

**RV INTENDERS**

**ANALYSIS**



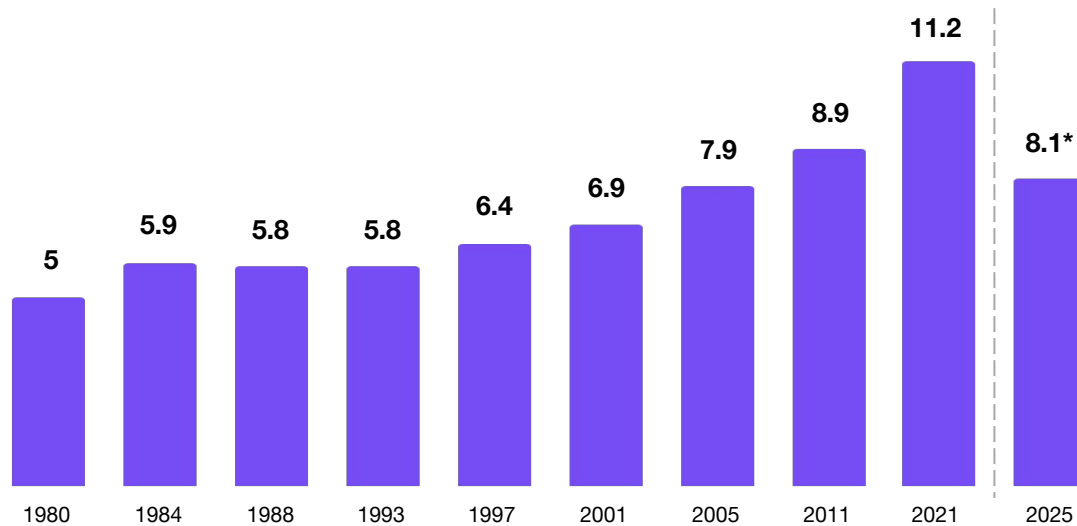
**GO RVING™**



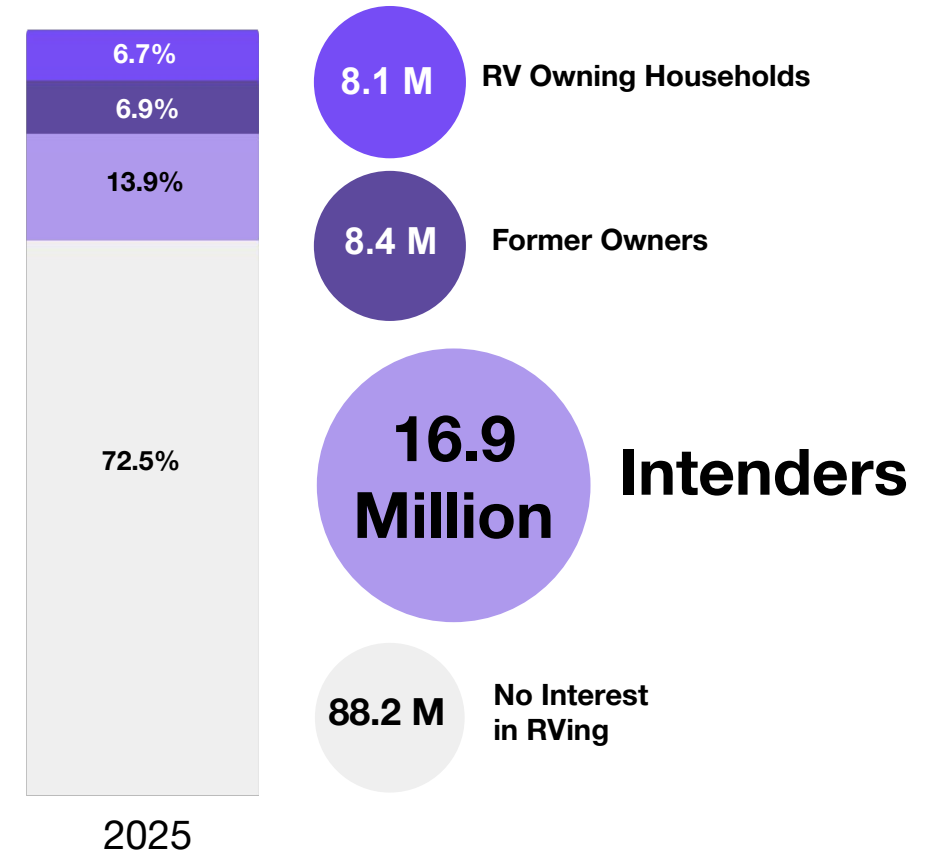
# 8.1 Million American Households Currently Own An RV.

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. What follows is a look at the profile of RV indenders.

**Number of US Households that Own RVs**  
(in millions)



**121.6 Million US Vehicle-Owning Households**  
(in millions)

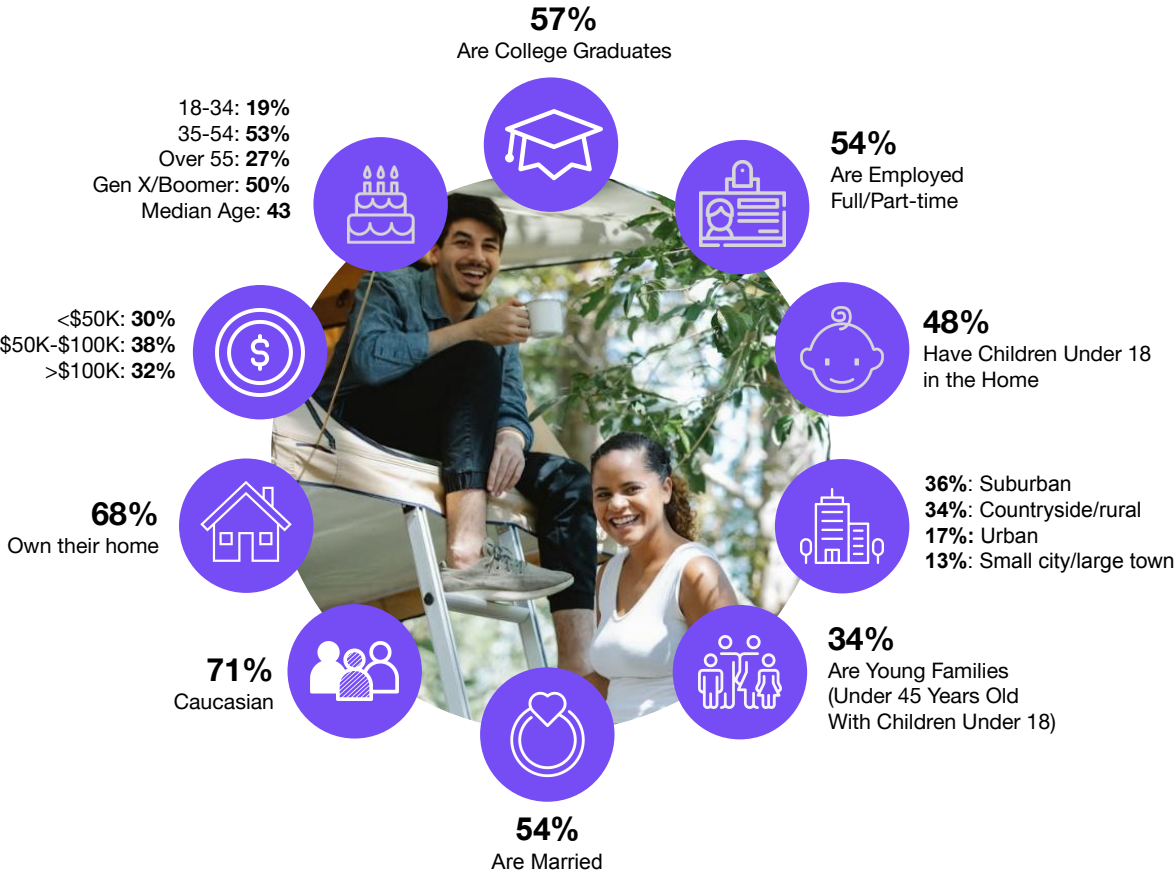


*\*In 2025, there was a significant change in survey methodology to more accurately account for the number of RV owning households. This number better aligns with other industry data such as shipments and registrations.*

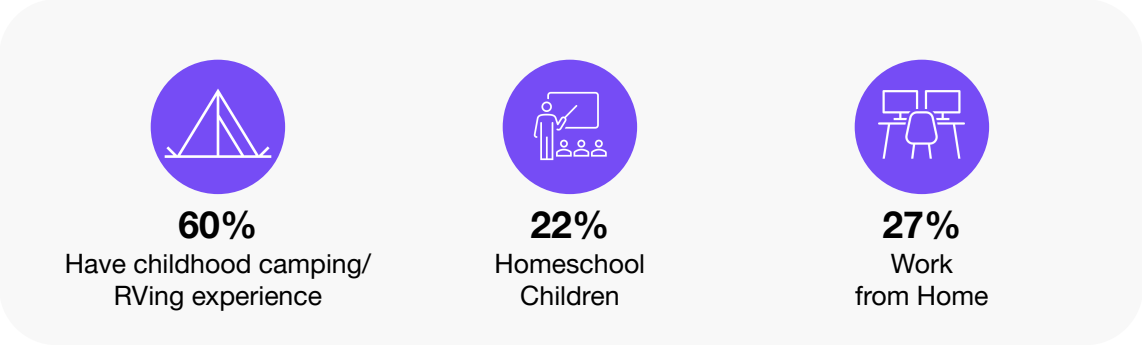
# Intender Profile

The face of future RVers is gradually changing, with Near-Term Intenders more likely than those Currently Owning to be under the age of 55 (73% vs. 61%), single (46% vs. 33%), parents of young children (48% vs. 43%), urban dwellers (34% vs. 25%), and from a diverse background (16% vs. 10%). Intenders also show a lower current interest level in Conventional Travel Trailers (Considering: 61% vs. 72% Intending Current Owners) – instead favoring Class A (29% vs. 20%) and Class B Motorhomes (28% vs. 16%).

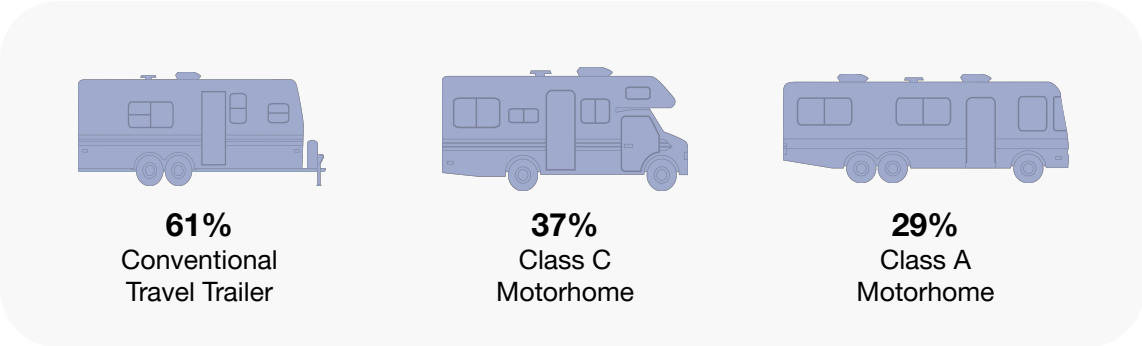
## Intender Profile n=1000



## Other Items n=1000



## Top RV Types Considered n=1000





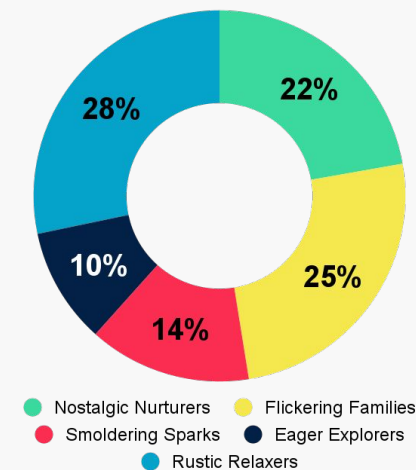
# INTENDING RV OWNERS

A long-time dream for many, the chance to own an RV is an incredibly exciting opportunity for industry intenders across numerous demographic, psychographic, and geographic backgrounds. Varying in their knowledge of the industry and planned use cases, the RVers of the future are excited to explore the great outdoors and change who and what it means to be an RVer.

## INTENDING RV OWNER PROFILE

- **Age Range:**  
73% 18 to 54  
27% 55+
  - **Employment:**  
54% Work Full Time  
11% Retired
  - **Average Annual Income:**  
49% over 75K
  - 48% Live with children in the home
- 32% Growth Audiences**
- 9% African American
  - 2% Asian-American
  - 13% Hispanic-American
  - 8% LGBTQ+
- 60% Have childhood RVing/camping experience**

## Segment Breakdown



## PERSONALITY



**93%** My family is my top priority



**92%** I research items before purchasing



**89%** I value exposing my children to different things



**84%** I am a very private person



**82%** I enjoy exploring new places while still working



**80%** I prefer a quiet evening at home over an event

## Hobbies



**61% Camping**



**54% Cooking**



**49% Swimming**

## RV INTEREST

### Sparked RV Interest



**37%** Change in travel method



**33%** Spend time with family/friends



**28%** History of camping



**27%** Change in camping method

### Why RV?

- **14%** Spending time in nature/explore the outdoors
- **11%** Adding some adventure/excitement to my life
- **9%** Saving money on travel costs
- **8%** Simply unwinding and relaxing
- **7%** Visiting a location with natural beauty

▲ Significantly higher / ▼ Significantly lower than all other segments

RV ATTITUDES & PLANNED USAGE

- **91%** RVs offer the convenience of a home away from home
- **83%** Owning an RV simplifies travel
- **76%** RVs make travel convenient for any age or physical condition

Intend to Bring



**48%**  
Bicycle



**20%**  
Kayak



**20%**  
E-Bike

Commonly Travel With



**75%**  
Spouse/  
Sig Other



**48%**  
Children  
(Under 18)



**41%**  
Pets



**30%**  
Friends

PURCHASE INTENTIONS



Plan to purchase **new**

Type of RV Intended



**31%** Conventional  
Travel Trailer



**14%** Class C Motorhome  
**51%** Class C | **33%** Super C



**13%** Class A  
Motorhome

Most Important  
Features When  
Considering  
Next RV

**1**

Bathroom/Shower

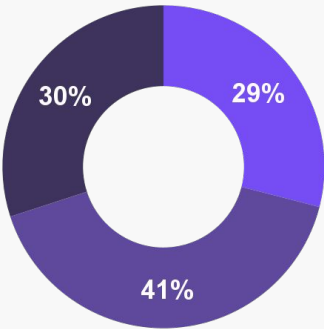
**2**

AC/Heat

**3**

WiFi

Next Purchase Timing



- **<1 year**
- **1-2 years**
- **3-5 years**

RV TRAVEL HISTORY & ATTITUDES

Current Vacations



**21%** Car Road Trip



**12%** Tent Camping/  
Backpacking



**12%** Beach (Non-Resort)



**10%** RV Trip/RV  
Camping



**8%** Vacation Rental

Travel Opinions

- **96%** I enjoy discovering new things about the world
- **95%** I enjoy going to new travel destinations
- **95%** Before I travel, I make sure to do my research
- **93%** I like to take weekend trips
- **92%** It is important to know in advance how much the trip is going to cost

MEDIA



RV KNOWLEDGE

Correctly Identified

**44%**



**44%**



**26%**



**49%**



**68%**



Digital/Print  
Resources



**40%** Social  
Media



**38%** YouTube



**38%** RV Sales  
Listings



**37%** Dealership  
Websites

Experiential  
Resources



**50%** Talking to  
other owners



**40%**  
Dealerships



**30%**  
Campgrounds



**30%** RV/  
Outdoor Shows

▲ Significantly higher / ▼ Significantly lower than all other segments



# SEGMENTS





# RV Intender Segmentation Clusters

After extensive analysis, five unique groups of RV intenders have been identified, each with their own habits, preferences, motivations, and profiles that will help to shape the RV industry of the future.

## CLUSTER 1



### Nostalgic Nurturers

Nostalgic Nurturers seek to build the next generation of RVers. Growing up RVing, they have an emotional attachment to the lifestyle and are now looking to create similar memories with their own children. Excited about the outdoors and the hobbies it offers, this segment looks forward to hitting the road to both see what the country has to offer and strengthen their familial bonds.

## CLUSTER 2



### Smoldering Sparks

Smoldering Sparks show an incredible initial interest in joining the RV lifestyle after being exposed in some capacity to the industry recently, but need education and knowledge to move further down the purchase funnel. Comprised of single/married growth audience members with no children, this is excited to see how they can incorporate RVing into their life but struggle to turn this dream into a reality given their lack of prior camping/outdoor experience and enthusiasm.

## CLUSTER 3



### Flickering Families

Recently exposed to RVs through a friend or family member, Flickering Families see the lifestyle as an attractive recreational option for their family – particularly tied to emerging use cases such as youth sports travel and homeschooling. Aspirational and heavily interested in other recreational product purchases and building comradery/traveling with other brand owners/RVers, this audience of largely Young Families seeks to change the definition of how and where RVs can be used, but currently lacks enough RV knowledge to become serious intenders.

## CLUSTER 4



### Eager Explorer

Excited by their ability to enhance a hobby and start a new adventure, Eager Explorers are ready to hit the great outdoors. Largely child-free couples with RV experience, this segment looks forward to traveling around the country, hitting the next music festival, and taking in the scenery and local hospitality wherever they go.

## CLUSTER 5



### Rustic Relaxers

Nearing or already retired, Rustic Relaxers are ready to put their feet up. Looking forward to owning an RV as a long-awaited milestone, this knowledgeable segment is ready to explore in uncomplicated comfort. Avoiding a need for luxury surroundings and additional recreation / entertainment, Rustic Relaxers look forward to nothing more than setting up camp at a well-equipped park and taking in the beauty of nature and solitude.



# NOSTALGIC NURTURERS

Nostalgic Nurturers seek to build the next generation of RVers. Growing up RVing, they have an emotional attachment to the lifestyle and are not looking to create similar memories with their own children. Excited about the outdoors and the hobbies it offers, this segment looks forward to hitting the road to both see what the country has to offer and strengthen their familial bonds.

“My husband doesn't like to fly and wants to be able to drive and travel and with all the kids we have it would be the most convenient. Even with the upfront cost it would save us in the long run.”

## KEY DEMOGRAPHICS

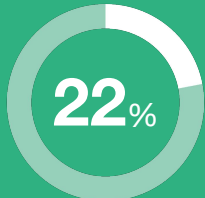
- **Age Range:**  
89% 18 to 54  
11% 55+
- **Employment:**  
59% Work Full Time  
6% Retired
- **Average Annual Income:**  
60% over 75K
- 88% Live with children in the home



Growth Audiences



Have childhood RVing/camping experience



22%  
out of  
TOTAL RV INTENDERS

- 6% African American
- 1% Asian-American
- 15% Hispanic-American
- 6% LGBTQ+

## PERSONALITY



96% My family is my top priority



94% I research items before purchasing



94% I value exposing my children to different things



81% I enjoy exploring new places while still working



81% I am a very private person



81% The kitchen is the center of our family life

## Hobbies



73% Camping



63% Swimming



59% Cooking

## RV INTEREST

### Sparked RV Interest



45% Spend time with family/friends



43% Change in travel method



35% Change in camping method



32% History of camping

### Why RV?

- 15% Adding some adventure/excitement to my life
- 12% Spending time in nature/explore the outdoors
- 9% Controlling my own itinerary
- 9% Saving money on travel costs
- 7% Simply unwinding and relaxing

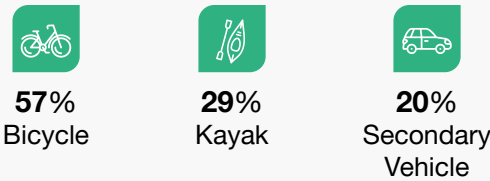
▲ Significantly higher / ▼ Significantly lower than all other segments



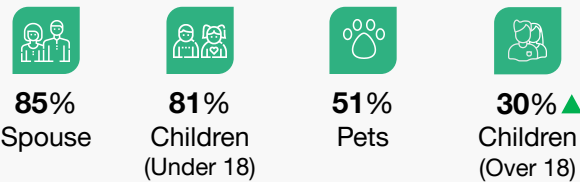
RV ATTITUDES & PLANNED USAGE

- 95% RVs offer the convenience of a home away from home
- 83% Owning an RV simplifies travel
- 81% RVs make travel convenient for any age or physical condition

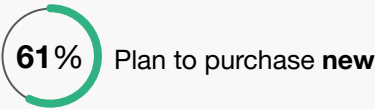
Intend to Bring



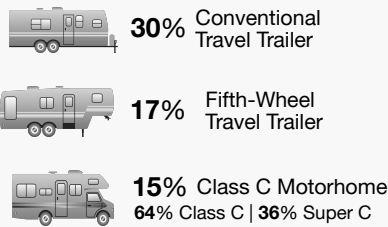
Commonly Travel With



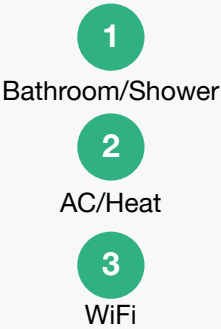
PURCHASE INTENTIONS



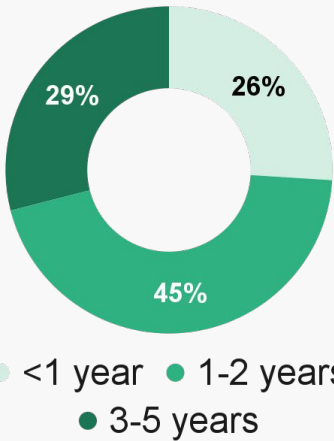
Type of RV Intended



Most Important Features When Considering Next RV

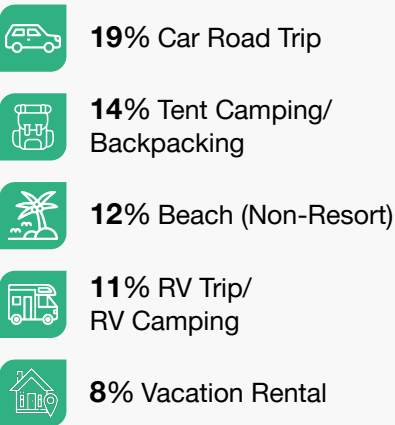


Next Purchase Timing



RV TRAVEL HISTORY & ATTITUDES

Current Vacations



Travel Opinions

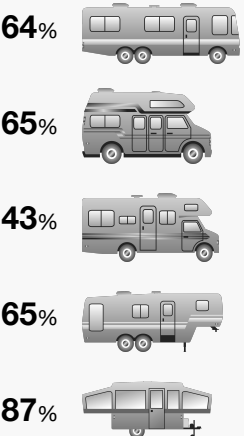
- 97% I enjoy discovering new things about the world
- 97% I enjoy going to new travel destinations
- 95% Before I travel, I make sure to do my research
- 95% I like to take weekend trips
- 95% It is important to know in advance how much the trip is going to cost

MEDIA

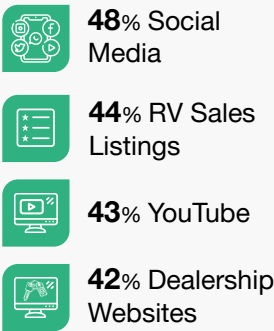


RV KNOWLEDGE

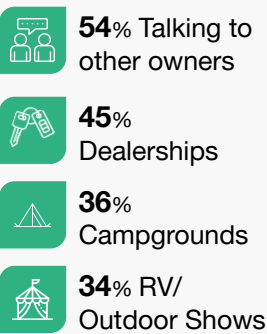
Correctly Identified



Digital/Print Resources



Experiential Resources



▲ Significantly higher / ▼ Significantly lower than all other segments





# SMOLDERING SPARKS

Smoldering Sparks show an incredible initial interest in joining the RV lifestyle after being exposed in some capacity to the industry recently, but need education and knowledge to move further down the purchase funnel. Comprised of single/married growth audience members with no children, this is excited to see how they can incorporate RVing into their life but struggle to turn this dream into a reality given their lack of prior camping/outdoor experience and enthusiasm.

“RVing appeals to me because you can just find an empty or vacant lot and enjoy fine fresh air.”

## KEY DEMOGRAPHICS

- **Age Range:**  
69% 18 to 54  
31% 55+
- **Employment:**  
49% Work Full Time  
12% Retired
- **Average Annual Income:**  
37% over 75K
- **0% Live with children in the home** ▼



Growth Audiences



Have childhood RVing/camping experience



14%  
out of  
TOTAL RV INTENDERS

- 21% African American
- 2% Asian-American
- 22% Hispanic-American
- 10% LGBTQ+

## PERSONALITY



91% I research items before purchasing



90% I value exposing my children to different things



89% My family is my top priority



85% My gender identity is represented in media



84% I enjoy exploring new places while still working



84% I feel at ease with people

## Hobbies



45% Camping



40% Running/  
Walking



40% Music  
Events/Festivals

## RV INTEREST

### Sparked RV Interest



30% Change in travel method



26% Full-time living



25% Change in life/family stage/dynamic



22% Spend time with family/friends

### Why RV?

- 12% Adding some adventure/excitement to my life
- 12% Spending time in nature/explore the outdoors
- 8% Saving money on travel costs
- 8% Simply unwinding and relaxing
- 7% Controlling my own itinerary

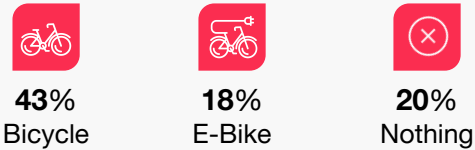
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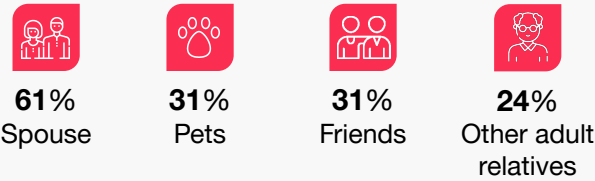
RV ATTITUDES & PLANNED USAGE

- **88%** RVs offer the convenience of a home away from home
- **77%** Owning an RV simplifies travel
- **67%** RVs make travel convenient for any age or physical condition

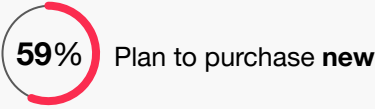
Intend to Bring



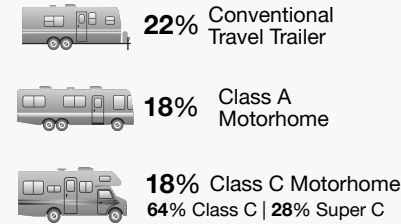
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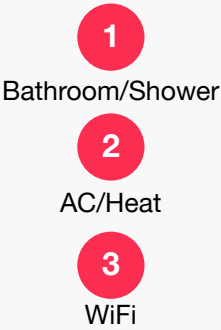
PURCHASE INTENTIONS



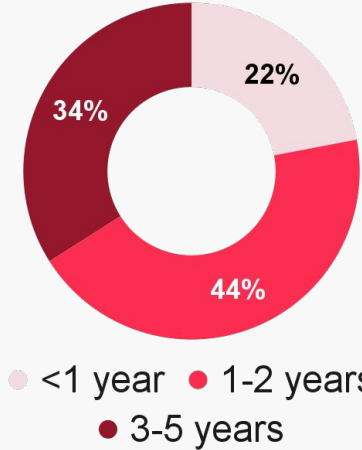
Type of RV Intended



Most Important Features When Considering Next RV

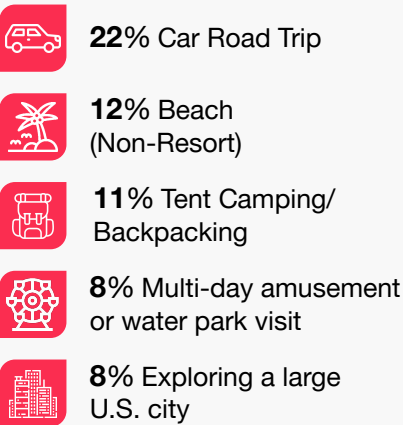


Next Purchase Timing



RV TRAVEL HISTORY & ATTITUDES

Current Vacations



Travel Opinions

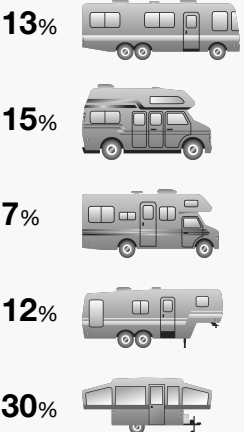
- **94%** Before I travel, I make sure to do my research
- **93%** I enjoy discovering new things about the world
- **92%** It is important to know in advance how much the trip is going to cost
- **91%** I enjoy going to new travel destinations
- **88%** I like to take weekend trips

MEDIA

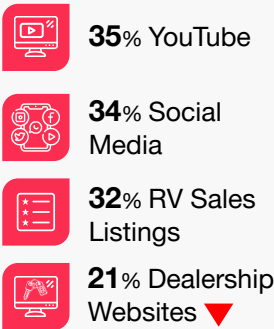


RV KNOWLEDGE

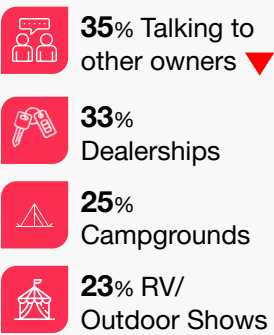
Correctly Identified



Digital/Print Resources



Experiential Resources



▲ Significantly higher / ▼ Significantly lower than all other segments





# FLICKERING FAMILIES

Recently exposed to RVs through a friend or family member, Flickering Families see the lifestyle as an attractive recreational option for their family – particularly tied to emerging use cases such as youth sports travel and homeschooling. Aspirational and heavily interested in other recreational product purchases and building camaraderie/traveling with other brand owners/RVers, this audience of largely Young Families seeks to change the definition of how and where RVs can be used, but currently lacks enough RV knowledge to become serious intenders.

“Traveling with my family in a RV on road trips seems so fun and convenient.”

## KEY DEMOGRAPHICS

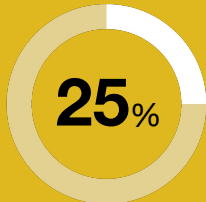
- **Age Range:**  
95% 18 to 54  
5% 55+
- **Employment:**  
77% Work Full Time ▲  
1% Retired
- **Average Annual Income:**  
64% over 75K
- **100%** Live with children in the home ▲



Growth Audiences



Have childhood RVing/camping experience



25%  
out of  
TOTAL RV INTENDERS

- 12% African American
- 4% Asian-American
- 14% Hispanic-American
- 5% LGBTQ+

## PERSONALITY



94% My family is my top priority in life



92% I enjoy exploring new places while still working ▲



91% I'm willing to pay premium prices for home furnishings ▲



88% I am very active and always on the go ▲



87% I follow social media of brands that interest me ▲



86% I feel financially secure ▲

## Hobbies



49% Camping



45% Cooking



41% Running/Walking

## RV INTEREST

### Sparked RV Interest



36% Spend time with family/friends



32% Change in travel method



30% Change in camping method



24% Social media ▲

### Why RV?

- 11% Visiting a location with natural beauty
- 10% Adding some adventure/excitement to my life
- 9% Simply unwinding and relaxing
- 9% Spending time in nature/explore the outdoors
- 6% Saving money on travel costs

▲ Significantly higher / ▼ Significantly lower than all other segments

RV ATTITUDES & PLANNED USAGE

- 87% Owning an RV simplifies travel
- 86% RVs offer the convenience of a home away from home
- 73% RVs are an environmentally friendly form of travel ▲

Intend to Bring



54%  
Bicycle



24%  
E-Bike



22% ▲  
Motorcycle

Commonly Travel With



85%  
Spouse



82%  
Children  
(Under 18)



33%  
Pets



32%  
Friends

PURCHASE INTENTIONS



Plan to purchase new ▲

Type of RV Intended



27%  
Conventional  
Travel Trailer



22%  
Class A  
Motorhome



16%  
Fifth-Wheel  
Travel Trailer

Most Important Features When Considering Next RV

1

Bathroom  
/Shower ▼

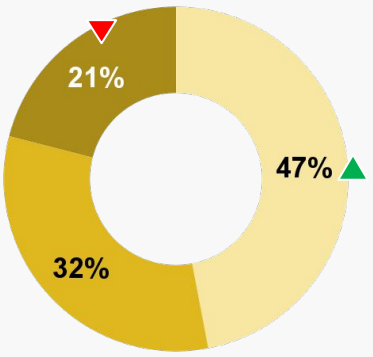
2

WiFi

3

AC/Heat ▼

Next Purchase Timing



● <1 year ● 1-2 years  
● 3-5 years

RV TRAVEL HISTORY & ATTITUDES

Current Vacations



15% Car Road Trip



14% RV Trip/  
RV Camping



11% Beach  
(Non-resort)



9% Tent Camping/  
Backpacking



8% Vacation  
Rental

Travel Opinions

- 95% I enjoy discovering new things about the world
- 94% I enjoy going to new travel destinations
- 94% Before I travel, I make sure to do my research
- 92% I like to take weekend trips
- 92% I'm always thinking about and planning my next vacation ▲

MEDIA



RV KNOWLEDGE

Correctly Identified

21%

14%

8%

17%

36%

Digital/Print Resources



54% Social  
Media



45% YouTube



32% Dealership  
Websites



32% RV Sales  
Listings

Experiential Resources



52% Talking to  
other owners



42%  
Dealerships



36%  
Campgrounds



28% RV  
Aftermarket  
Stores ▲

▲ Significantly higher / ▼ Significantly lower than all other segments





# EAGER EXPLORERS

Excited by their ability to enhance a hobby and start a new adventure, Eager Explorers are ready to hit the great outdoors. Largely child-free couples with RV experience, this segment looks forward to traveling around the country, hitting the next music festival, and taking in the scenery and local hospitality wherever they go.

“The freedom to travel to different parts of the country. Kayaking, hiking, cooking outdoors. I love nature.”

## KEY DEMOGRAPHICS

- **Age Range:**  
100% 18 to 54  
0% 55+
- **Employment:**  
63% Work Full Time  
0% Retired
- **Average Annual Income:**  
39% over 75K
- **23% Live with children in the home** ▼



**Growth Audiences**

- 12% African American
- 2% Asian-American
- 10% Hispanic-American
- 21% LGBTQ+ ▲



**Have childhood RVing/camping experience**



**10% out of TOTAL RV INTENDERS**

## PERSONALITY



**95%** I research items before purchasing



**94%** I am a very private person



**91%** My family is my top priority



**88%** My ethnicity is represented in media



**86%** I value exposing my children to different things



**84%** I enjoy exploring new places while still working

## Hobbies



**72% Camping**



**59% Cooking**



**59% Sightseeing**

## RV INTEREST

### Sparked RV Interest



**44%** Change in travel method



**37%** Spend time with family/friends



**37%** History of camping



**36%** Change in camping method

### Why RV?

- **20%** Spending time in nature/explore the outdoors
- **9%** Visiting a location with natural beauty
- **8%** Adding some adventure/excitement to my life
- **7%** Simply unwinding and relaxing
- **6%** Strengthening relationship with adult and/or child
- **6%** Getting off the beaten path

▲ Significantly higher / ▼ Significantly lower than all other segments

RV ATTITUDES & PLANNED USAGE

- **90%** RVs offer the convenience of a home away from home
- **81%** Owning an RV simplifies travel
- **75%** RVs make travel convenient for any age or physical condition

Intend to Bring



**51%**  
Bicycle



**33%**  
Kayak



**23%**  
Secondary Vehicle

Commonly Travel With



**70%**  
Spouse



**43%**  
Pets



**40%**  
Friends



**31%**  
Children (Under 18)

PURCHASE INTENTIONS



Plan to purchase **new**

Type of RV Intended



**48%** Conventional Travel Trailer ▲



**11%** Class C Motorhome  
**55%** Class C | **46%** Super C



**10%** Fifth-Wheel Travel Trailer

Most Important Features When Considering Next RV

**1**

AC/Heat

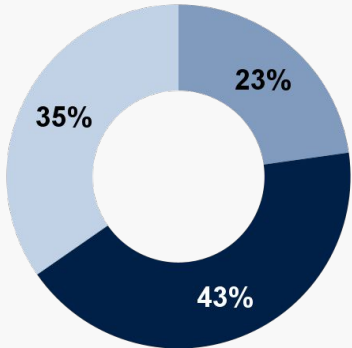
**2**

Bathroom/Shower

**3**

Solar Panels

Next Purchase Timing



● <1 year ● 1-2 years  
● 3-5 years

RV TRAVEL HISTORY & ATTITUDES

Current Vacations



**21%** Car Road Trip



**14%** Tent Camping/Backpacking



**12%** RV Trip/RV Camping



**10%** Beach (Non-Resort)



**9%** Vacation Rental

Travel Opinions

- **97%** I enjoy discovering new things about the world
- **96%** I enjoy going to new travel destinations
- **93%** Before I travel, I make sure to do my research
- **93%** I like to take weekend trips
- **90%** When I find a great vacation spot, I tend to go back again and again

MEDIA



TV



Music



RV KNOWLEDGE

Correctly Identified

**62%**



**69%**



**39%**



**60%**



**93%**



Digital/Print Resources



**51%** YouTube



**44%** Dealership Websites



**44%** RV Sales Listings



**42%** Social Media

Experiential Resources



**55%** Talking to other owners



**39%** Campgrounds



**38%** Dealerships



**24%** RV/Outdoor Shows

▲ Significantly higher / ▼ Significantly lower than all other segments





# RUSTIC RELAXERS

Nearing or already retired, Rustic Relaxers are ready to put their feet up. Looking forward to owning an RV as a long-awaited milestone, this knowledgeable segment is ready to explore in uncomplicated comfort. Avoiding a need for luxury surroundings and additional recreation / entertainment, Rustic Relaxers look forward to nothing more than setting up camp at a well-equipped park and taking in the beauty of nature and solitude.

“I am retired and this would allow me to see the country in comfort”

## KEY DEMOGRAPHICS

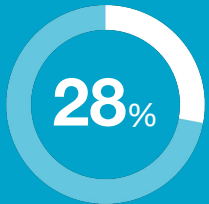
- **Age Range:**  
33% 18 to 54 ▼  
67% 55+ ▲
- **Employment**  
32% Work Full Time ▼  
27% Retired ▲
- **Average Annual Income:**  
38% over 75K
- 7% Live with children in the home



Growth Audiences



Have childhood RVing/camping experience



28%  
out of  
TOTAL RV INTENDERS

- 3% African American
- 2% Asian-American
- 9% Hispanic-American
- 8% LGBTQ+

## PERSONALITY



93% I research items before purchasing



91% My family is my top priority



87% I value exposing my children to different things



85% I am very worried about the state of the economy



46% I follow social media of brands that interest me ▼



45% I feel financially secure ▼

## Hobbies



65% Camping



60% Cooking



53% Gardening ▲

## RV INTEREST

### Sparked RV Interest



40% Change in travel method



33% History of camping



32% Change in life/family stage/dynamic



27% Spend time with family/friends

### Why RV?

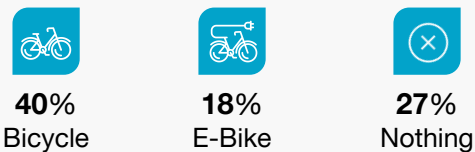
- 18% Spending time in nature/explore the outdoors
- 12% Saving money on travel costs
- 10% Bringing a pet with me
- 10% Simply unwinding and relaxing
- 9% Adding some adventure/excitement to my life

▲ Significantly higher / ▼ Significantly lower than all other segments

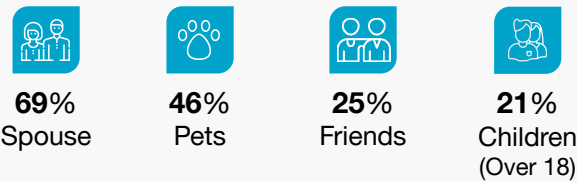
RV ATTITUDES & PLANNED USAGE

- **96%** RVs offer the convenience of a home away from home
- **84%** Owning an RV simplifies travel
- **73%** RVs make travel convenient for any age or physical condition

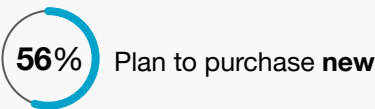
Intend to Bring



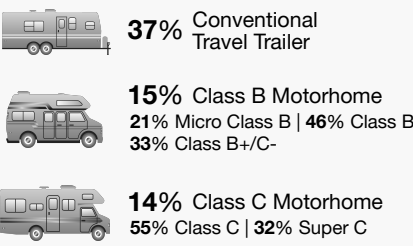
Commonly Travel With



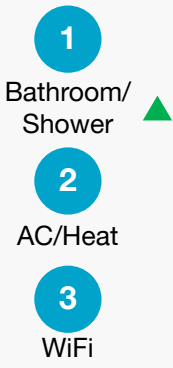
PURCHASE INTENTIONS



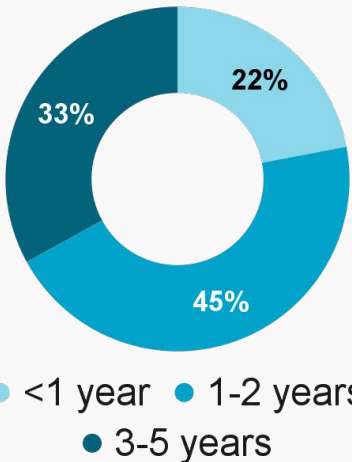
Type of RV Intended



Most Important Features When Considering Next RV

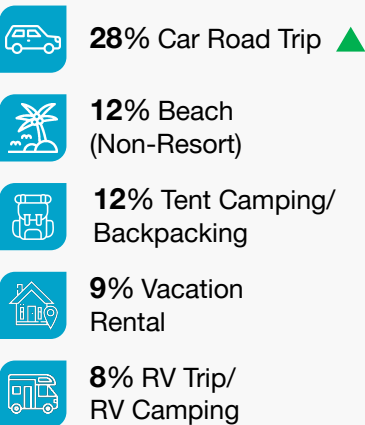


Next Purchase Timing



RV TRAVEL HISTORY & ATTITUDES

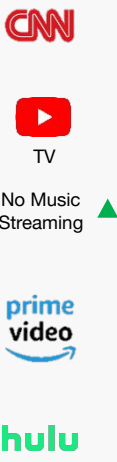
Current Vacations



Travel Opinions

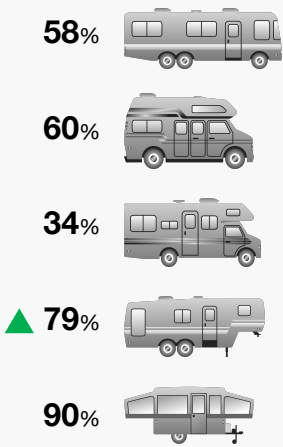
- **98%** I enjoy discovering new things about the world
- **98%** I enjoy going to new travel destinations
- **97%** Before I travel, I make sure to do my research
- **94%** I like to take weekend trips
- **92%** It is important to know in advance how much the trip is going to cost

MEDIA

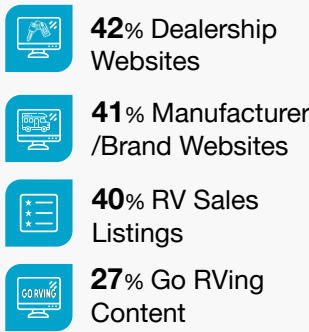


RV KNOWLEDGE

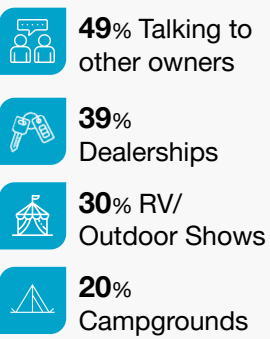
Correctly Identified



Digital/Print Resources



Experiential Resources



▲ Significantly higher / ▼ Significantly lower than all other segments