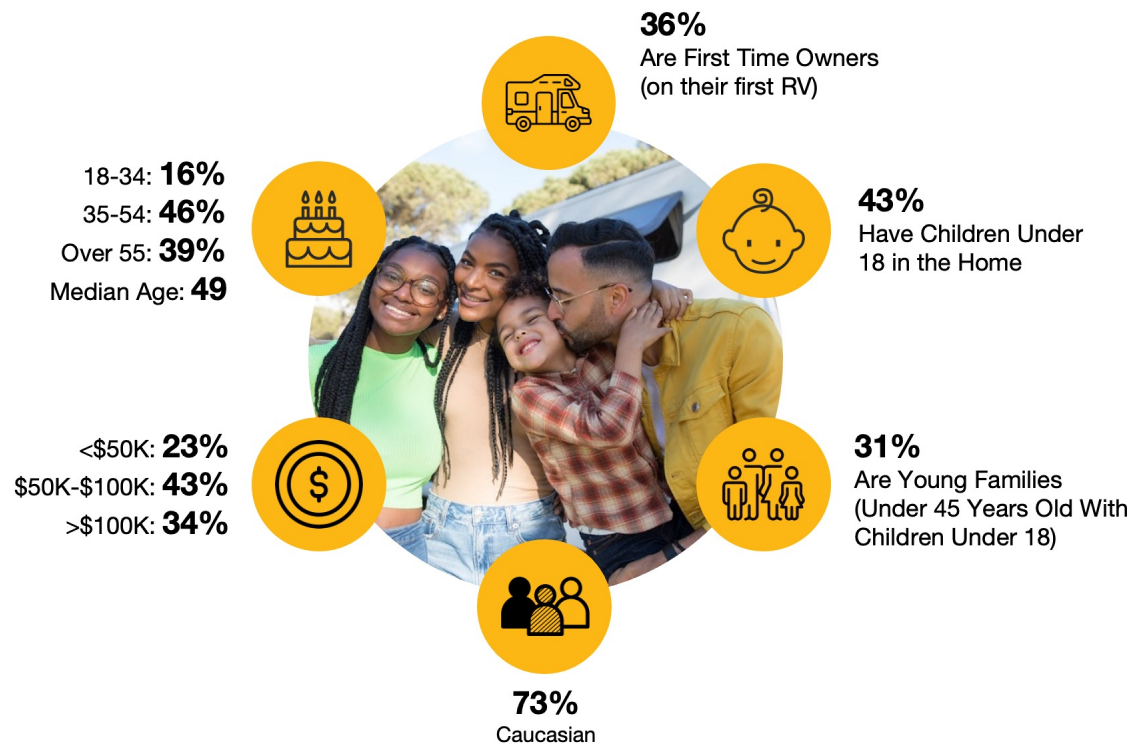


Intenders are set to further alter the face of RVing, with an ever-growing number of young, diverse families looking to join the lifestyle.

2025 RV Intender Profile



2025 RV Owner Profile



Shifting demographics are even more evident among Intenders that fall within at least one growth audience*

Compared to their General Market RV-Intender counterparts, Growth Audience Intenders skew younger, are more likely to reside in an urban area, and live within a multi-generational home.

Current Owners

18-34: **16%**
35-54: **46%**
Over 55: **39%**



Suburban: **34%**
Urban: **25%**
Countryside/rural: **29%**
Small city/large town: **13%**



Spouse: **56%**
Children Under 18: **43%**
Children Over 18: **11%**
Parents: **4%**
Grandparents: **0%**



General Intenders

18-34: **19%**
35-54: **53%**
Over 55: **27%**



Suburban: **36%**
Urban: **34%**
Countryside/rural: **17%**
Small city/large town: **13%**



Spouse: **41%**
Children Under 18: **48%**
Children Over 18: **13%**
Parents: **8%**
Grandparents: **1%**



Growth Audience Intenders

18-34: **22%**
35-54: **63%**
Over 55: **15%**



Suburban: **41%**
Urban: **39%**
Countryside/rural: **9%**
Small city/large town: **12%**



Spouse: **32%**
Children Under 18: **51%**
Children Over 18: **11%**
Parents: **12%**
Grandparents: **1%**



*Growth Audiences are defined as someone that identifies as African-American, Hispanic, Asian-American, and/or LGBTQIA+.

Methodology

1 Approach

To Current and Former RV Owners, Ipsos conduct a 25-minute online, device-agnostic survey with. Questions centered on RV usage, habits, preferences, and demographic characteristics for rich analysis. Current RV Owners were also assigned to their appropriate RV Owner segment for further analysis.

Additionally, a 20-minute, mobile optimized survey was fielded to RV Intenders to understand their motivations, intended usage, and personality/profiles for industry capitalization. The Intender sample was divided between General Market Intenders, as well as boosted sample to capture Growth Audience Intenders in the African-American, Hispanic-American, Asian-American, and LGBTQ+ communities. Upon completion of fielding, the Intender data was ran through a segmentation statistical analysis to determine unique, meaningful groups for further dissection and targeting. Final Study results were weighted to align collected RV type ownership with actual sales dispersion.

2 Sample

	General Market Results	Boosted Results	Total
Current Owners	3,000	-	3,000
Former Owners	1,000	-	1,000
Intenders	1,000	-	1,000
Growth Audience Intenders	<i>(Natural Fallout)</i>	500	500

3 Methodology

Study Qualifiers:

- Current RV Owners must own a qualifying RV product (Motorhome or Towable) and be a primary or joint purchase decision maker of the unit.
- RV Former Owners must have disposed of a qualifying RV within the past five years and have been a primary or joint decision maker in the purchase of the unit.
- RV Intenders must intend to purchase an RV within the next five years and be the primary or joint decision maker.
- All respondents must be at least 18 years old and not have household employment within any sensitive industries (i.e., RV manufacturing/dealership, market research, etc.)