WOODALL'S
•CAMPGROUND MAGAZINE•

CAIRN CONSULTING GROUP

RV INDUSTRY ASSOCIATION

Campground Owner & Manager Survey

Key Takeaways

- 78% of campground owners/managers say that the influx of new campers has resulted in a positive impact on their business.
- Looking ahead to 2023, about 7-in-10 campgrounds (69%) are planning some type of site (41%), accommodation (21%), and/or amenity improvement (36%) to their campground.
- Site development is of greatest importance across all types of campgrounds as a way to accommodate the volume and needs of campers.
- More than half (53%) wish that they had better staffing this past year.
- One-third (34%) say that they need more capital for improvements (including half of small campgrounds); one-fourth (25%) would like help with emergency preparedness for natural disasters.
- 1-in-5 new campground owners would like to open another campground in the coming year.
- Close to half of campground owners/managers (48%) say that the typical guest stays in a travel trailer, though only 23% say that this would be their ideal guest and instead, would like to attract more motorhome (34%), fifth wheel (22%), or cabin/accommodation guests (13%). They would also like to have the typical guest extend their stay from 2-3 nights to 4-7 nights.

What are the challenges for campground owners and managers?

Small Campgrounds:

- Financing/capital for campground improvements
- Marketing and marketing support
- Developing and maintaining a social media presence
- Having the time to work on development
- Managing near-term reservations

Mid-Sized campgrounds:

- Adding amenities/infrastructure
- Text messaging
- Policies & procedures
- Funding for improvements
- Help with local ordinances
- Space for improvements

Large campgrounds:

- Staffing
- Adding amenities
- Adding on-site recreation
- Policies and procedures
- Having the time to work on development
- Managing guest expectations

What are the opportunities?

Identifying how campgrounds can attract the type of guest they would prefer to have, which is indicated by a higher than ideal volume of travel trailer guests, and guests who are likely to stay more than 2-3 nights.

Connecting campgrounds to the resources that can help with important management concerns and issues such as site planning and development, adding services/amenities/on-site rec, planning for and addressing issues such as natural disasters, and how to access financing for improvements.

Developing automation and efficiencies that will help the management team to free-up more time to work on business development and growth.

Marketing resources, especially for the small to mid-sized campgrounds who not only need overall marketing support, but in particular, the need to manage and develop text messaging and email marketing campaigns as well as managing their presence on social media platforms.

How are campground owners and managers adjusting to the changing market?

Campground owners and managers are actively seeking ways to capitalize on the new market of campers and keep their parks in-line with guest needs and expectations. The flood of RVs into the space over the past two years has put a strain on many campgrounds to accommodate the volume. Additionally, the new set of campers are placing demands on campgrounds to provide a greater array of services and amenities, as well as seeking unique camping experiences and comfort in their camping adventures. To this end, the three major adjustments being made include:

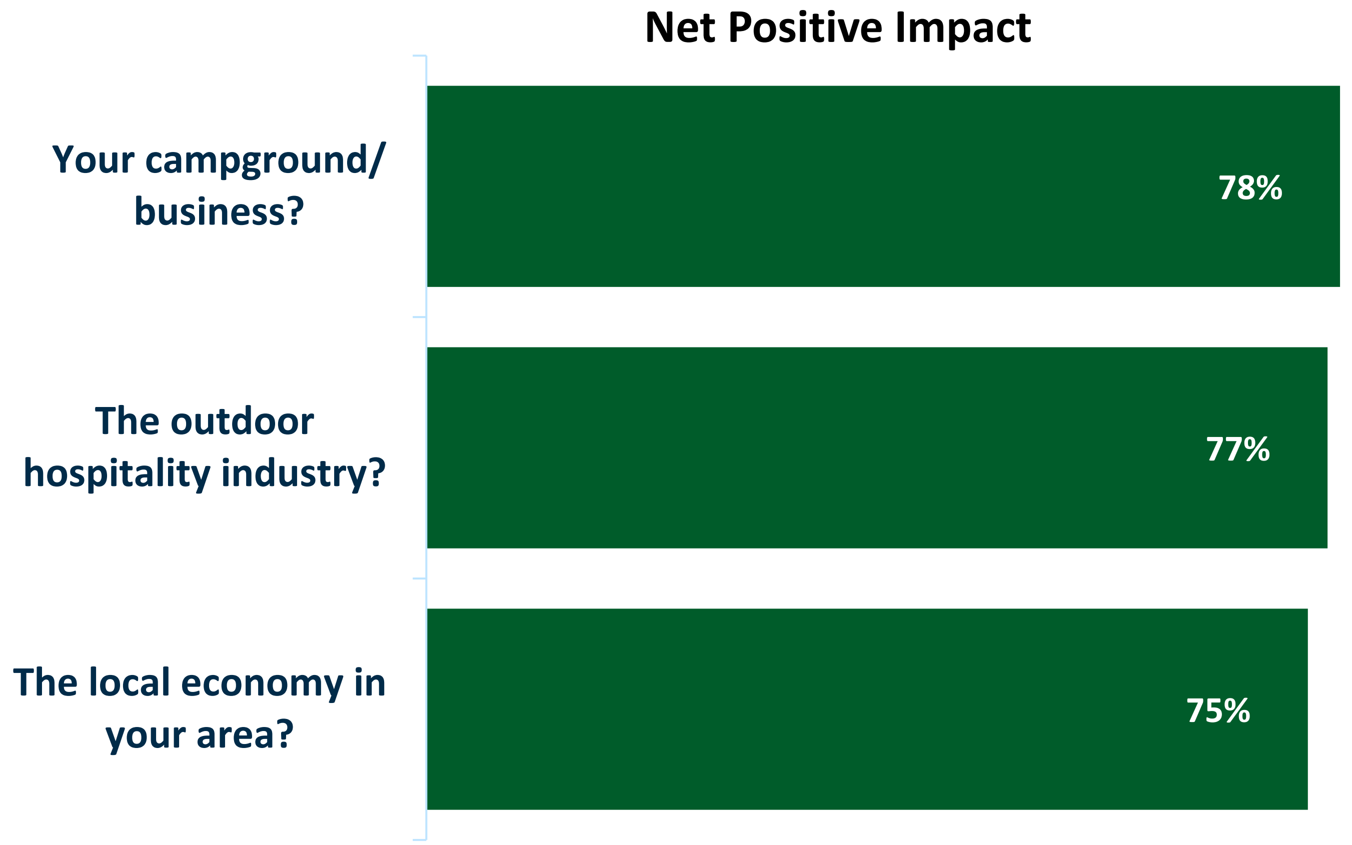
Providing more on-site recreation opportunities for the new campers who want to have access to an array of activities during their stay, which has the added benefit of keeping a higher proportion of campers on-site, and avoiding boredom among their kids especially in light of campgrounds wanting more families.

Adding RV hook-ups to accommodate more of the new RVers. Additionally, there is an imbalance in the proportion of campers in travel trailers (based on campground owners/managers typical versus ideal mix of campers), the need to provide the infrastructure for these RVers is critical.

Considering **additional rental units/glamping accommodations** to attract the set of leisure travelers who recently started camping, yet want more comfort in their stays. These types of units help to alleviate the primary barriers to camping among leisure travelers, which is the idea of being safe and secure, as well as avoiding bugs and pests.

Detailed Findings

What impact has the "new camper" had on campgrounds, the industry, and economies?



All things considered, campground management views the influx of new campers as a positive, whether it's on the local economy, the outdoor hospitality industry, or their individual campground.

Only about 1-in-10 feel these campers have a negative impact. Smaller to mid-sized campgrounds are less likely to have been impacted by the set of new campers when compared to larger campgrounds.

"These new campers came with an entitlement, they had no camping experience, didn't respect the other guest or the park, felt they could make their own rule and didn't have to follow ours."

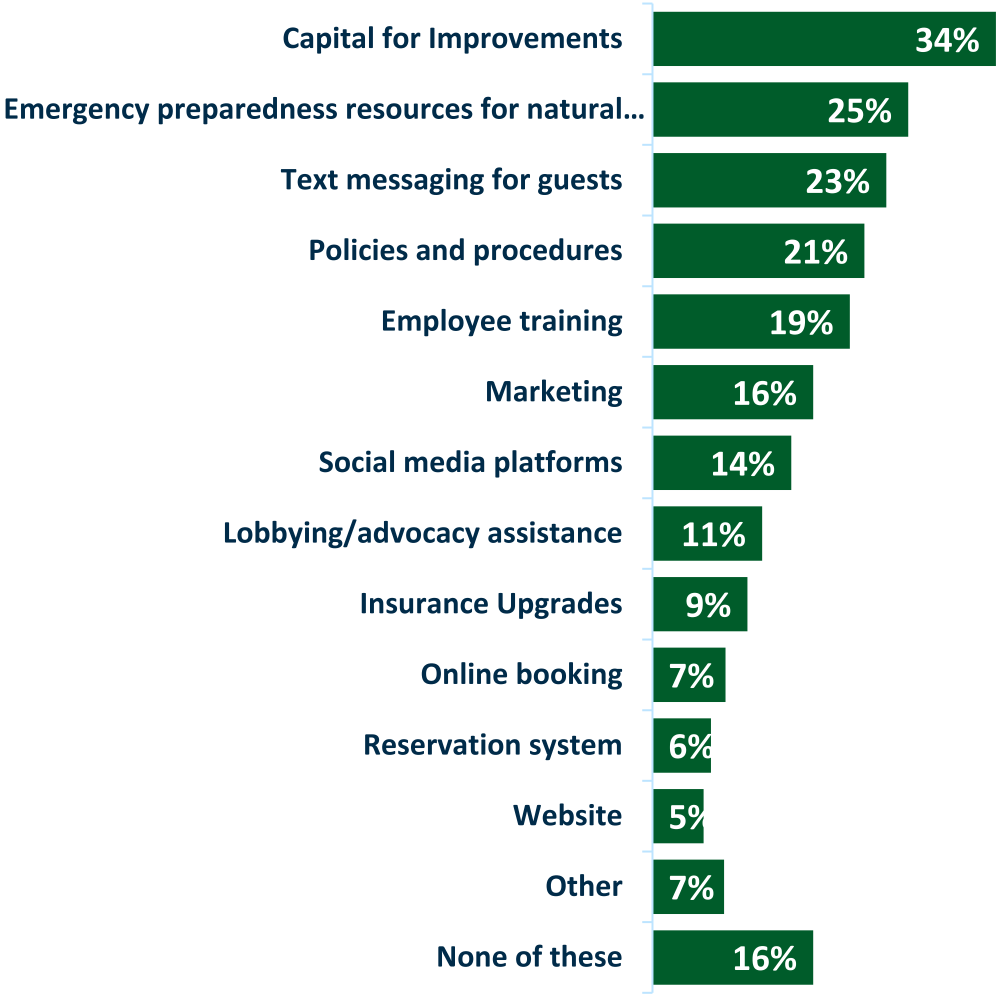
What resources do owners/managers wish they had this past year?

Nine out of ten campground owners/managers cite at least one resource they wish they had this past year.

Staffing issues are a problem across the industry and all sectors, including more than half of campground owners and managers. However, smaller and medium sized parks are much less likely to have this problem when compared to the larger parks, potentially due to the need of fewer staff overall. About 4-in-10 park managers say that having more/improved amenities are on their wish list and one-third note infrastructure improvements.

Looking back at 2022, what resources do you wish you had?

What resources are needed for future operations?



84% of park owners/managers list at least one resource they need for 2023 and beyond.

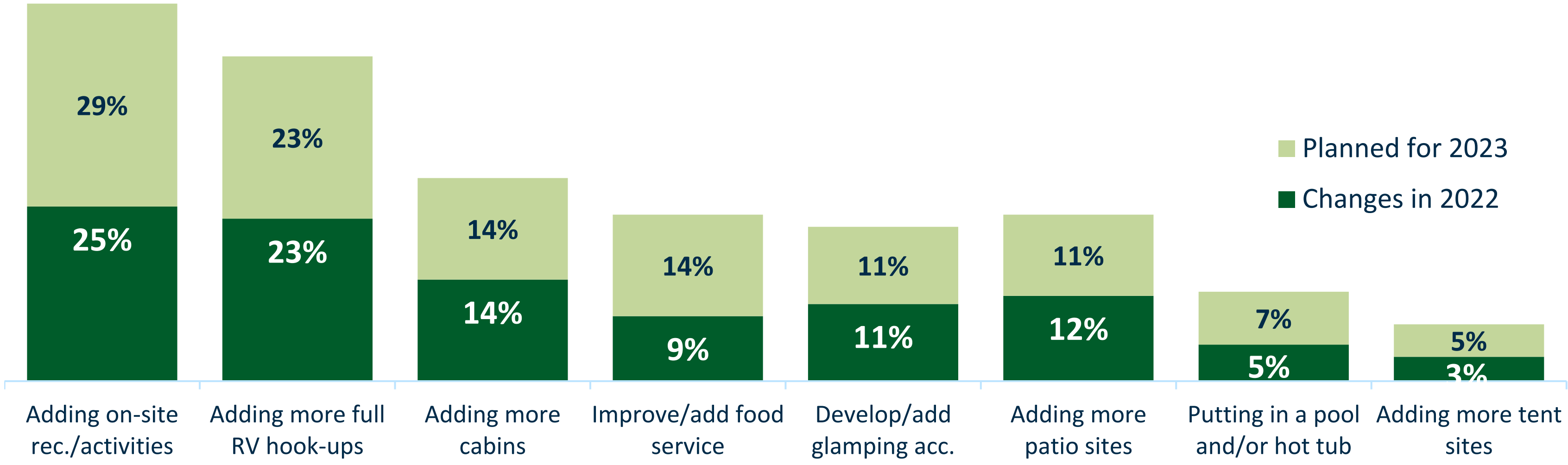
About one-third of parks overall, including about half of smaller parks, say that having the capital for improvements is the primary resource that's needed for 2023. Another one-fourth cite emergency preparedness resources or text messaging services for guests.

What resources, if any, do you need for 2023 and beyond that you currently do not have?

What are the planned upgrades or changes that parks have in mind?

Seven out of ten campground managers surveyed indicate that they made some type of change in 2022 and an identical proportion plan to make changes in the coming year.

On-site recreation and more full RV hook-ups were the most commonly mentioned changes in 2022 (and planned for 2023). 21% plan to add more cabins and/or glamping sites.

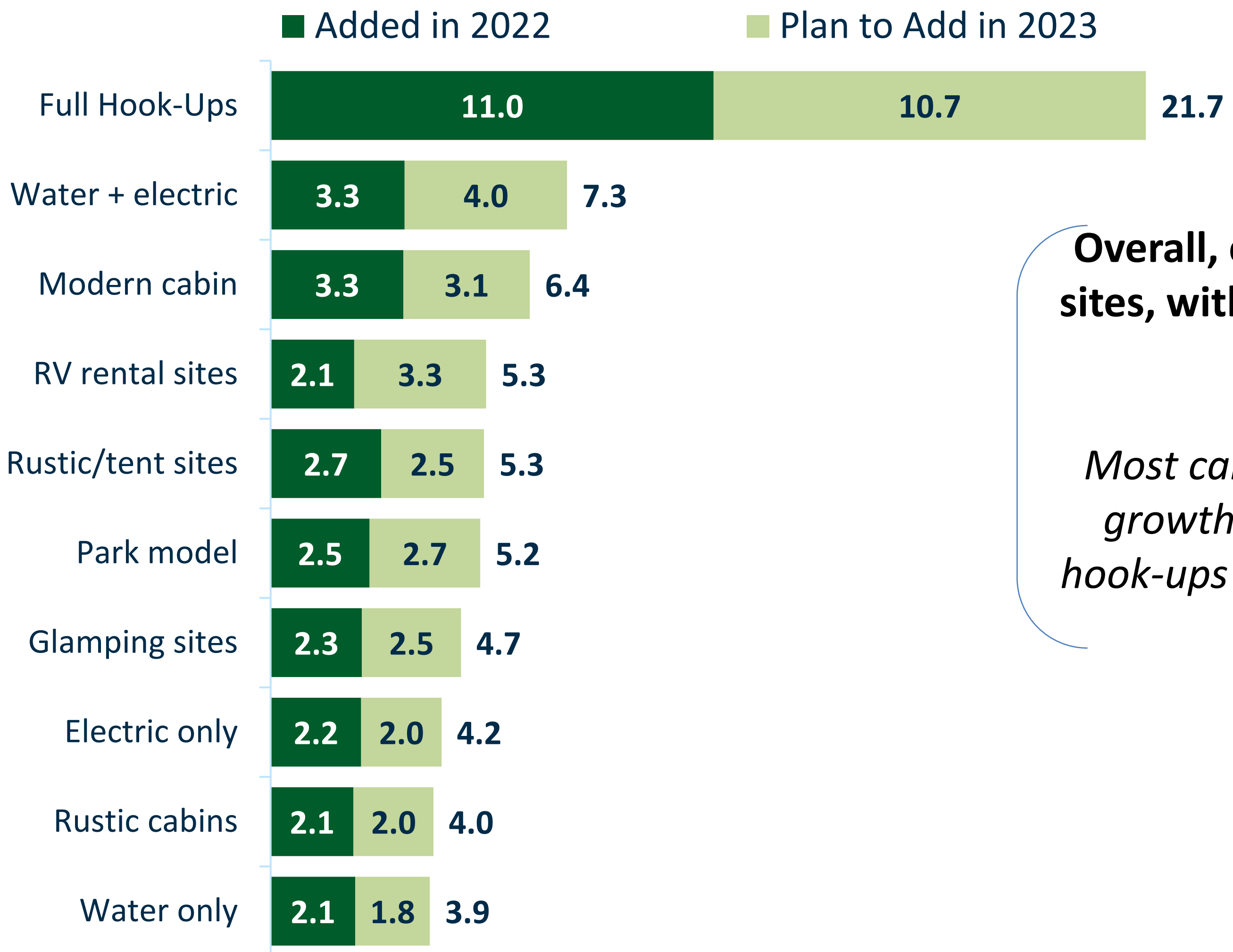


On-site recreation was more likely to have been added at larger campgrounds, while smaller campgrounds in general were less likely to have made any changes at their parks.

And the look ahead for 2023 suggests that the mid-sized campgrounds are more likely to add on-site rec, full RV hook-ups, or cabins.

Which of the following changes, upgrades, and/or improvements, if any, did you make in 2022 and which do you have planned for your campground in the next year?

What types of campsites were added 2022? What are the plans for 2023?

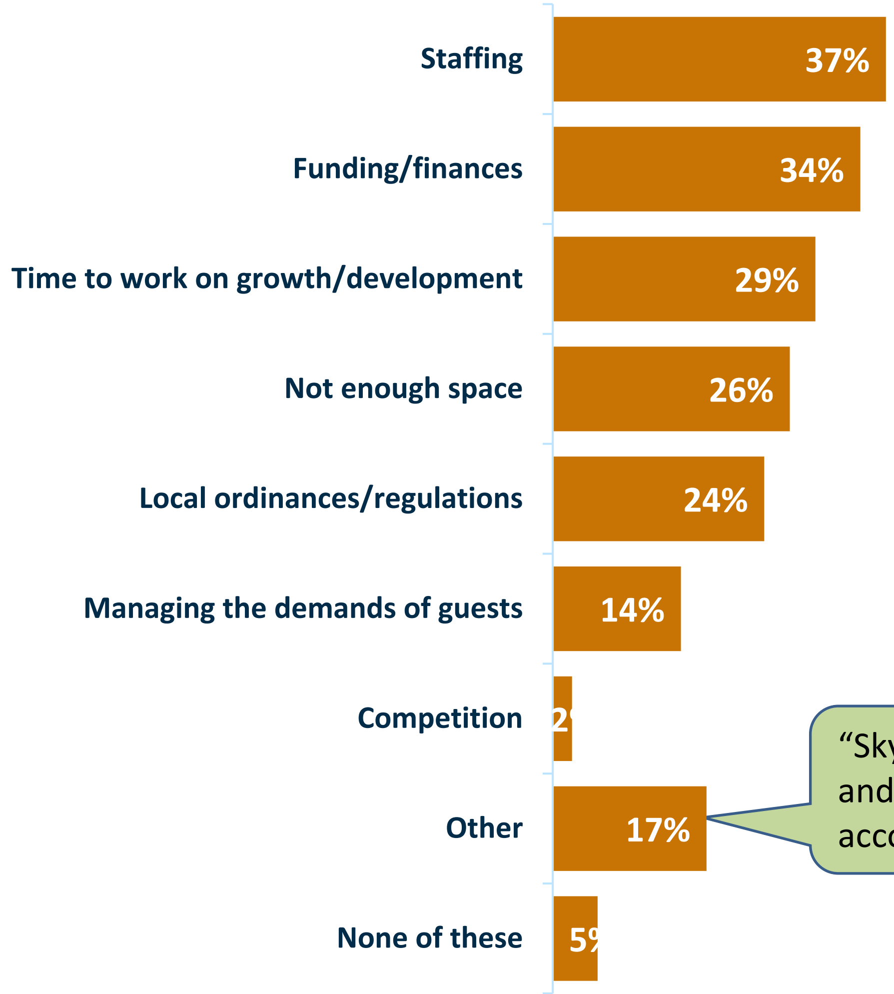


Overall, campgrounds are adding an array of sites, with a focus on full RV hook-up sites (11 on average in 2022).

Most campgrounds appear to replicate their growth for 2023, again focusing on full RV hook-ups and secondarily, sites with water and electric only.

Which of these types of camping sites are available at your park/campground?

What are the barriers to growth?



"Skyrocketing costs of building materials and interest rates. Not enough big sites to accommodate big rigs."

Campground managers are nearly evenly split in their views regarding whether staff issues or finances represent the greatest barriers to future growth.

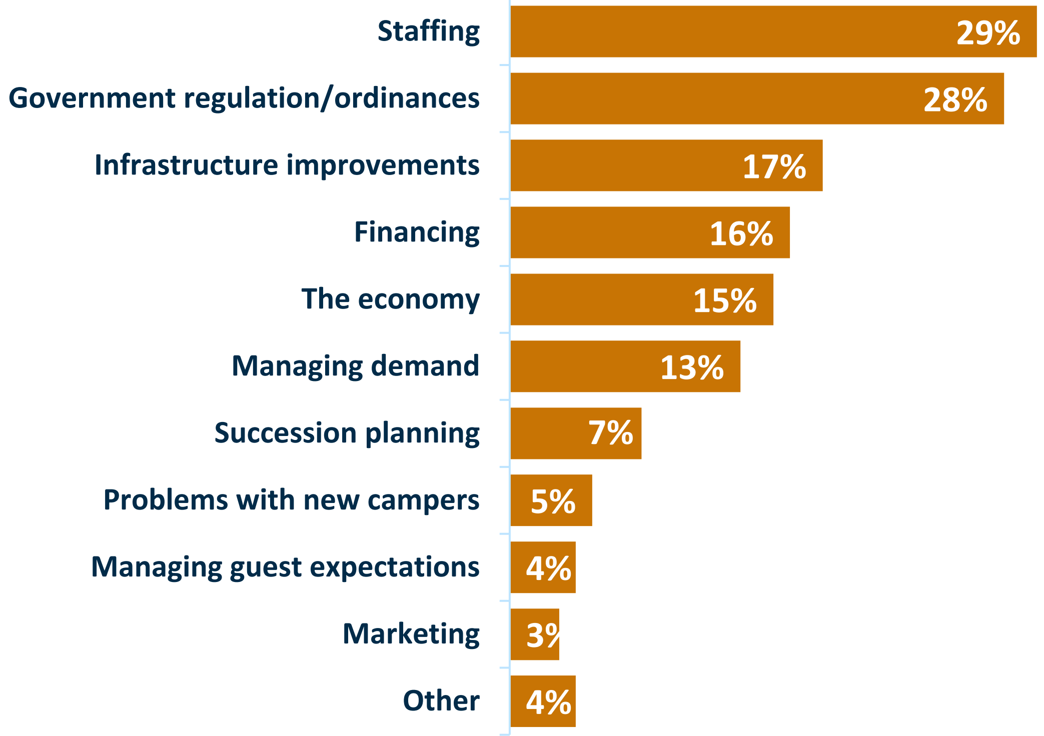
Notably, few campgrounds cite competition as a barrier to growth, potentially due to the robust camping participation over the past couple of year.

Finances are a greater barrier among the small to mid-sized campgrounds.

And what for you, if any, are the greatest barriers to growth and development of your campground?

What are the biggest issues facing campgrounds in the next 5 years?

Using an open-ended format, campground owners and managers were asked what their biggest issues or concerns are for the next five years. When the comments were categorized, the two areas of greatest concern surrounding staffing and the impact that government regulations and ordinances have on their businesses. These issues are relatively consistent across all campground types.



"Infrastructure. On site amenities need to be addressed and a management staff secured."

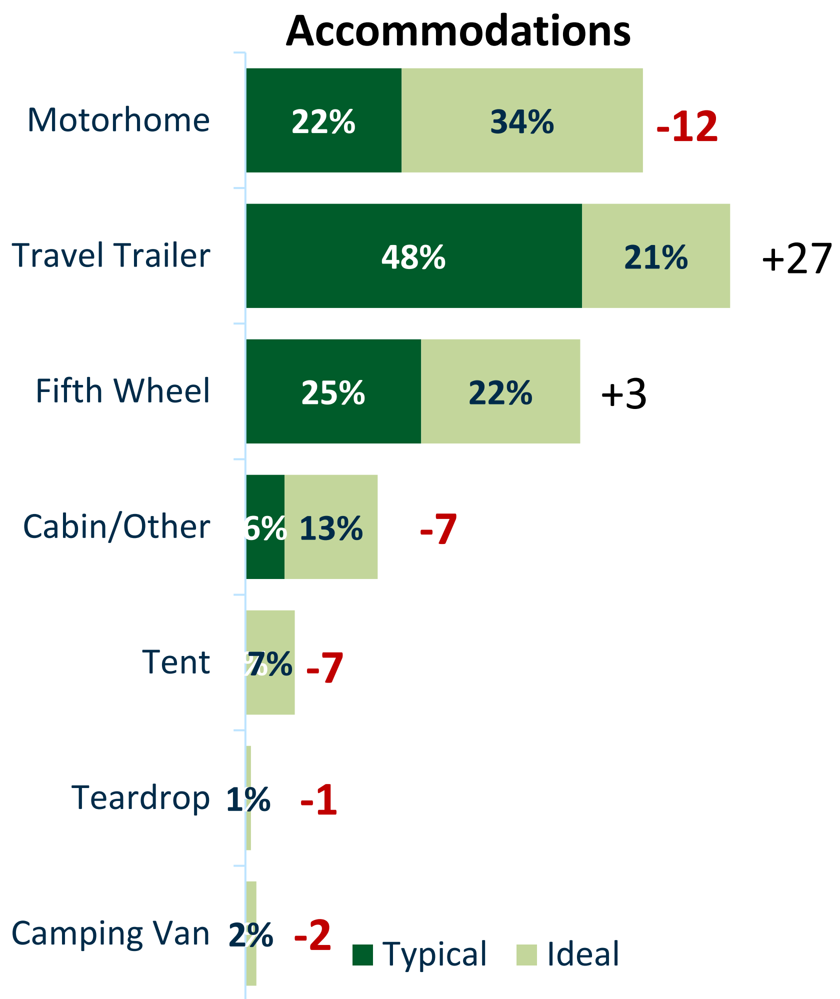
"My biggest concerns are having and maintaining a full staff. We have worked short handed through COVID and since it seems we are not able to get a full team back in all our departments in the RV Park such as not having a full maintenance team and full housekeeping team and office staff."

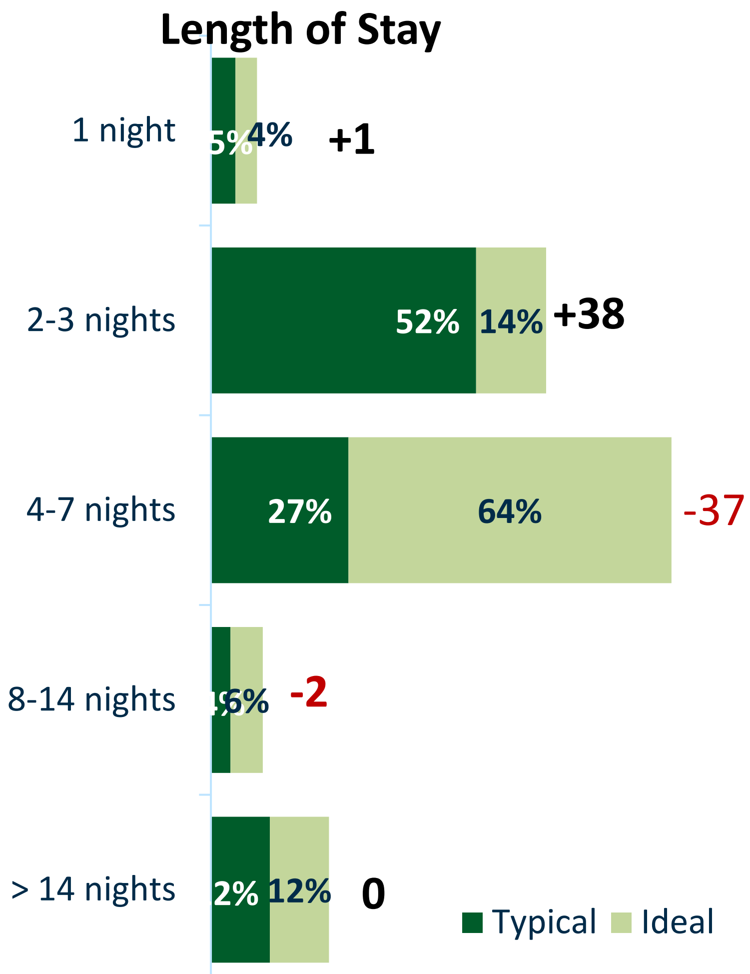
As you look ahead to the next 5 years, what for you are the biggest issues or concerns you have in managing and operating your campground(s)?

What are the typical and desired accommodations among campground owners/managers? Length of stay?

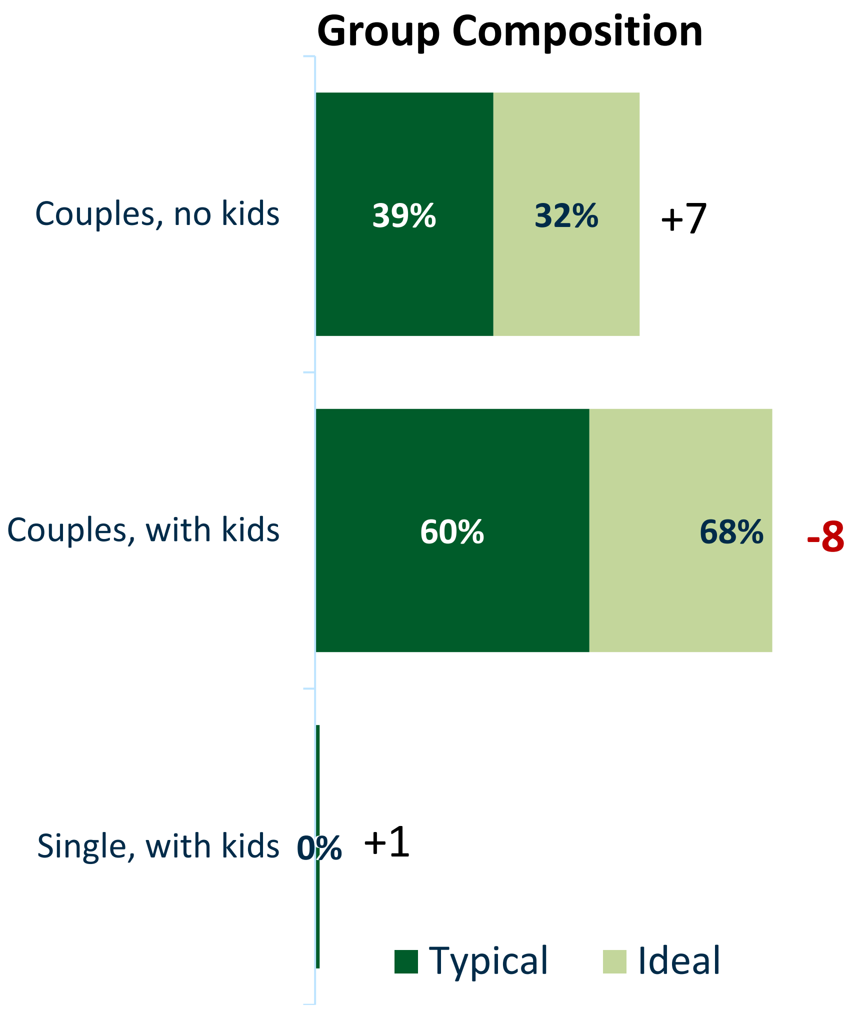
Campground owners and managers are more likely to seek a greater proportion of motorhome guests. *Currently, motorhome guests are 12 percentage points under the ideal overall, having a greater than ideal proportion of travel trailer guests (+27).*

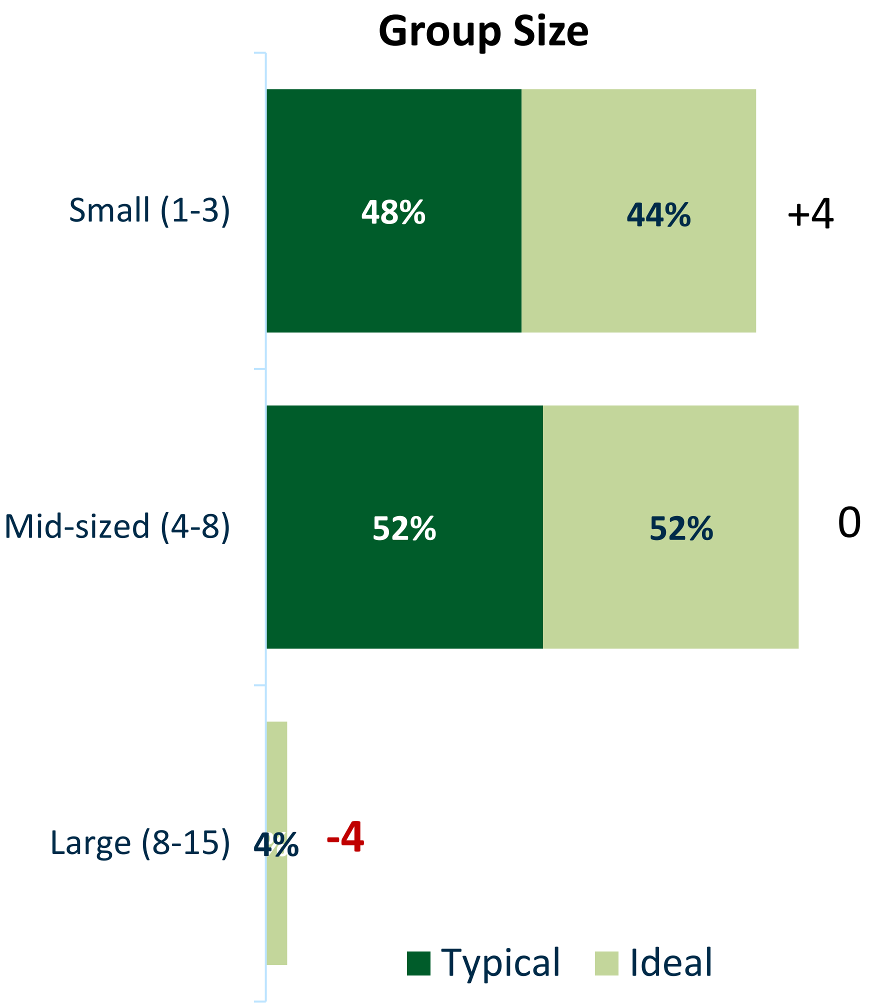
And when asked about length of stay, almost two-thirds of campground owners/managers would prefer a 4-7 night stay, which is well above their typical guest who stays only 2-3 nights.





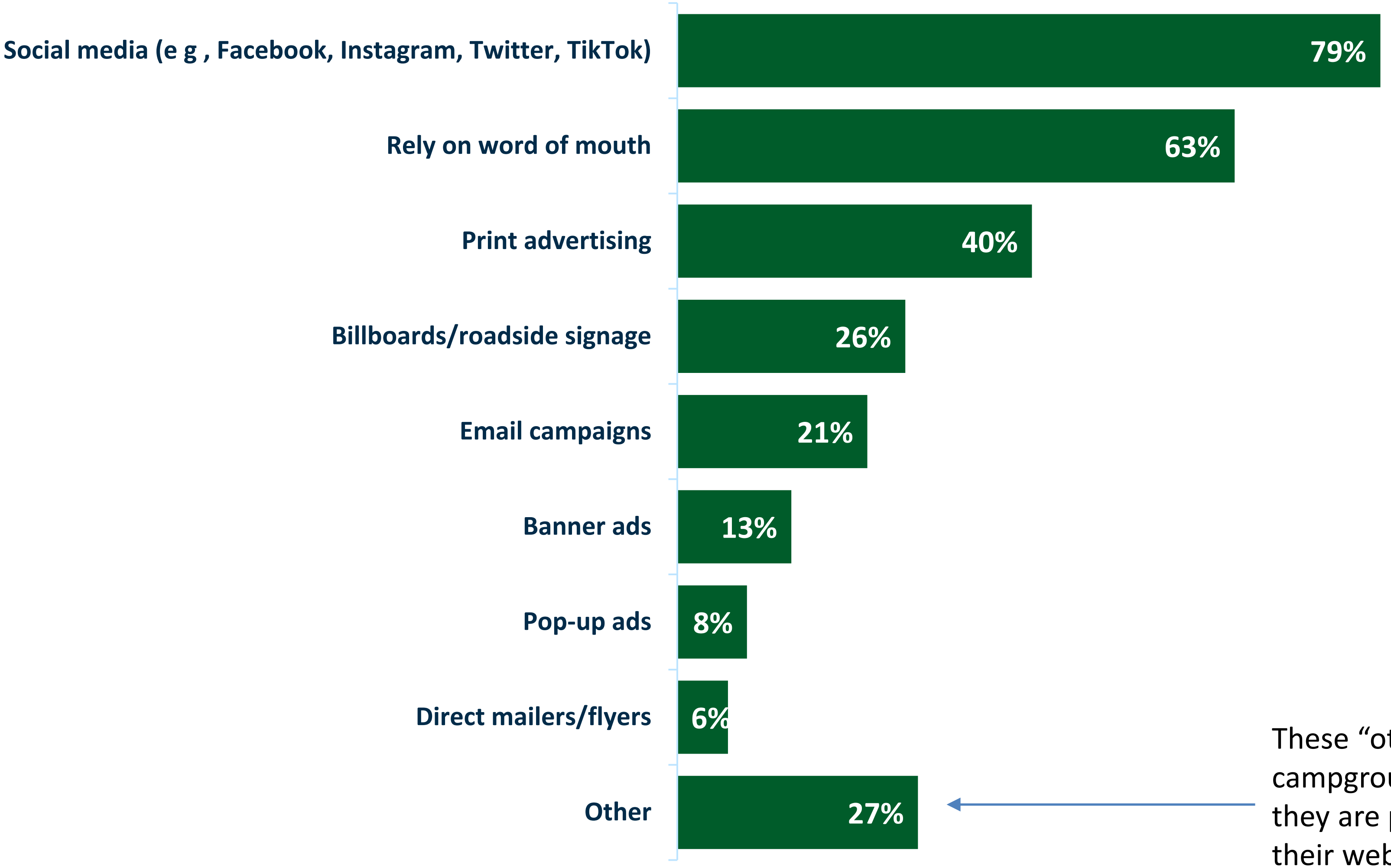
What is the typical and desired group composition?





In general, campgrounds appear to be attracting the types of guests they prefer, which include a higher percentage of couples with children, and a split of small and mid-sized groups.

How are campgrounds marketing their business?



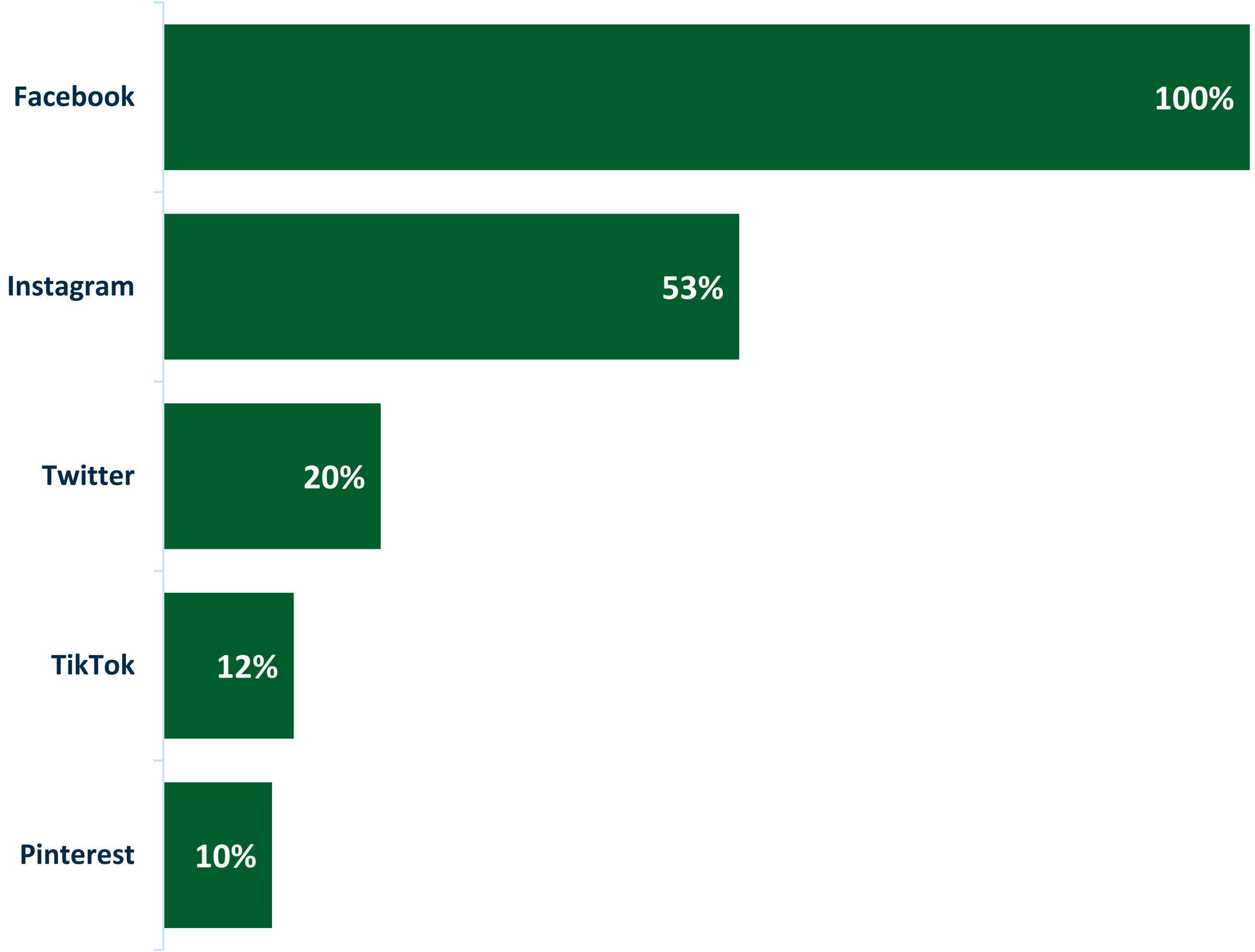
Social media represents the most prominent resource for marketing of campgrounds.

Small and mid-sized campgrounds are less reliant on word-of-mouth. Larger campgrounds are more likely to use a variety of marketing approaches, including print, email, banners, and event direct mail.

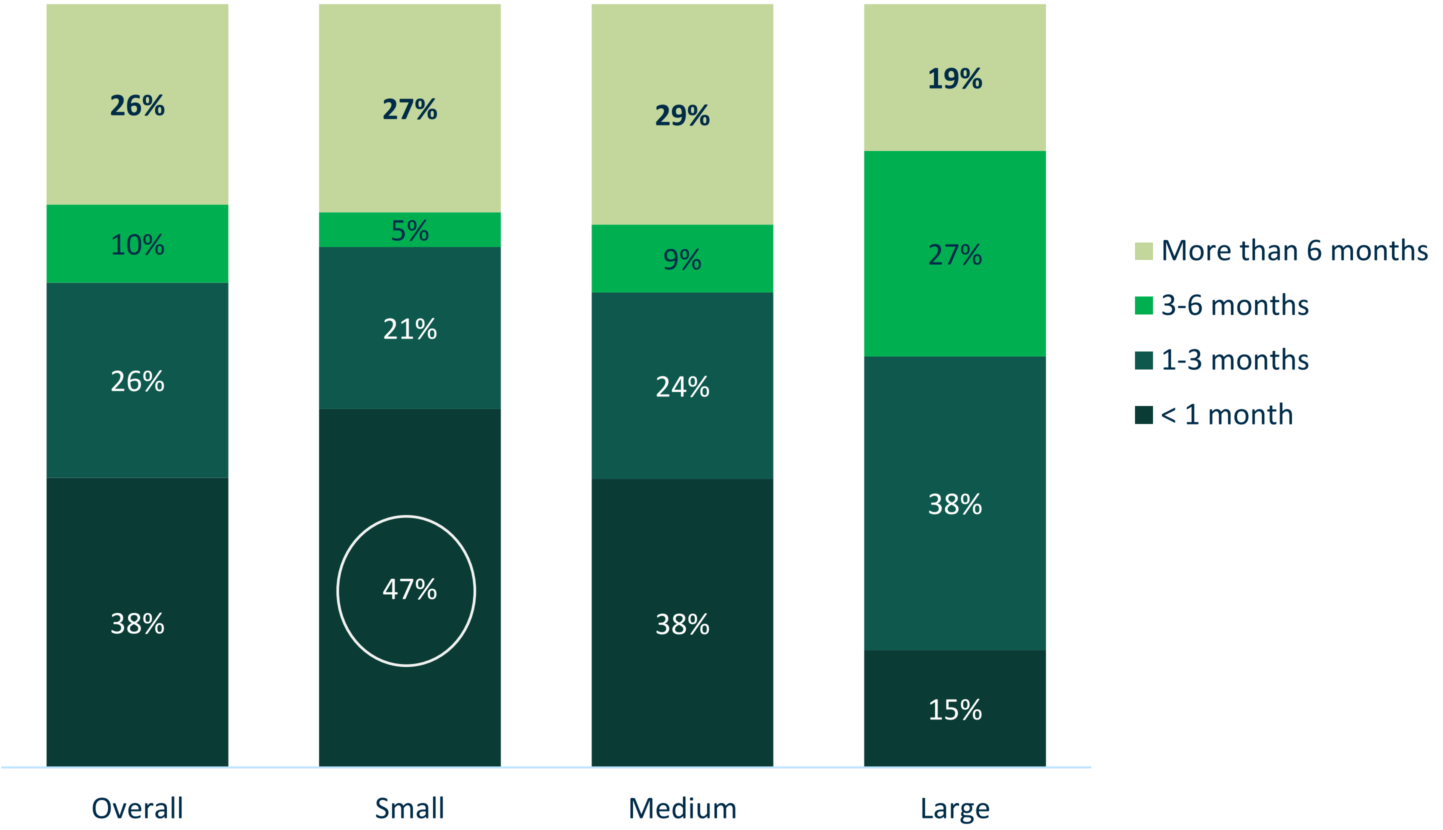
These "other" responses are comprised of campgrounds who rely on the campground system they are part of for marketing, those who use just their website, sponsorships, or rely on Google search results.

Which of the social media platforms are campgrounds using?

Among users of social media for marketing purposes, all campgrounds are using Facebook. *About half are using Instagram, while Twitter is more popular among the larger campgrounds.*



How far out are campers typically booking?

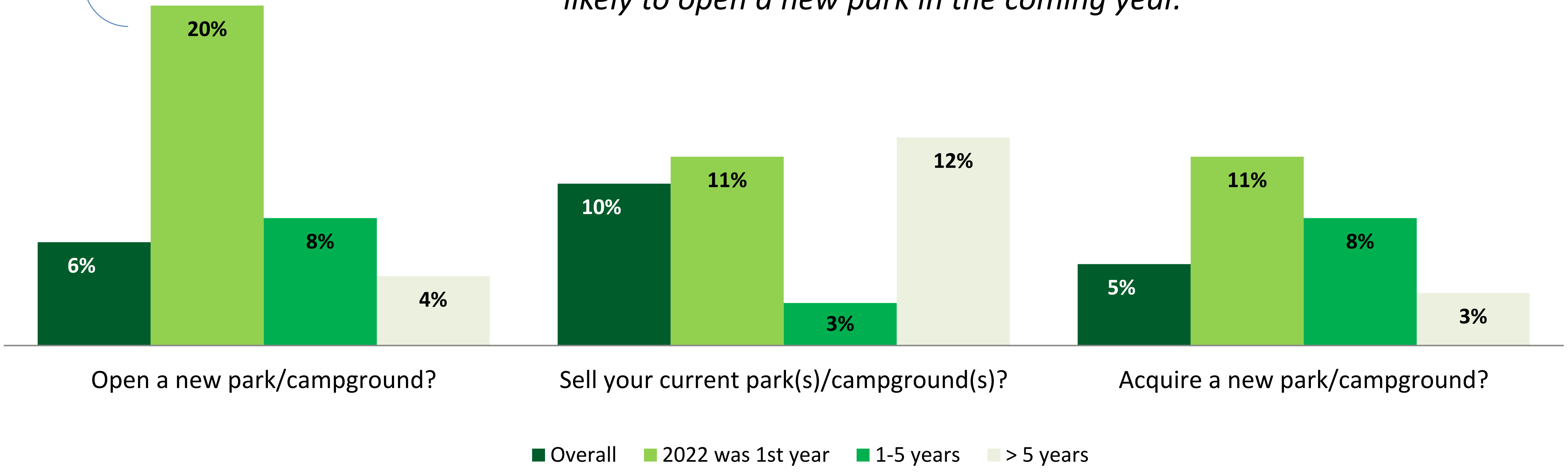


The typical campground is getting their reservations between 1 and 3 months out, with smaller campgrounds reporting a shorter time frame.

What is the likelihood of major changes in the coming year?

Campground owners/managers are generally unlikely to seek major changes in the coming year, whether it's opening a new park, selling their current park, or acquiring a new park.

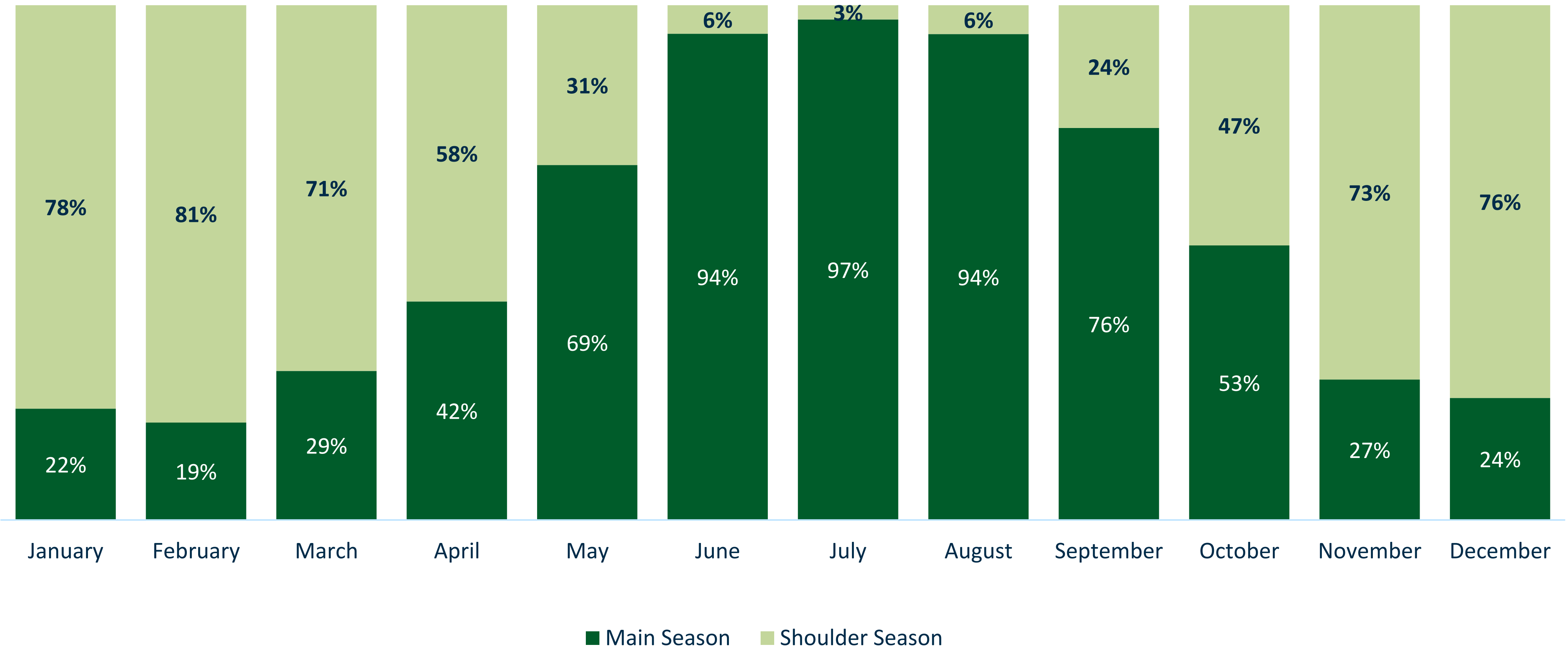
Still, about a third of the owners surveyed are either open to, or uncertain about whether they would sell their campground. Additionally, the newest set of owners/managers are most likely to suggest that they are likely to open a new park in the coming year.



In the next 12 months, how likely are you to:

What are the months of operation?

Not surprisingly, June, July and August are the peak months across all campgrounds, with campgrounds nearly evenly split regarding October.



What is the mix of campsites by campsite type?

Regardless of campground size, nearly all say that they have at least some full RV hook-up sites at their campgrounds. *The set of larger campgrounds is more likely to have a mix of site types and accommodations, whether it's rustic sites/tent sites or water and electric only.*

	Overall	Small	Medium	Large
Full hook up (electric, water, & sewer)	94%	93%	96%	93%
Water & electric only	45%	40%	44%	59%
Rustic/tent (no hook up)	45%	41%	38%	67%
Electric only	16%	12%	20%	22%
Water only	6%	1%	13%	7%
Other	12%	9%	16%	15%

In terms of the proportion, the smaller campgrounds are more likely to have a larger percentage of RV sites, while again, the larger campgrounds offer a greater mix of site types.

	Overall	Small	Medium	Large
RV	74%	82%	83%	57%
Tent	12%	9%	8%	17%
Cabin	7%	6%	5%	10%
Park Model	6%	1%	2%	14%
Glamping	1%	1%	0%	2%
Yurt*	0%	0%	0%	0%
Rental RV	1%	1%	1%	0%

*Note: the percentage of yurts is less than 1%, but not zero.

Which of these types of camping sites are available at your park/campground?

Ownership Structure

	Overall	Small	Medium	Large
Independently owned campground(s)	74%	81%	73%	59%
Partnership with 1 or more others	9%	6%	11%	15%
Owned by a company or corporation	8%	3%	11%	15%
Part of a franchise model	9%	7%	11%	11%
Is membership based	1%	1%	0%	4%
Other	1%	1%	0%	4%

Methodology

The overall approach to this work was an online survey that included the targeting of campground owners and managers across the U.S. and Canada.

Participants in the research were recruited using a variety of approaches, including the soliciting of responses via the Woodall's Campground Magazine social media pages, industry partners, state organizations, and direct emails sent to campground contacts.

In total, 488 surveys were completed representing all regions of the U.S. and to a lesser degree, Canada. A sample of n=488 has an associated margin of error of +/- 4.33%.

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