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Message from the President

As we look back on 2023, I am proud of what we have accomplished as an industry, and I can’t help but feel optimistic about the direction we are heading.

Interest in the outdoors and RVing has exploded over the last few years. The median age of new RV buyers has dropped to only 32 years old and these buyers are more diverse than ever before. RVers are enjoying the health benefits of recreating in nature. Our industry also continues to be an economic powerhouse with the latest numbers from the Bureau of Economic Analysis showing that RVing has been the No. 1 contributor to the conventional outdoor recreation economy for two years running. To top it off, there is growing consensus that the recent economic headwinds are beginning to subside.

The RV industry has stepped up to meet the needs of new buyers with innovative products to fit every lifestyle and every budget. Even when faced with challenging economic conditions, RVing provides an affordable way for families and friends to experience the great outdoors and create lasting memories and connections with loved ones. This fact was confirmed by the 2023 Vacation Cost Comparison Study conducted by CBRE Hotels Advisory that found RV vacations are up to 60% less expensive than other comparable vacations. Go RVing has made this a consistent theme, weaving the message of affordability throughout our earned media efforts and paid marketing campaign.

“We want consumers to have the best experience possible when they arrive at their destination and spend time outdoors, and we’re working with our partners in the RV travel and camping industries to achieve this goal through informed, data-driven decisions.”

While there is much to be optimistic about, we continue to be vigilant about delivering a first-class experience for RVers. To that end, the RV Industry Association’s Government Affairs Team has been pushing hard on our federal policy agenda – with a significant focus on critical issues like campground modernization and expansion, as well as addressing tax and trade issues impacting companies in our industry. Our relationship with the campground industry has never been stronger, and the newly formed RV Campground Coalition will continue the Association’s work to unify the entire industry around the importance of campgrounds to the current and future health of RV camping.

On the service side, the industry’s investment in the RV Technical Institute is paying dividends. Over the past two years, the Institute has recruited over 2,200 new RV techs into the field and there are currently 15,000 individuals enrolled in some type of technician training. Even more impressive, there are 5,000 newly certified technicians – the largest number of certified techs in the RV industry’s history and over 800 RV dealerships have at least one certified RV technician on staff. Filling the funnel with more highly trained technicians is an incredibly important facet of our continued efforts to improve repair event cycle...
time (RECT) and enhance the customer experience.

Our Standards Department and its team of inspectors continue to be an extremely valued member benefit, maintaining our industry’s self-regulation and promoting the enhancement of safety by monitoring adherence to the standards adopted by the Board of Directors for the construction of RVs and park model RVs. In 2023, we laid the foundation to expand the standards training offered to our members, further improving understanding and compliance with changing standards.

Looking forward, this year the RV Industry Association will celebrate 50 years of serving the RV industry and the companies and people that build the products that create fun and everlasting memories for millions of people every year. As always, we appreciate the support and involvement of our members in making this industry so dynamic and robust, and thank them for their ongoing contributions. Our past success has come from the entire industry uniting and working together to overcome obstacles – and our future successes will as well. From self-regulation, sustainability, and consumer marketing to industry training and advocacy, we’re stronger together than apart.

Craig A. Kirby
President & CEO,
RV Industry Association
Membership Makeup

The RV Industry Association is the national trade group representing more than 500 manufacturer and component supplier companies producing approximately 98 percent of all RVs manufactured in North America, and approximately 60 percent of RVs produced worldwide. The Association unites these diverse industry segments and forges an alliance to form a strong, single voice focused on our collective mission to promote and protect the RV industry. Working with our members, we advance and expand the industry by driving growth and innovation across the $1.1 Trillion outdoor recreation economy.

Total Members: 524

- RV Manufacturer: 118
- Park Model RV Manufacturer: 54
- Supplier: 177
- Aftermarket Supplier: 71
- Finance Firm: 15
- Associate: 82
- Manufacturer’s Representative: 7
RV Industry Association and its related parties strategically planned for a material net loss in 2023. Over the past several years, the operating reserve increased as either revenues exceeded plan or cost controlling measures were enacted during uncertain times, such as the recent pandemic. To maintain a consistent RV Industry Association seal price, excess operating reserves were designated by the Board of Directors to cover programmatic and operating expenses in 2023 as the preferred alternative.
Board of Directors & Committees

Executive Committee

Chair
Kevin McArt
Forest River Inc.,
General Manager

Vice Chair
Mary Pouliot
Thetford Corp.,
Executive Vice President, Americas

Treasurer
Ryan Elias
Leisure Travel Vans/Triple E RV,
President and General Manager

Secretary
Brett Randall
Aliner,
President & CEO

Past Chair
Jeff Rutherford
Airxcel, Inc.,
Chairman

Staff Liaison
Craig Kirby
RV Industry Association,
President & CEO
## Board Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Company</th>
<th>Position</th>
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<tbody>
<tr>
<td>Ashley Bontrager Lehman</td>
<td>Ember Recreational Vehicles, Inc.</td>
<td>President &amp; CEO</td>
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<tr>
<td>Eric Cannon</td>
<td>Carefree of Colorado</td>
<td>President</td>
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<tr>
<td>Bryan Hughes</td>
<td>Winnebago Industries</td>
<td>CFO, SVP- Finance, IT, and Business Development</td>
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<tr>
<td>April Klein-Carroll</td>
<td>Lippert Components, Inc.</td>
<td>VP, Customer Support Services</td>
</tr>
<tr>
<td>Mike Lanciotti</td>
<td>REV Group, Inc.</td>
<td>President, Recreation Group</td>
</tr>
<tr>
<td>Jeff Rodino</td>
<td>Patrick Industries, Inc.</td>
<td>President, RV</td>
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<tr>
<td>Jeffery Sather</td>
<td>Freightliner Custom Chassis Corporation</td>
<td>President &amp; CEO</td>
</tr>
<tr>
<td>Coley Brady</td>
<td>Alliance RV</td>
<td>Co-Founder &amp; President</td>
</tr>
<tr>
<td>Matt Carboneau</td>
<td>Wesco Distribution, Inc.</td>
<td>District Manager</td>
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<tr>
<td>Heather Jenks</td>
<td>Genesis Products Inc.</td>
<td>Vice President RV Sales</td>
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<tr>
<td>Trevor Kropf</td>
<td>Kropf Manufacturing, Inc.</td>
<td>General Manager</td>
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<tr>
<td>Bob Martin</td>
<td>THOR Industries, Inc.</td>
<td>President &amp; CEO</td>
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<tr>
<td>Bob Parish</td>
<td>Wells Fargo CDF</td>
<td>Vice President</td>
</tr>
<tr>
<td>Garry Enyart</td>
<td>Core Support Consulting</td>
<td>CEO</td>
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Committee Chairs

Audit Committee
Ryan Elias
Leisure Travel Vans/Triple E RV, President and General Manager

Awards Committee
Ryan Elias
Leisure Travel Vans/Triple E RV, President and General Manager

Canadian Coalition
Shane Devenish
Canadian Recreational Vehicle Association, President

Emerging Leaders Coalition
Ryan Elias
Leisure Travel Vans/Triple E RV, President and General Manager

Financial Services Committee
Chris Renn
Huntington Bank, Senior Vice President

Governance Committee
Bob Parish
Wells Fargo CDF, Vice President

Lawyers Committee
David Thomas
Keystone RV, Vice President & General Counsel

Market Information Committee
Kip Ellis
Patrick Industries, Inc., President, Powersports & Housing

Membership Committee
Anthony Wollschlager
Airxcel, President & CEO

Park Model RV Committee
John Soard
Woodland Park, Inc., General Manager

Public & Legislative Affairs
Brett Randall
Aliner, President & CEO

Public Relations Committee
Chad Reece
Winnebago Industries, Inc., Vice President, Government & Industry Relations

RV Aftermarket Committee
John Tinghitella
RV Designer, President

RVPAC Steering Committee
Coley Brady
Alliance Recreational Vehicles, Co-Founder & President

Standards Steering Committee
Dave Mihalick
THOR Industries Inc., Vice President, Vehicle Safety & Regulatory Compliance

Supplier Committee
Mary Pouliot
Thetford Corp., Executive Vice President, Americas

Sustainability Committee
Sandy Rynalski
THOR Industries, Inc., Vice President, ESG
2023: A Year for Industry Unity and Charting the Future
A hallmark of the RV industry over the past five years has been increased collaboration and unity to grow our industry, reach new customers, and create great experiences for the millions of RVers across North America. In 2023, that was taken to a new level as the industry continued to come together to cultivate the next generation of RV leaders, deliver unparalleled research and consumer insights, advocate for our industries policy priorities, and strengthen relationships across the three pillars of our industry: manufacturers and suppliers, dealers, and campground.

“This mindset of unity was evident from the beginning of the year during the second annual Leadership Conference,” said RV Industry Association President & CEO Craig Kirby. “Over 180 current and future industry leaders attended the two-day event’s impactful networking sessions, leadership development seminars, and innovative speaker presentations. By all accounts, the event was a huge success, creating new relationships and lasting connections that will help to propel our industry forward.”

And that was just the beginning. RV Industry Association staff and members then convened once again for RVs Move America Week in Washington, D.C. Throughout the week, volunteers from across the RV industry collectively worked to build a strategic roadmap to help define future growth of the $140 billion RV industry. During Advocacy Day, 120 Association members and partners participated in 111 meetings with federal policymakers on Capitol Hill, sharing the industry’s significant economic impact and advocating for solutions to industry issues. Awareness of our industry and our issues is growing as a direct result of these advocacy efforts at RVs Move America Week.

“As the world continues to move towards alternative fuel types, the RV industry must keep pace. States across the country are tapping into federal funding for increased EV charging infrastructure, and our Government Affairs team has been hard at work ensuring the RV industry’s needs are being taken into consideration,” said Kirby. “These advocacy efforts have resulted in 15 states incentivizing pull-through charging for RVs.”

“By all accounts, the event was a huge success, creating new relationships and lasting connections that will help to propel our industry forward.”

RV Industry Association President & CEO, Craig Kirby, on the RV Industry Association’s 2023 Leadership Conference
Another way the RV Industry Association is constantly working to future-proof the RV industry is through the creation of an Alternative Fuels and Advanced Vehicles Committee to expand efforts beyond electrification.

Despite the dip in RV shipment and retail sales, RV usage among consumers remains very high, creating opportunities for the industry’s aftermarket segment. The annual RV Aftermarket Conference is an invaluable way for this critical segment of the industry to seize opportunities and grow their businesses with one-on-one meetings to pitch new products, networking events, and presentations from thought-leaders on the state of the RV industry. The Association continues to look for ways to highlight the aftermarket segment as it plays such a critical role in creating an excellent RV experience for consumers.

In 2023, inspectors from the RV Industry Association’s Standards Department completed over 2,500 unannounced plant inspections, spot checking representative RV units for compliance with over 500 safety-related standards requirements, talking to line employees, and conducting hands-on discussions about these standards. In addition to inspections, the Standards team also provided educational resources and hands-on training to manufacturer members to support their commitment to comply with the industry-adopted codes and standards.

It remains as crucial as ever to continue emphasizing industry unity. Some of our industry’s best achievements have come through working together. From advocacy and self-regulation to industry training, consumer marketing, and now our Emerging Leaders and Leadership Conference, the foundation of RV industry is strong and the future is bright.
Go RVing:
Bringing RVing to Consumers
Reflecting on 2023, it had its share of ups and downs but throughout, Go RVing continued to seek out audiences most open to our positive messages through our Go on a Real Vacation campaign that focuses on our two primary objectives; to recruit and retain RV buyers.

Nearly three decades since the program first began, Go RVing continues to be a marketing and consumer awareness thought-leader, introducing millions of Americans to the freedom and control of RV travel and building a desire for the adventures that await.

For the past three years, a cornerstone of Go RVing has been to actively build a repository of data about preferences and habits of new owners, prospective owners, and emerging segments of the population who might become RVers in the future. The more we know about those who are likely to become RV buyers, the more targeted and impactful our marketing messages can be.

“Most prospective new consumers turn to the digital world for ideas, inspiration, education, and recommendations from friends and those they trust the most. We focus much of our messaging in that digital environment where we can connect with and get to know consumers through data.”

Go RVing Chief Marketing Officer, Karen Redfern

“In 2023, we released the much-anticipated Path to Purchase study. From demographics to sources of research to reasons for travel, the profile of prospective and current RV owners is continually evolving,” stated Redfern. “While the COVID-19 pandemic left the industry clamoring to meet increased consumer demand, questions arise as to how the RV industry can retain heightened levels of consumer enthusiasm and purchase consideration.”
In 2023, Go RVing partnered with Ipsos, the global leader in market research, to develop a comprehensive look at the buying process customers go through for their first-time and repeat RV purchases. Recognizing the key differences between Towable and Motorhome buyers, segmented reports for those specific buying groups were developed.

One of the biggest takeaways from the study was the positive impact of time spent in the outdoors, especially during childhood. It’s why we continue to focus on families with children in the home.

We also had great coverage by television media, fueled by National Go RVing Day and our Media Summit, as well as two live segments on Fox and Friends that were seen by over 1 million people, one at the kickoff to camping season and another in December.

“*We invite our members to take advantage of getting to know our team and resources and how we can help one another – we’re in this together for the future of the industry.*”

Go RVing Chief Marketing Officer, Karen Redfern
RV Technical Institute: Elevating Today’s RV Techs and Building the Pipeline for the Future
In a word, 2023 was about the future.
With millions of new RV buyers over the last few years and millions more planning a purchase, there’s more demand and opportunity for skilled RV technicians than ever before.

In just a few short years, the RV Technical Institute’s technician training program has quickly become recognized as the RV industry’s gold standard. By leveraging decades of industry experience and partnering with the top RV manufacturer and supplier leaders in the field, we have developed the most up-to-date and influential RV technician training program ever built.

“The RV industry’s support of the RV Technical Institute has been critical to its success and is even more critical for future success,” said RV Technical Institute Executive Director Curt Hemmeler. “With more and more RVers finding the outdoors and camping for the first time, the ability to provide quality, timely service as an industry is critical to delivering an exceptional experience for RVers.”

To keep RVers happy and on the road, the Institute launched a significant technician recruitment effort in 2022. By partnering with the American School Counselors Association to attend events across the country, the team can educate high school counselors about the RV industry and the current demand for technicians. In 2023, these efforts continued while also beginning to implement the training program at high schools in three states—Texas, Indiana, and Pennsylvania. RV Technical Institute staff trained teachers to become certified RV technician instructors, which allows those teachers to train their own students. As a result, interested high school students are now able to graduate as a certified Level 1 RV technician.
RV Industry Association Programs Highlight The Significance Of e-RV Infrastructure
“In 2023, we really emphasized advertising and marketing efforts to attract career changers and job seekers to the RV industry,” explains Hemmeler. “These efforts delivered great results with over 20 million impressions and over 10,000 leads, generating increased awareness about the RV industry, our gold standard training program, and employment opportunities that come with training. As a result, over 1,000 individuals were recruited and started taking classes to become technicians.”

That’s why this year the Institute assembled a recruitment campaign specifically targeting women who are interested in becoming RV techs. Beyond digital ads and content, campaign marketing efforts included a landing page that speaks directly to prospective women technicians. Additionally, after a successful pilot class in 2022, the RV Women’s Alliance and the Institute took their All-Female Technical Class nationwide in 2023. Six classes were offered across the United States, including classes in Texas, Oregon, Pennsylvania, Florida, and Indiana.

“Our multipronged approach to recruitment has been very successful, allowing the Institute to reach people from outside the RV industry who can be trained to fill RV technician jobs now, and people who will fill the pipeline with the RV technicians of the future,” continued Hemmeler.

For those technicians who are already in the industry seeking continuing education, the Institute launched the highly anticipated Level 3 training in 2023. Partnering with industry suppliers, Level 3 training in Electrical, Chassis, Electronics, Appliances, and Slideouts helps current techs increase their skills and expertise on specific RV systems and components, focused on advanced diagnostics, troubleshooting, and repair. New Level 3 classes are constantly being added to the approved training program and technicians can find them at RVTI.org.

As of today, there are already over 5,000 RV Technical Institute Certified technicians and nearly 1,000 RV dealerships and other locations training techs on the Institute’s training program.

“We wouldn’t be where we are today without the RV Industry Association, the RV Dealers Association, and Go RVing,” remarked Hemmeler. “The dedication from the entire industry to support our team’s mission means the RV Technical Institute is well-positioned to help deliver outstanding customer service and a better RVing experience for millions of RVers in the future.”
Our Impact:
Sustainability and Workplace Safety

The RV industry is committed to promoting exploration, adventure, and responsible recreation, while advocating for innovation and conservation in our business practices. As an association, we encourage and promote sustainability, diversity, safety, and the many community activities of our member companies. The RV industry and our partners in the outdoor segment are working together to create accessible, inclusive, and lasting positive experiences for millions of Americans looking to enjoy the benefits of an active outdoor lifestyle.
In further recognition of the importance of sustainability to our industry, the RV Industry Association Board of Directors unanimously approved the creation of a Sustainability Committee. The committee serves as the convening body for sustainability experts in the RV industry to share ideas and best practices as well as an educational resource for companies looking to increase their sustainability practices.

The newly formed committee kicked off the year with “A Conversation About Sustainability” at the spring Leadership Conference that highlighted the journey RV companies have taken and the big and small ways to implement sustainable practices.

Throughout 2023, the new committee hosted multiple educational events to share information and resources for people and companies looking to learn more about sustainability and what kind of programs and initiatives can be implemented. The group also provided a deep dive into how to effectively market sustainability efforts while avoiding the perception of “green washing.”

The group will once again take center stage at the 2024 Leadership Conference with a presentation on “Starting Your Sustainability Journey—A Roadmap.”
While workplace safety and the wellbeing of the RV industry workforce has always been a priority for the RV industry, in 2023 the Workplace Safety Taskforce convened to renew our efforts to share best practices and insights to help all companies improve. The group of workplace safety professionals from companies across the industry met monthly to discuss the biggest pain points, strategies, and solutions to mitigate issues and improve overall safety.

In November, the group hosted a half-day seminar that included presentations from companies setting the bar on workplace safety, speakers with keen insights on why workplace safety is important, and a panel focused on specific actions companies can take to improve workplace safety for your teams. Feedback on the seminar was overwhelmingly positive and plans are already in motion to host two more workplace safety seminars in 2024.
Membership Benefits

Membership in the RV Industry Association provides companies with access to research, resources, and reports unavailable anywhere else. But even more importantly, membership means having the expertise of a talented group of standards, government affairs, research, and marketing professionals who serve as an extension of member company’s own staff.

THERE ARE THREE MAIN PILLARS THAT MAKE UP THE ASSOCIATION

- **RV Industry Association**: The core programs of the Association consisting of self-regulation and industry standards, government relations, and market data and research.
- **Go RVing**: Our consumer-facing advertising arm charged with attracting new consumers to RVing and conducting consumer research.
- **RV Technical Institute**: Our educational arm charged with the training, certification, and recruitment of RV technicians.

**UNITE AS A SINGLE VOICE**
The RV Industry Association is the voice for the industry at the federal and state level, advocating on a wide range of issues to create a favorable business environment, protect against onerous legislation and regulations, and make it easier for consumers to buy, drive, and own an RV. Our state and federal government affairs teams work with officials across the country. We forge strong alliances with industry partners across the outdoor industry to amplify our voices and present a united message to lawmakers.

**STAY INFORMED WITH MARKET DATA AND TRENDS**
The RV Industry Association is the leader in driving new research into industry trends and consumer behaviors which allow members to tailor your products to the demands of the market. We drive research on future consumer markets and provide shipment data tracking and trends that allow you and your manufacturing partners to produce RVs, parts, internal systems, and accessories to meet your business demands. RV Industry Association members have access to this research and data to assist in making informed, data-driven business decisions in an evolving RV market.

**MAKE CONNECTIONS TO DRIVE BUSINESS**
The RV Industry Association connects you with and gives you visibility among the manufacturers who produce 98% of North America’s RVs. There are nearly thirty RV Industry Association committees made up of industry volunteers who, together with the Board of Directors, set the strategic direction of the Association. In addition, the RV Industry Association provides members with several virtual and in-person events and trainings every year. Participation in Association committees, events, and advocacy provide opportunities to contribute to the advancement of the RV industry, learn the latest on issues impacting RV businesses, showcase innovative products, forge new relationships, and provide actionable insights to grow your business.
INFLUENCE THE STANDARDS THAT DEFINE THE INDUSTRY
The Standards team maintains and contributes to the creation of over 500 safety-related industry standards regulating traditional and park model RVs. Our inspectors travel across the country to all member facilities for unannounced inspections every 6-8 weeks to audit the manufacturer’s compliance with the industry’s universally adopted standards, including NFPA 1192 standards, ANSI standards, and others. The inspectors also educate manufacturers on certain existing, future, and updated regulations that affect that the RV industry to ensure that members have the most up-to-date information. The Association regularly hosts technical training webinars, seminars, and events; works with the National Highway Traffic Safety Administration (NHTSA) and provides opportunities for members to interact and receive updated information from the administration; and publishes a standards handbook every three years with compliance information.

PROMOTE AND GROW THE INDUSTRY
In 1994, a forward-thinking group of RV industry thought leaders conceived the idea of creating an all-industry marketing campaign that united the three branches of the industry (RV manufacturers, dealers, and campgrounds) necessary for a positive consumer experience. Today, in addition to our highly impactful public relations efforts that drive a cohesive and positive industry message across the media landscape, the Go RVing program introduces millions of Americans to the freedom of RV travel, building a desire and passion of the adventures that await. The award-winning Go RVing program continues to be a marketing and consumer awareness thought leader, focusing recent efforts on recruiting, diversifying, and retaining RVers through a broad media mix and partnerships that target high value audiences primed to be your future customer. In addition to its consumer-focused marketing efforts, Go RVing provides manufacturers, dealers, campground operators, state associations, show promoters, and their agencies with access to sales leads, an image and video library, industry best practices, consumer research, and other marketing tools.

RECRUIT AND TRAIN RV TECHNICIANS
In June 2018, the RV Industry Association launched a comprehensive strategic plan with a multi-million-dollar investment, creating the RV Technical Institute, to solve the RV industry’s shortage of trained technicians and to implement metrics to track the RV customer experience. The 501(c)3 non-profit organization provides the gold-standard of training for RV maintenance and repair, working directly with manufacturers, suppliers, and leading RV experts to deliver the only RV technician training program built by the industry. As of today, there are over 5,000 RV Technical Institute Certified technicians and nearly 1,000 RV dealerships and other locations training techs on the Institute’s curriculum.

REPORTS AVAILABLE TO MEMBERS INCLUDE:

- Go RVing RV Owner Demographic Profile
- Monthly RV and Park Model RV Shipment Reports
- Monthly RV Seals Sales Reports
- RVs Move America Economic Impact Study
- Quarterly Travel Intentions Survey
- RV Aftermarket Parts & Accessories Study
- New RV Buyers Study
- Survey of Lenders’ Experiences
- RV Technician Market Assessment Survey
- Annual RV Market Industry Profile
- Campground Industry Market Analysis
- Annual Report for RV Industry Association
- Quarterly RoadSigns RV Shipment Forecasts
- Path to Purchase Customer Journey Map
- Vacation Cost Comparison Study