



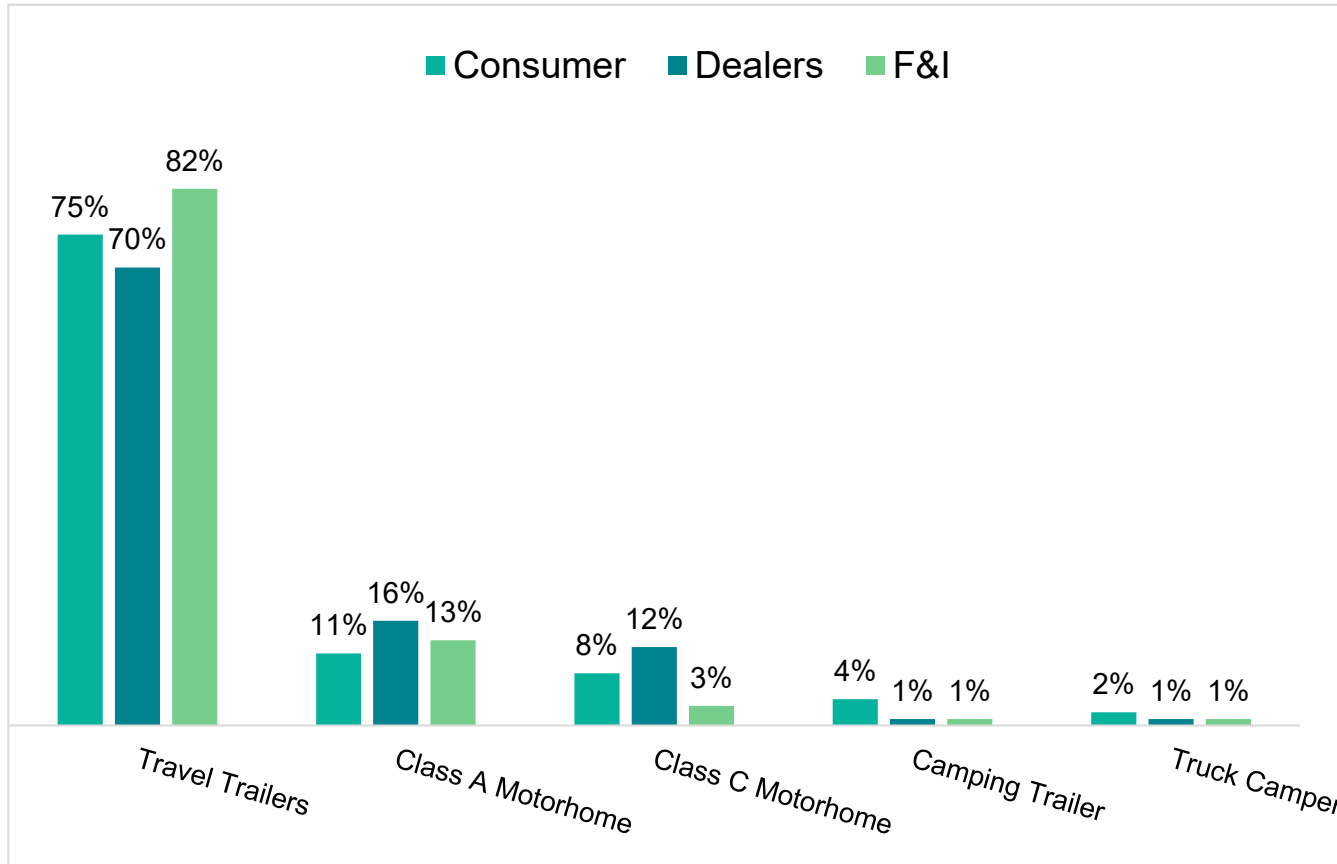
Specialty Vehicles Market Insights Report

Recreational Vehicles

2026 Q1

Segment Views by User Type

Travel Trailers were by far the most-viewed segment across all customer channels in Q1, also showing a major increase in interest from Consumers year-over-year.



| 2025 Q1 to 2026 Q1 Change in Share of Views | | | |
|---|----------|---------|-------|
| Model Type | Consumer | Dealers | F&I |
| Travel Trailers | ▲ 20% | ▬ 0% | ▲ 5% |
| Class A Motorhomes | ▼ -10% | ▬ 0% | ▲ 1% |
| Class C Motorhomes | ▼ -6% | ▬ 0% | ▼ -6% |
| Camping Trailers | ▼ -2% | ▬ 0% | ▬ 0% |
| Truck Campers | ▼ -2% | ▬ 0% | ▬ 0% |

Year-Over-Year Change in Views

There were notable changes in Class A F&I traffic in Q1, with all makes except Allegro seeing an increase. This activity suggests healthy closing activity.

| Class A Motorhomes | | | | | |
|--------------------------|----------|-----|---------|-----|--------|
| Manufacturer | Consumer | | Dealers | | F&I |
| Winnebago | ▼ | -2% | ▼ | -2% | ▲ 5% |
| Thor Motor Coach | ▲ | 2% | ▼ | -1% | ▲ 9% |
| Allegro | ▬ | 0% | ▲ | 2% | ▼ -34% |
| Holiday Rambler | ▼ | -1% | ▲ | 1% | ▲ 5% |
| Entegra Coach | ▲ | 1% | ▲ | 1% | ▲ 5% |
| Coachmen by Forest River | ▲ | 1% | ▬ | 0% | ▲ 4% |
| Itasca | ▬ | 0% | ▬ | 0% | ▲ 2% |
| Georgetown | ▬ | 0% | ▬ | 0% | ▲ 2% |

| Class C Motorhomes | | | | | |
|---------------------------|----------|-----|---------|-----|-------|
| Manufacturer | Consumer | | Dealers | | F&I |
| Thor Motor Coach | ▲ | 1% | ▲ | 1% | ▼ -4% |
| Winnebago | ▼ | -1% | ▬ | 0% | ▼ -2% |
| Jayco | ▼ | -1% | ▼ | -1% | ▲ 1% |
| Coachmen by Forest River | ▬ | 0% | ▼ | -1% | ▼ -1% |
| Sunseeker by Forest River | ▲ | 1% | ▼ | -1% | ▲ 1% |
| Gulf Stream | ▼ | -1% | ▬ | 0% | ▲ 1% |
| Forester | ▲ | 1% | ▬ | 0% | ▲ 1% |
| Entegra Coach | ▲ | 1% | ▲ | 1% | ▲ 2% |

Year-Over-Year Change in Views

Flagstaff saw healthy business across all of our customer channels in Q1, suggesting that brand is capturing consumers from the research phase to the check writing phase.

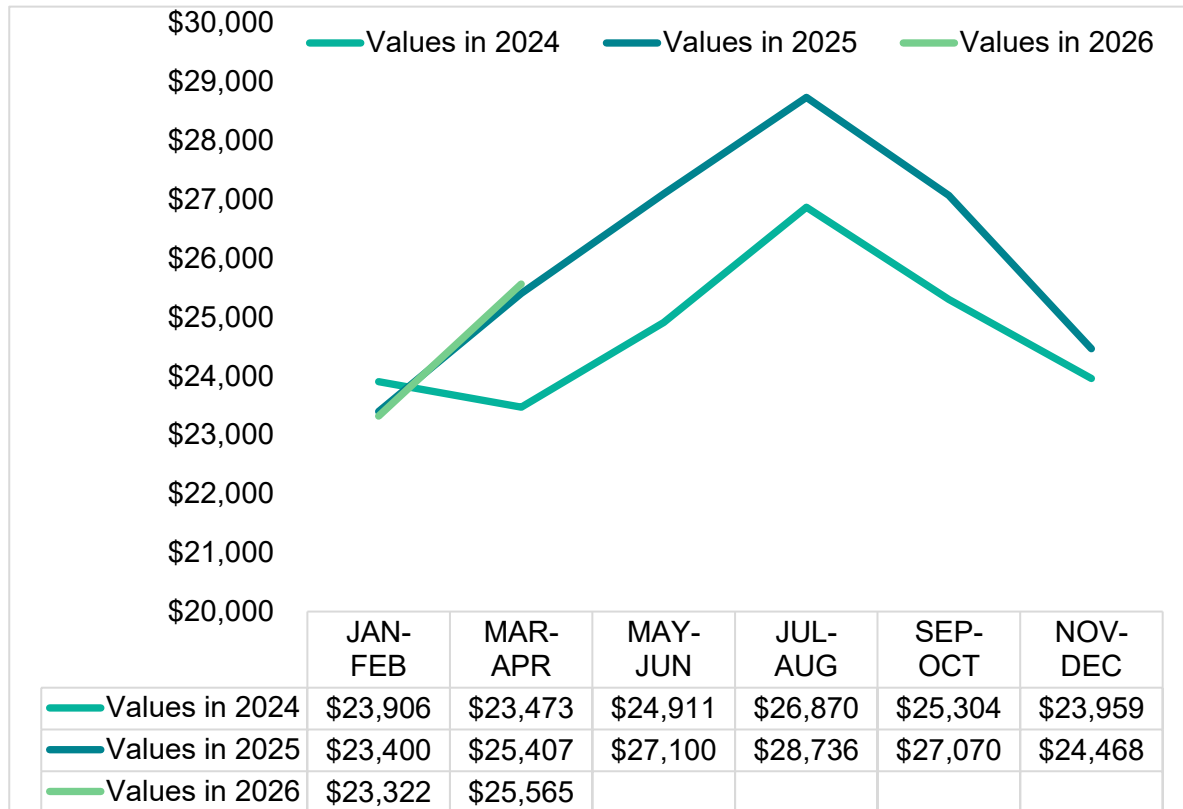
| Camping Trailers | | | | | | |
|---------------------------|----------|-----|---------|-----|-----|-----|
| Manufacturer | Consumer | | Dealers | | F&I | |
| Rockwood by Forest River | ▲ | 6% | ▼ | -7% | ▼ | -3% |
| Jayco | ▼ | -2% | ▼ | -3% | ▼ | -3% |
| Flagstaff by Forest River | ▲ | 1% | ▲ | 5% | ▲ | 11% |
| A Liner | ▼ | -1% | ▲ | 6% | ▼ | -6% |
| Coleman | ▼ | -3% | ▲ | 2% | ▲ | 1% |
| Coachmen by Forest River | ▬ | 0% | ▼ | -1% | ▼ | -3% |
| Fleetwood Folding Trlrs | ▬ | 0% | ▼ | -2% | ▬ | 0% |
| Starcraft | ▬ | 0% | ▼ | -1% | ▲ | 2% |

| Truck Campers | | | | | | |
|--------------------------|----------|-----|---------|-----|-----|------|
| Manufacturer | Consumer | | Dealers | | F&I | |
| Lance | ▼ | -3% | ▼ | -2% | ▼ | -4% |
| Palomino by Forest River | ▲ | 4% | ▼ | -2% | ▲ | 10% |
| Arctic Fox | ▲ | 1% | ▲ | 5% | ▲ | 2% |
| Travel Lite | ▼ | -2% | ▲ | 1% | ▼ | -3% |
| Adventurer | ▬ | 0% | ▬ | 0% | ▼ | -11% |
| Real Lite by Palomino | ▲ | 2% | ▬ | 0% | ▲ | 15% |
| Northstar | ▼ | -1% | ▬ | 0% | ▼ | -7% |
| Bigfoot Ind | ▼ | -1% | ▬ | 0% | ▼ | -1% |

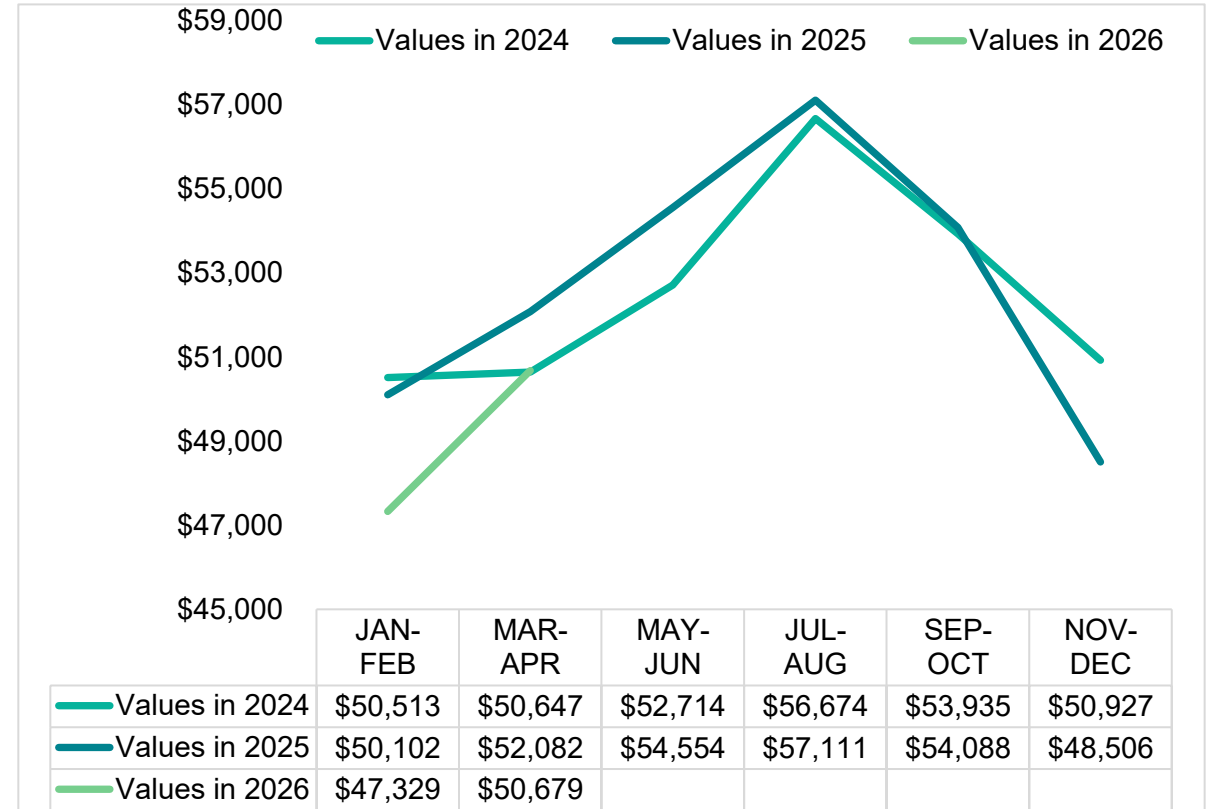
Average Retail Value by Category – Last 10 Model Years

Standard Hitch Travel Trailers are performing very similarly to last year. Fifth Wheels are underperforming 2025 by 3%.

Standard Hitch Travel Trailers



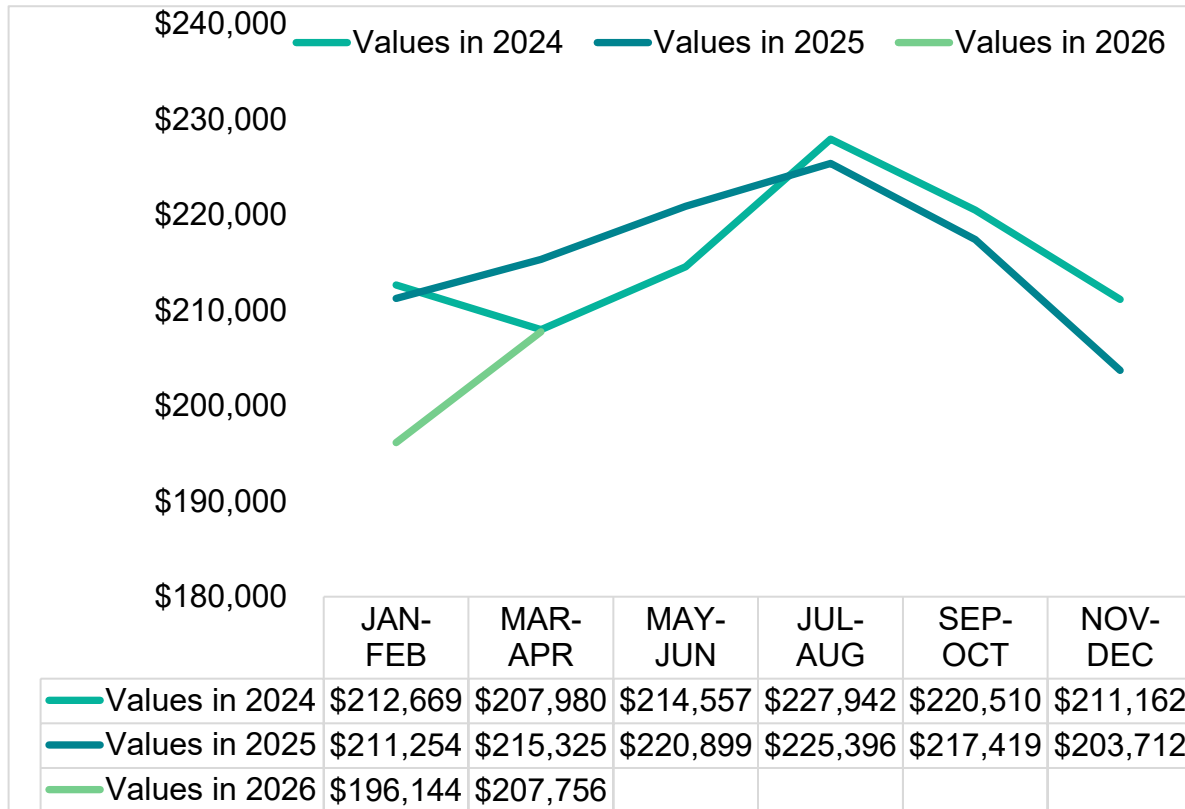
Fifth Wheels



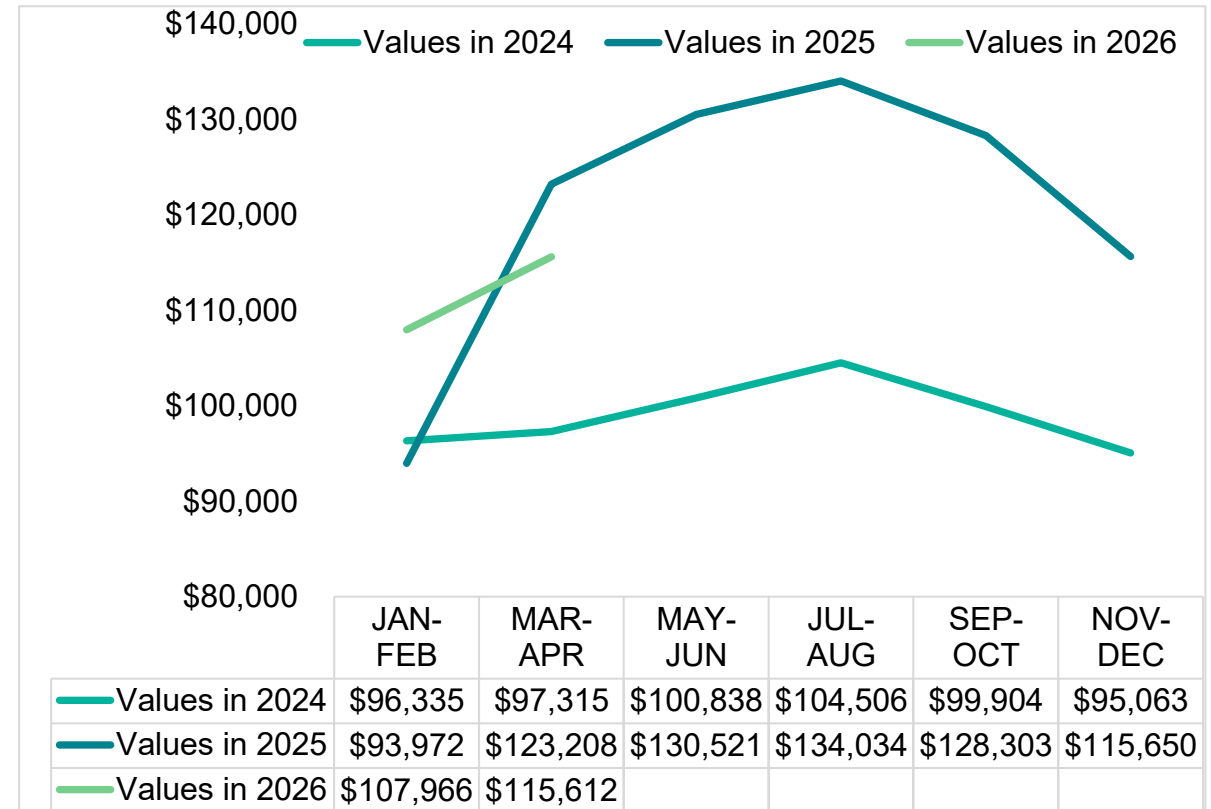
Average Retail Value by Category – Last 10 Model Years

Class A Motorhome values are underperforming 2025 and are at parity with 2024. Class C's did not see the steep seasonal ramp-up they received last year.

Class A Motorhomes



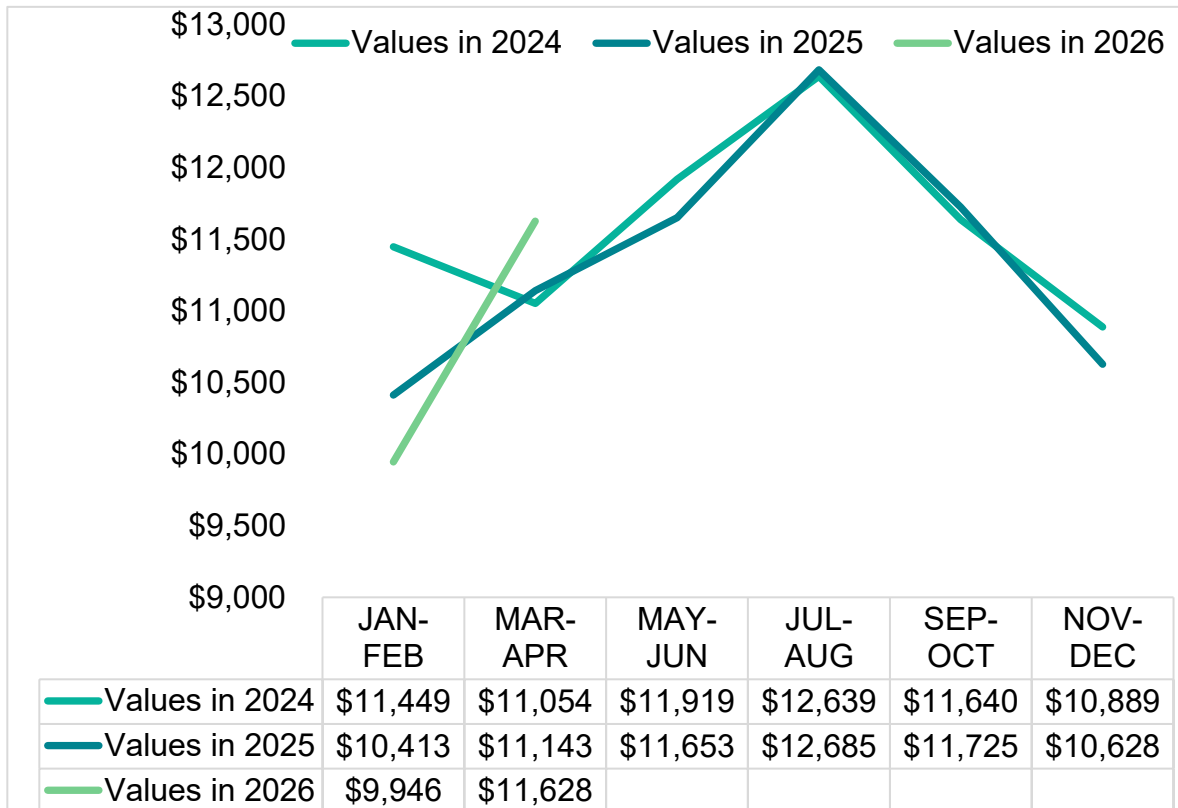
Class C Motorhomes



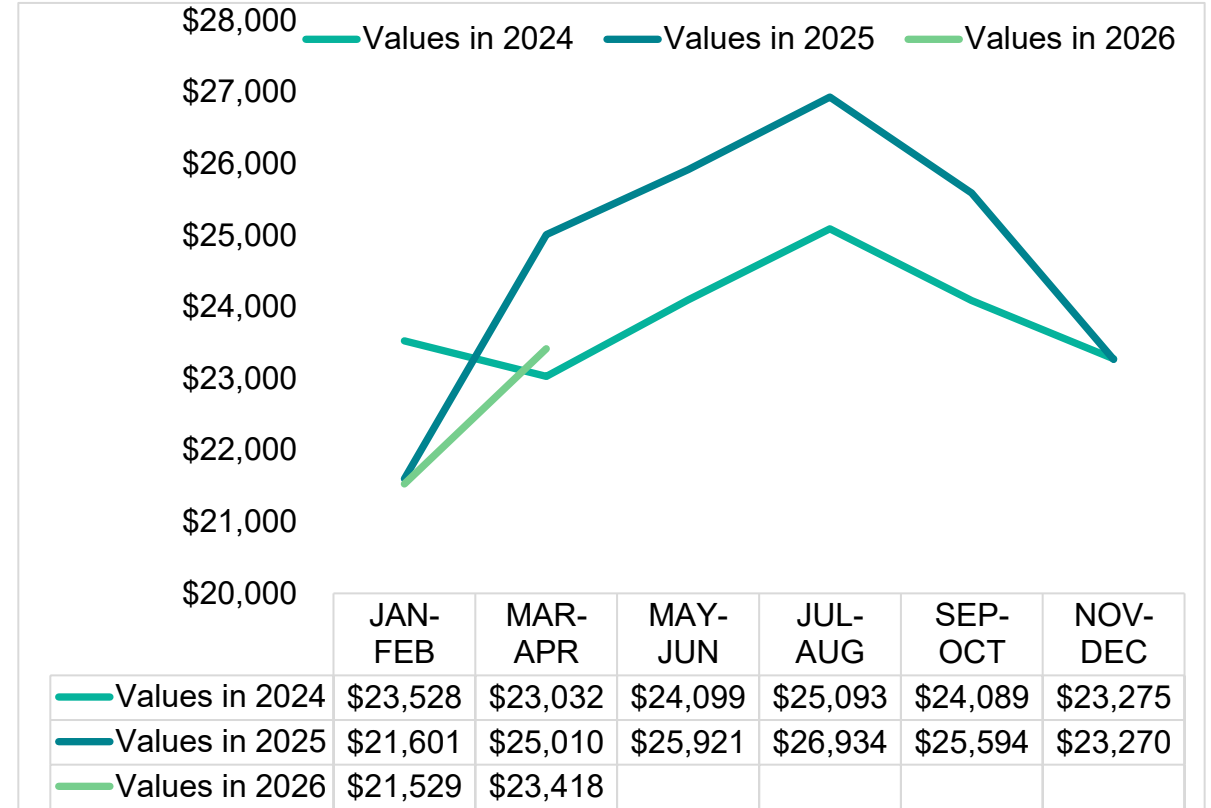
Average Retail Value by Category – Last 10 Model Years

Camping Trailers saw notable appreciation going into the spring, while Truck Campers had a more muted start to the season.

Camping Trailers



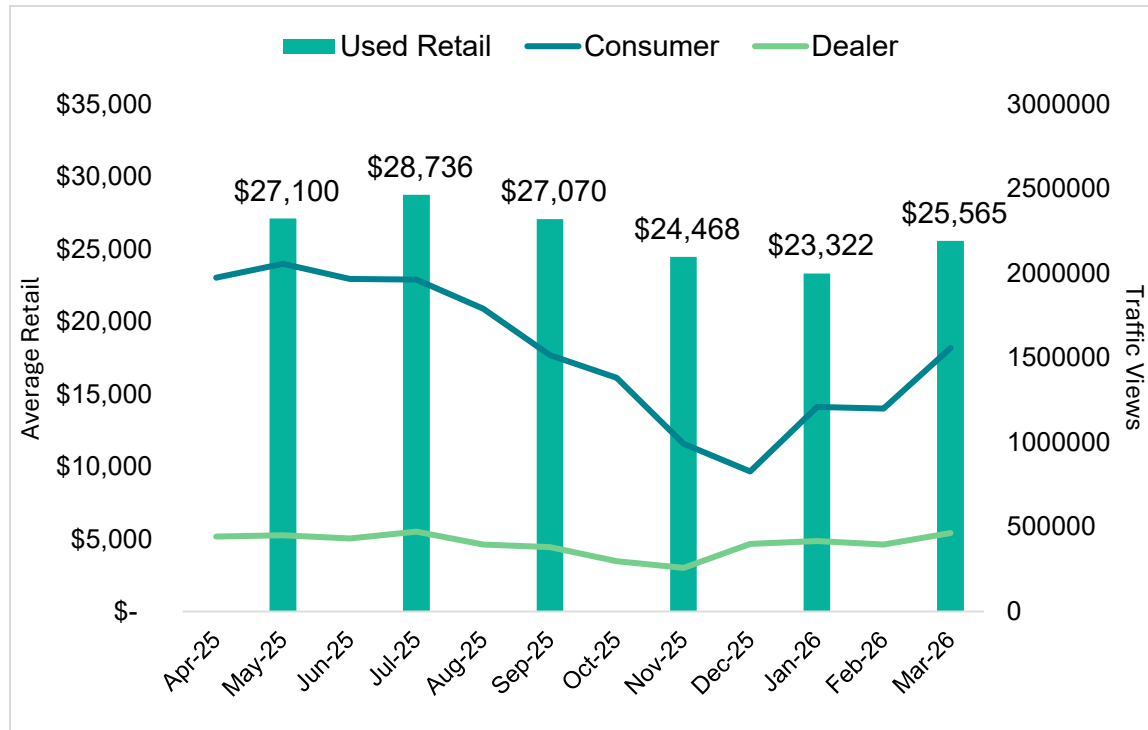
Truck Campers



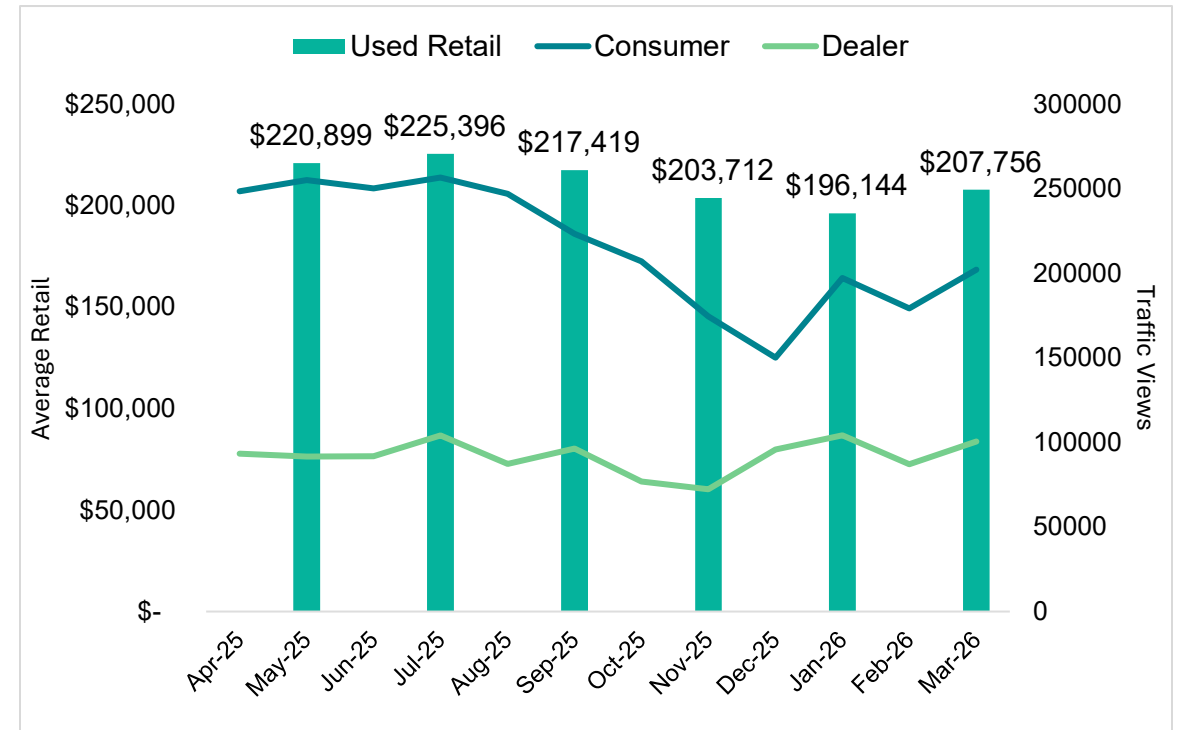
Values vs. Traffic

Consumers showed healthy interest in Travel Trailers going into the spring, while interest in Class A Motorhomes was more subdued.

Travel Trailers



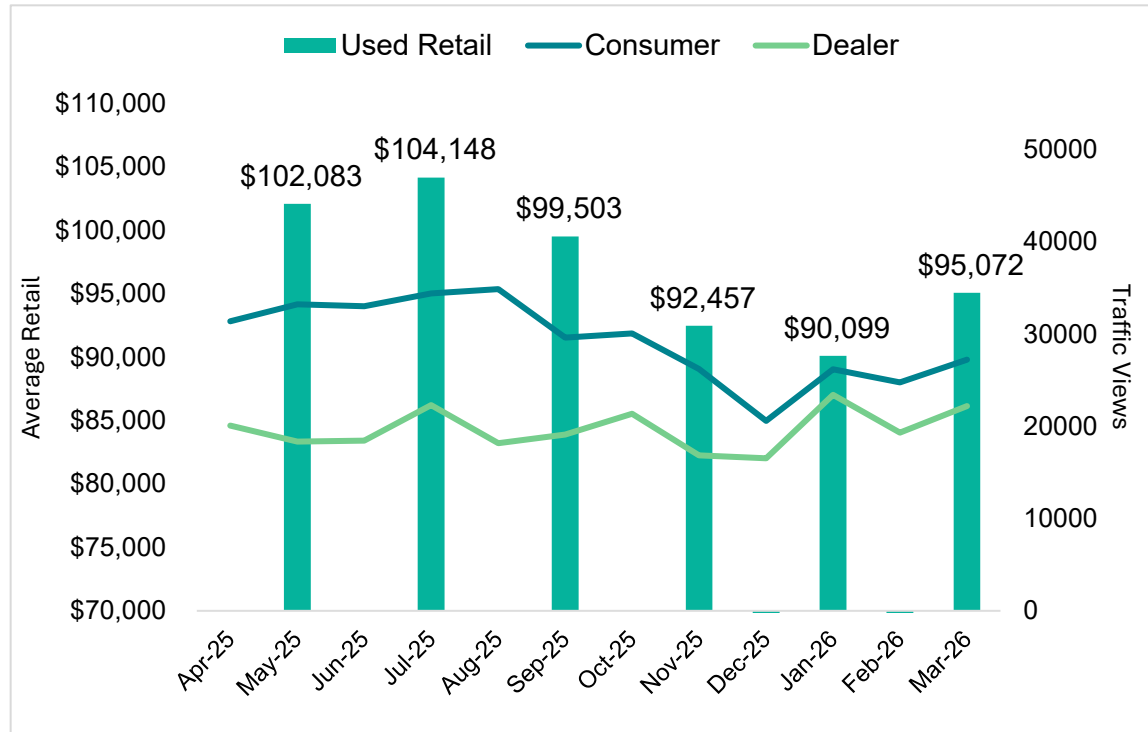
Class A Motorhomes



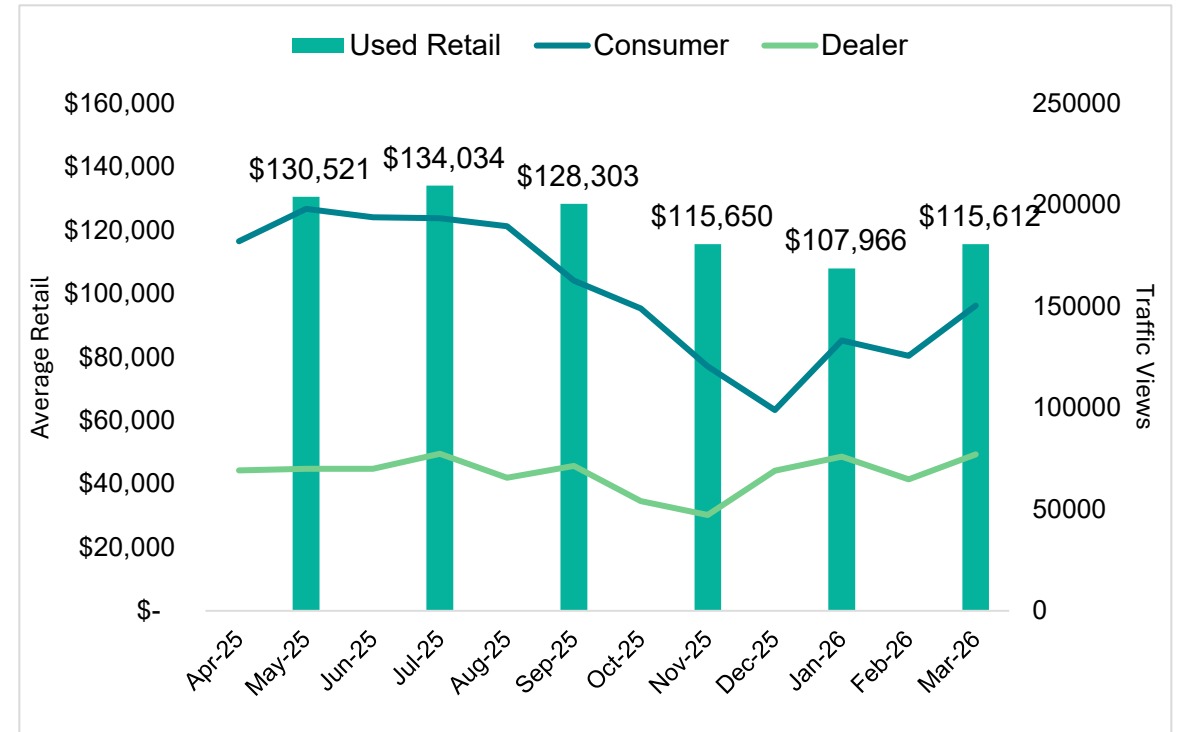
Values vs. Traffic

Consumers appeared more interested in Class C Motorhomes than Class B in Q1.

Class B Motorhomes



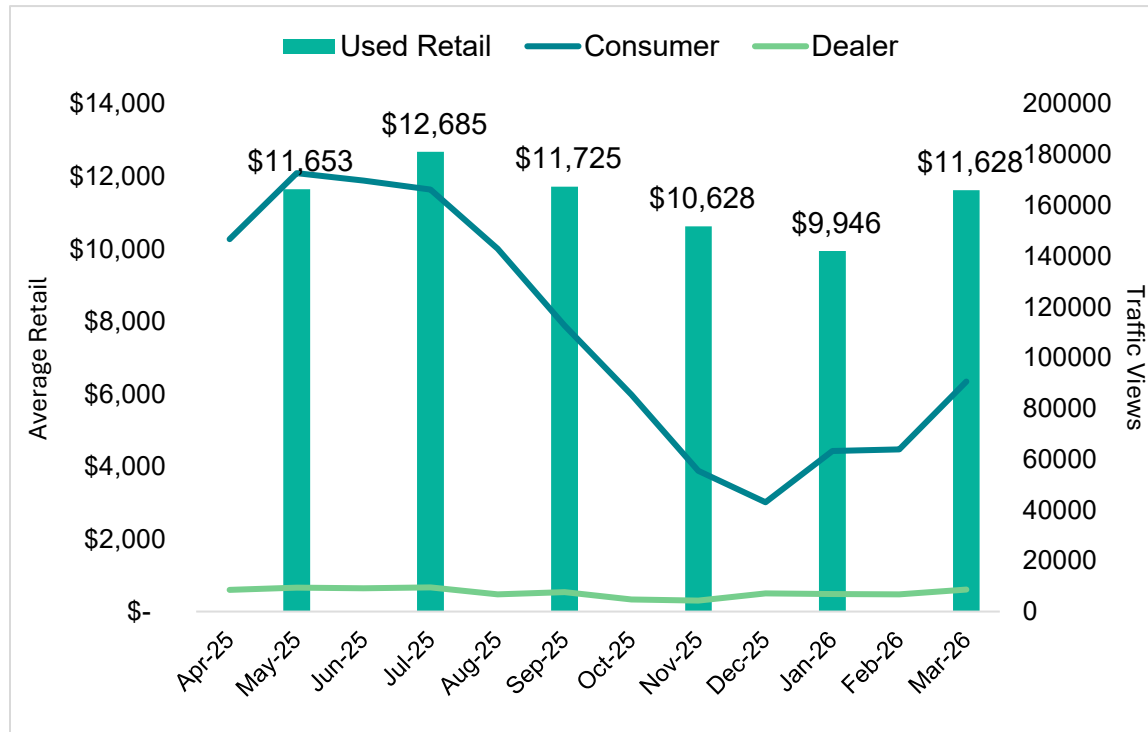
Class C Motorhomes



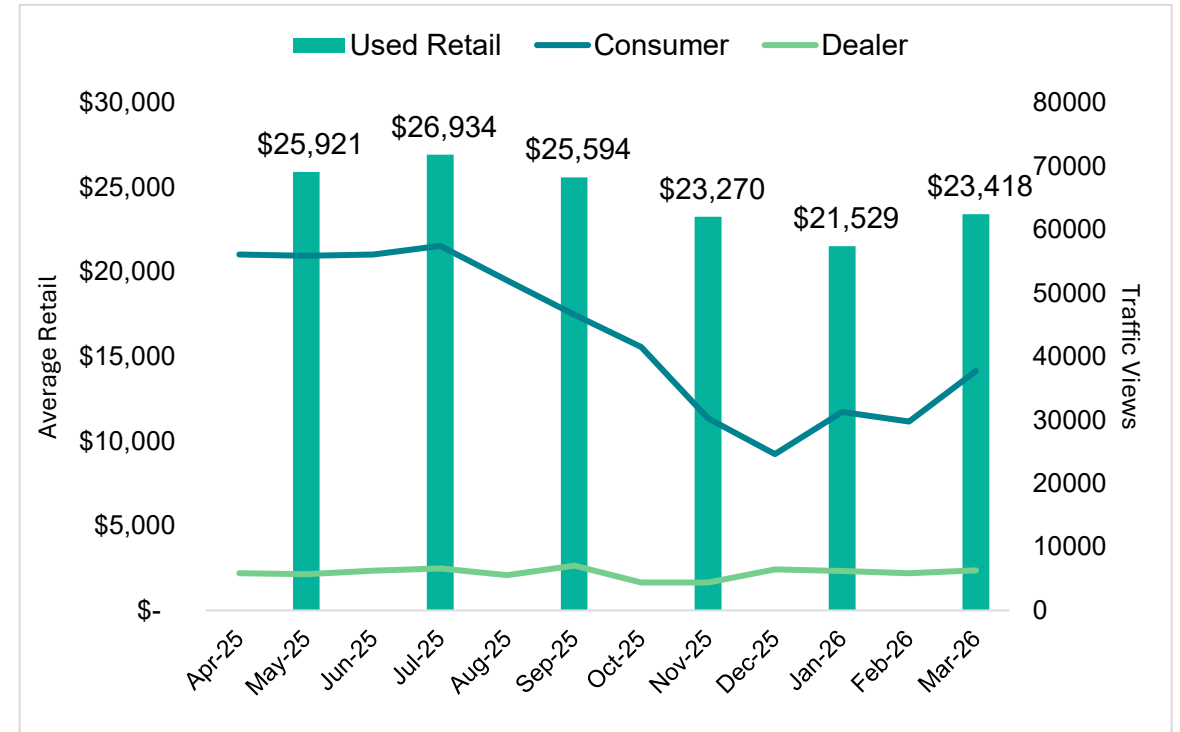
Values vs. Traffic

Consumer interest in Camping Trailers and Truck Campers saw a typical seasonal uptick in early 2026, but activity is sluggish compared to 2025.

Camping Trailers

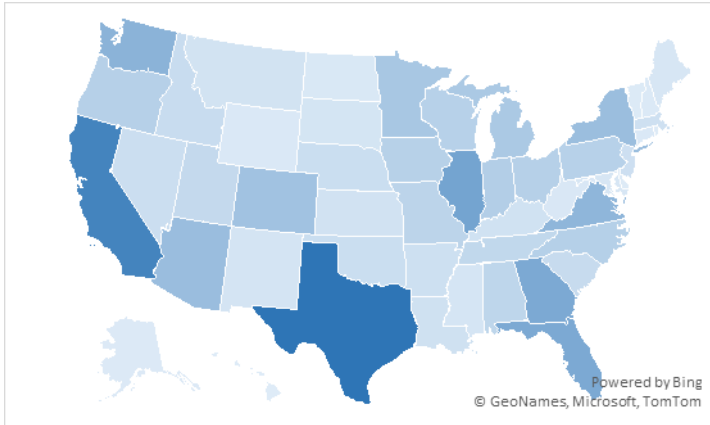


Truck Campers

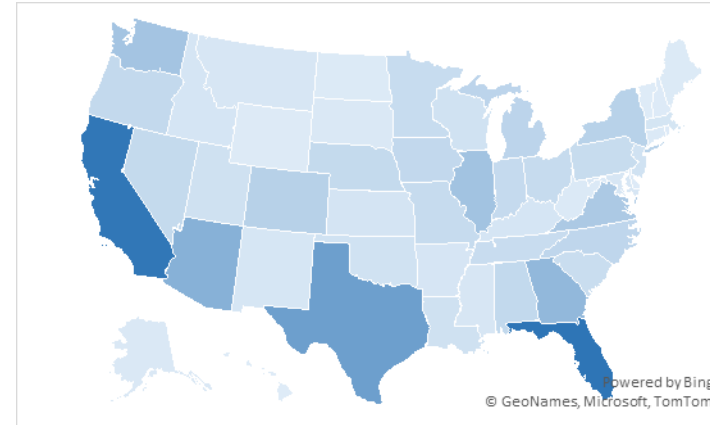


Views by Region

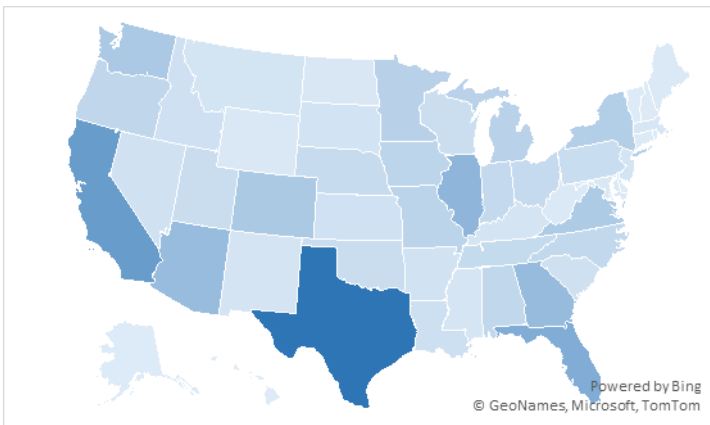
Standard Hitch Travel Trailers



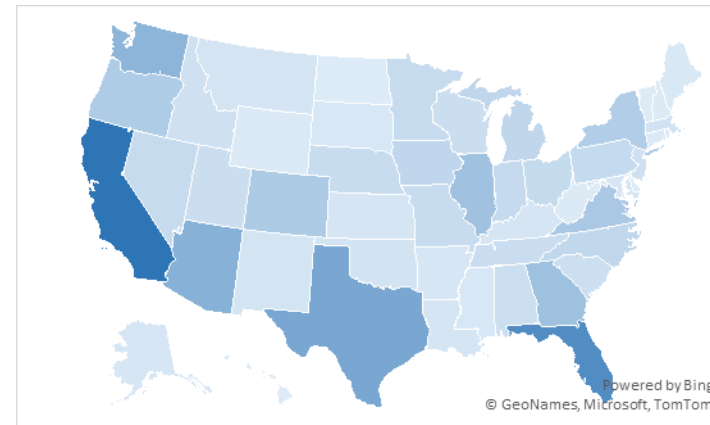
Class A Motorhomes



Fifth Wheels

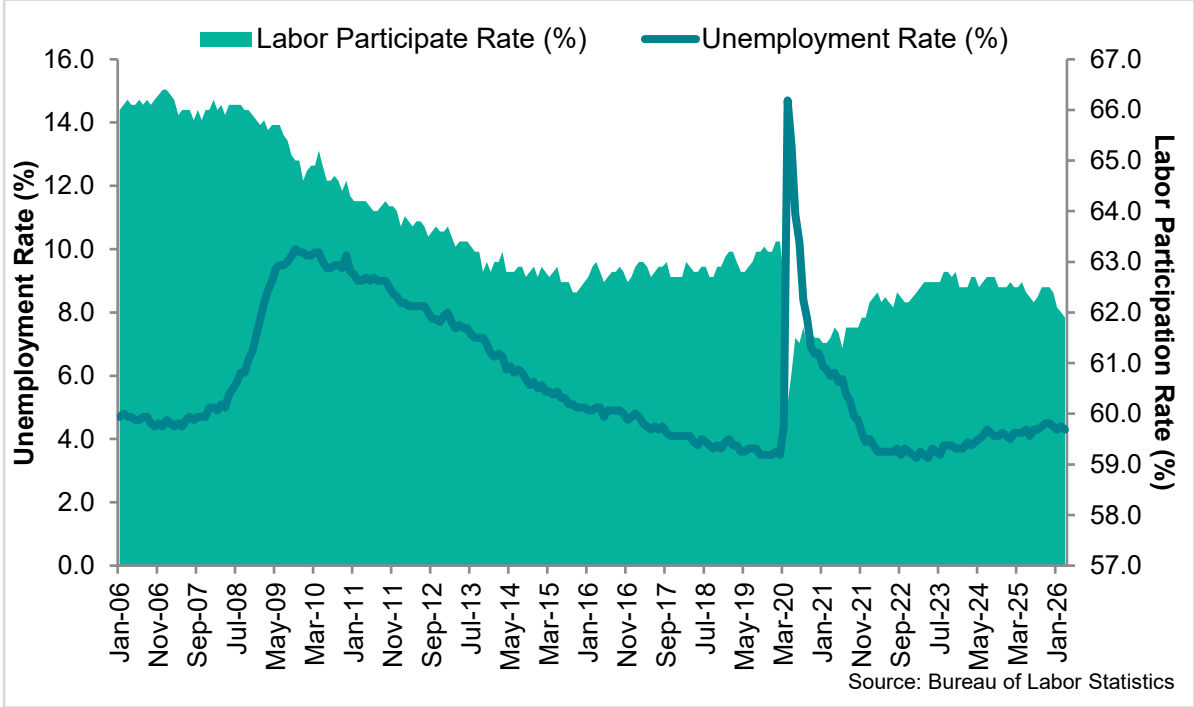


Class C Motorhomes



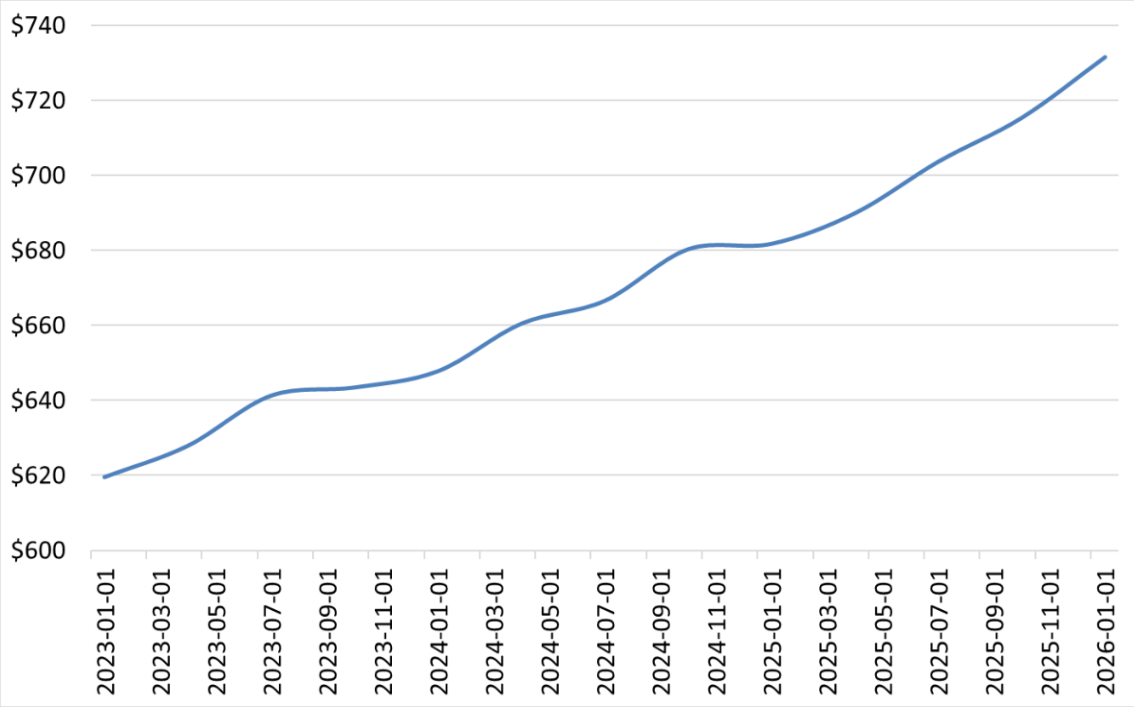
Economic Data

Unemployment and Labor Participation



Source: Bureau of Labor Statistics (BLS) (www.bea.gov)

Consumer Spending on Recreational Goods and Vehicles



Source: "Real Personal Consumption Expenditures by Major Type of Product" (billions of Dollars)
Bureau of Labor Statistics (BLS) (www.bea.gov)

Key Takeaways

- Travel Trailers were once again by far the most popular segment across all our customer channels. Rockwood saw the most consumer interest in this segment, but dealer and F&I strength was with the Flagstaff nameplate, suggesting that was the make customers actually ended up purchasing.
- F&I activity for Class C Motorhomes decreased in Q1. Winnebago and Thor were the makes most affected by this dip.
- Camping Trailer was the only segment where Q1 2026 valuations were higher than both 2025 and 2024, indicating strong valuation momentum. Truck Camper average retail values were softer in Q1 2026 with valuations lower than Q1 2025 and slightly higher than Q1 2024.
- Class A and Class C values were both lower in Q1 2026 year over year. Class A values were in line with Q1 2024 whereas Class C values were 19% higher than Q1 2024.
- Lower priced used RV's, especially travel trailers, continued to sell well in Q1.
- Gas and diesel prices will represent an increasing threat to overall RV demand the longer they stay elevated.

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