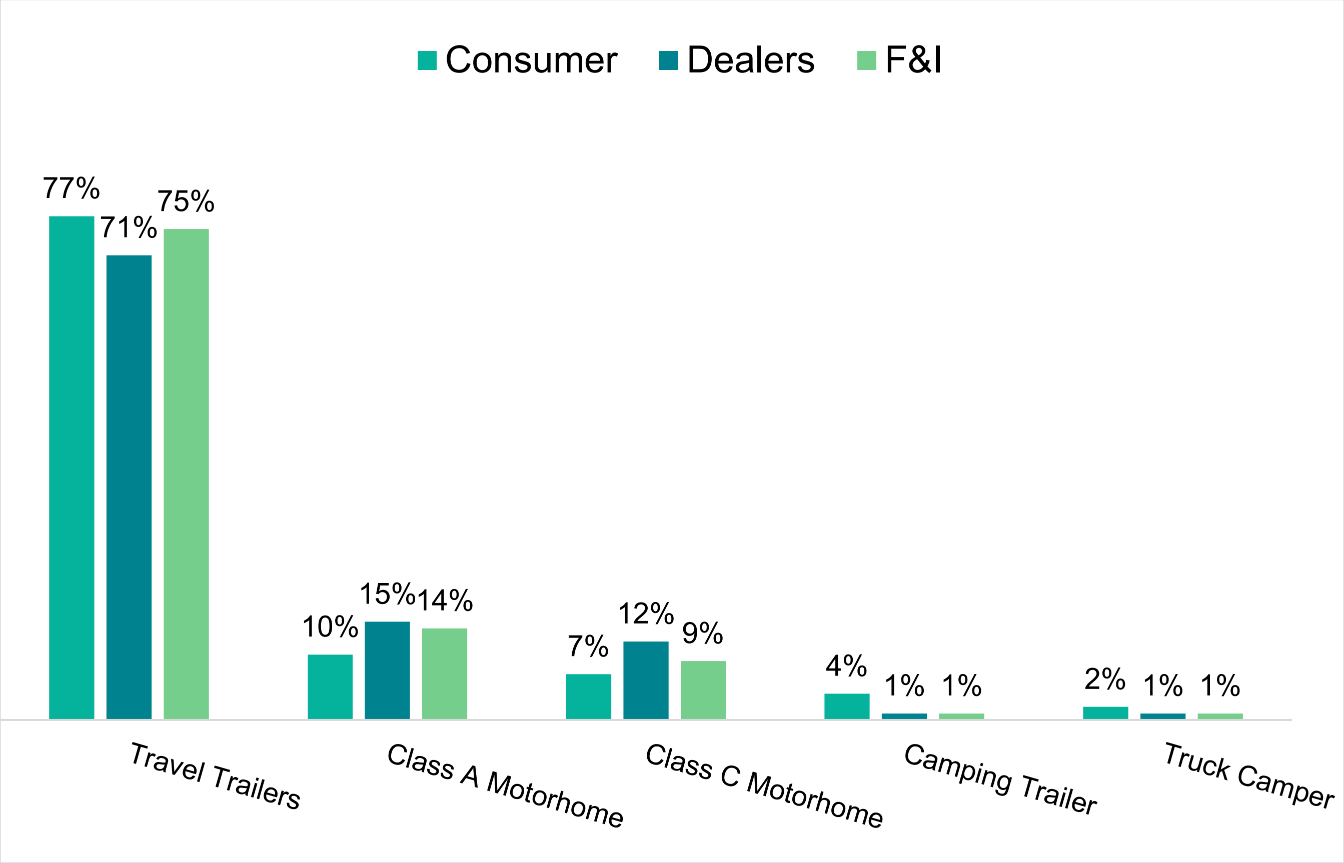
Specialty Vehicles Market Insights Report

Recreational Vehicles

2026 Q2

Segment Views by User Type

Travel Trailers were once again by far the most-viewed segment across all customer channels in Q1. This segment showed a notable increase in F&I views in Q2, a nice follow-on to Consumer strength last quarter.



2025 Q1-Q2 to 2026 Q1-Q2 Change in Share of Views

Model Type	Consumer	Dealers	F&I
Travel Trailers	2%	0%	7%
Class A Motorhomes	-1%	-1%	-6%
Class C Motorhomes	0%	0%	0%
Camping Trailers	-1%	0%	0%
Truck Campers	0%	0%	0%

Year-Over-Year Change in Views

F&I strength continued into Q2 across most makes, with two notable exceptions. This activity points to healthy closing activity.

Class A Motorhomes			
Manufacturer	**Consumer**	**Dealers**	**F&I**
Winnebago	-2%	-2%	4%
Thor Motor Coach	3%	0%	5%
Allegro	0%	2%	-25%
Holiday Rambler	-1%	0%	5%
Entegra Coach	0%	1%	4%
Coachmen by Forest River	1%	0%	3%
Itasca	0%	-1%	2%
Georgetown	0%	0%	2%

Class C Motorhomes			
Manufacturer	**Consumer**	**Dealers**	**F&I**
Thor Motor Coach	1%	1%	-11%
Winnebago	-1%	-1%	0%
Jayco	0%	-1%	2%
Coachmen by Forest River	0%	-1%	1%
Sunseeker by Forest River	0%	1%	2%
Gulf Stream	-1%	0%	2%
Forester	0%	0%	2%
Entegra Coach	1%	1%	2%

Year-Over-Year Change in Views

Flagstaff saw healthy business across all of our customer channels for another quarter, suggesting that brand continues to capture consumers from the research phase to the check writing phase.

Camping Trailers

Manufacturer	Consumer	Dealers	F&I
Rockwood by Forest River	3%	-10%	-2%
Jayco	-5%	-4%	-1%
Flagstaff by Forest River	8%	11%	5%
A Liner	0%	4%	-4%
Coleman	-4%	3%	2%
Coachmen by Forest River	0%	-1%	-3%
Fleetwood Folding Trlrs	-1%	-2%	1%
Starcraft	-1%	-1%	3%

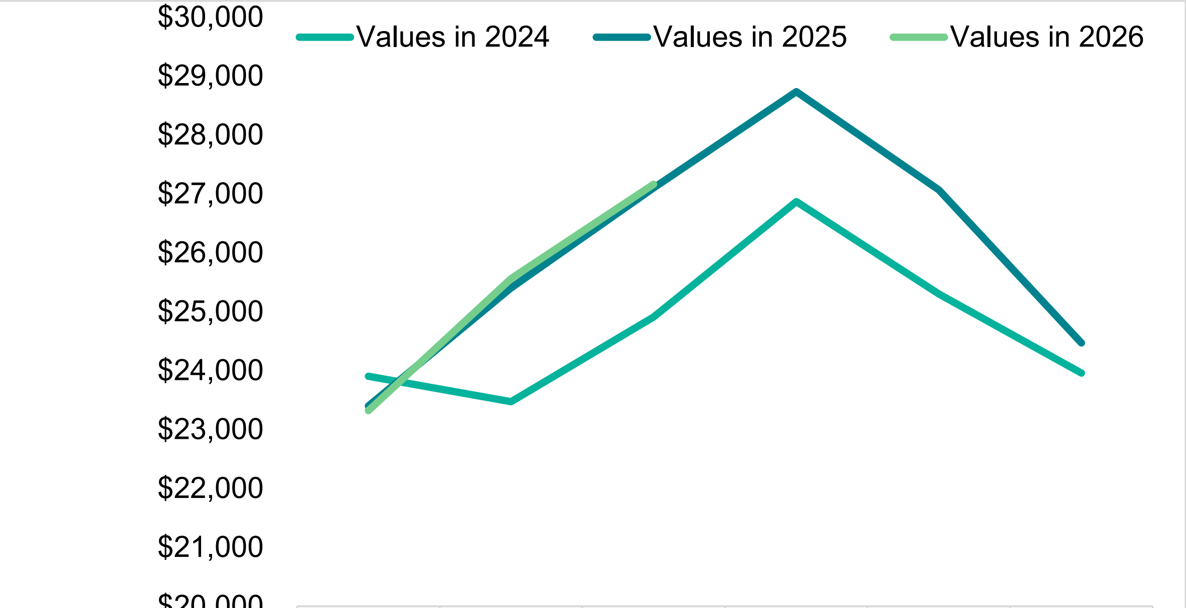
Truck Campers

Manufacturer	Consumer	Dealers	F&I
Lance	-3%	-2%	-2%
Palomino by Forest River	4%	0%	5%
Arctic Fox	0%	2%	1%
Travel Lite	-1%	1%	-1%
Adventurer	0%	0%	-6%
Real Lite by Palomino	2%	0%	10%
Northstar	-1%	0%	-7%
Bigfoot Ind	-1%	0%	-1%

Average Retail Value by Category – Last 10 Model Years

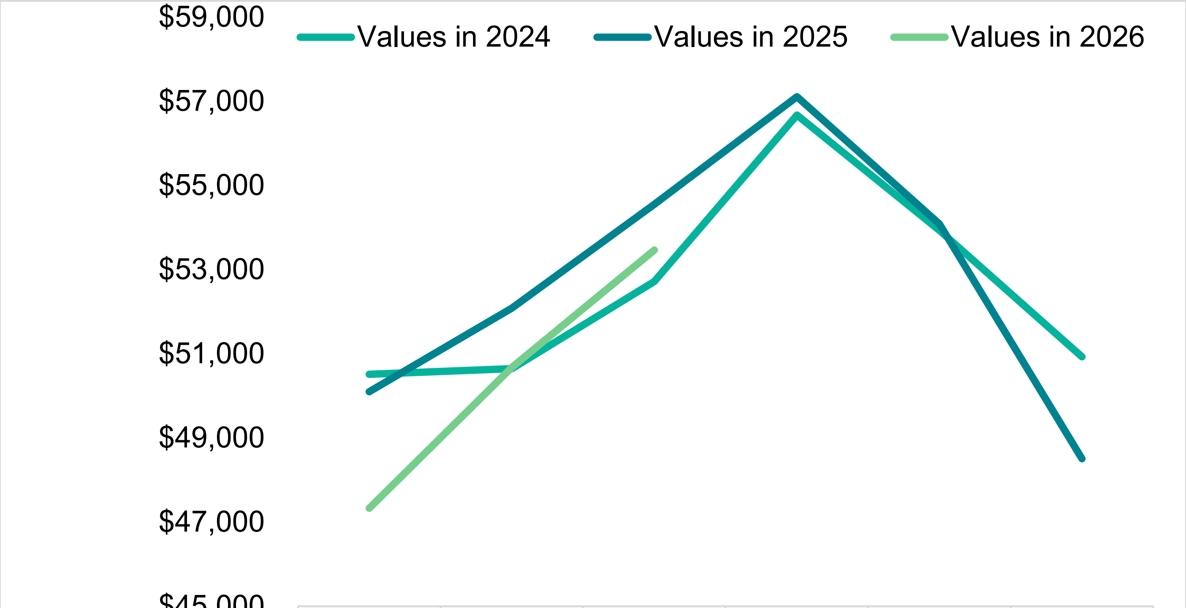
Standard Hitch Travel Trailers continue to perform very similarly to last year. Fifth Wheels are underperforming 2025 by 2%.

Standard Hitch Travel Trailers



	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$23,906	$23,473	$24,911	$26,870	$25,304	$23,959
Values in 2025	$23,400	$25,407	$27,100	$28,736	$27,070	$24,468
Values in 2026	$23,322	$25,565	$27,164			

Fifth Wheels



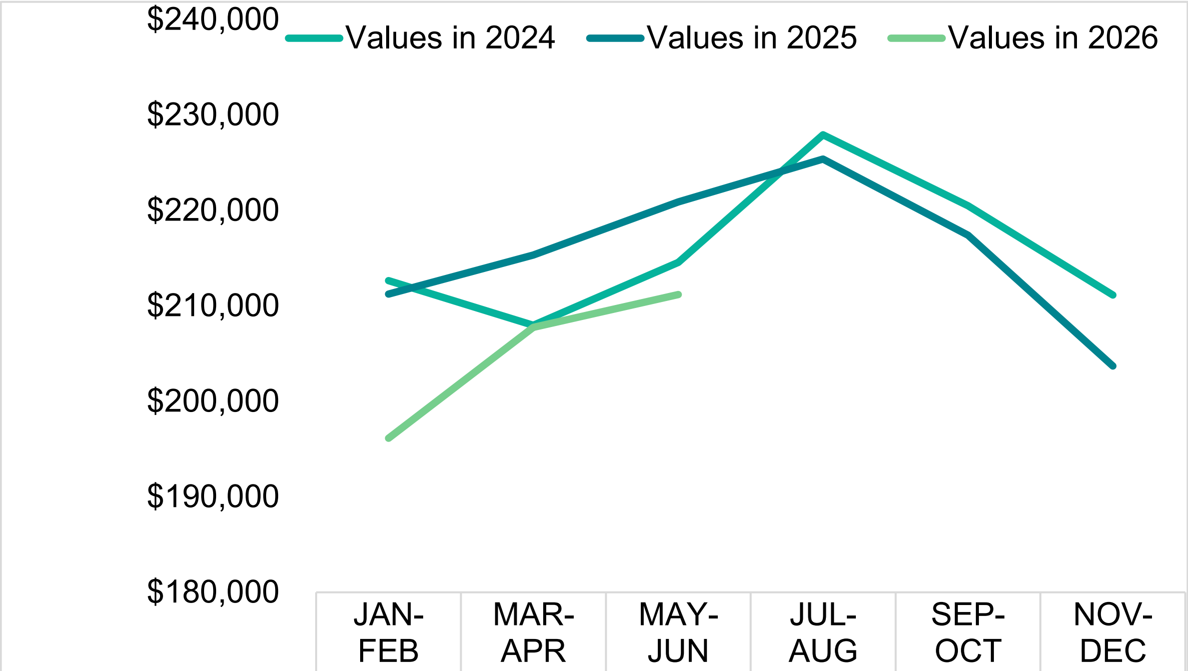
	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$50,513	$50,647	$52,714	$56,674	$53,935	$50,927
Values in 2025	$50,102	$52,082	$54,554	$57,111	$54,088	$48,506
Values in 2026	$47,329	$50,679	$53,466			

JDPOWER

Average Retail Value by Category – Last 10 Model Years

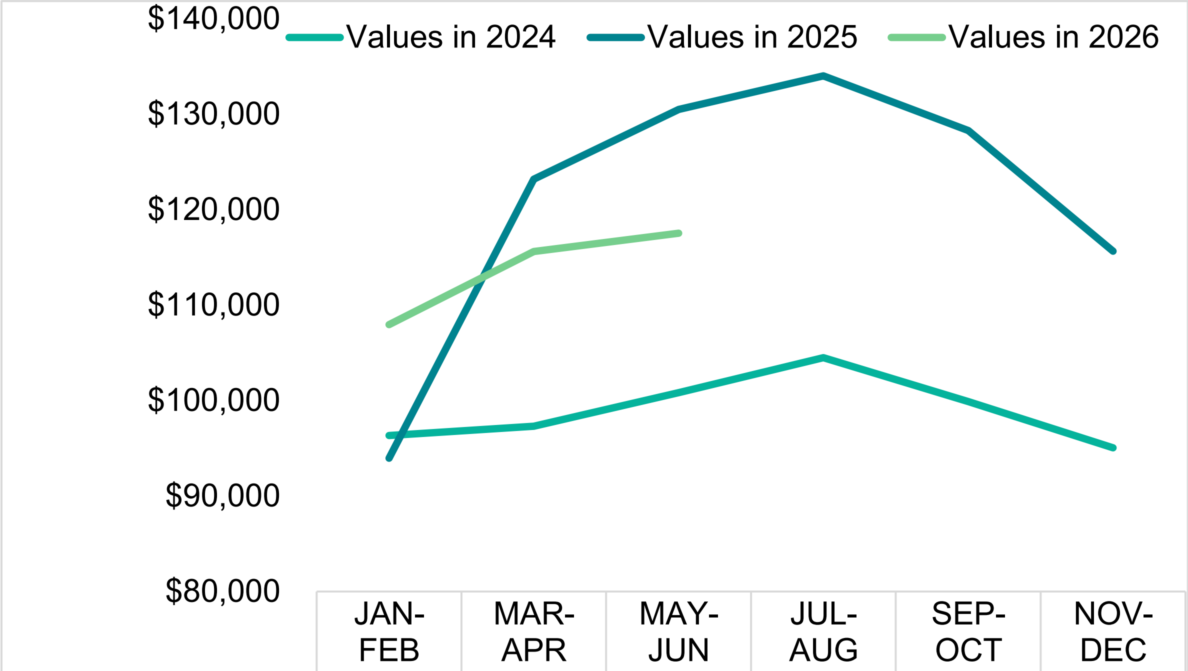
Seasonal value momentum is slower this year than 2025 or 2024 in Class A and C.

Class A Motorhomes



	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$212,669	$207,980	$214,557	$227,942	$220,510	$211,162
Values in 2025	$211,254	$215,325	$220,899	$225,396	$217,419	$203,712
Values in 2026	$196,144	$207,756	$211,199			

Class C Motorhomes

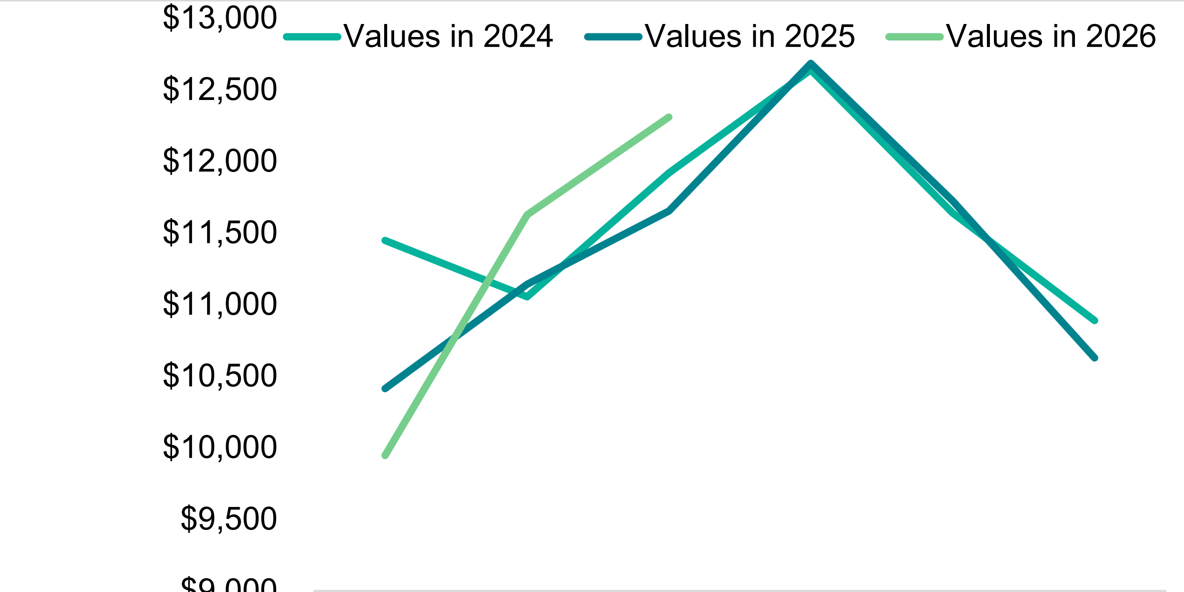


	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$96,335	$97,315	$100,838	$104,506	$99,904	$95,063
Values in 2025	$93,972	$123,208	$130,521	$134,034	$128,303	$115,650
Values in 2026	$107,966	$115,612	$117,545			

Average Retail Value by Category – Last 10 Model Years

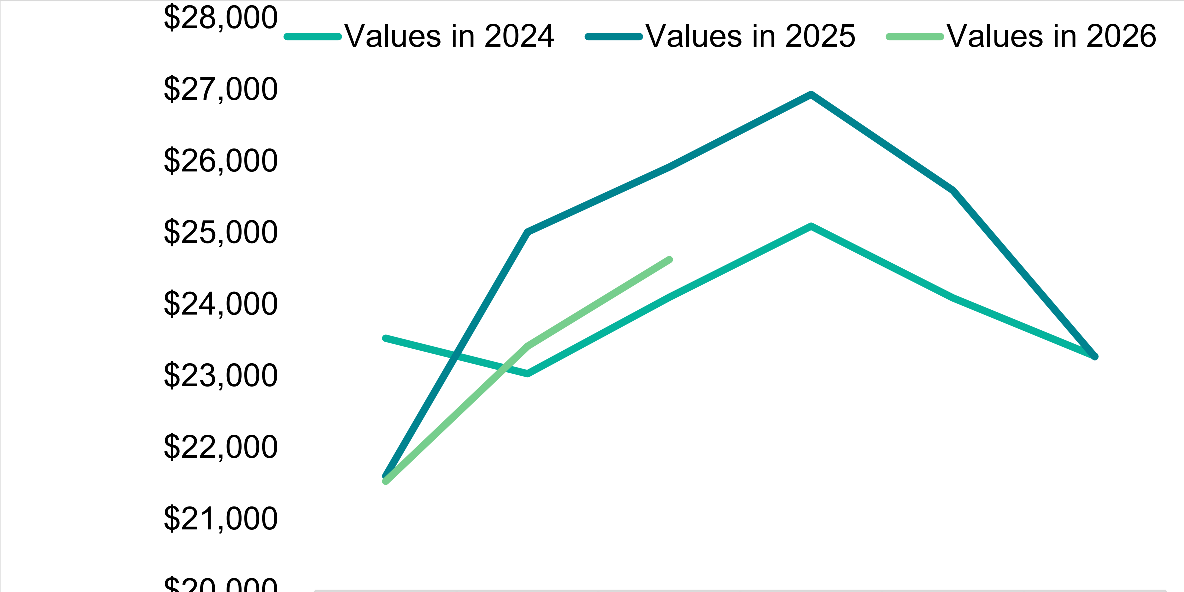
Camping Trailers are a standout in 2026, valued 6% higher than a year earlier.

Camping Trailers



	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$11,449	$11,054	$11,919	$12,639	$11,640	$10,889
Values in 2025	$10,413	$11,143	$11,653	$12,685	$11,725	$10,628
Values in 2026	$9,946	$11,628	$12,309			

Truck Campers

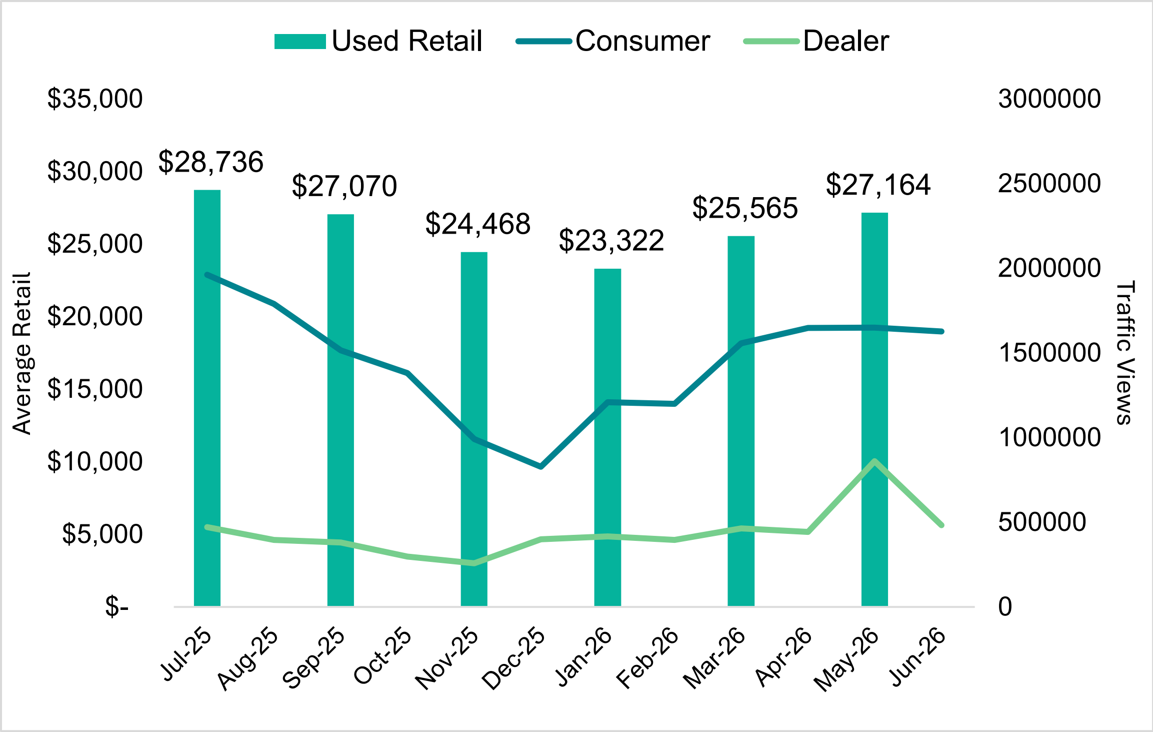


	JAN-FEB	MAR-APR	MAY-JUN	JUL-AUG	SEP-OCT	NOV-DEC
Values in 2024	$23,528	$23,032	$24,099	$25,093	$24,089	$23,275
Values in 2025	$21,601	$25,010	$25,921	$26,934	$25,594	$23,270
Values in 2026	$21,529	$23,418	$24,626			

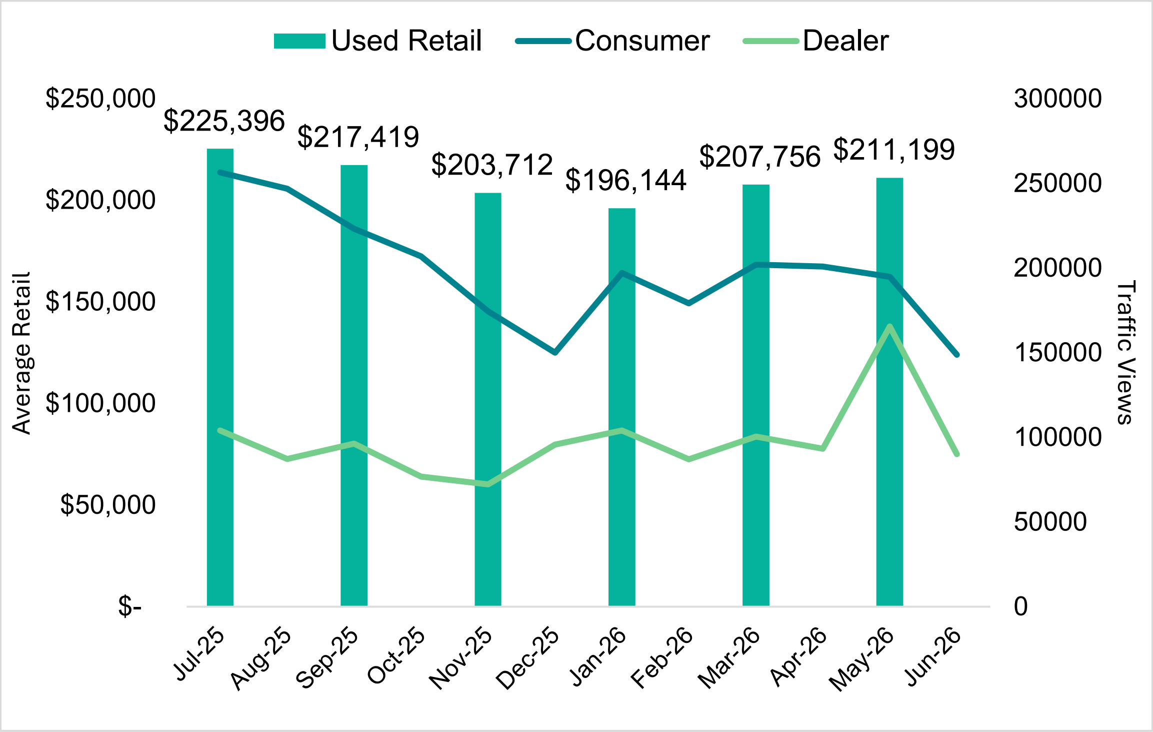
Values vs. Traffic

Consumer interest in Travel Trailers saw a pronounced seasonal uptick in Q1, but leveled out in Q2. Interest in Class A Motorhomes is muted compared to 2025.

Travel Trailers



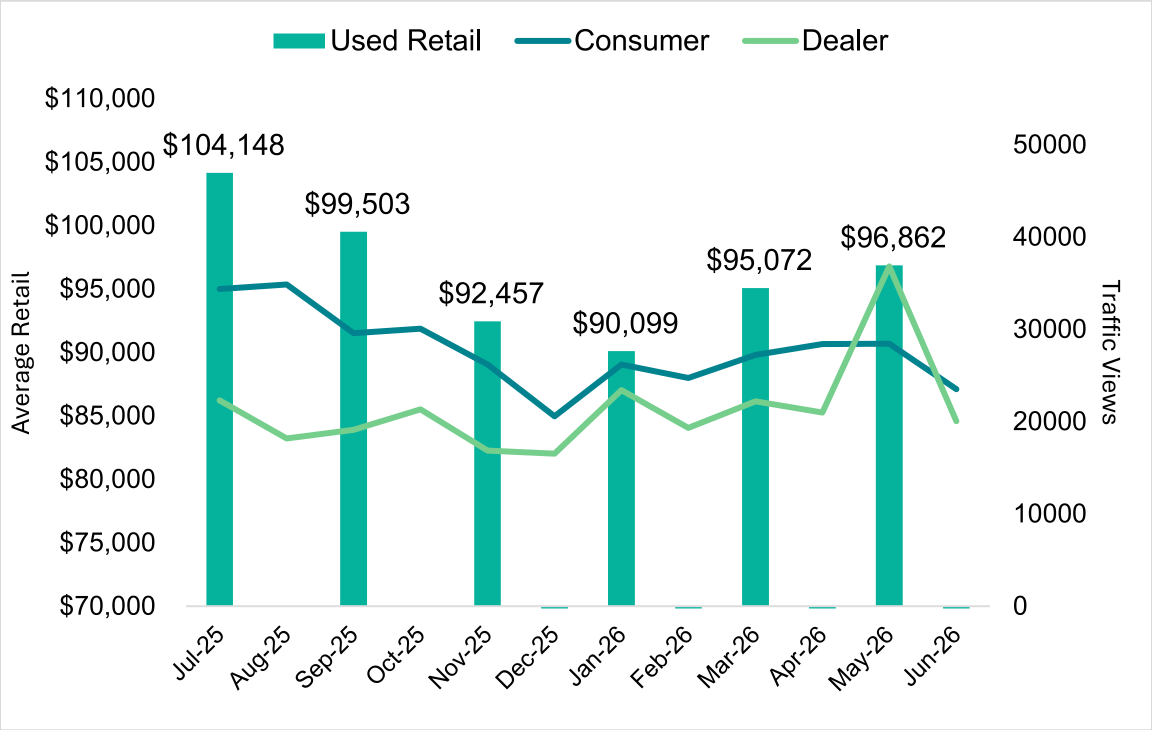
Class A Motorhomes



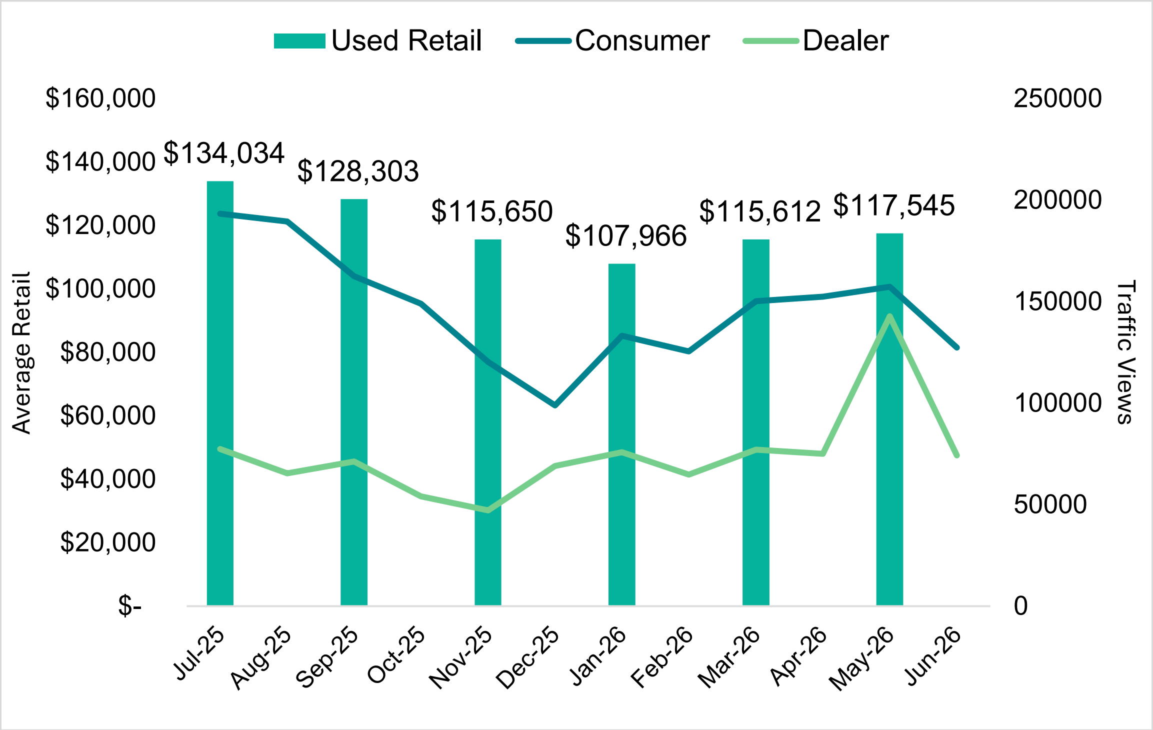
Values vs. Traffic

Consumer and dealer interest in Class B and C Motorhomes dipped in the most recent period.

Class B Motorhomes



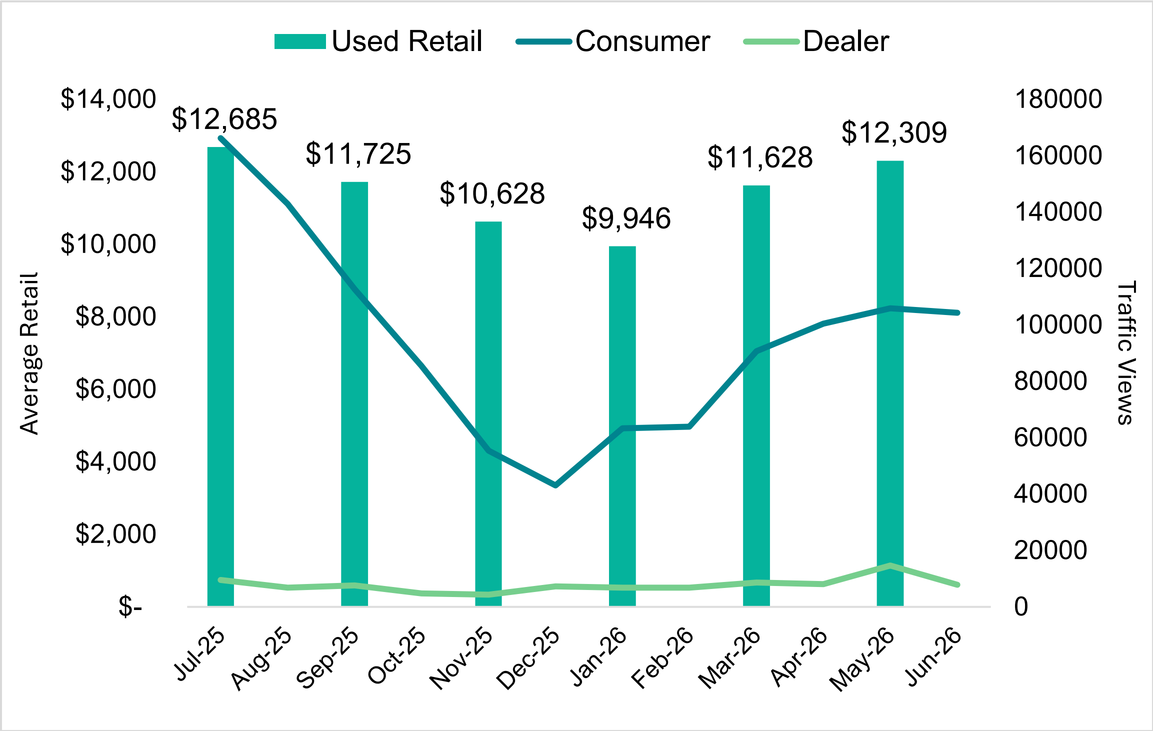
Class C Motorhomes



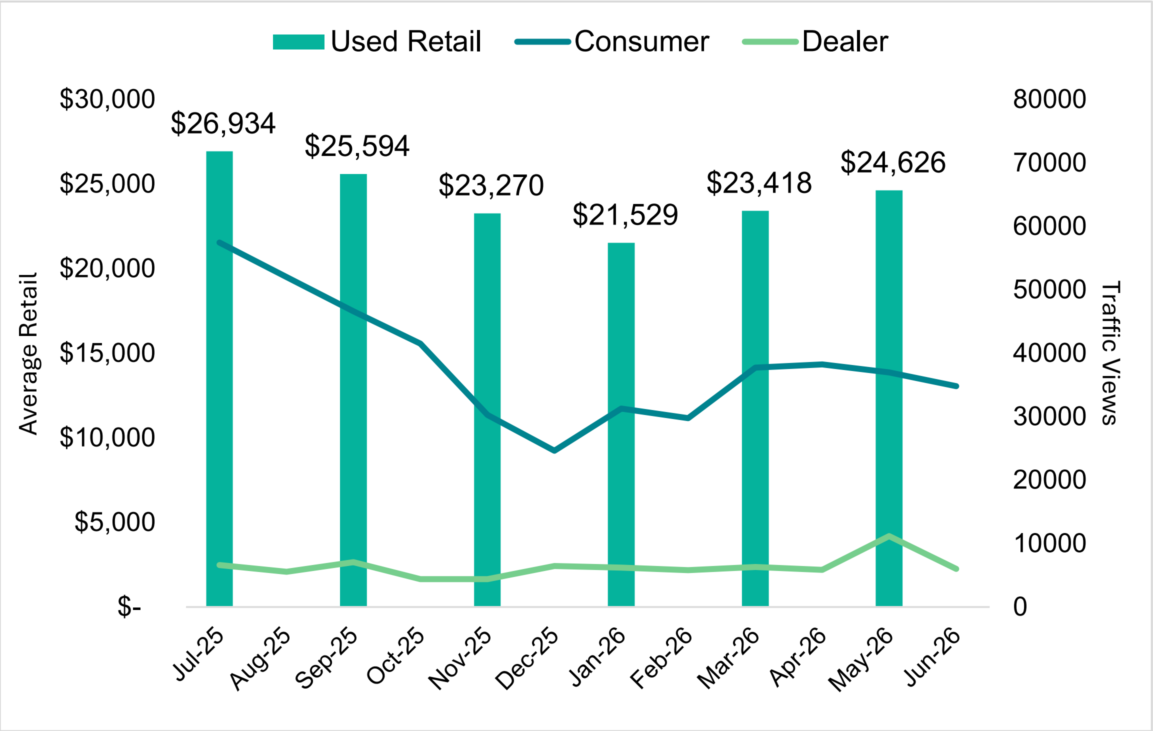
Values vs. Traffic

Consumer interest in Camping Trailers and Truck Campers was relatively stable in Q2 at a level lower than last year.

Camping Trailers

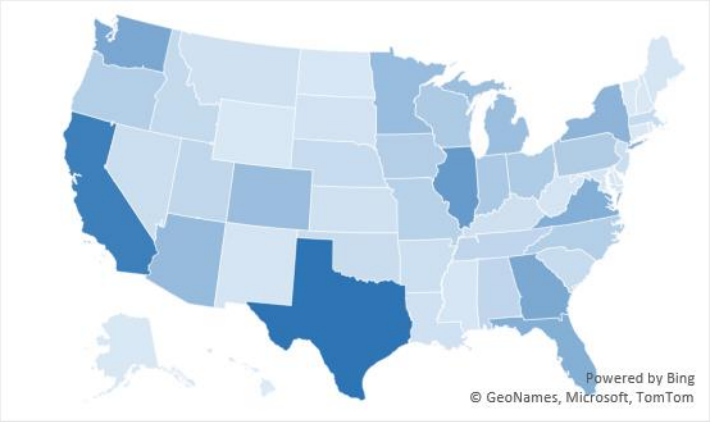


Truck Campers

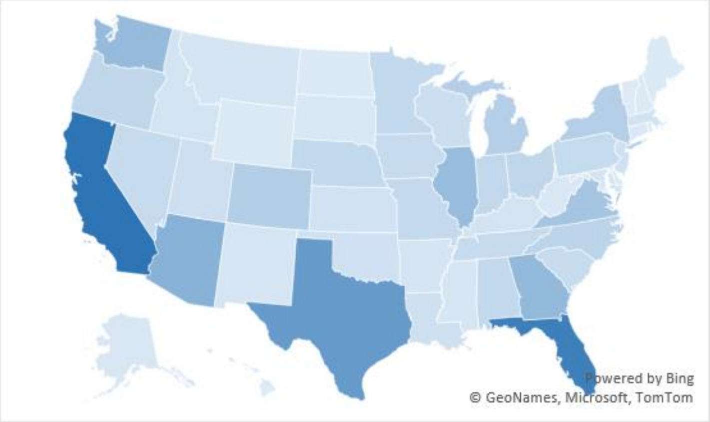


Views by Region

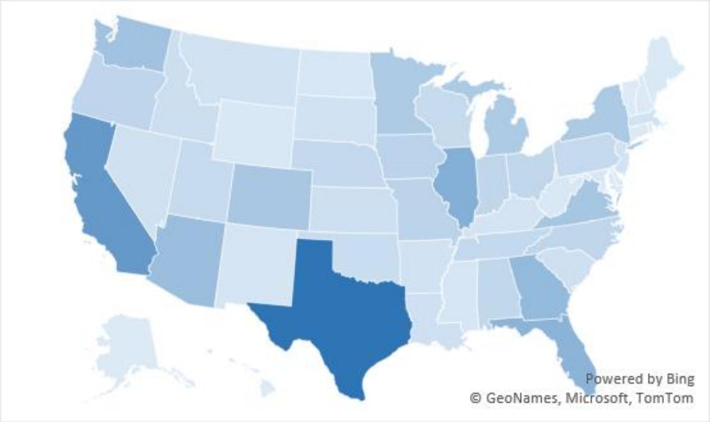
Standard Hitch Travel Trailers



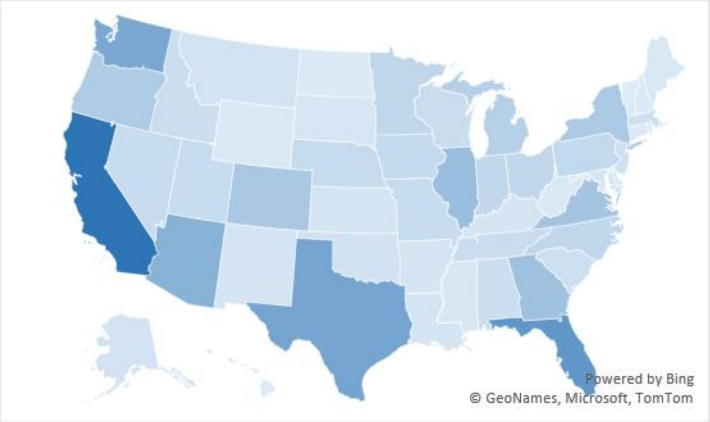
Class A Motorhomes



Fifth Wheels

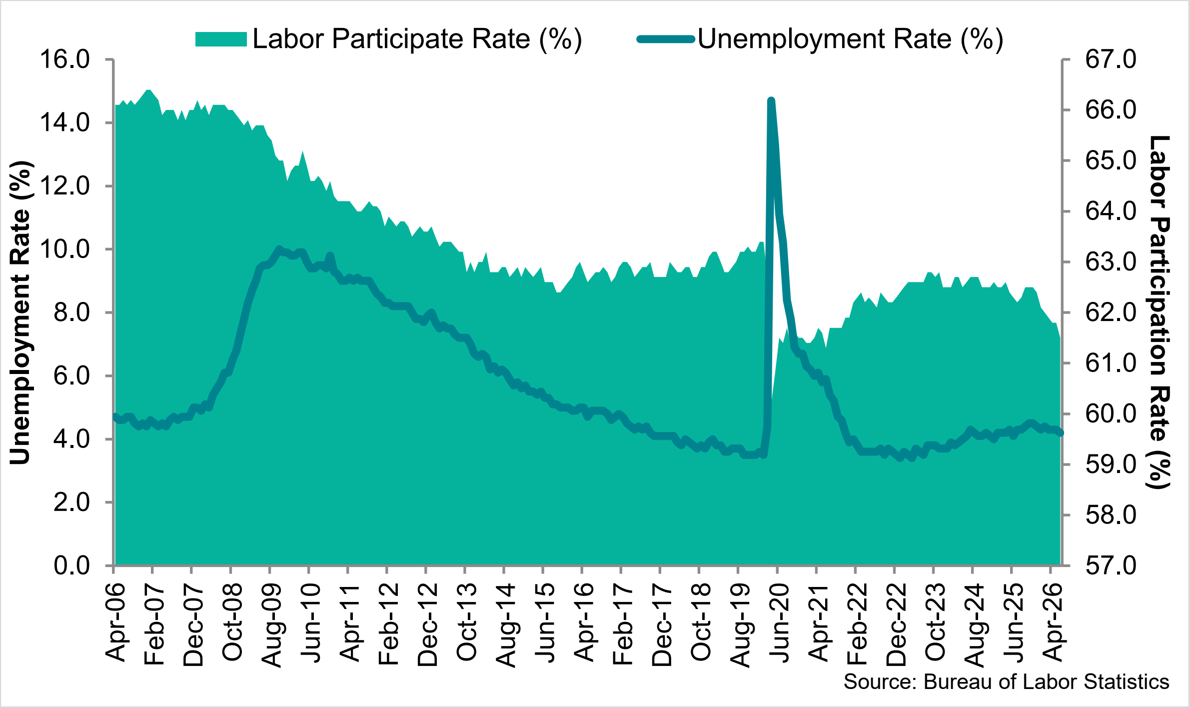


Class C Motorhomes



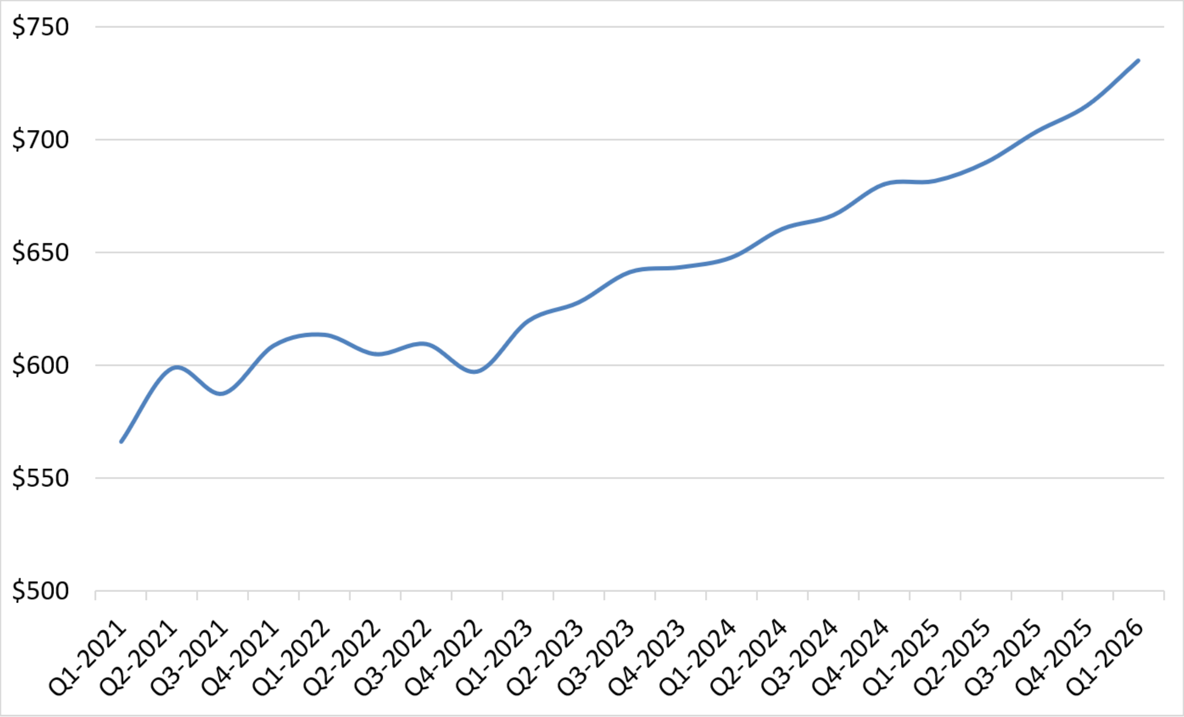
Economic Data

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 Trailer values remained relatively steady through Q2 in comparison to 2025. Fifth wheel values continued to decline through Q2, though at a slightly slower rate with a decrease of only 2% as compared to 3% in Q1.
- Class A and Class C experienced slower seasonal value growth than seen in 2024 and 2025. Class A values remained below 2025 decreasing just over 4% year over year through Q2. Class C values also declined year over year by 10% but remained above 2024 values.
- Camping Trailers saw the highest increase for all RV segments with values appreciating 6% year over year for Q2, maintaining strong valuation momentum from Q1. Truck Camper values continued to remain soft in Q2 with a decrease in values of 5% year over year through Q2. Valuations remained lower than Q2 2025 but were slightly higher than Q2 2024.
- Travel trailer views continued to be the most popular across all RV segments, ranging between 71-77% depending on the user type. F&I activity increased across most RV brands, suggesting continued retail transactions and healthy purchase conversion.
- Overall, used retail values across all RV segments continued to increase through Q2 although at a much slower rate. Consumer traffic leveled out in Q2 for travel trailers. Consumer and dealer traffic across all motor home segments declined in Q2.
- Consensus from dealers is demand continues to remain flat for new and used RVs. Issues affecting sales include inflationary pressure on goods, high fuel prices, and overall market uncertainty.

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