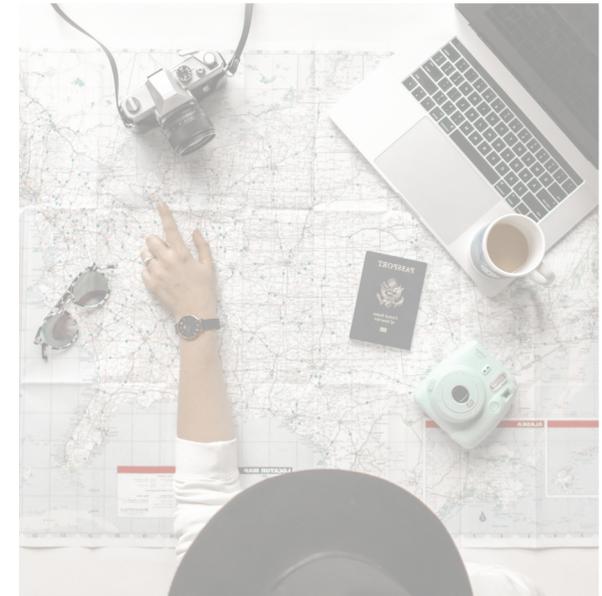




Survey of RV Industry Professionals

Summary of Findings

10.20.2021



Methodology

As a follow-up to the 2019 survey, an updates survey was conducted by Cairn Consulting Group, an independent market research firm with extensive experience in the outdoor hospitality and RV sectors.

The most recent survey was conducted in August and September, 2021.

The sampling methodology targeted those who are employed within the RV industry and are employed in a role where they are part of the hiring and staffing functions.

Sampling was designed to obtain n=262 completed surveys. All surveys were completed online via an outbound solicitation.



Key Findings



Key Talking Points



1. There has been some moderate improvement in women's representation within the industry.
2. Those employed in the industry feel that there has been progress, but still a lot of room for improvement.
3. Women are generally viewed as making less than men for the same work, but there is uncertainty by how much.
4. Staffing issues continue to be one of the greatest challenges within the industry and in all likelihood are impacting progress in attracting more women to the industry.

What is the current status of women in the RV industry compared to two years ago?

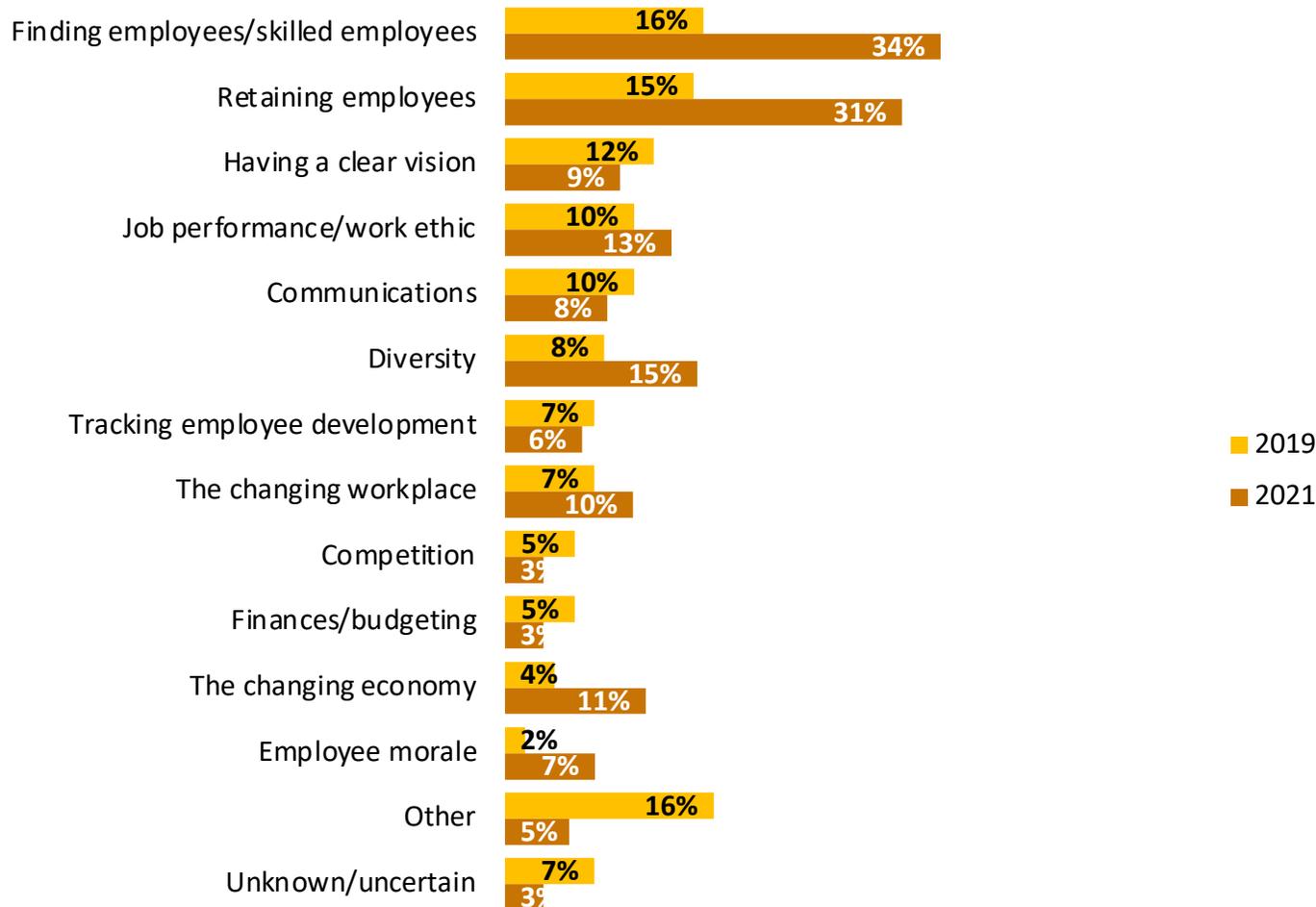


- Given the employment situation nationally, the RV industry is also realizing some issues in staffing, whether it's finding or retaining staff, and this is reflected in these results with many organizations having increases in these areas.
- However, it is worth considering that in general, some moderate improvement has been noted in overall representation of women in the industry (a net +16% more women compared to 2 years ago), which could be due at least in part to organizations who are actively seeking women applicants overall (66% versus 58% in 2019) and especially among those in the manufacturing sector (71% versus 66% in 2019).
- Industry staff are most likely to say that the greatest challenge in hiring women is finding candidates who are interested in the work (62%, up from 52% in 2019) or finding qualified candidates (46%, up from 38% in 2019). These challenges are mentioned more often among those in manufacturing, but are also identified among the women who participated in the survey.
- About one-fourth of the women respondents say that the industry is heading in the right direction when it comes to the hiring of women, though half say that the industry is static, and not changing.

Overview of the Findings



Greatest Challenges in the Industry



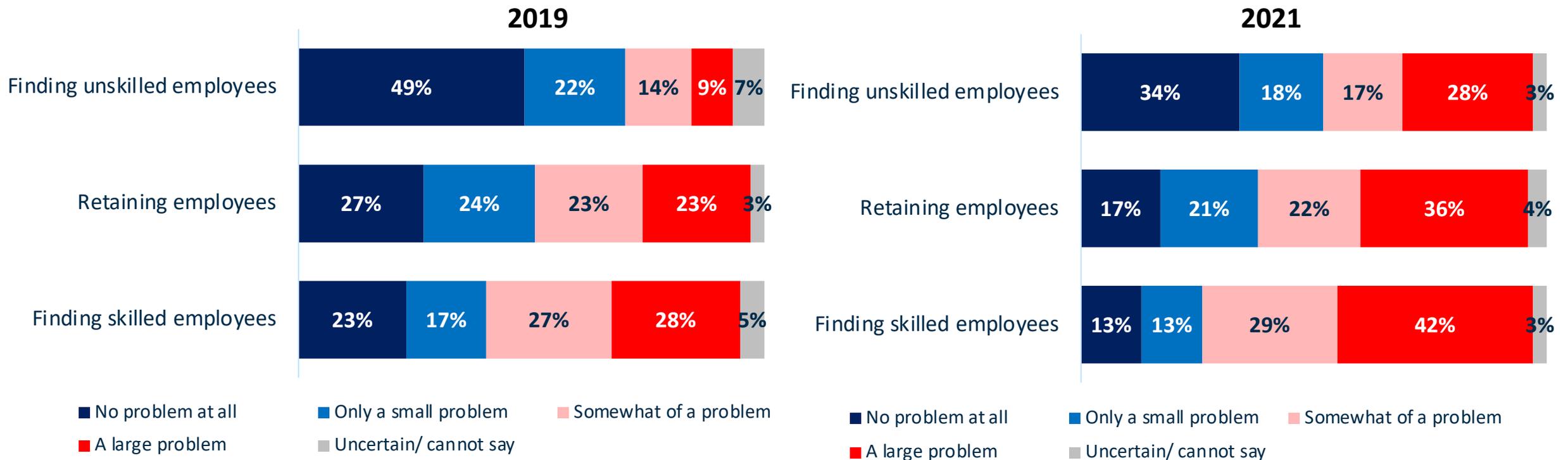
The greatest challenges within the industry are most likely to include staffing issues. Indeed, since last year, the proportion of industry representatives who mention finding employees (16% vs. 34%) or retaining employees (15% vs. 31%) have doubled.

It is also worth noting that the proportion who mention diversity as a challenge has also doubled from 8% to 15%, but is much lower as a concern when compared to staffing issues.

Problems Finding & Retaining Employees



The scope of the problems finding and retaining employees has also increased over 2019, whether it's finding unskilled workers (up 22 percentage points), retaining employees (up 12 percentage points), or finding skilled workers (up 16 percentage points).



How much of a problem, if at all, are each of the following?

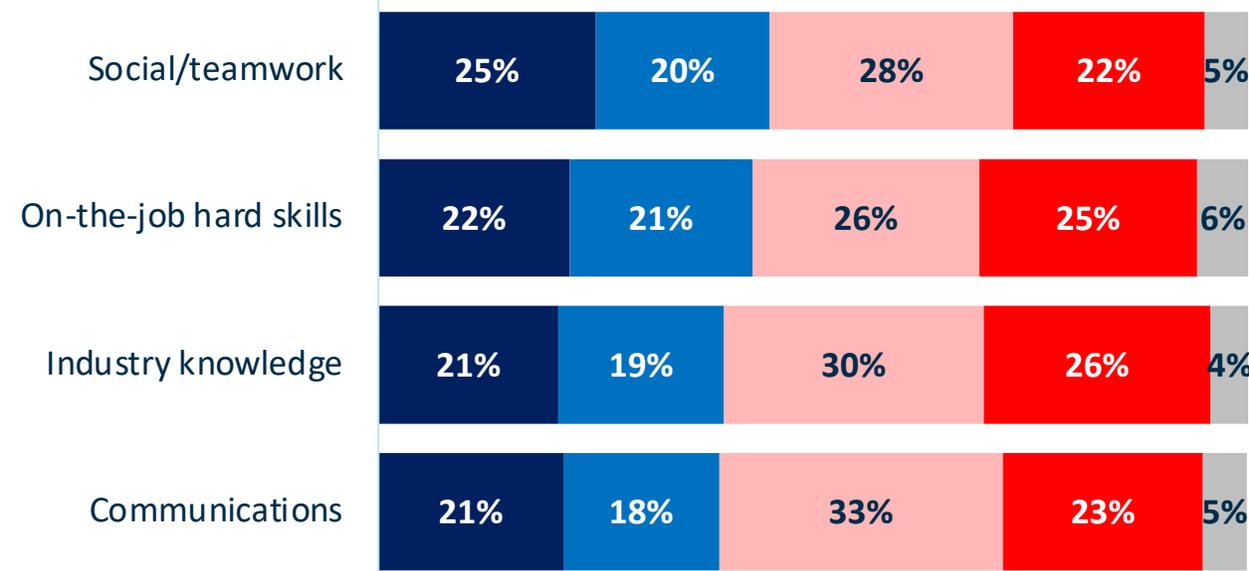
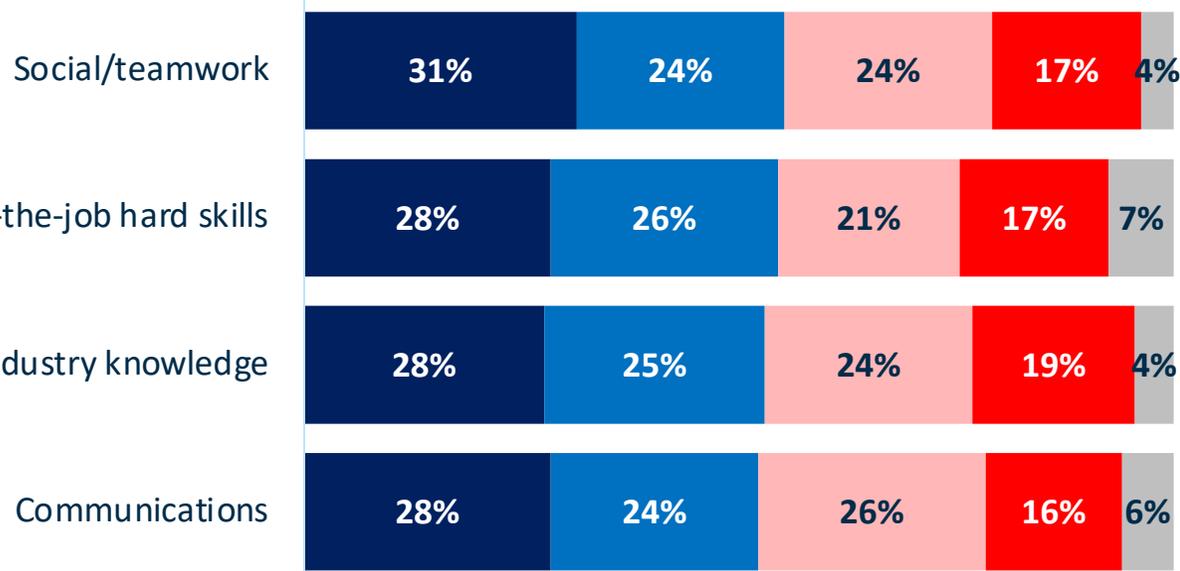
Addressing the Skills Gap



Again, staffing issues are an ongoing concern throughout the industry, whether it's identifying the skills gap in teamwork (+9), hard skills (+13), industry knowledge (+13), or communications (+14).

2019

2021



■ No problem at all
 ■ Only a small problem
 ■ Somewhat of a problem
■ A large problem
 ■ Uncertain/ cannot say

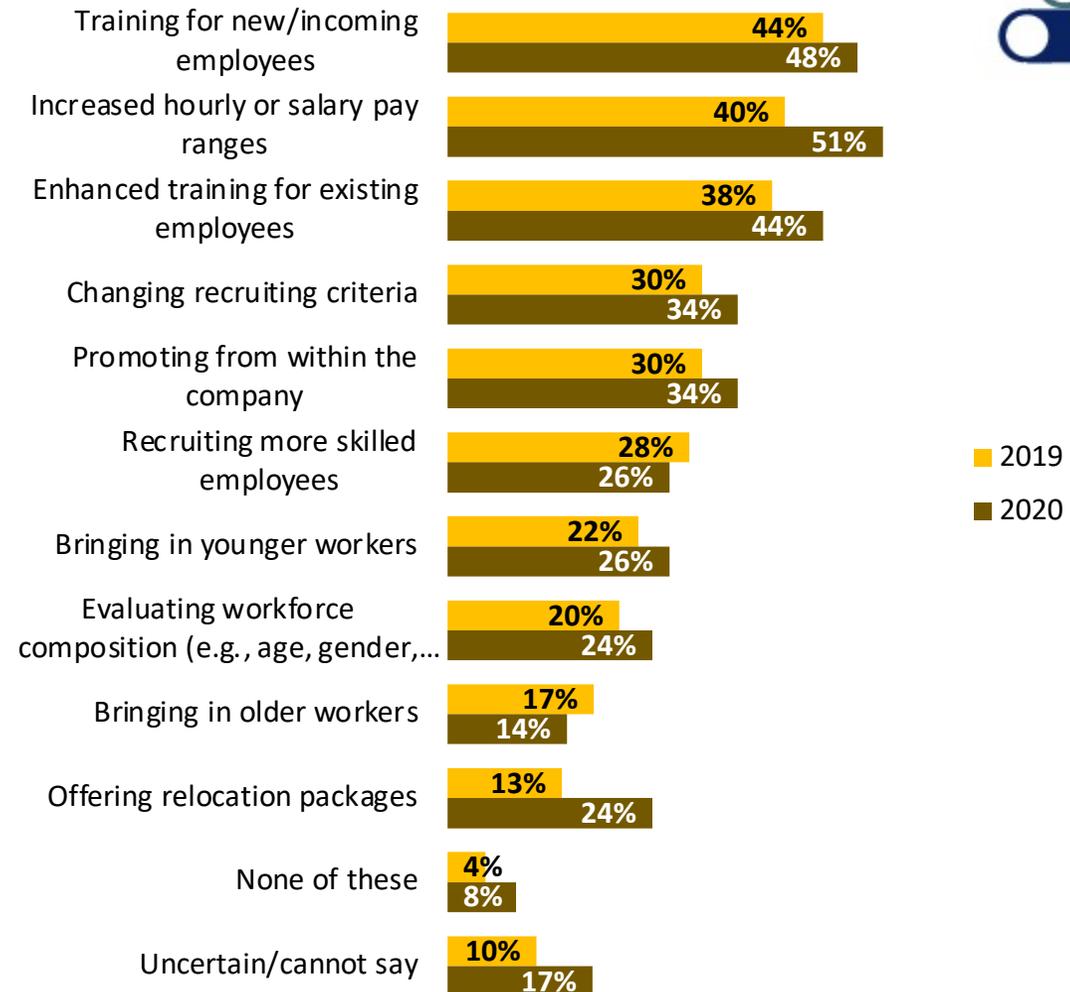
■ No problem at all
 ■ Only a small problem
 ■ Somewhat of a problem
■ A large problem
 ■ Uncertain/ cannot say

Hiring Initiatives



Perhaps as a response to increased staffing issues, there is also an increase in hiring initiatives to help develop the workforce.

In particular, a majority of industry staff say that there have been increases in pay, and close to half mention training for new hires.



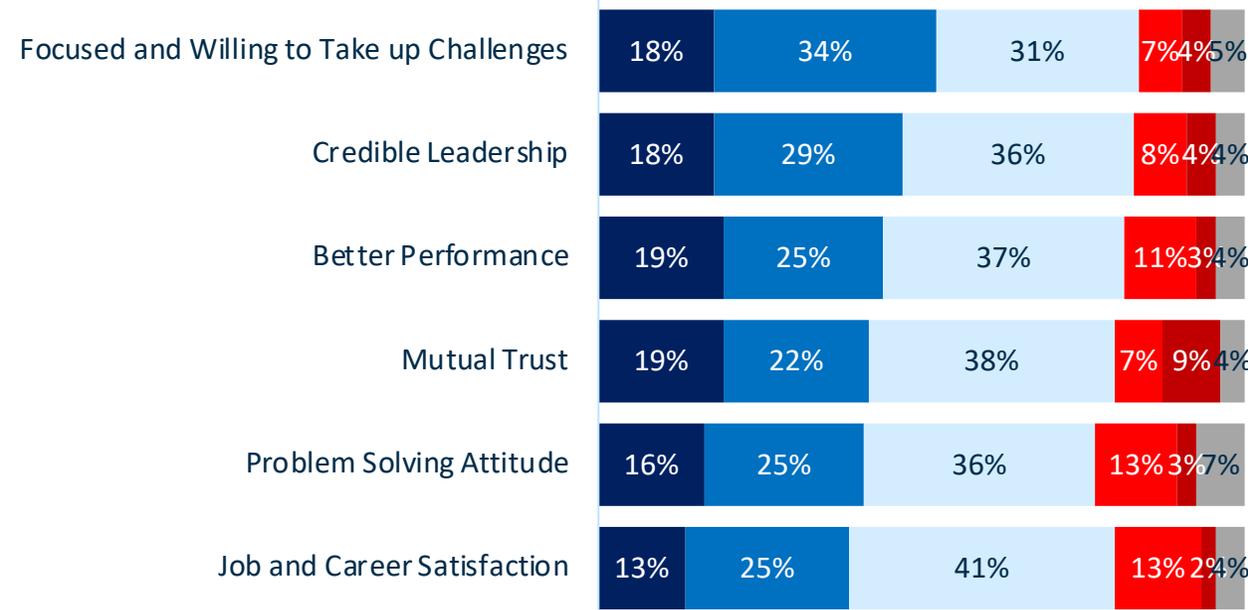
Workplace Evaluation



The workplace overall is still viewed relatively favorably, with few major changes including half who say that their company’s workforce is focused and willing to take on challenges, while close to half say their organization has credible leadership. The areas lagging surround job and careers satisfaction and having a problem-solving attitude.

2019

2021

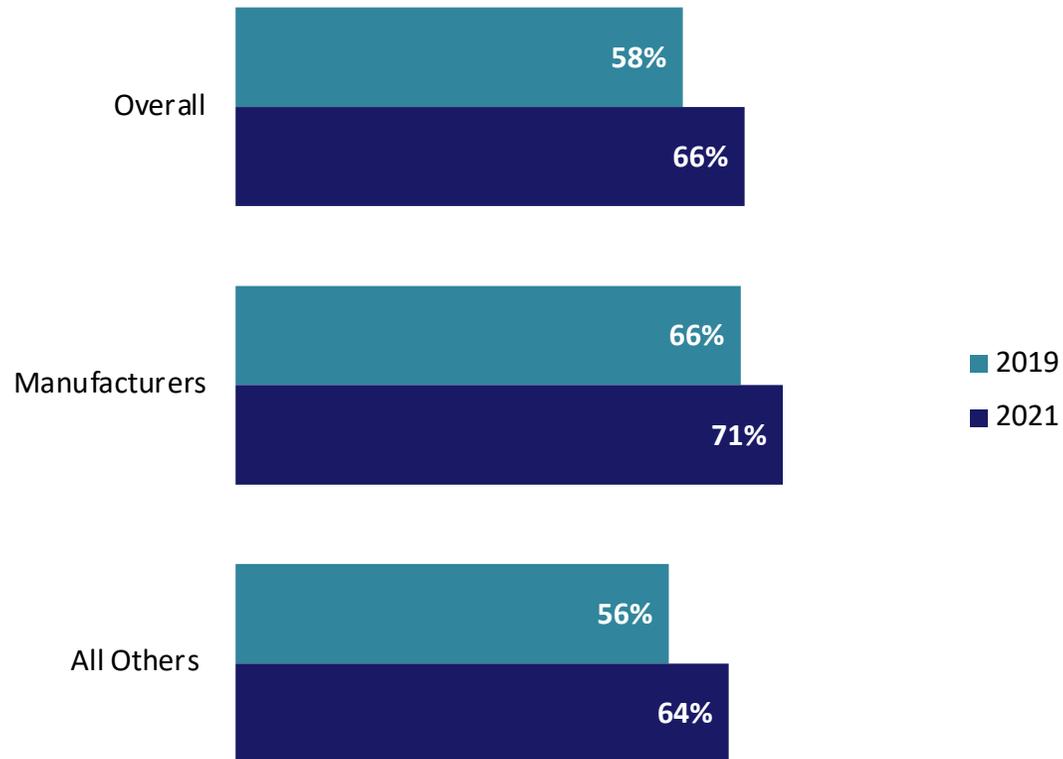


■ Excellent ■ Very Good ■ Good ■ Poor ■ Very Poor ■ Uncertain/ cannot say

■ Excellent ■ Very Good ■ Good ■ Poor ■ Very Poor ■ Uncertain/ cannot say

How would you evaluate your company and its workforce on each of the following:

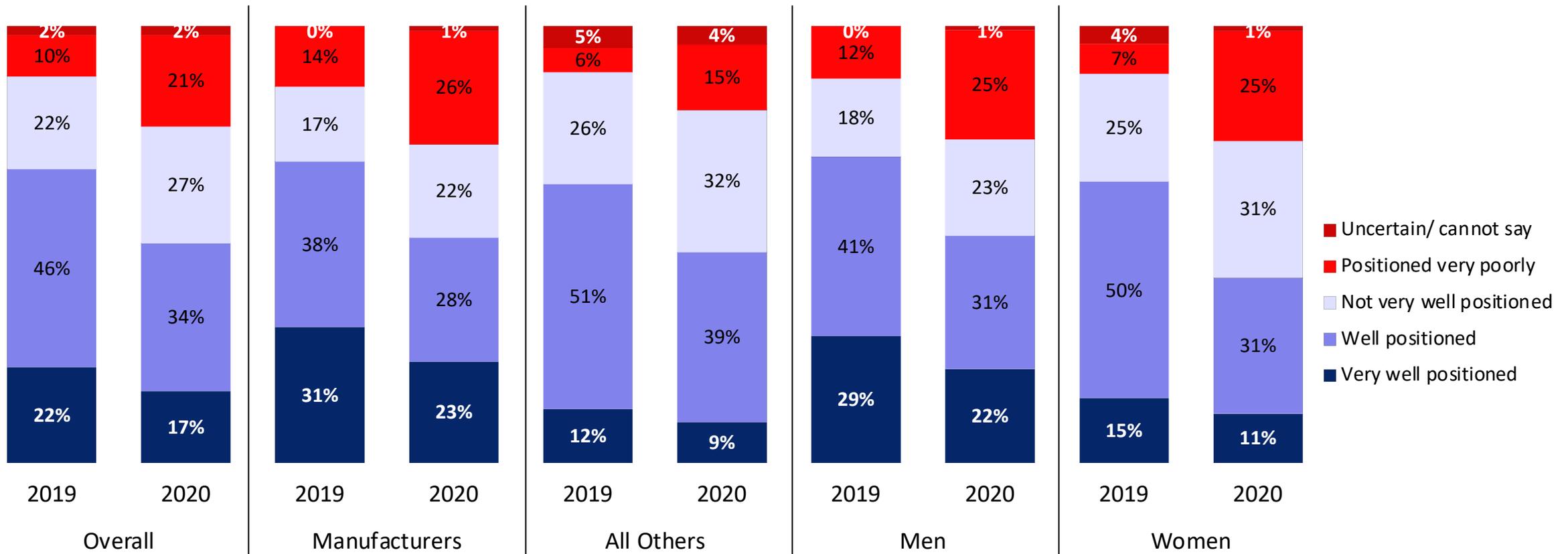
Actively Seeking Women Job Applicants



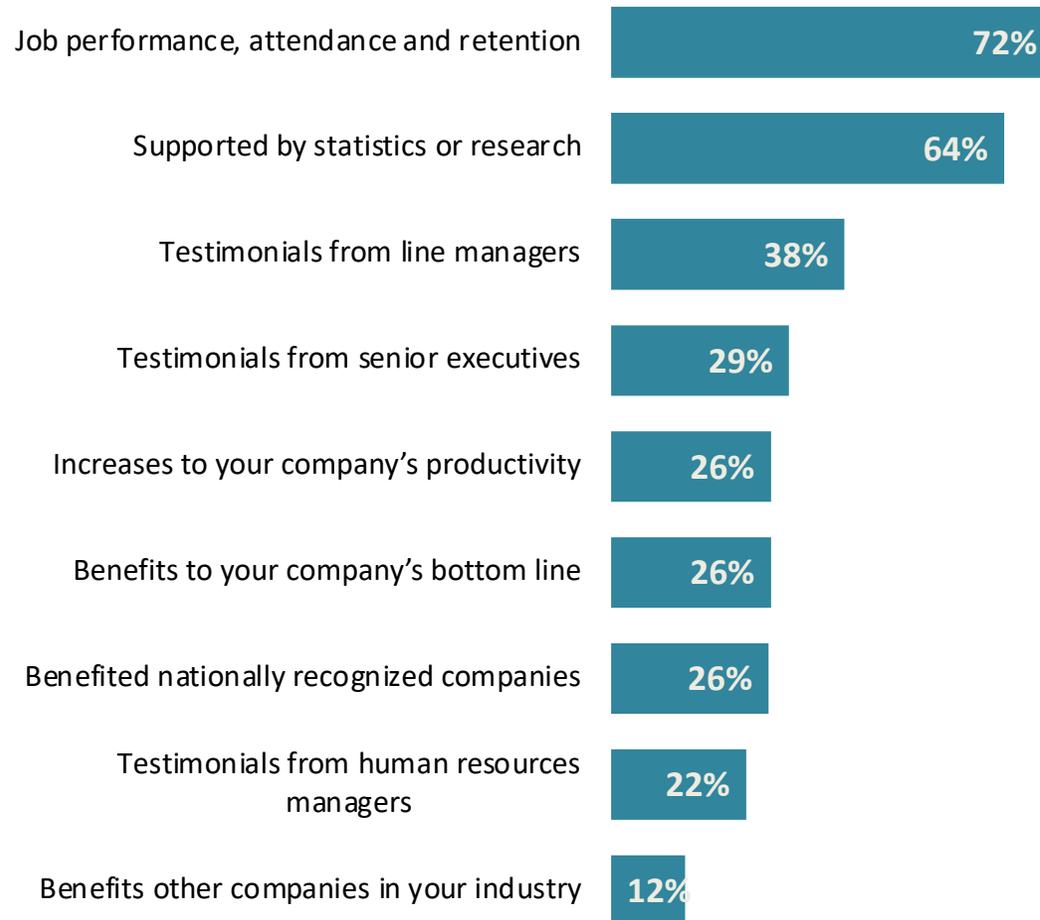
Up since 2019, about two-thirds overall, and 7-in-10 in manufacturing suggest that they actively recruit women job applicants. Again, active recruitment is up across all sectors.

Company Positioning Based on Workforce

RV industry representatives are less likely than they were in 2019 to feel as though their company's workforce composition positions the company for the changes in coming years. About 42% of women feel their company is well positioned, compared to 53% of men.



Helpful Information in Recruiting Women

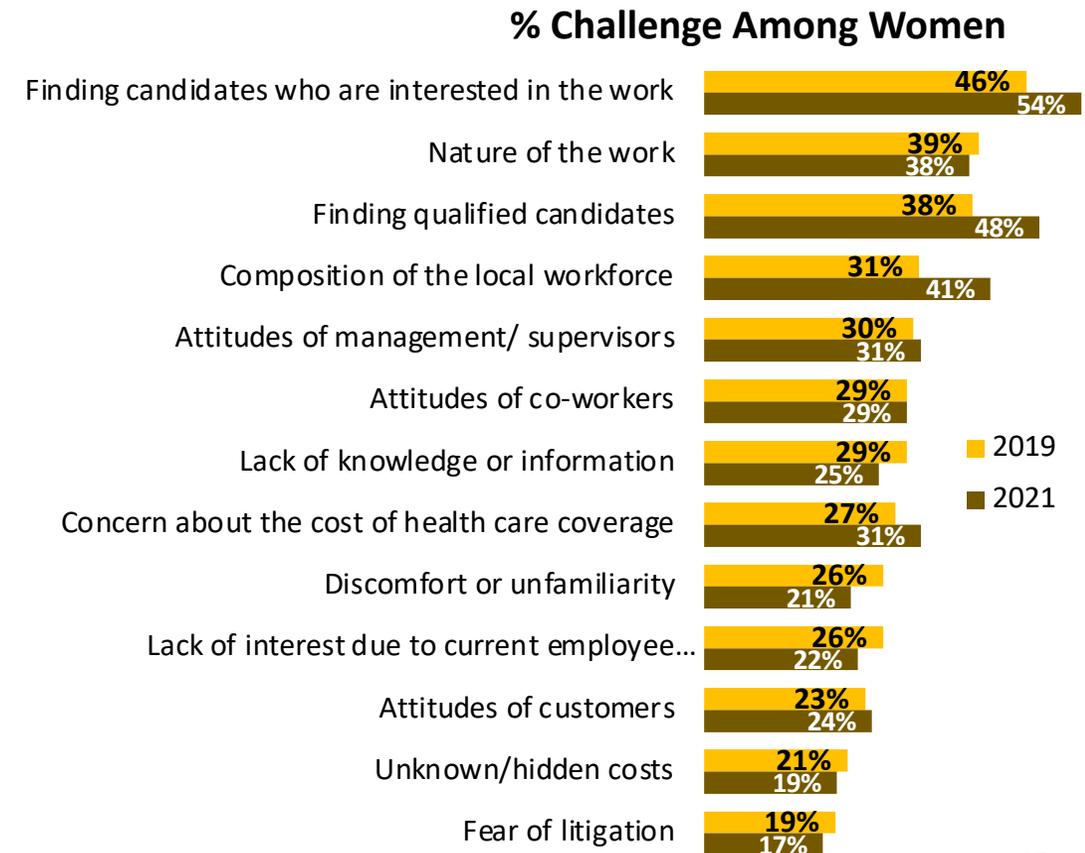


When asked what types of information would be helpful in recruiting women, the most commonly given response includes information about the individual candidates work history. Still, almost two-thirds mention the support from research or statistics.

Challenges in Hiring Women



And among those employed in the industry, 6-in-10 say that finding candidates interested in the work is a challenge in hiring more women, yet this figure is somewhat lower among women in particular. Finding qualified candidates represents a challenge for the industry overall, as well as among women.

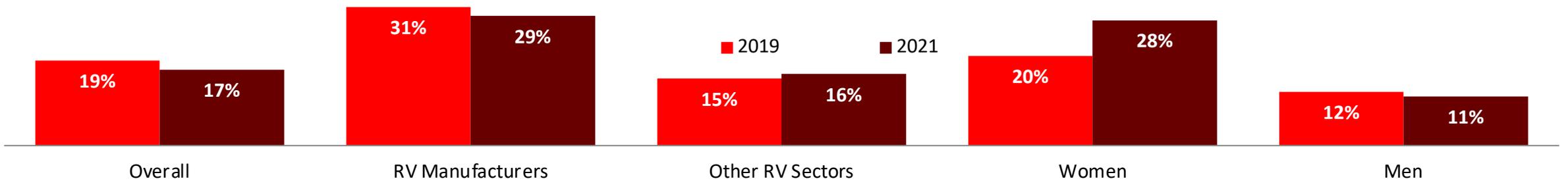


How much of a challenge are the following factors to your company in hiring women?

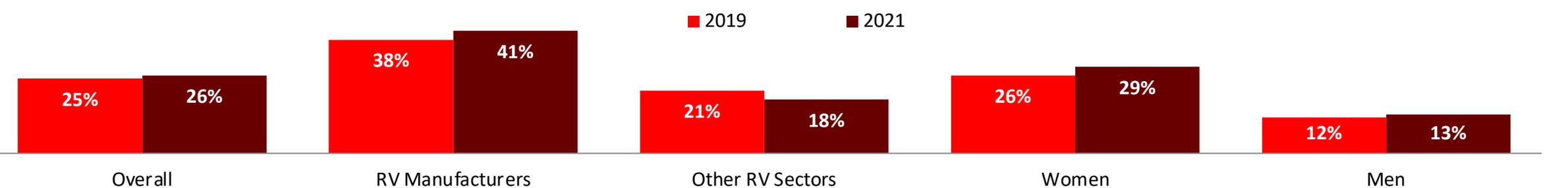
Comparative Representation

Even though those employed in the RV industry are more likely to say that there are fewer women when compared to other industries, it appears that there has been some minor progress in this area of measurement, primarily among the RV manufacturers. However, compared to 2019, an increased percentage of women say that there are fewer women compared to other companies and other industries.

% Who Say There are Fewer Women Compared to Other Companies



% Who Say There are Fewer Women Compared to Other Industries



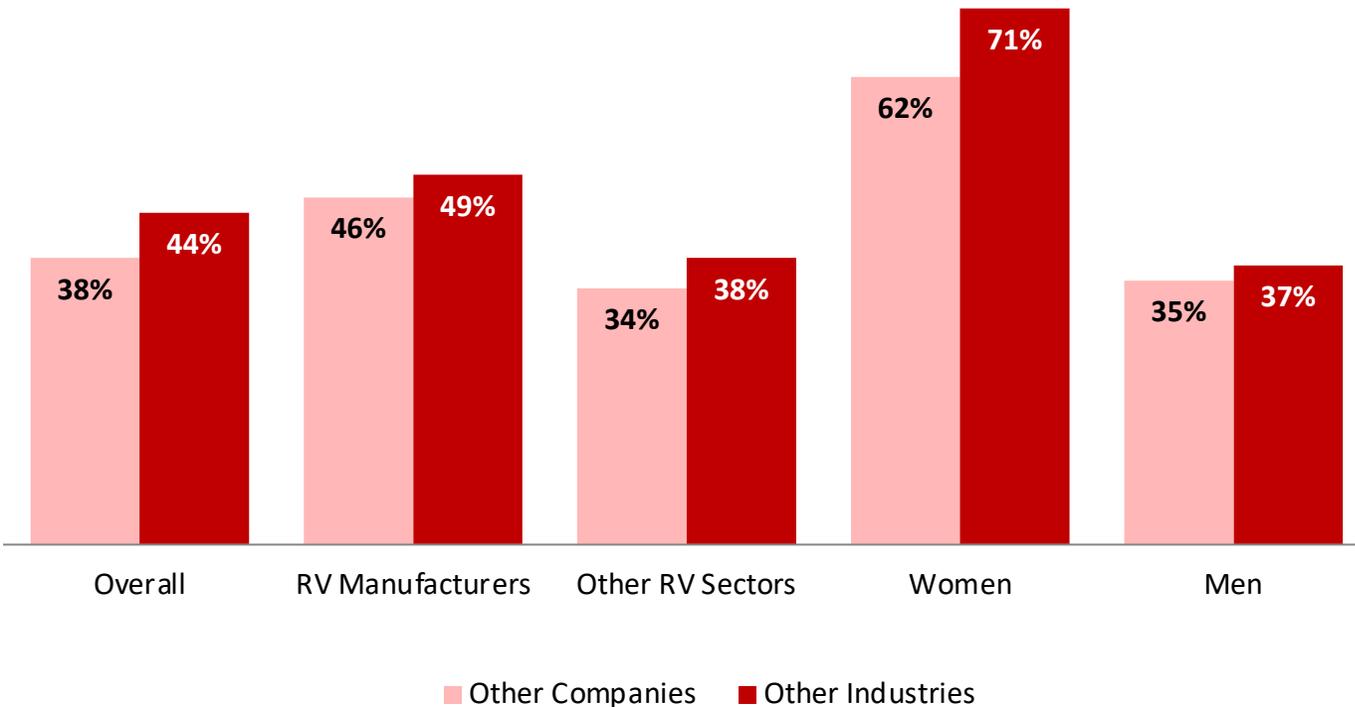
Overall, compared to other similar types of companies,/other industries how would you compare your company in its representation of women?

Salary Comparisons

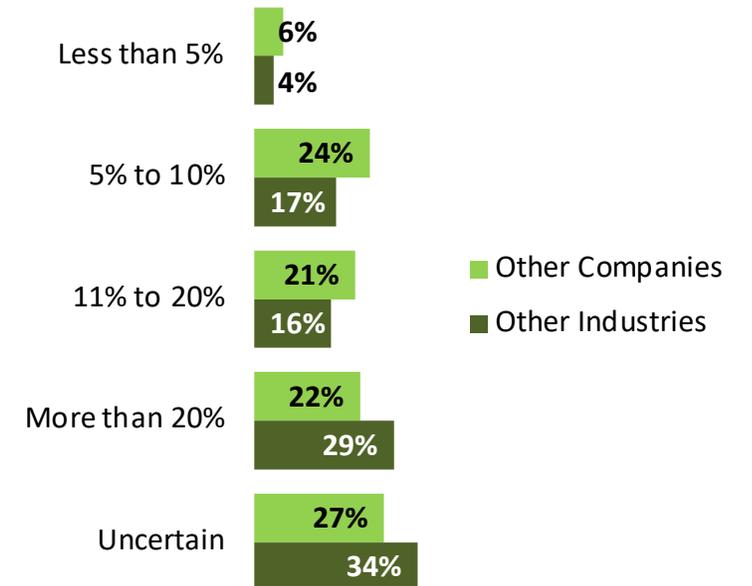


Overall, about 4-in-10 of those employed in the industry say that women make less than men in the same types of positions. The percentage is even greater among women whether it's at comparative companies (62%), or other industries (71%). More than 4-in-10 feel that the wage gap is more than 10%.

% Who Say Women Make Less



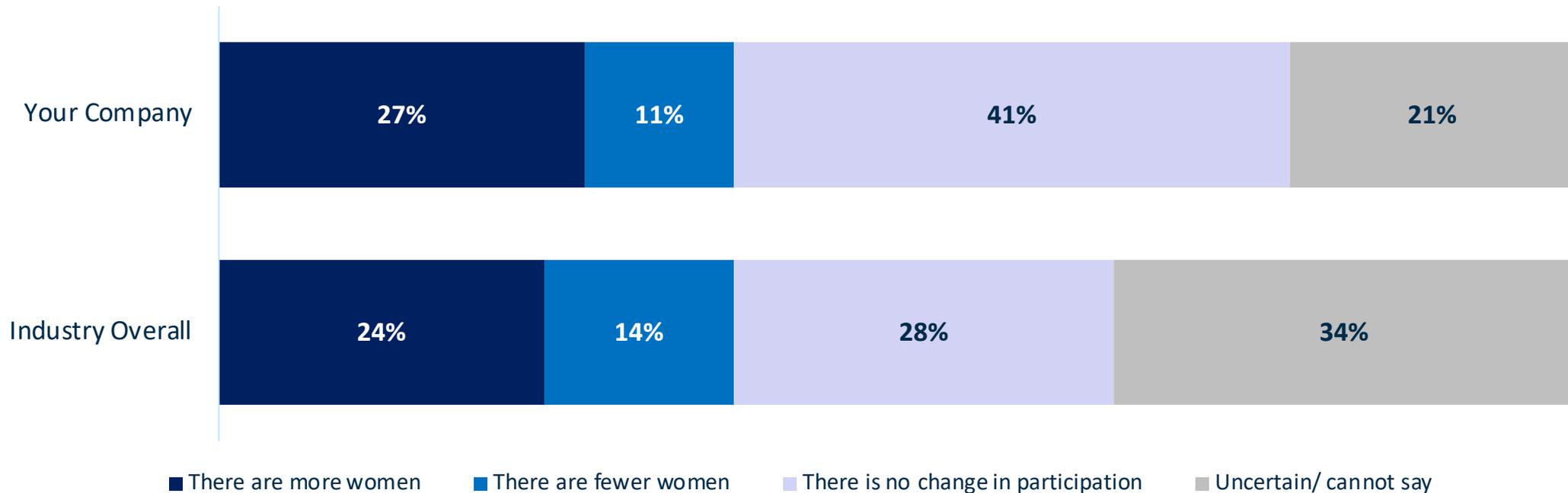
Using your best guess, how much of a difference is there in the salaries between men and women at your company?



Change in Workforce in the Past Two Years



On net, industry employees are likely to stay that over the past two years that has been an increase in the number of women in the workforce.

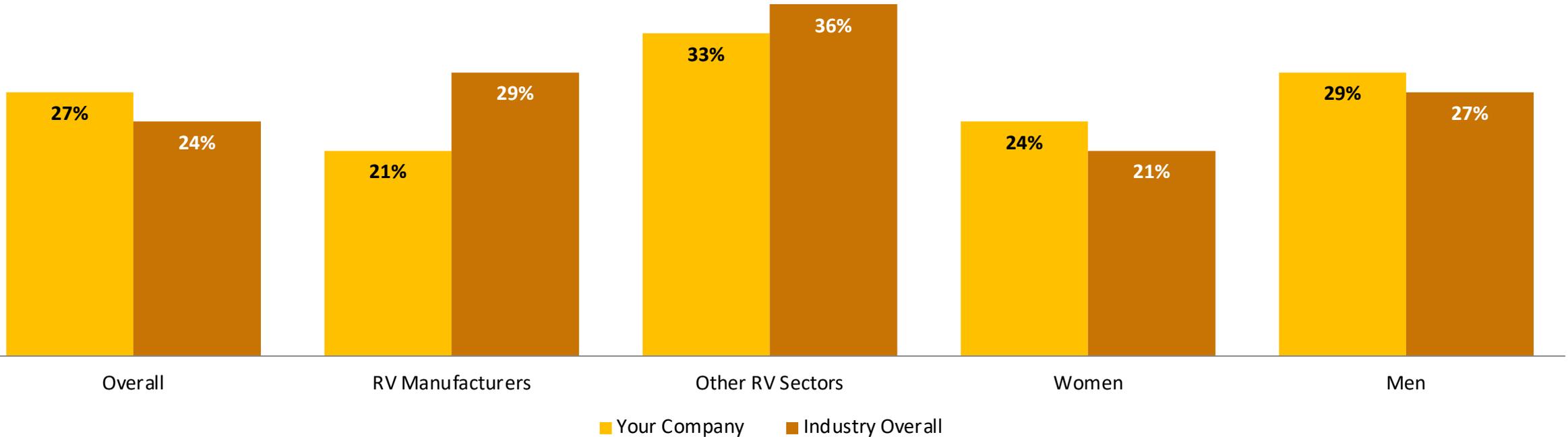


Overall, what changes, if any, have you seen in women's participation in the workforce during the past 2 years for:

Increases in Women's Participation

Increases in women's participation in the industry is noted by about one-fourth of women, but one-third or more of those in sectors other than manufacturing.

% Who Say There are More Women Compared to Two Years Ago



Overall, what changes, if any, have you seen in women's participation in the workforce during the past 2 years for:

Direction of the Industry



Overall, about 3-in-10 of those employed in the RV industry say that the participation of women in the workforce is headed in the right direction, though close to half say it is static. Equal proportions of women feel that the industry is either heading in the right direction or wrong direction in terms of women's participation.

