



Forest River's Rockwood Signature Ultra Lite offers La-Z-Boy swivel recliners, solid wood and raised-panel doors and drawers, a 12-volt power plug with USB charging port, LED 12-volt interior lighting and directional reading LED lights on most sofa slides.



A Price Point Packed with Punch

Successful 'Entry-Level' Fifth Wheels Pack More Amenities Pound for Pound

By Omar Needly

The definition of what would constitute an "entry-level" fifth wheel varies between manufacturers, dealers and consumers. Generally, this style of "starter" fifth wheel is usually of a stick and tin construction with one or two slide-outs at most, thus keeping the retail price point lower. Buyers looking for features such as three or more slide-outs, a large refrigerator, aluminum framing and fiberglass exterior construction may need to look at more expensive fifth

wheels instead. A diligent consumer, however, can find some of those "higher-end" features on lower-priced models by shopping around.

Scott Stropkai, national RV sales manager and a lead statistician for Statistical Surveys, Inc., says the company doesn't use classifications such as "entry-level" when speaking about fifth wheels. It does, however, offer statistics on smaller fifth wheels, such as those under \$40,000, which comprise a

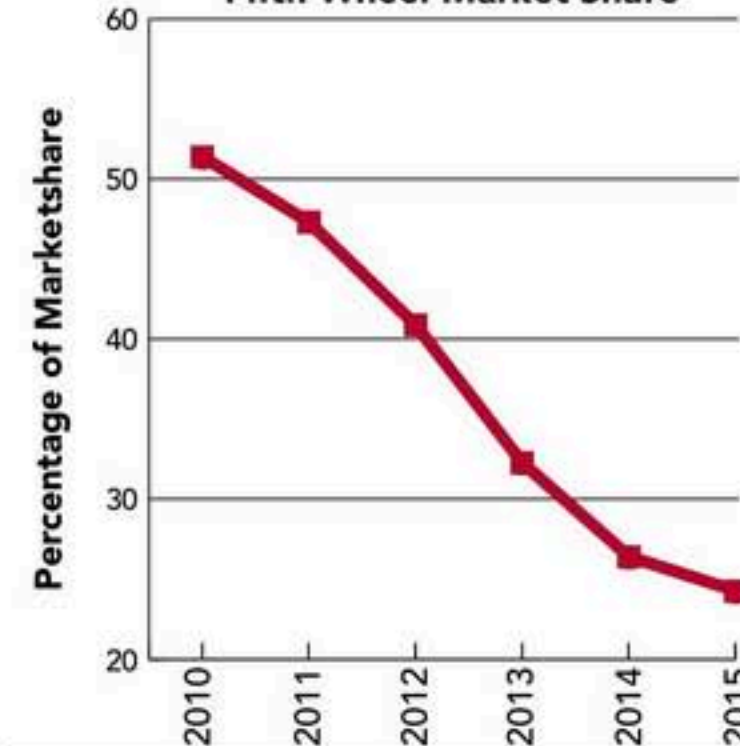
large part of what would be considered entry-level in that category.

Statistical Surveys' data shows that this price category accounts for 28 percent of all fifth wheels sold, with the top sellers in order being the Keystone Cougar, Forest River Rockwood, Jayco Eagle, Keystone Sprinter and Keystone Hideout. Those top five had a market share growth of 5.96 percent for 2015. Despite that recent growth, the overall market share for the category has shrunk

in the years following the recession, and is down slightly overall from 29.75 percent in 2014.

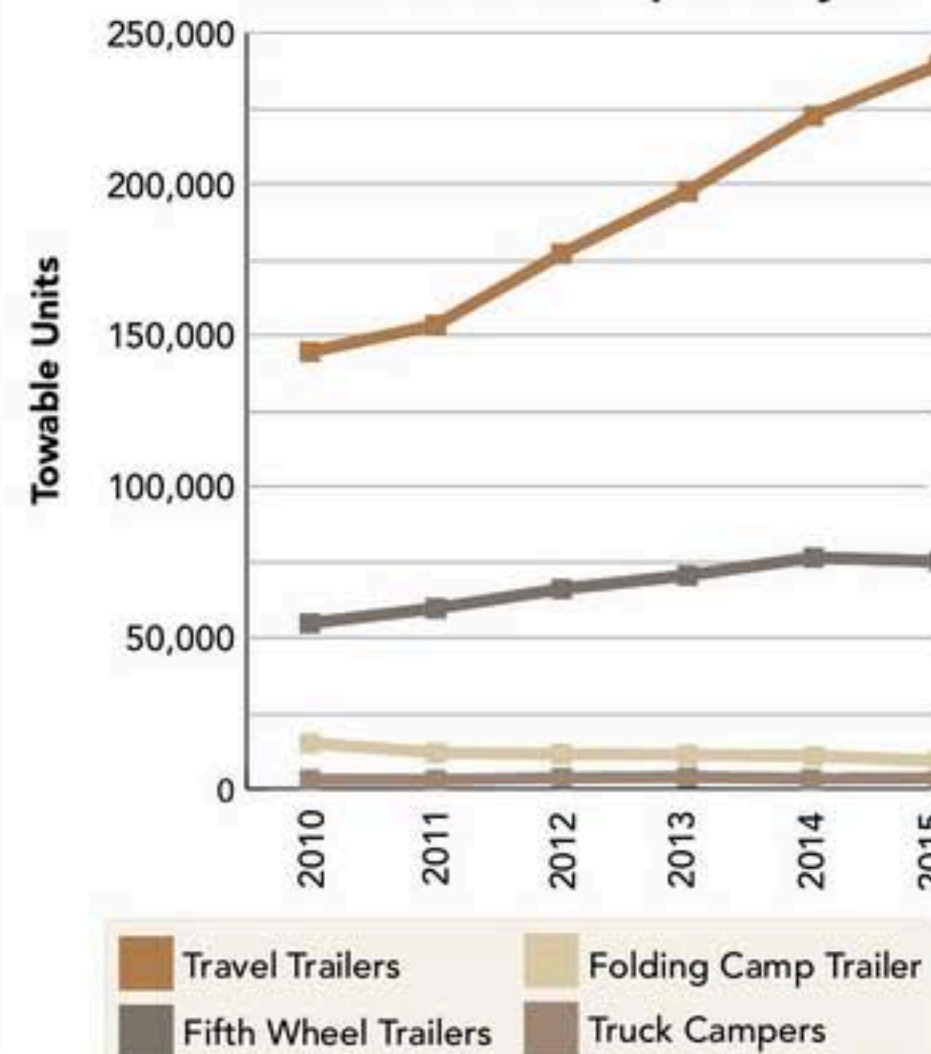
"As the economy has improved, it appears so has the consumer's appetite to get products with more features in them. This is apparent when you go to shows and to dealers' lots and see that many of the fifth wheels, and all products for that matter, have more 'stuff' in them," Stropkai says.

Annual \$40,000-and-Under Fifth Wheel Market Share



Source: Statistical Surveys

Wholesale Towable Shipments by Year



Source: RVIA

Top: The percentage of market share for fifth wheels that cost \$40K and under has dropped dramatically from 2010 to 2015. Above: For comparison, nearly all towable RVs experienced growth in number of units sold during the same time span.

With more features comes a higher price tag, in most cases. This makes it a challenge for manufacturers to try to pack more amenities and features into their entry-level RVs and to show consumers that they are getting a greater value for their dollar.

OEMs Weigh In

Contrary to what some manufacturers may build, Eagle's entry-level fifth wheels are shorter and lighter weight while being feature-rich," says Chris Barth, senior director of product development for Jayco's Eagle fifth wheels. "Since many buyers are coming from a travel trailer background when first exploring entry-level fifth wheels,

they're looking for a great floor plan that maximizes storage, tank capacities, residential upgrades, and other fifth wheel benefits. Very often, price is a strong indicator as well. The \$30,000 to \$40,000 retail price point is the most popular price group, by volume, for fifth wheels today."

John Stringer, of Forest River's Rockwood/Flagstaff Division, says all of their RVs are aimed at first-, second-, third- or fourth-time buyers. They do not discriminate when designing and marketing their fifth wheels, and don't use classifications such as "entry-level."

"Very few first-time buyers are fifth wheel buyers," Stringer says. "To us, the first-time

buyer is an entry-level buyer. Entry-level doesn't need to represent price, it represents value. When a customer does research today, they want the best value, and that is where Rockford's success comes from."

Group General Manager for Keystone RV Company Kyle Kwasny adds, "We think the term 'entry level' is misleading. Keystone's under-\$40,000 fifth wheels contain many of same features found in higher-priced models — features such as multiple slides, LED lighting, larger TVs and high-tech entertainment centers, upgraded kitchens, multiple selections of floorplans, elegant interiors and copious storage — all features important to the RV camper."

Midwest and West Coast are Popular Regions for 'Entry-Level' Fifth Wheels



According to Statistical Surveys, a poll of dealers reports that entry-level fifth wheels are more popular in the Midwest and on the West Coast where more people own large trucks for their personal vehicle or for work. The top five states that sell fifth wheels costing \$40,000 or less in order of sales are detailed here.

Rockwood provides customers with as many amenities and competitive advantages as possible at a given price point, Stringer says. Easier and less expensive towing is one focus of their design that is intended to attract customers.

"Families today are driving four-door, half-ton trucks with a short bed. Rockwood uses the Reese Revolution hitch (pin box) standard and our fifth wheels are designed to be towed by those vehicles without requiring expensive hitch upgrades to slider hitches. When this is combined with our standard four-wheel torsion axle system by Dexter, instead of a pogo stick leaf spring, the towing difference is outstanding."

Stringer describes those features as a "safety-first" approach that appeals to consumers.

Kwasny says Keystone Cougar's success in the fifth wheel category is due to offering the right features and floorplans at the

right price. As a result, he says Cougar has been the No. 1 selling fifth wheel across all segments for four consecutive years and the No. 1 selling mid-profile fifth wheel for 15 consecutive years.

In addition to fifth wheel amenities, Barth says dealers and consumers like better material selection (for instance, plywood versus OSB) and engineering (Jayco custom designs all frames and sidewalls internally).

Top Features that Sell

Demand for certain features will vary according to the individual consumer, but Stringer says a fifth wheel customer's first question is usually "What does it weigh?"

"After that, it comes down to features and value," he says. "Full aluminum framing, including dinettes and bed bases along with solid block foam insulation instead of spun fiberglass, are among our strongest points. We also strive to make as much standard as possible."

2015		2010		
1.	Keystone Cougar	14.93%	1. Keystone Cougar	16.40%
2.	Forest River Rockwood	7.50%	2. Heartland Sundance	7.33%
3.	Jayco Eagle	6.35%	3. Jayco Eagle	6.93%
4.	Keystone Sprinter	5.74%	4. Forest River Wildcat	6.05%
5.	Keystone Hideout	4.10%	5. Keystone Laredo	5.09%

Fifth Wheels \$40K-and-Under Top Sellers in 2015 Compared to 2010
Statistical Surveys' data shows that the \$40,000-and-under price category accounts for 28 percent of all fifth wheels sold. They had a market share growth of 5.96 percent for 2015.



The Keystone Cougar's kitchen offers amenities such as a 22" stainless steel oven, an easy-to-reach stainless steel microwave, and 5" residential cabinet pulls.



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Residential amenities for the Jayco Eagle include "wood plank" vinyl flooring and Shaw residential carpeting, flexible seating options and a kitchen-island layout. Select models also offer a party sofa with stowable tables.

Rockwood fifth-wheel standard features include an electric hitch jack, A&E power awnings with LED lights, flat-screen TVs, microwave ovens, Bluetooth stereos with built-in DVD players, large ovens with flush-mount stove covers, under-mount sinks with high-rise pullout faucets and black tank flush, as well as winterizing ports.

Keystone's Kwasny addressed top features in the under \$40,000 category, as well. "We don't use the term 'entry-level.' Entry-level implies stripped down and cheap, as in poorly made. Our lower-priced fifth wheels offer most of the features and conveniences found in higher-priced models."

Jayco also has a laundry list of features that they feel make the Eagle stand out from the crowd. "Although great floor plan selection and good pricing are key factors, towability and richness of feature-set drives most entry-level fifth wheel sales. Eagle has made a name for itself in the marketplace by being lightweight without sacrificing amenities."

Those features include using the same Magnum Truss roof system, Climate Shield weather protection, Mor/Ryde CRE-3000 suspension, LED interior lighting, Tuff-Shell vacuum-bonded lamination process, solar prep, and residential-brand Denver Mattress as its more expensive fifth wheel offerings. Jayco provides potential upgrade options only found at higher price points such as solid surface countertops, "Whisper Quiet" 15k BTU A/C, 16" MAXXIS tires, auto-leveling system, back-up camera, second 15k BTU A/C, and dual-pane frameless windows.

"Specific to Eagle, because of its custom-engineered frame, people search out the brand due to an industry-exclusive rear two-inch receiver hitch. It allows for standard off-the-shelf bike racks, rack storage options up to 300 pounds and even tandem towing up to 3,000 pounds in select states and provinces," Barth says.

Fifth Wheels Versus Travel Trailers

But why would a first-time or entry-level buyer choose a fifth-wheel over a travel trailer? "The people that choose a fifth wheel over a trailer are doing this primarily for three reasons," Stringer says. "They are easier to tow, easier to hook up, and they have an abundance of outside storage."

Kwasny agrees. "Fifth wheels offer wonderful towability and are beneficial for customers who are conscious of their overall length on the road. They also maximize the amount of outside storage for customers who are looking to go on extended camping trips."

Barth has similar insights. "While it's often just personal preference and what best fits each RVer's personal camping style, many customers prefer fifth wheels for better towing experiences over greater distances and terrain. They also offer increased storage and holding tank capacities, and in some cases, a richer feature-set with more residential upgrades."

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