**RV & Campers Market 2022**

**Recording-Breaking Results**

The millions of Americans who crave an escape from the pandemic continue unabated and it will drive an almost 40% YOY increase of total 2021 RV shipments to approximately 602,200 units. 2022 shipments are expected to increase to 627,700 units.

Fueling the demand for 2022 is the 72 million Americans who said they expect to take an RV trip with an owned, rented or borrowed vehicle or an 18.0% increase from the equivalent 2020 survey of 61 million Americans.

According to the RV Industry Association, 2021 RV shipments set a new record almost every month. August’s increase of 33.8% was not only the best August ever, but also the second-best month ever; March 2021 is still the best month ever.

**Total RV Shipment YOY Increases by Major Categories,**

**September, October and November 2021**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Category | September | October | November | Year to Date\* |
| All travel trailers | +36.6% | +23.7% | +18.9% | +46.1% |
| All towables (includes travel trailers) | +33.4% | +23.3% | +14.0% | +43.6% |
| All motorhomes | +19.6% | +14.4% | +30.4% | +43.0% |
| Park Model RVs | -3.2% | +6.3% | +7.4% | +6.9% |
| Total RV shipments | +32.3% | +22.5% | +15.6% | +43.5% |

RV Industry Association, October, November and December 2021 \*through November 2021

**Inventory Issues Impact Retail Sales**

During the first half of 2021, retail RV registrations increased 38.0% to a total of 325,032; however, June’s decrease of 12% was the first decrease of the previous 12 months as manufacturers began to experience supply-chain issues similar to the automotive industry.

October 2021 was the fifth consecutive month of decreasing retail registrations at -23.8%, however, those declining retail sales for June through October 2021 are being compared to the equivalent 2020 period when retail sales were often at all-time highs.

Although retail registrations declined during the second half of 2021, the first half of the year is expected to propel total registrations to a new record. Total registrations were 512,304 through October 2021 compared to the 2020 record year of 515,819 registrations.

**RV Retail Unit Sales by Categories, the First 6 Months of 2021**

**Compared to the First 6 Months of 2020, October 2021**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Category | 2021 | 2020 | Change | Category | 2021 | 2020 | Change |
| Camping trailer | 5,529 | 4,379 | +26.2% | Park model | 1,422 | 1.054 | +34.9% |
| Class A motorhome | 8,632 | 7,344 | +17.5% | Travel trailer | 227,451 | 167,129 | +36.0% |
| Class B motorhome | 5,597 | 3,247 | +72.3% | Truck camper | 1,049 | 691 | +51.8% |
| Class C motorhome | 14,911 | 12,319 | +21.0% | Total | 325,032 | 235,506 | +38.0% |
| Fifth-wheel | 60,711 | 39,343 | +54.3% |  |  |  |  |

*RV Business*, September/October 2021 issue

**Travel and RV Travel Trends for 2022**

Despite the surge of the COVID-19 Omicron variant, Americans are still very keen to travel. According to a November 2021 survey from the RVShare 2022 Travel Trend Report, almost 90% of adults 18+ said they expected to travel during 2022.

Millennials and Gen Xers continued to lead the growing popularity of an RV trip, as 70% and 54%, respectively, said they expect to take an RV road trip during the next year. 45% of survey respondents said an RV was one of their top three preferred travel accommodations.

Having a rented RV delivered to their destination would be a compelling reason and have a positive influence for 77% of survey respondents to plan an RV trip. An option strongly favored by people living in urban areas.

**Adults’ Survey Responses to the Appeal of RVs for**

**Various Types of Trips, November 2021**

|  |  |
| --- | --- |
| Road Trip | Percent |
| Road trip | 59% |
| Trip to a national park | 56% |
| Family camping trip | 45% |
| Trip with friends | 42% |
| RV delivery to a festival | 24% |

RVShare, January 2022

**Industry Leaders Remain Positive**

In the 2022 *RVBusines*s/Wells Fargo Survey of selected industry leaders, most remain upbeat about the industry. Although their supply chains and limited inventory are challenges, 51% described the industry as “solid” despite these obstacles.

While 48% said their RV business increased by more than 20% during 2021, 9% expected the same 20%+ increase for 2022. The largest percentage for 2022 was “growth of 0% to 10%” at 35%, which was the answer of only 16% when asked for the 2021 survey.

Of the industry leaders participating in the survey, 53% said their inventory levels remain low but were improving. The significant increase in the prices of RVs is concerning to 58% of the respondents who think those prices will substantially affect long-term sales.

**The Issues RV Industry Leaders Think Will Have Major**

**Impacts on the 2022 RV Market, December 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Issue | Percent | Issue | Percent |
| Inflation pressure | 70% | Overall customer experience | 23% |
| Price increases | 52% | Campsite availability | 21% |
| Continuing supply chain problems | 50% | Washington, DC politics | 21% |
| General economic uncertainty | 42% | Federal fiscal policies | 15% |

*RVBusiness*, Jan/Feb 2022 issue

**RV Ownership Insights**

Analysis of data from five representative 2021 consumer/market surveys conducted by The Media Audit finds an average of 7.3% of adults 18+ live in a household that owns an RV/motorhome. Adults 25–44, predominately Millennials, have the large average at 34.5%.

Of particular note is the Monterey-Salinas, CA market where 43.1% of all adults are Latinx Americans. Of all adults in the market who live in a household that owns an RV/motorhome, 9.7% were Latinx American households and 80.7% of them were 49 or younger.

Unsurprisingly, those adults with incomes of $75K–$150K had the largest average of RV/motorhome ownership at 33.3%; however, the second-largest average were those with an income of $35K or less at 27.0%.

**Adults 18+ Who Live in a Household That Owns an RV/Motorhome**

**and Their Outdoor Activities\*, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Outdoor Activities | Ft. Myers-Naples, FL | Columbus | Salt Lake City | Monterey-Salinas, CA | Portland, OR |
| Biking/Cycling | * 19.4% | * 13.5% | * 9.7% | * 29.5% | 15.4% |
| Boating/Sailing | * 16.2% | * 6.3% | * 1.3% | * 14.1% | * 8.2% |
| Camping | * 24.6% | * 24.7% | * 13.0% | * 9.2% | * 27.7% |
| Hiking | * 6.5% | * 15.0% | * 14.1% | * 23.6% | * 17.0% |
| Jogging, running or walking | 22.8% | * 27.0% | * 38.4% | * 22.2% | * 45.1% |
| Swimming | 24.2% | * 18.7% | * 3.9% | * 15.3% | * 23.2% |
| Water skiing/tubing | * 17.5% | * 13.8% | * † | * 13.1% | * 6.1% |

Based on The Media Audit’s 2021 surveys \*during the past four weeks †insufficient data

**RV Owners’ Media Consumption**

Additional analysis of the same five representative 2021 consumer/market surveys from The Media Audit revealed newspaper over-indexed the most at an average of 135 for the “media day” of adults 18+ who live in a household that owns an RV/motorhome.

Radio was second with an average index of 128 and email third with an average index of 121, followed by billboards 113, the Internet 103 and TV 98.

**Adults 18+ Who Live in a Household That Owns an RV/Motorhome**

**and Their Social Media Use\*, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Social Media | Ft. Myers-Naples, FL | Columbus | Salt Lake City | Monterey-Salinas, CA | Portland, OR |
| YouTube | * 66.4% | * 71.0% | * 77.4% | * 77.9% | 84.0% |
| Facebook | * 68.2% | * 77.9% | * 77.9% | * 68.3% | * 62.4% |
| LinkedIn | * 27.0% | * 52.2% | * 34.0% | * 47.3% | * 28.6% |
| Twitter | * 29.5% | * 45.6% | * 28.5% | * 50.5% | * 38.6% |
| Pinterest | * 35.4% | * 53.3% | * 40.4% | * 63.2% | * 42.8% |
| Instagram | 38.6% | * 61.6% | * 52.4% | * 50.1% | * 44.9% |
| Snapchat | 23.7% | * 52.3% | * 34.5% | * 46.6% | * 26.4% |
| TikTok | * 28.2% | * 48.7% | * 35.7% | * 43.4% | * 35.1% |

Based on The Media Audit’s 2021 surveys \*logged on during the past month

**More Valuable Insights**

Recent issues of *RVBusiness* reported ownership of selected RVs by income.

**RV Ownership of Selected RVs, June, August and September 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Income Range | Travel Trailer | Class B Motorhome | Class C Motorhome |
| $0–$14,999 | 0.62% | 0.19% | 0.28% |
| $15,000–$19,999 | 0.93% | 0.26% | 0.42% |
| $20,000–$29,999 | 3.44% | 1.60% | 2.31% |
| $30,000–$39,999 | 4.41% | 1.68% | 2.63% |
| $40,000–$49,999 | 6.87% | 3.19% | 4.51% |
| $50,000–$74,999 | 17.1% | 8.46% | 12.17% |
| $75,000–$99,999 | 16.8% | 10.68% | 13.44% |
| $100,000–$124,999 | 13.88% | 9.94% | 12.97% |
| $125,000–$149,999 | 11.52% | 12.77% | 12.75% |
| $150,000–$174,999 | 6.56% | 7.74% | 8.16% |
| $175,000–$199,999 | 5.74% | 9.47% | 8.34% |
| $200,000–$249,999 | 5.35% | 10.87% | 8.57% |
| $250,000+ | 6.78% | 23.15% | 13.4% |

*RVBusines*s, September/October, November/December 2021 and January/February 2022 issues

Travel trailer: approximately 13 to 40 feet, sleeps as many as 10 and towed via a hitch to another vehicle

Class B motorhome: Often known as camper vans, approximately 21 to 24 feet, usually sleeps two

Class C motorhome: approximately 24 to 32 feet, sleeps as many as 11 depending on the floor plan

*Sources:* RV Industry Association Website, 1/22; *RV Business* Website, 1/22; RVShare Website, 1/22; The Media Audit Website, 1/22; Thor Industries Website, 1/22.

*Updated*: January 2022

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**Local Market and Station Information**