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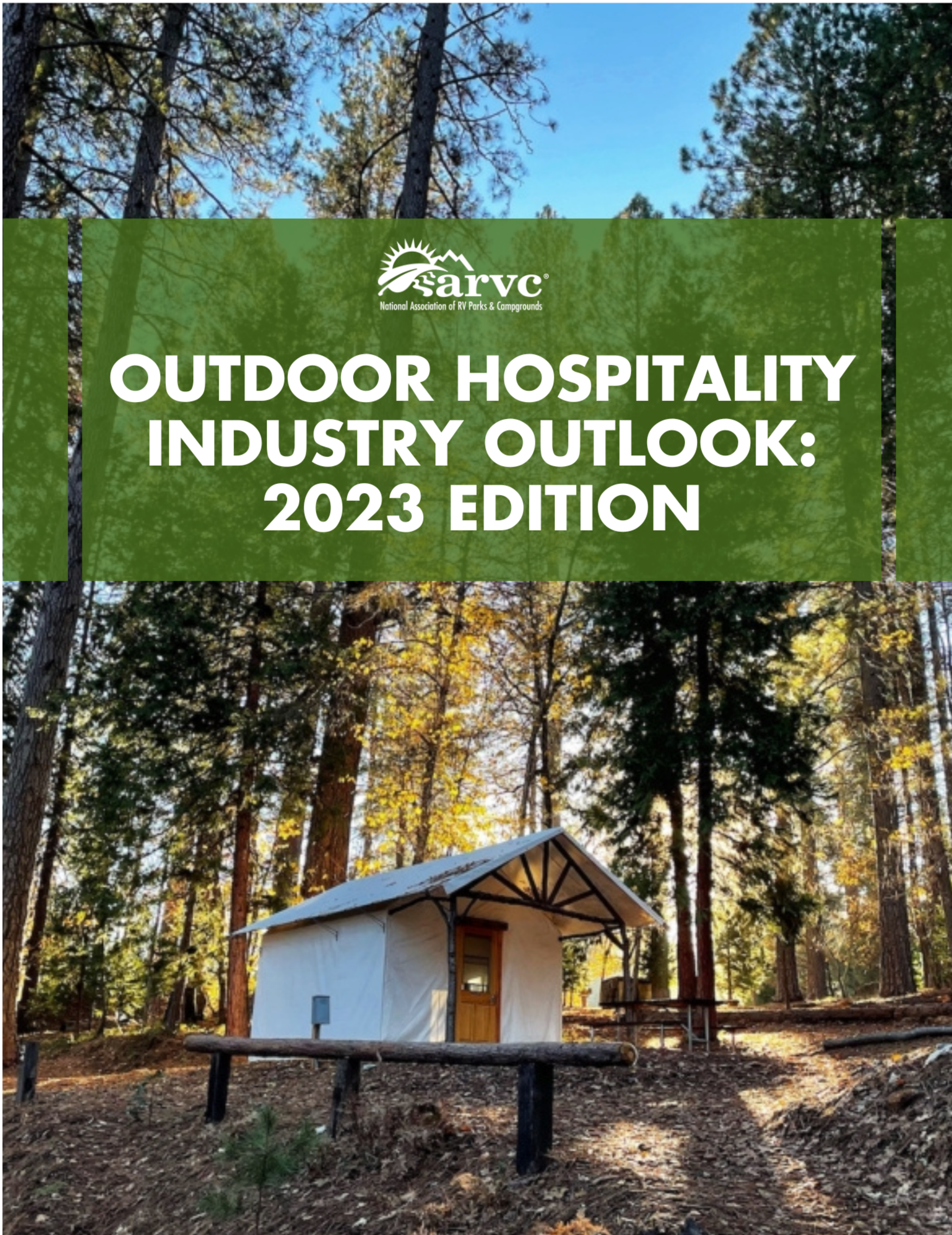
National Association of RV Parks & Campgrounds

OUTDOOR HOSPITALITY INDUSTRY OUTLOOK: 2023 EDITION



CONTENTS

CONTENTS

KEY FINDINGS

Overall, park/campground demographics reported in 2022 are similar to 2021 survey results (operational structure, types of campsites, etc.).

- **Many parks are anticipating increased profit margins in 2023.** Around three in four (73%) report that they are confident that their park will show an increased profit margin in 2023. Only a small proportion report that they are not confident (4%). This is in keeping with the results from the 2021 study, in which 64% reported that they anticipated profits to be up for that year, compared to the previous year.
    - When considering barriers to the success of their park in 2023, respondents most commonly reported staffing issues (23%) as their greatest anticipated barrier. However, a similar proportion (25%) reported that they do not anticipate any barriers to their success in this year.
- **Expansion plans for the next 12 months may be decreasing.** While the typical number of sites added in the last 12 months has remained consistent, with a median of 8 sites added (compared to 7 in 2021), 28% of respondents indicated their park plans to expand their existing park/campground in the next 12 months, down from the 48% reported in the year prior.
    - Plans for opening a new park have remained steady with 5% reporting a plan to do so in the next 12 months, similar to 2021 (4%). 14% report that there are plans to sell the existing park in the next 12 months (not asked about in the previous year's study).

Park/Campground Profile

- **Park/campground longevity is common.** 77% have been in operation for at least 20 years, including 39% that have been in operation for at least 50 years. The median report was 40 years.
- **Just under four-fifths (79%) are individual/independently owned small businesses.** Far fewer are corporate-owned (13%), membership or member-owned (3%), a franchised brand (1%), or have some other operational structure (4%).
- **The typical park/campground has 119 total rentable sites.** Median number of sites is higher in the Northeast than in other regions.
    - Most parks/campgrounds (90%) have full hook up camping sites. Around half have water & electric only sites (51%) and/or rustic/tent sites with no hook up (47%). Far fewer have electric only sites (12%) and/or water only sites (6%).
- **Parks report that the most typical length of stay is four nights.** Parks located in the South were more likely to report a longer typical length of stay, with a median of 7 nights.
- **Parks report that campers are typically booking four months in advance.** What is typical for each park can vary notably, with one in three (32%) reporting that their typical booking is four weeks out or less and a similar proportion (36%) reporting that their typical is six months out or further.

KEY FINDINGS

Improvements and Additions

- **Many parks/campgrounds made improvements in the last year.** Two in three (65%) improved their infrastructure (roads, cable, electric, sewer, etc.) and 47% improved their existing amenities (pools, bath houses, etc.). One in three (33%) report having added amenities in the last year, a small increase in proportion from 2021 (23%).
    - Similar proportions of parks/campgrounds plan to make improvements in the *next* 12 months, with the emphasis again most commonly upon improving infrastructure over that time (60%).
- **In the past year, WiFi has been the most commonly added amenity**—around one in three (36%) of parks that added amenities in the last year added WiFi.

Marketing and OTA Usage

- **The majority of parks engage in at least one type of marketing for their park**—only 11% of respondents indicated that their park does not engage in marketing. Most commonly, around three in four parks (72%) market themselves on social media. Larger parks are more likely than smaller parks to engage in at least one type of marketing.
- **While most parks do not use an Online Travel Agency (OTA), their usage is increasing.** Around one in four parks (24%) currently use an OTA to distribute site inventory, an increase from just 12% in 2021. In general, smaller parks were more likely to report currently using an OTA than larger parks.

Note

- When results are analyzed by geographic region, operational structure, size of park/campground, or by a specific type of campsite/accommodation, it is important to note that in some instances the number of respondents in which the results are based is small, creating greater variability in the survey data. This should be taken into consideration when analyzing segmented results.

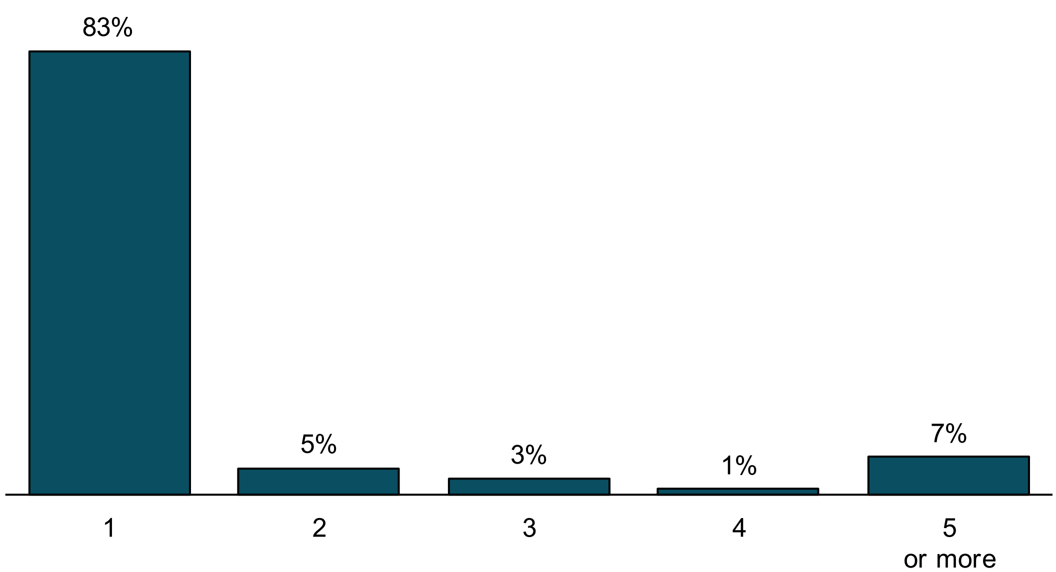
FINDINGS: Park/Campground Profile

Four in five respondents[1] (83%) own, manage, operate, or have detailed knowledge about one privately-owned RV park, campground, or glamping park (hereafter in this report referred to as "parks"). The other 17% were instructed to answer the survey for what they consider to be the most average RV park they own, manage, operate, or have detailed knowledge about.

Number of Parks/Campgrounds

How many privately-owned RV parks, campgrounds or glamping parks does the outdoor hospitality business you own, manage, operate, or have detailed knowledge about have?

base (unweighted): 246 qualified respondents



[1] Throughout this report "Respondents" refers to the 246 individuals who responded to the survey and indicated in the first few survey questions they have owned, managed, operated, or have had detailed knowledge about a privately-owned outdoor hospitality business and have owned, managed, operated or had detailed knowledge about that business for at least one year.

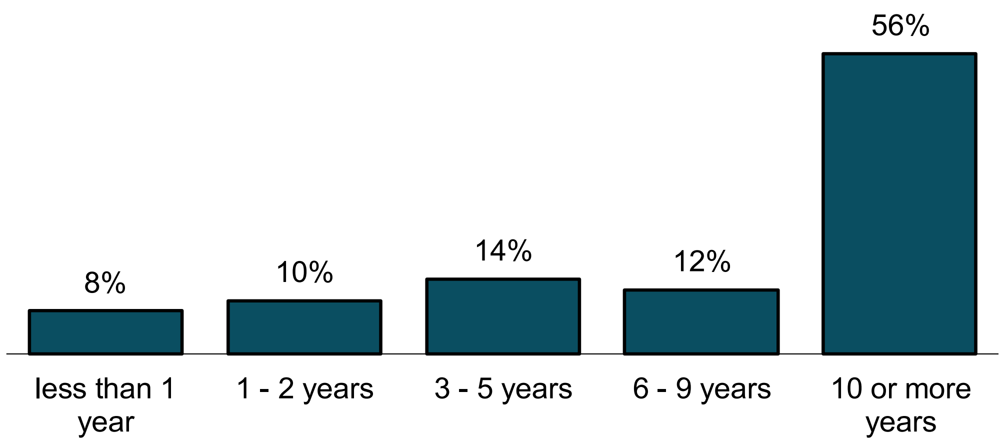
FINDINGS: Park/Campground Profile

Among those reporting that they are an owner, manager, operator or have detailed knowledge of a privately-owned outdoor hospitality business, more than half (56%) report they have held that role or had detailed knowledge of the business for 10 years or more.

Number of Years as Owner/Manager/Operator or With Detailed Knowledge of Operation

For how many years have you owned, managed, operated, or had detailed knowledge about this outdoor hospitality business?

base (unweighted): 266 owners, managers, operators, and those with detailed knowledge of a privately-owned outdoor hospitality business



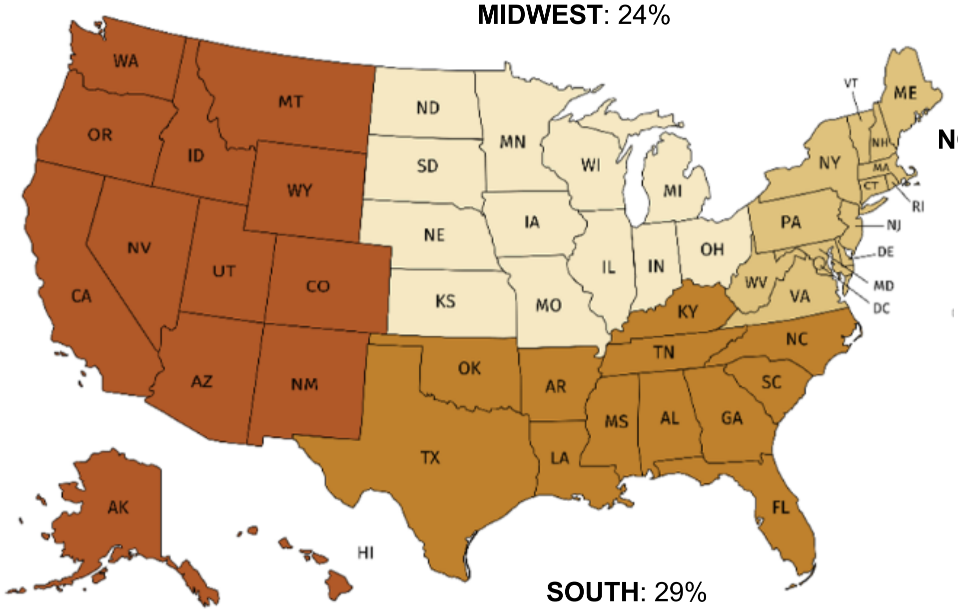
FINDINGS: Park/Campground Profile

The parks for which respondents reported on are dispersed relatively equally across four geographic regions (which closely mirror the Census regions but with slight modifications) with a moderately higher proportion in the western and southern states. California claims 9% of the reported locations while no other individual state accounts for more than 7%.

Geographic Distribution: Modified Census Regions

In what zip code is this RV park, campground or glamping park?

base (unweighted): 246 qualified respondents



Geographic Regions Defined
Northeast: CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV
Midwest: IA, IL, IN, KS, MI, MN, MO, NE, ND, OH, SD, WI
South: AL, AR, FL, GA, KY, LA, MS, NC, OK, SC, TN, TX
West: AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

FINDINGS: Park/Campground Profile

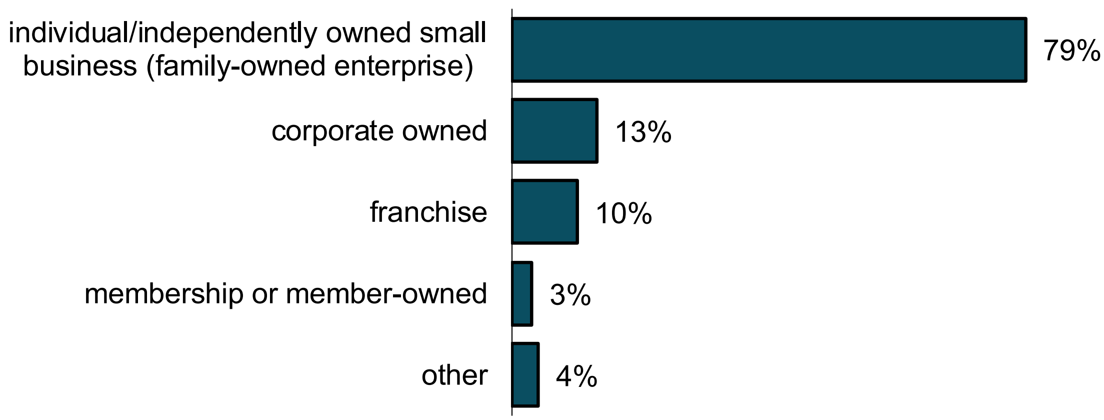
In terms of operational structure, 79% of reported RV parks/campgrounds/glamping parks are individual/independently owned small businesses (such as “mom and pop”), 13% are corporate-owned, 10% are a franchised, 3% are membership or member-owned, and 4% have some other operational structure.

The likelihood of being an individual/independently owned small business is greater for parks of fewer than 50 sites/units (92%) than for those with more sites. Some differences in operational structure appear by region, as well.

Operational Structure

What is the operational structure of this park/campground?

base (unweighted): 246 qualified respondents (multiple answers); those in each segment



OPERATIONAL STRUCTURE	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
individual/independently	87%	88%	71%	75%	92%	85%	73%	72%
corporate-owned	9%	4%	22%	13%	5%	4%	17%	21%
franchised brand	4%	4%	16%	12%	5%	11%	12%	9%
membership or member-owned	3%	2%	5%	1%	2%	1%	2%	7%
other	0%	5%	3%	7%	3%	5%	5%	1%

=50% - 64% =65% - 79% =80%+

FINDINGS: Park/Campground Profile

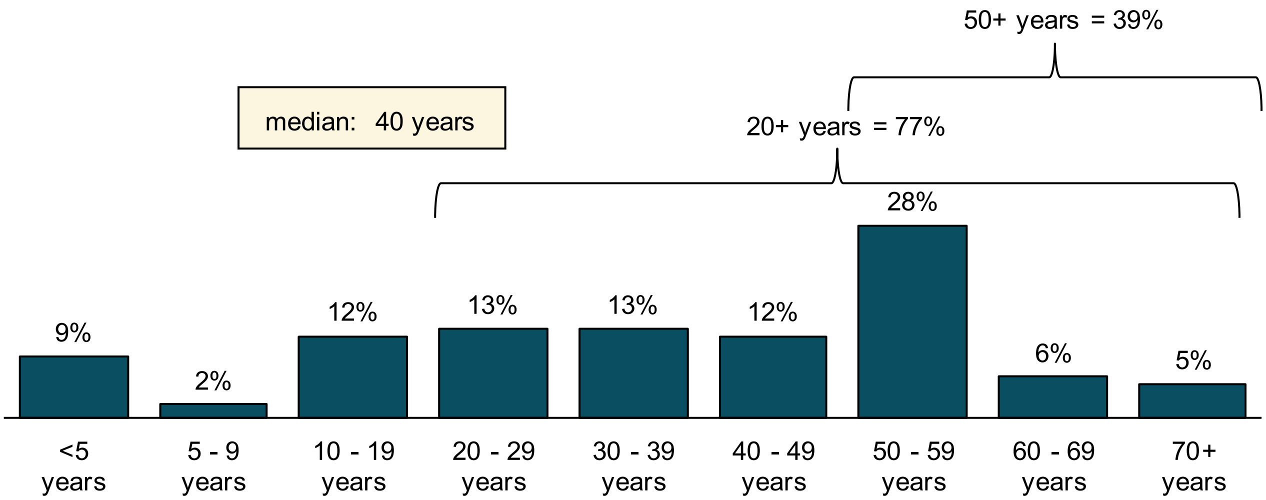
Most parks reported organizational longevity; 77% have been in operation for at least 20 years, including 39% that have been in operation for at least 50 years. The typical (median[2]) respondent indicated their park/campground has been in operation for 40 years.

The longest reported median operational tenure is from parks with more than 100 sites/units. Those in the South and those with a corporate-owned operational structure reported shorter median operational tenures than others.

Operational Tenure

Approximately how long has this RV park, campground or glamping park been in operation?

base (unweighted): 246 qualified respondents answering (fill-in answers); those in each segment



Operational Tenure	median years
GEOGRAPHIC REGION	
Northeast	50
Midwest	50
South	27
West	35
OPERATIONAL STRUCTURE	
independent/membership	40
corporate-owned	21
franchised brand	47
SIZE (# of sites/units)	
200+	44
100 - 199	45
50 - 99	35
<50	24

[2] A **median** is the value that lies at the middle of a distribution: that is, 50% of the values are above it and 50% are below. It represents the "typical" response, and is not influenced by extreme values.

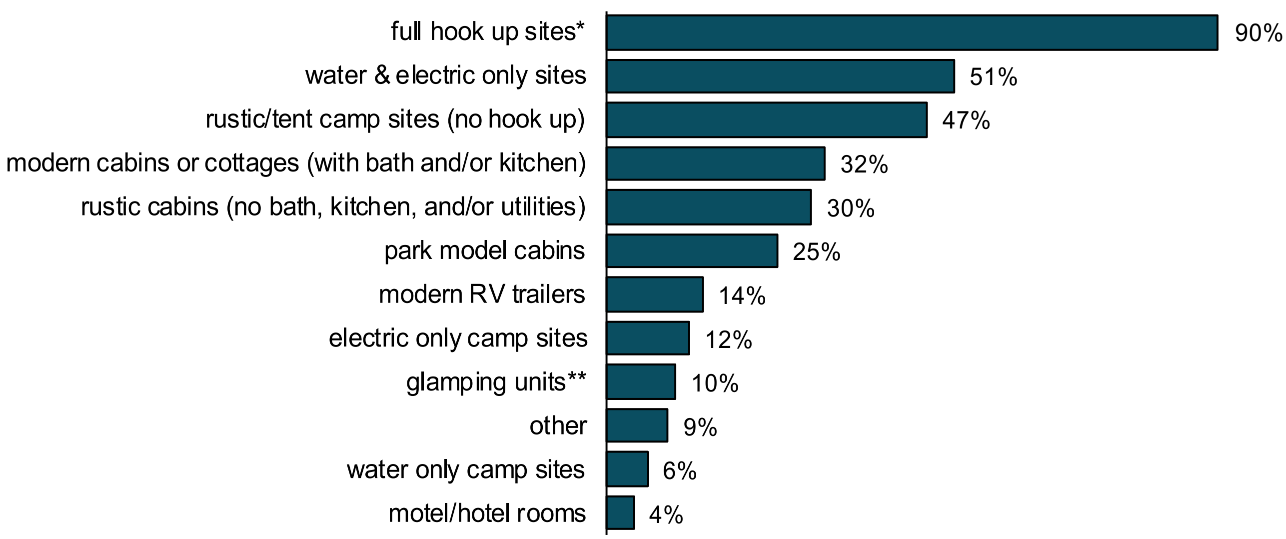
FINDINGS: Park/Campground Profile

The vast majority of reported RV parks/campgrounds/glamping parks (90%) have full hook up camping sites—including water, electric, and sewer. Around half have water & electric only sites (51%) and/or rustic/tent sites with no hook up (47%). While full hook up sites are available at a majority of parks regardless of geographic region, operational structure, and/or number of sites/unites available, other offerings vary.

Accommodations Available

How many rentable sites does this RV park, campground or glamping park have?

base (unweighted): 246 qualified respondents (multiple answers); those in each segment



**includes water, electric, and sewer*
*** including remodeled vintage RVs, glamping tents, safari tents, tree houses, yurts, etc.*

Accomodations Available	REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
full hook up sites*	81%	88%	94%	94%	89%	98%	100%	86%	88%	88%	96%
water & electric only sites	72%	59%	42%	37%	52%	28%	61%	30%	48%	58%	59%
rustic/tent camp sites (no hook up)	49%	49%	45%	47%	50%	42%	48%	60%	48%	46%	39%
modern cabins or cottages (with bath and/or kitchen)	34%	38%	32%	25%	31%	35%	42%	22%	28%	30%	45%
rustic cabins (no bath, kitchen, and/or utilities)	44%	35%	18%	30%	30%	21%	64%	22%	28%	36%	32%
park model cabins (rentals)	28%	24%	26%	25%	24%	35%	45%	8%	15%	27%	47%
modern RV trailers	19%	12%	13%	14%	14%	18%	15%	27%	5%	17%	11%
electric only camp sites	4%	22%	11%	11%	12%	7%	15%	0%	23%	16%	5%
glamping units**	7%	10%	12%	9%	9%	14%	18%	13%	7%	12%	7%
water only camp sites	10%	0%	4%	10%	6%	0%	24%	5%	5%	8%	5%
motel/hotel rooms	0%	6%	4%	7%	4%	2%	3%	5%	8%	3%	2%
other	3%	1%	21%	7%	8%	16%	30%	14%	13%	6%	4%

=30% - 49% =50% - 69% =70% - 89% =90%+

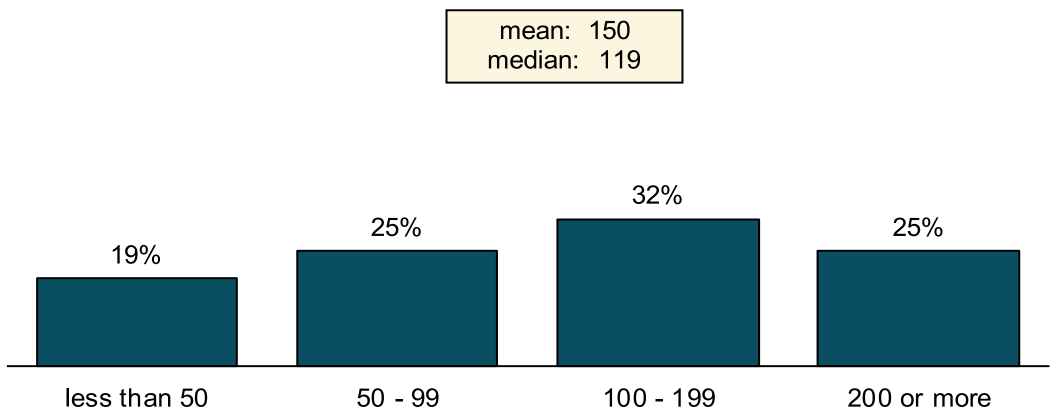
FINDINGS: Park/Campground Profile

The typical (median) respondent reported their RV park/campground/glamping park has 119 total sites/units; the average report was higher at 150, influenced by a handful of large parks/campgrounds. Parks in the Northeast and those that are corporate-owned tend to be larger than others.

Number of Rentable Sites: Total

How many rentable sites does this RV park, campground or glamping park have?

base (unweighted): 246 qualified respondents answering (fill-in answers); those in each segment



Number of Sites/Units	REGION				OPERATIONAL STRUCTURE		
	Northeast	Midwest	South	West	ind./mem	corp.-owned	fran-chised
200 or more	29%	28%	30%	13%	24%	41%	24%
100 - 199	48%	30%	24%	29%	29%	44%	39%
50 - 99	13%	32%	23%	29%	26%	7%	27%
less than 50	9%	8%	24%	29%	21%	7%	9%
mean	172	161	151	122	143	193	159
median	159	110	105	81	106	188	121

FINDINGS: Park/Campground Profile

Among parks with each type of site/unit, median reports of each are below. For example, the median number of full hook up sites available *among RV parks/campgrounds/glamping parks with this type of site* is 83.

Median reports vary by region and operational structure—especially median reports of full hook up sites and water/electric only sites. That said, much of the data in the chart below is based on few reporting parks/campgrounds, which should be taken into consideration when making comparisons.

Median Number of Sites/Units Among Those With Each Type at Their RV Park/Campground/Glamping Park

How many rentable sites does this RV park, campground or glamping park have?

base (unweighted): qualified respondents with this site/accommodation at their park/campground answering; those in each segment (fill-in answers)

Median # of Sites/Units [Among Those With Each Type]		REGION				OPERATIONAL STRUCTURE		
	TOTAL	Northeast	Midwest	South	West	ind./mem	corp.-owned	fran-chised
CAMP SITES								
full hook up	**83**	124	68	96	51	78	139	82
water & electric only	**26**	29	46	25	9	26		10
rustic/tent	**10**	12	10	8	6	10	7	4
electric only	**10**		33			10		
water only	**9**					8		
OTHER ACCOMMODATIONS								
modern cabins or cottages	**3**	3	3	4	2	3	4	2
rustic cabins	**3**	2	4	2	4	3		7
park model cabins	**4**	8	5	7	3	4	10	7
modern RV trailers	**2**					2		
glamping units	**3**					3		
motel/hotel rooms	**12**							
other (not listed above)	**4**			4		4		

grey shading denotes results based on fewer than 30 (unweighted) respondents; results based on fewer than 10 are suppressed

FINDINGS: Park/Campground Profile

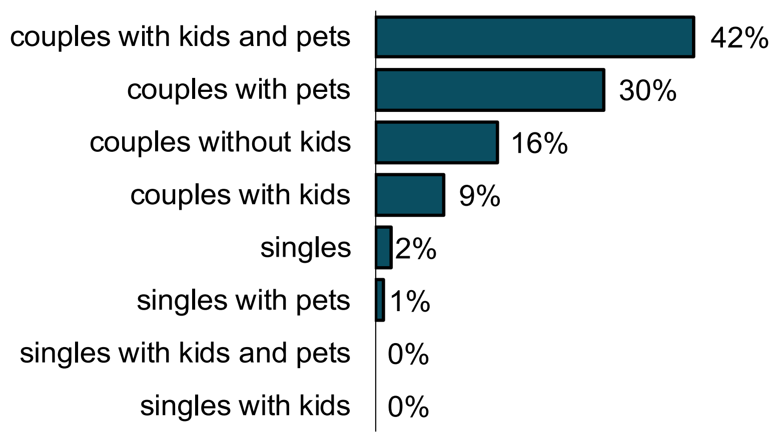
Couples with kids and pets (42%) are the most commonly reported camper demographic at RV parks/campgrounds/glamping parks, followed by couples with pets (30%). Far fewer respondents reported single individuals (2%) or singles with pets (1%) to be their most typical demographic.

Some variation in typical camper demographic appear by region and size of park.

Camper Demographic

What camper demographic do you see most frequently at your RV park, campground or glamping park?

base (unweighted): 246 qualified respondents answering; those in each segment



Camper Demographic	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
couples with kids and pets	53%	55%	42%	22%	16%	46%	42%	57%
couples with pets	22%	12%	35%	47%	52%	34%	26%	14%
couples without kids	16%	14%	11%	22%	25%	17%	13%	10%
couples with kids	7%	17%	10%	2%	0%	2%	13%	18%
singles	0%	0%	3%	4%	5%	1%	3%	0%
singles with pets	0%	1%	0%	3%	2%	0%	3%	0%
singles with kids and pets	1%	0%	0%	0%	0%	0%	0%	1%
singles with kids	0%	0%	0%	0%	0%	0%	0%	0%

=30% - 39% =40% - 49% =50%+

FINDINGS: Park/Campground Profile

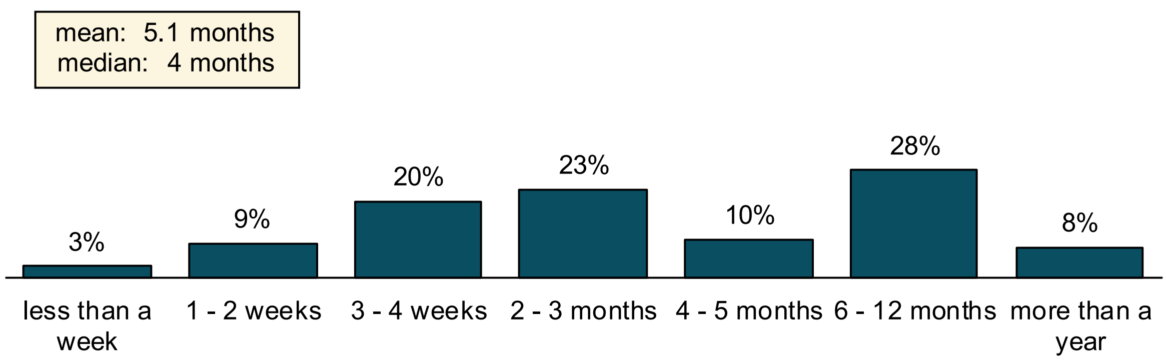
The typical (median) respondent reports that campers are typically booking at their RV park/campground/glamping park 4 months in advance. The average response is higher at 5.1 months, due to some respondents reporting that their typical booking is many months out.

Some variation can be seen by park size. In general, smaller parks report their typical booking being less far in advance than larger parks.

Length of Typical Advanced Booking

How far in advance are campers typically booking at your RV park, campground or glamping park?

base (unweighted): 246 qualified respondents; those in each segment



Length of Typical Advanced Booking	# OF SITES/UNITS			
	<50	50-99	100-199	200+
less than a week	0%	12%	0%	1%
1 - 2 weeks	8%	14%	10%	5%
3 - 4 weeks	25%	17%	23%	14%
2 - 3 months	40%	13%	16%	27%
4 - 5 months	11%	9%	8%	11%
6 - 12 months	16%	25%	31%	34%
more than a year	0%	11%	10%	8%
mean	3.6	4.9	5.6	5.8
median	3	3	4	4

=10% - 19% =20% - 29% =30%+

FINDINGS: Park/Campground Profile

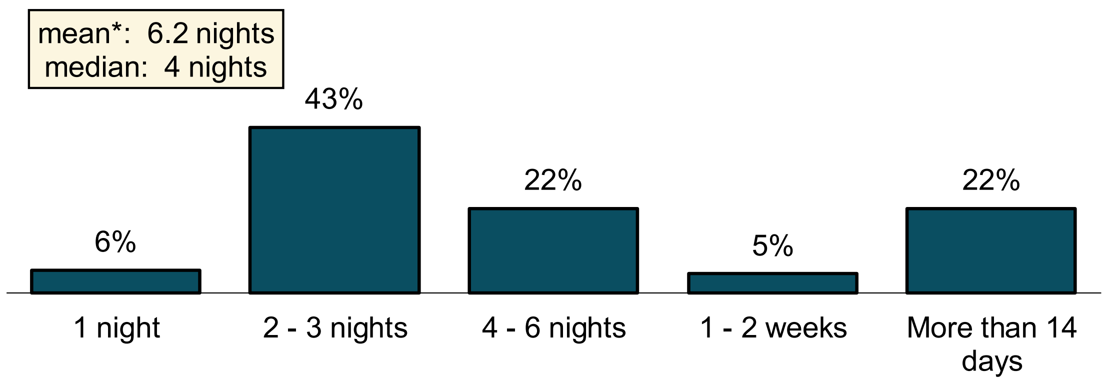
The typical (median) respondent reports that the most typical length of stay at their RV park/campground/glamping park is 4 nights. The average response higher at 6.2 nights, due to a significant proportion of respondents reporting their typical length of stay as longer than 14 days.

Differences in typical length of stay can be seen by region. For example, two in five respondents reporting on a park in the South (40%) report that their typical length of stay is more than 14 days, a much higher proportion than other regions.

Typical Length of Stay

What is the most typical length of stay at your RV park, campground or glamping park?

base (unweighted): 246 qualified respondents; those in each segment



**Due to the significant proportion of respondents answering in the top category, the sample statistic may understate the true population mean.*

Typical Length of Stay	REGION			
	North-east	Mid-west	South	West
1 night	1%	2%	2%	15%
2 - 3 nights	41%	49%	31%	53%
4 - 6 nights	32%	31%	16%	13%
1 - 2 weeks	3%	0%	12%	3%
More than 14 days	16%	13%	40%	15%
mean	5.7	5.0	8.8	4.8
median	4	3	7	3

=10% - 19% =20% - 39% =40%+

FINDINGS: Recent and Future Improvements and Additions

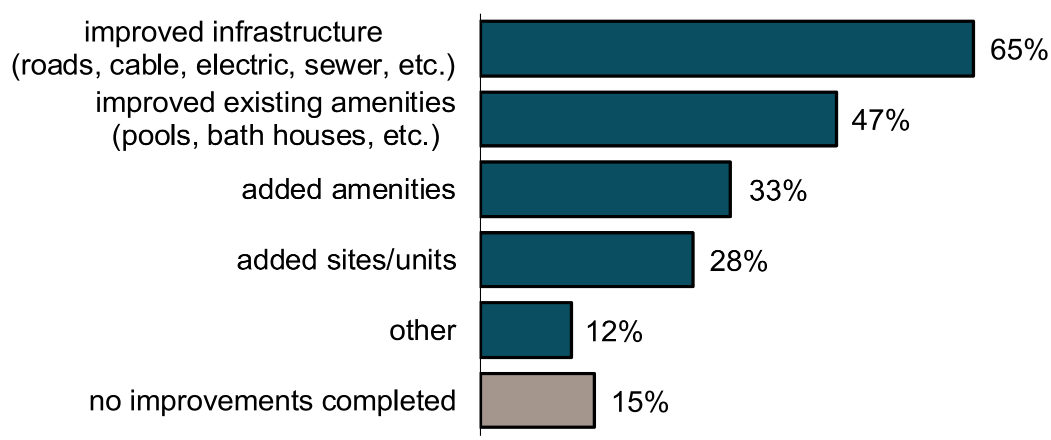
A majority of respondents (65%) report infrastructure was improved at their RV park/campground/glamping park in past 12 months, 47% improved existing amenities, 33% added amenities, and 28% added sites/units to the park. 15% indicated that no improvements were completed at their park.

Variation in proportion of respondents reporting improvements made can be seen by region. For example, parks in the Northeast were more likely to have improved infrastructure in the last 12 months (82%) when compared with other regions.

Improvements Made

Which of the following improvements were completed at your RV park, campground or glamping park in the past 12 months?

base (unweighted): 246 qualified respondents (multiple responses); those in each segment



Improvements Made	Northeast	Midwest	South	West
improved infrastructure	82%	62%	66%	54%
improved existing amenities	65%	38%	55%	34%
added amenities	38%	38%	34%	24%
added sites/units	31%	32%	31%	18%
other	7%	18%	19%	3%
no improvements completed	10%	17%	16%	16%

=30% - 49% =50% - 69% =70%+

FINDINGS: Recent and Future Improvements and Additions

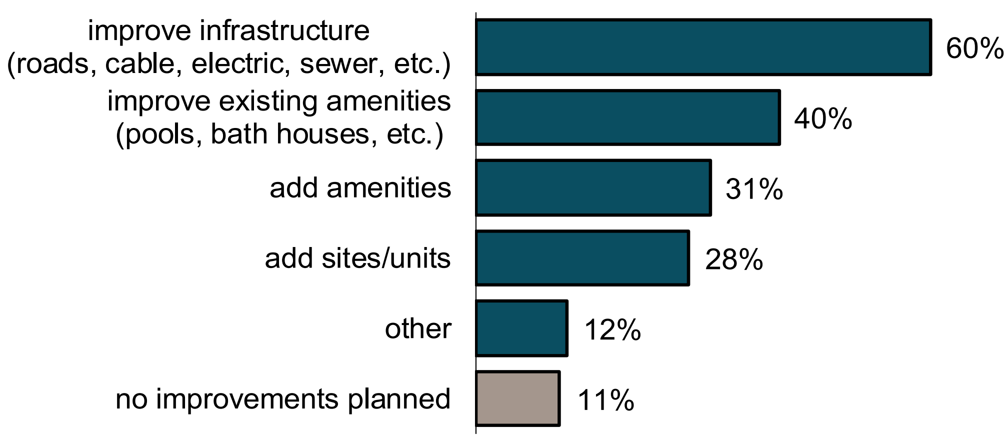
When reporting planned improvements for the next 12 months, improving infrastructure is again emphasized, with more than half of respondents (60%) indicating that their RV park/campground/glamping park is planning to do so. One in ten (11%) indicate that their park has no improvements planned for the next 12 months.

Similarly to improvements completed in the past 12 months, plans for improvements in the next 12 months vary by region. RV parks/campgrounds/glamping parks in the Northeast are more likely to report that they are planning to improve infrastructure in the next 12 months (77%). Those in located in the South are more likely to be planning to add sites/units in the next 12 months (50%) than those located in other regions.

Planned Improvements

Which of the following improvements are planned at your RV park, campground or glamping park in the next 12 months?

base (unweighted): 246 qualified respondents (multiple responses); those in each segment



Planned Improvements	Northeast	Midwest	South	West
improve infrastructure	77%	64%	53%	52%
improve existing amenities	47%	40%	44%	30%
add amenities	32%	40%	23%	30%
add sites/units	24%	25%	50%	10%
other	4%	15%	10%	17%
no improvements planned	10%	7%	4%	21%

=30% - 49% =50% - 69% =70%+

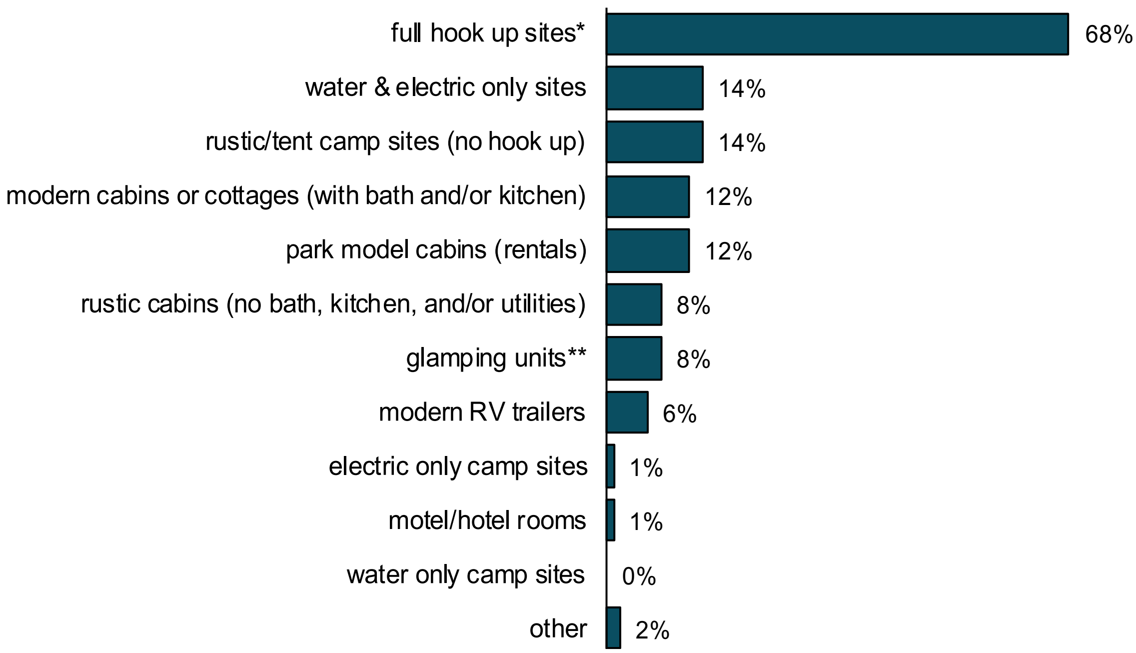
FINDINGS: Recent and Future Improvements and Additions

Among respondents who report that their RV park/campground/glamping park has added sites/units in the past 12 months, two in three (68%) report adding at least one full hook up camping sites—including water, electric, and sewer.

Types of Sites/Units Added

Approximately how many sites/units were added to this RV park, campground or glamping park in the past 12 months?

base (unweighted): 71 qualified respondents who added sites/units in the past 12 months (fill-in answers)



**includes water, electric, and sewer*
*** including remodeled vintage RVs, glamping tents, safari tents, tree houses, yurts, etc.*

FINDINGS: Recent and Future Improvements and Additions

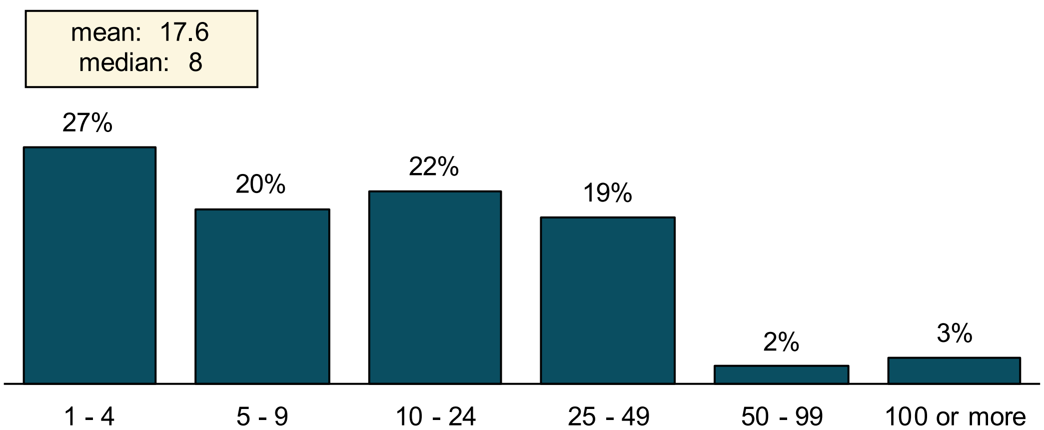
Among those answering whose RV park/campground/glamping park added sites/units in the past year, the typical (median) respondent indicated their park added 8. The average report was more than double that at 17.6, influenced by a handful of locations adding large quantities of sites/units.

Median reports vary by region and number of units, however, data is based on few respondents.

Number of Sites/Units Added

Approximately how many sites/units were added to this RV park, campground or glamping park in the past 12 months?

base (unweighted): 71 qualified respondents whose park/campground added sites/units in the past 12 months (fill-in answers); those in each segment



Number of Sites/Units Added*	REGION			
	North-east	Mid-west	South	West
mean	14.0	22.7	15.4	18.3
median	7	10	8	14

**results based on fewer than 30 (unweighted) respondents in each segment*

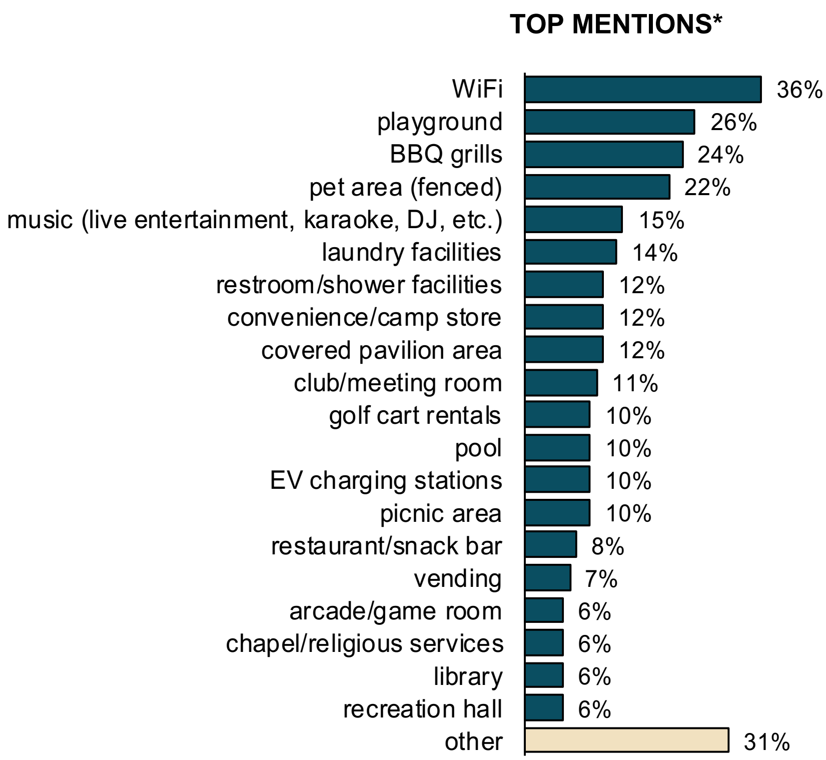
FINDINGS: Amenities and Activities

Among those whose RV park/campground/glamping park added amenities in the past 12 months, the most commonly reported amenity added was WiFi (36%), followed by playgrounds (26%), BBQ grills (24%), and fenced pet areas (22%).

Amenities Added

Which of the following amenities did you add at your RV park, campground or glamping park in the past 12 months?

base (unweighted): 83 qualified respondents who added amenities in the past 12 months



**those selected by at least 6% of the total*

FINDINGS: Amenities and Activities

When asked to report the top three most popular amenities at their RV park/campground/glamping park, respondents most commonly mentioned swimming pools (43%), WiFi (41%), and restroom/shower facilities (22%).

Significant differences appear by region and size of park (number of sites/units) for some of the listed amenities. For example, access to a pool was more frequently reported as a top-three popular amenity by parks with a larger number of sites/units.

Top Three Popular Amenities

Which of the following are the top three most popular amenities with campers at your RV park, campground or glamping park?

base (unweighted): 246 qualified respondents (up to three answers); those in each segment

TOP MENTIONS*

Top Three Popular Amenities		REGION				# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	<50	50-99	100-199	200+
pool	43%	49%	47%	49%	29%	24%	26%	45%	73%
WiFi	41%	34%	36%	38%	54%	46%	42%	47%	28%
restroom/shower facilities	22%	16%	23%	18%	29%	24%	39%	17%	9%
laundry facilities	21%	6%	18%	28%	26%	33%	32%	13%	11%
playground	18%	26%	26%	15%	8%	2%	22%	18%	25%
convenience/camp store	18%	24%	23%	10%	16%	13%	26%	11%	21%
propane sales	9%	15%	6%	9%	9%	8%	12%	15%	1%
hot tub/sauna	8%	6%	1%	14%	11%	6%	1%	9%	16%
covered pavilion area	8%	6%	11%	9%	4%	3%	11%	10%	5%
music (live entertainment, karaoke, DJ, etc.)	7%	15%	5%	9%	1%	6%	1%	6%	14%
pet area (fenced)	7%	4%	5%	8%	10%	13%	8%	4%	6%
boat rentals (includes motor boats, canoes, kayaks, etc.)	7%	10%	9%	3%	6%	11%	4%	7%	6%
recreation hall	7%	4%	6%	11%	4%	0%	5%	5%	16%
TV: cable	7%	7%	2%	9%	8%	6%	5%	9%	6%
arcade/game room	6%	12%	10%	2%	2%	0%	5%	12%	4%
restaurant/snack bar	6%	3%	5%	8%	7%	6%	2%	5%	9%
golf cart rentals	5%	6%	9%	5%	1%	0%	0%	4%	15%
club/meeting room	4%	1%	1%	2%	10%	8%	0%	5%	2%
marina	4%	4%	1%	4%	4%	8%	2%	3%	2%
other	24%	38%	25%	15%	24%	32%	20%	27%	20%

=20% - 39% =40% - 59% =60%+

**those selected by at least 4% of the total*

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FINDINGS: Future Plans

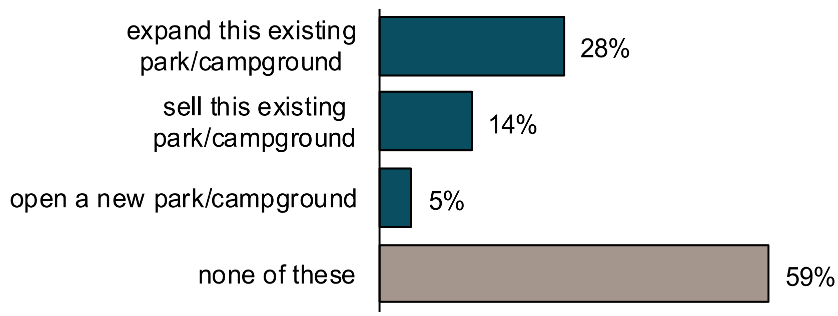
One in four respondents indicate that there are plans to expand their existing park/campground in the next 12 months (28%), while 5% report that there are plans to open a new park/campground. Around one in seven respondents report that there are plans to sell this park/campground in the next 12 months (14%).

Parks in the South, on average, were more likely to report plans to expand the existing park/campground in the next 12 months than those in other regions.

Plans For This Outdoor Hospitality Business

Are there plans to expand this RV park, campground or glamping park (adding additional sites/units), open a new park, or sell the existing park in the next 12 months?

base (unweighted): 246 qualified respondents (multiple answers); those in each segment



Future Plans	Northeast	Midwest	South	West
expand this existing park/campground	21%	24%	41%	23%
sell this existing park/campground	16%	12%	9%	18%
open a new park/campground	1%	2%	6%	8%

=10% - 19% =20% - 39% =40%+

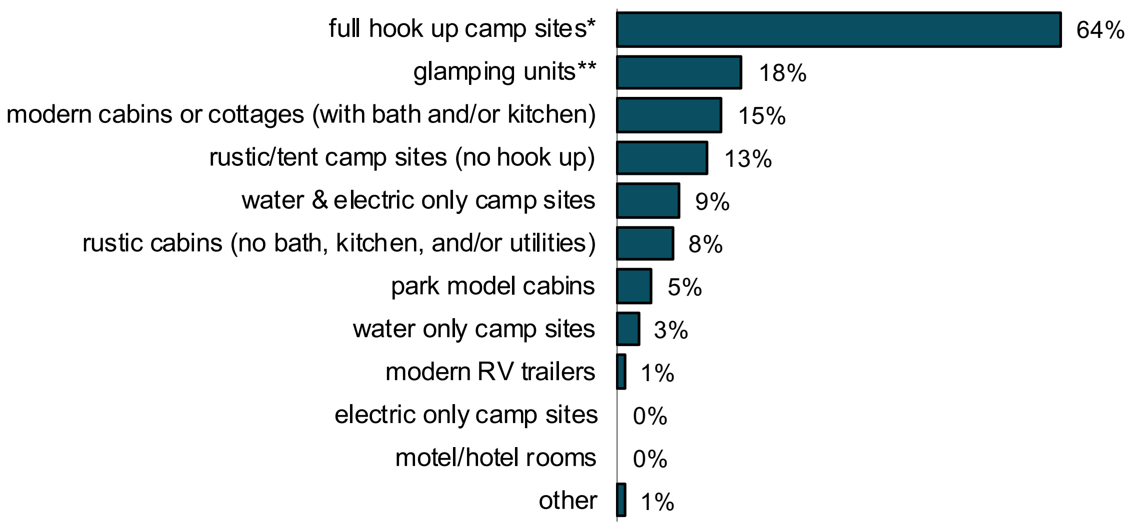
FINDINGS: Future Plans

Among respondents who report that their RV park/campground/glamping park is planning to expand in the next 12 months, two in three (64%) report that they are planning to add at least one full hook up camp site.

Types of Sites/Units Planning to Add

How many sites/units are planned to be added to this existing RV park, campground or glamping park in the next 12 months?

base (unweighted): 69 qualified respondents who plan to expand this existing park/campground in the next 12 months (fill-in answers)



*includes water, electric, and sewer

** including remodeled vintage RVs, glamping tents, safari tents, tree houses, yurts, etc.

FINDINGS: Future Plans

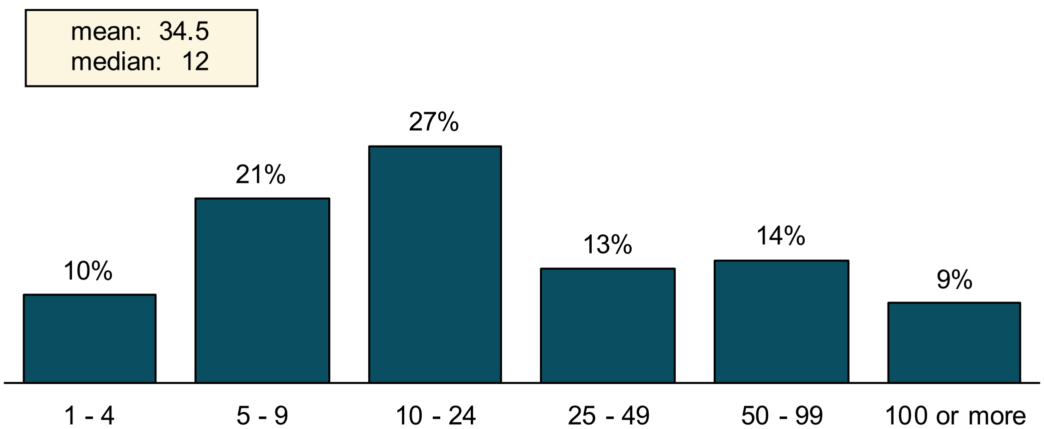
Among respondents who report that their RV park/campground/glamping park is planning to expand in the next 12 months, the typical (median) respondent reports that their park is planning to add 12 sites/units. The average is much higher at 34.5, influenced by a handful of parks planning to add large quantities of sites/units.

Variation in median reports can be seen by region and operational structure, however data is based upon few respondents.

Number of Sites/Units Planning to Add

How many sites/units are planned to be added to this existing RV park, campground or glamping park in the next 12 months?

base (unweighted): 69 qualified respondents whose park/campground added sites/units in the past 12 months (fill-in answers); those in each segment



Number of Sites/Units Planning to Add	REGION				OPERATIONAL STRUCTURE		
	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised
mean	39.4	39.0	39.9	12.9	31.1	50.7	23.6
median	18	14	20	7	12	27	6

grey shading denotes results based on fewer than 30 (unweighted) respondents

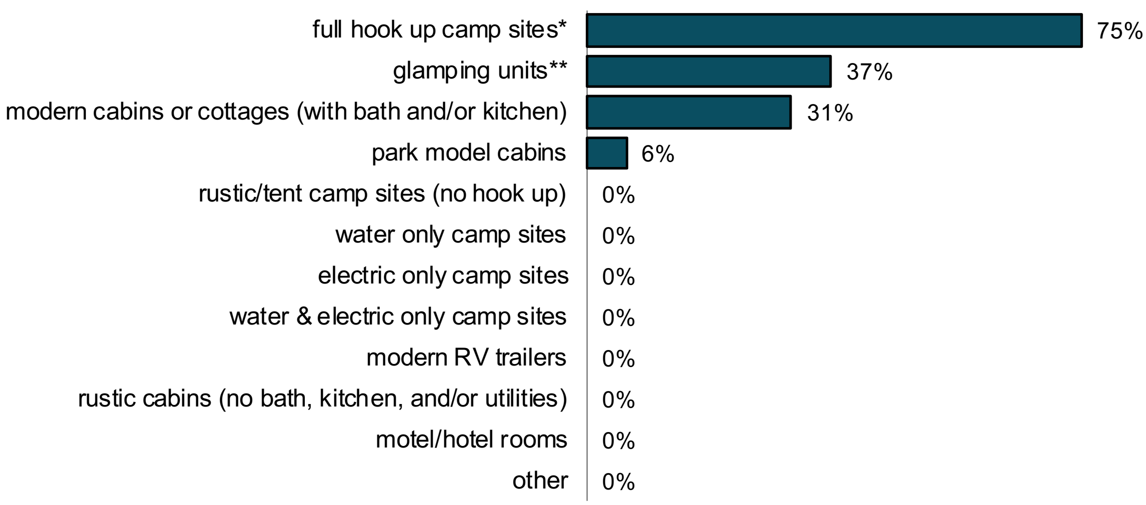
FINDINGS: Future Plans

Among the small percentage of respondents who report plans to open a new park/campground in the next 12 months, three in four (75%) report that this new park will have at least one full hook up camp site. 37% report that the new park will contain glamping units and 31% report that their new park will have modern cabins or cottages.

Types of Sites/Units Planning to Build at New Park

How many sites/units are planned to be built in the new RV park, campground or glamping park in the next 12 months?

base (unweighted): 12 qualified respondents who plan to open a new park/campground in the next 12 months (fill-in answers)
results are based on fewer than 30 (unweighted) responses and considered statistically unstable



**includes water, electric, and sewer*
*** including remodeled vintage RVs, glamping tents, safari tents, tree houses, yurts, etc.*

FINDINGS: Marketing

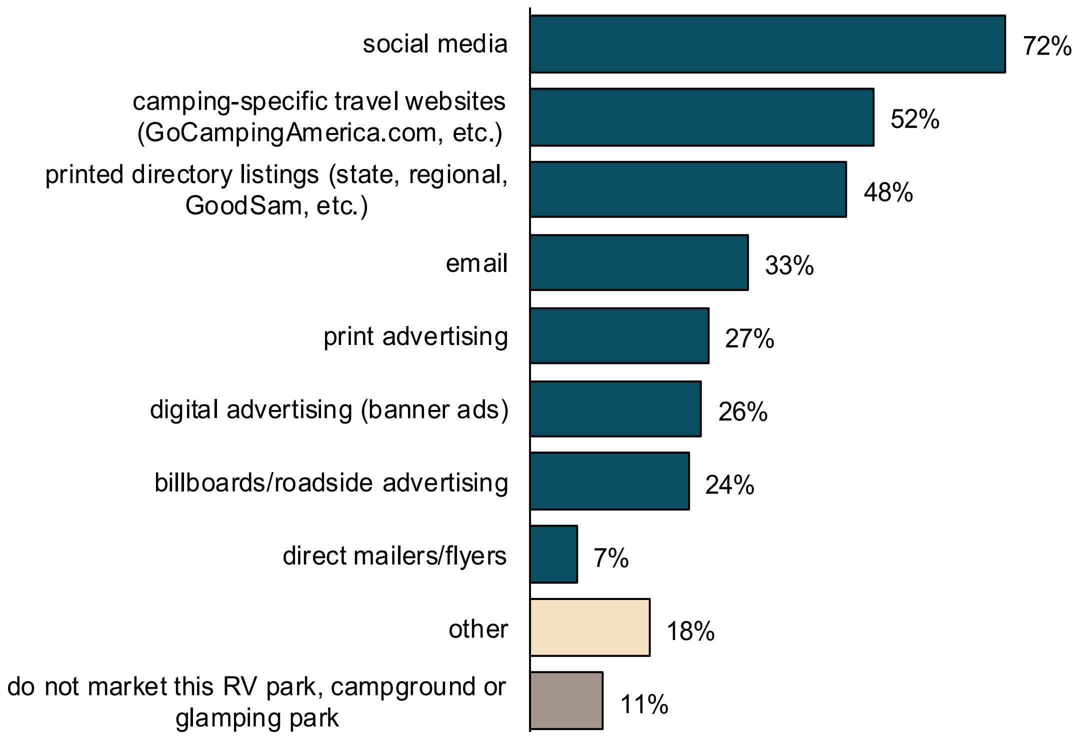
Around three in four respondents (72%) report they market their park on social media, with around half marketing on camping-specific travel websites (52%) and/or printed directory listings (48%).

One in ten (11%) report that they do not engage in marketing for their park.

Marketing Used

How are you currently marketing this RV park, campground or glamping park?

base (unweighted): 246 qualified respondents (multiple answers)



FINDINGS: Marketing

Differences can be seen in prevalence of types of marketing used by size of RV park/campground/glamping park. For example, in general, larger parks are more likely to engage in marketing on social media, when compared with smaller parks.

Respondents with smaller parks (those with less than 50 sites/units) are much more likely to report that they do not engage in marketing for their RV park/campground/glamping par, when compared with parks of more than 100 sites/units.

Marketing Used by Size of Park

How are you currently marketing this RV park, campground or glamping park?

base (unweighted): 246 qualified respondents (multiple answers); those in each segment

Marketing Used	# OF SITES/UNITS			
	<50	50-99	100-199	200+
social media	53%	67%	76%	85%
camping-specific travel websites (GoCampingAmerica.com, etc.)	52%	42%	60%	52%
printed directory listings (state, regional, GoodSam, etc.)	25%	49%	53%	58%
email	14%	22%	40%	48%
print advertising	21%	24%	32%	28%
digital advertising (banner ads)	13%	24%	26%	38%
billboards/roadside advertising	24%	19%	27%	25%
direct mailers/flyers	3%	4%	6%	13%
other	8%	18%	20%	21%
do not market this RV park, campground or glamping park	25%	11%	6%	6%

=30% - 49% =50% - 69% =70%+

FINDINGS: Online Travel Agency (OTA) Usage

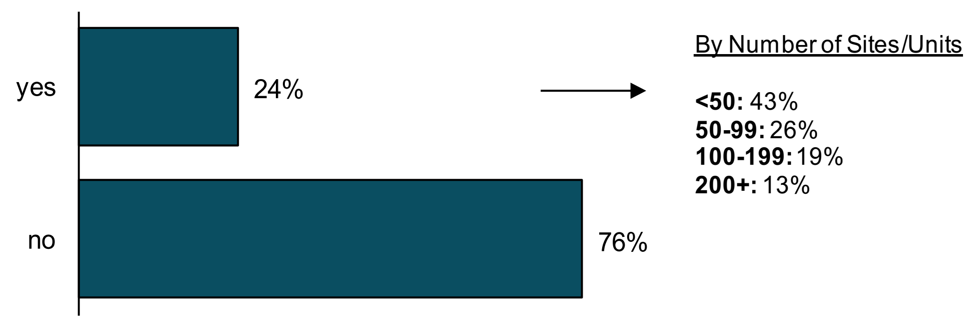
24% of respondents report that they currently use an Online Travel Agency (OTA) to distribute site inventory for their RV park/campground/glamping park. In general, parks with fewer sites/units were more likely to report currently using an OTA for distributing their site inventory than larger parks.

Among those currently using an OTA, more than half use Campspot (55%).

Proportion Using an OTA

Do you currently use an Online Travel Agency or OTA (Spot2Nite, BookOutdoors, AirBnB, Campspot, etc.) to distribute your site inventory for this RV park, campground or glamping park?

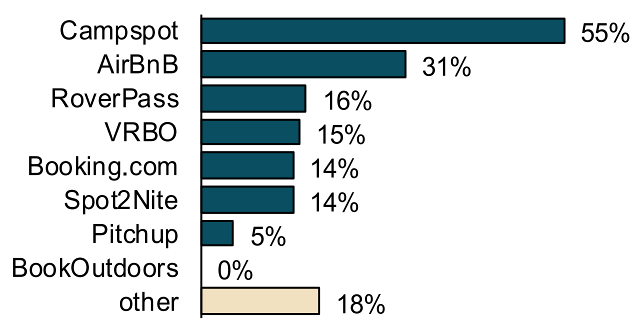
base (unweighted): 246 qualified respondents; those in each segment



OTAs Used

Which of the following OTAs are you currently using for this RV park, campground or glamping park?

base (unweighted): 63 qualified respondents who currently use an Online Travel Agency (multiple answers)



FINDINGS: Online Travel Agency (OTA) Usage

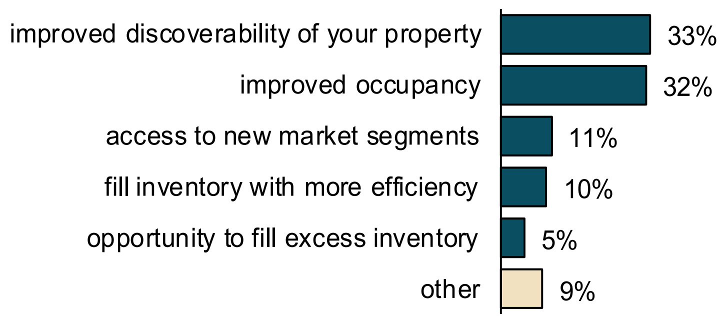
Of those respondents currently using an OTA, one in three (33%) report that the biggest advantage is improved discoverability of their property. A similar proportion (32%) report improved occupancy as the biggest advantage.

Of those respondents who *do not* currently use an OTA, around two in three (69%) report that they are not at all likely to begin using one in the next 12 months. A small proportion, (6%) report that they are likely* to begin working with an OTA in the next year.

Biggest Advantage of Using an OTA

What do you see as the biggest advantage you receive from posting on an OTA?

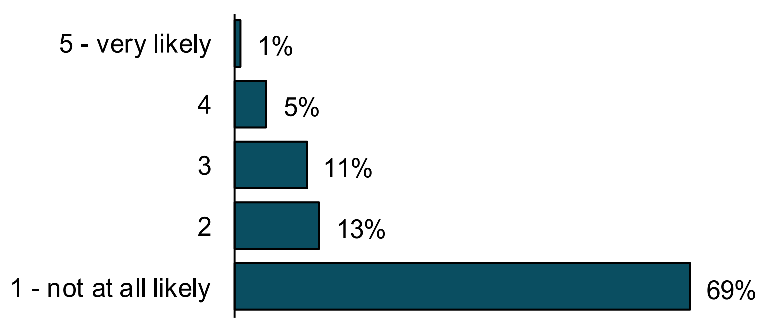
base (unweighted): 63 qualified respondents who currently use an Online Travel Agency



Likelihood to Start Using an OTA

How likely are you to begin using an OTA in the next 12 months for this RV park, campground or glamping park?

base (unweighted): 182 qualified respondents who do not currently use an Online Travel Agency



**Likely = rating of 4 or 5 on a 5-point scale where 5=very likely and 1=not at all likely.*

FINDINGS: Electric Vehicle Trends

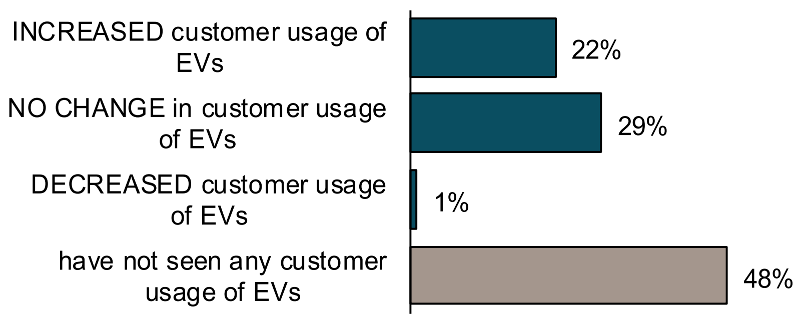
Just over one in four respondents (29%) report no change in customer usage of electric vehicles (EVs) in the past 12 months, 22% report an increase in customer usage, and a small proportion (1%) report that they had seen a decrease in EV usage from customers. Around half (48%) report not having seen any customer usage of EVs.

RV parks/campgrounds/glamping parks with more than 100 sites/units are more likely to report having seen an increase in customer usage of EVs in the past 12 months, when compared with smaller parks.

EV Trends Observed

Which of the following trends in electric vehicle (EVs) usage have you observed at your RV park, campground, or glamping park in the past 12 months?

base (unweighted): 246 qualified respondents; those in each segment



EV Trends Observed	# OF SITES/UNITS			
	<50	50-99	100-199	200+
INCREASED customer usage of EVs	8%	15%	33%	25%
NO CHANGE in customer usage of EVs	35%	19%	25%	41%
DECREASED customer usage of EVs	2%	2%	0%	0%
have not seen any customer usage of EVs	56%	63%	42%	34%

=10% - 24% =24% - 49% =50%+

FINDINGS: Electric Vehicle Trends

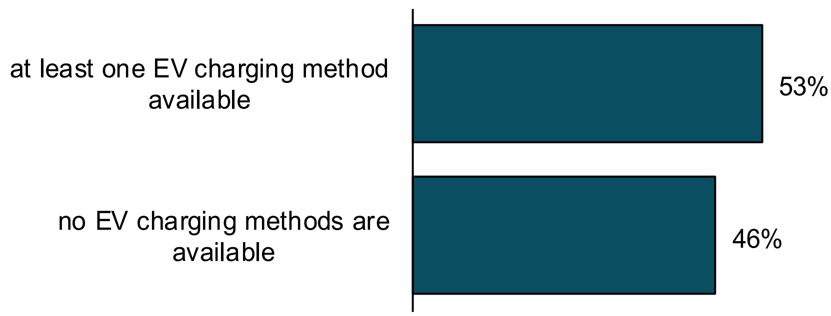
Approximately half of respondents (53%) report that their RV park/campground/glamping park has at least one method for charging EVs available.

Among respondents indicating that there are EV charging methods available at their park, four in five (85%) report that customers are allowed to use an adapter to plug their EV into the existing 30- or 50-amp pedestals at each site. One in ten (9%) report that they have installed Level 2 chargers in public spaces.

EV Charging Methods Available

What methods for charging electric vehicles are available at your RV park, campground, or glamping park?

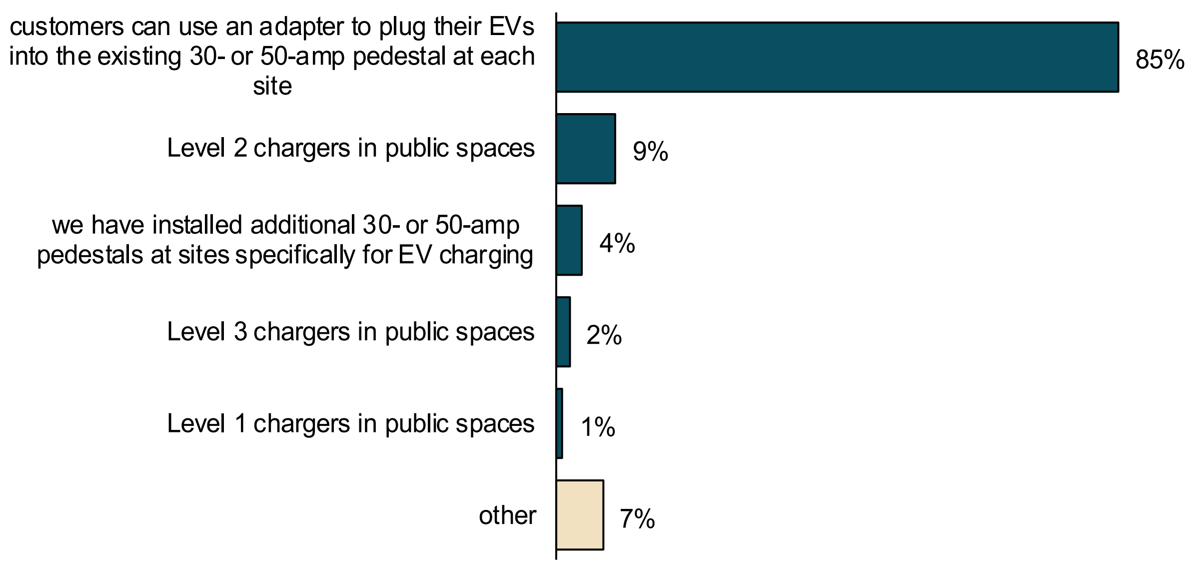
base (unweighted): 246 qualified respondents (multiple answers)



EV Charging Methods Available (Based on Those With EV Charging Methods Available)

What methods for charging electric vehicles are available at your RV park, campground, or glamping park?

base (unweighted): 126 qualified respondents with EV charging methods available (multiple answers)



FINDINGS: Electric Vehicle Trends

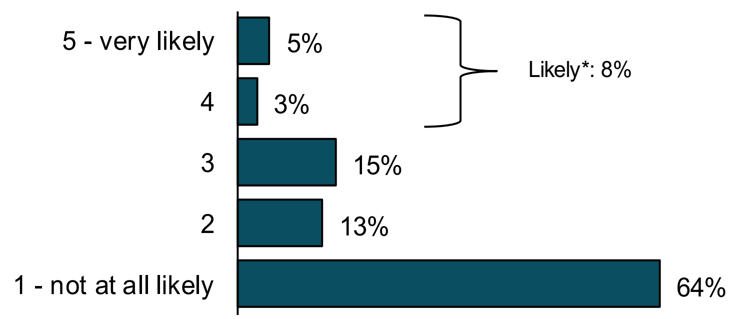
Among those who do not currently offer EV charging methods at their parks, 8% of reported that they are likely* to add electric charging stations to their park/campground in the next 12 months. A majority (64%) of respondents reported that they are not at all likely to add charging stations in the next 12 months.

Among the small proportion with no EV charging methods available at their parks, who are likely to add charging stations in the next 12 months, one in three (33%) would prefer to install Level 2 chargers in a public space.

Likelihood of Adding EV Charging Stations

How likely are you to add electric charging stations to your RV park, campground, or glamping park in the next 12 months?

base (unweighted): 107 qualified respondents with no EV charging methods available at their park/campground

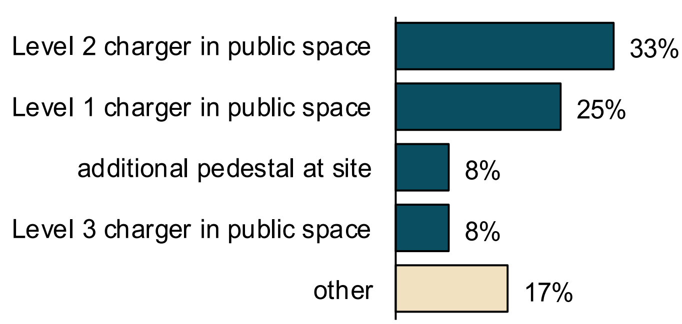


**Likely = rating of 4 or 5 on a 5-point scale where 5=very likely and 1=not at all likely.*

Chargers Preferred to Install

What type of chargers would you prefer to install at your RV park, campground, or glamping park?

base (unweighted): 12 qualified respondents with no EV charging methods available at their park/campground but are likely to add them in the next 12 months*



**Results are based on fewer than 30 (unweighted) responses and considered statistically unstable.*

FINDINGS: Outlook For 2023

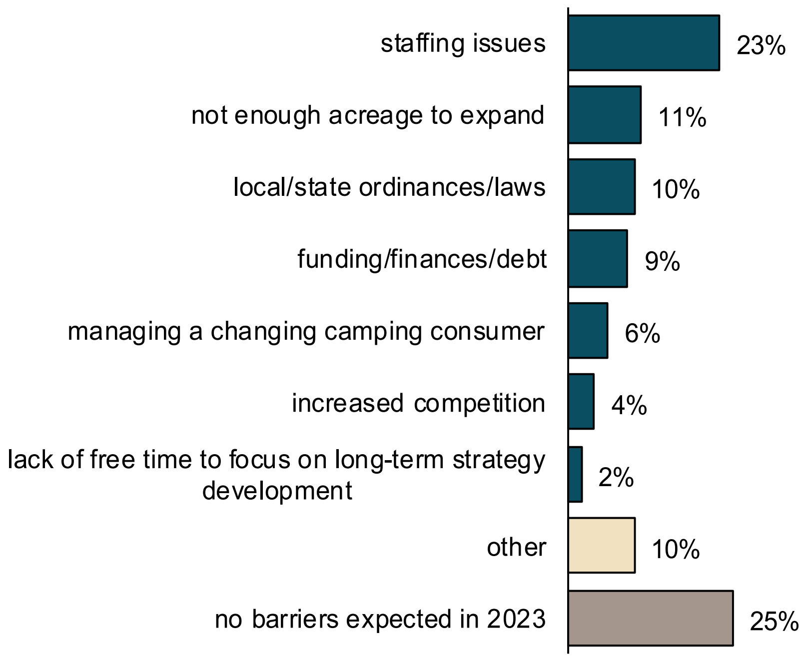
When asked about the greatest anticipated barrier to the success of their RV park/campground/glamping park in 2023, one in four respondents (23%) indicated staffing issues. Not enough acreage to expand (11%), local/state ordinances/laws (10%), and funding/finances/debt (9%) were all mentioned by about one in ten respondents.

One in four respondents (25%) expect no barriers to the success of their park in 2023.

Greatest Anticipated Barrier to Success in 2023

What do you anticipate will be the greatest barrier to the success of your RV park, campground, or glamping park in 2023?

base (unweighted): 246 qualified respondents



FINDINGS: Outlook For 2023

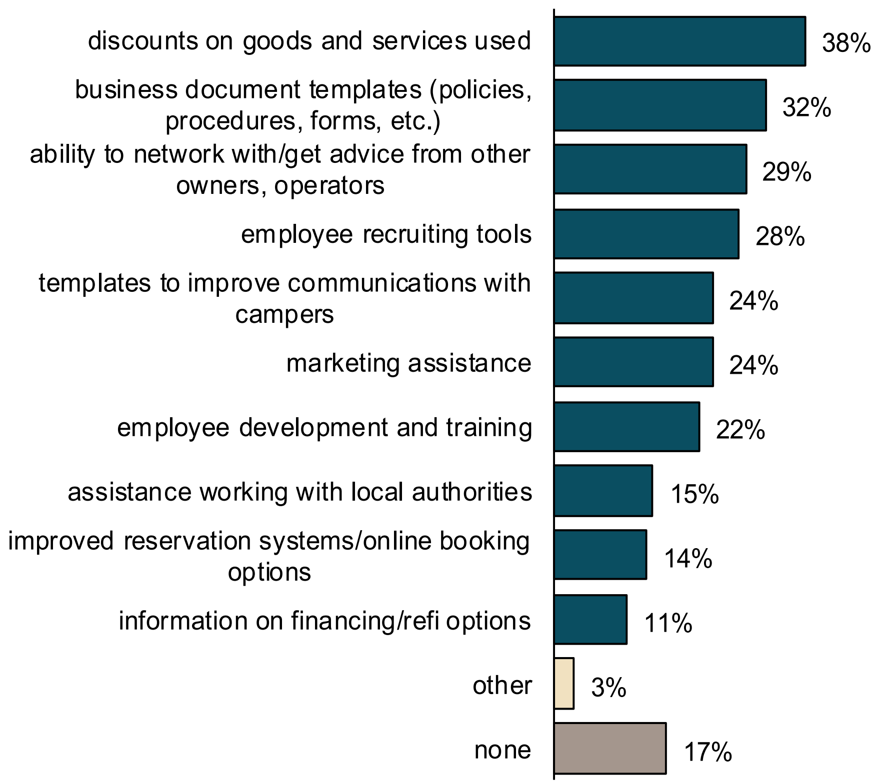
When asked to assess if they would utilize various resources for their parks in the next 12 months, if they were available, respondents expressed interest in a wide variety of resources.

Most commonly, respondents indicated that they would use discounts on goods and services (38%), followed by business document templates (32%).

Resources Would Utilize

Which of the following resources for your RV park, campground, or glamping park would you utilize in the next 12 months, if they were available to you?

base (unweighted): 246 qualified respondents (multiple answers)



FINDINGS: Outlook For 2023

Some differences can be seen in the resources respondents report that they would use by size of RV park/campground/glamping park.

For example, parks with more than 200 sites/units are much more likely to be interested in using employee recruiting tools, resources for employee development and training, as well as discounts on goods and services used, when compared with smaller parks.

Resources Would Utilize by Size of Park

Which of the following resources for your RV park, campground, or glamping park would you utilize in the next 12 months, if they were available to you?

base (unweighted): 246 qualified respondents (multiple answers); those in each segment

Resources Would Utilize	# OF SITES/UNITS			
	<50	50-99	100-199	200+
discounts on goods and services used	25%	35%	36%	52%
business document templates (policies, procedures, forms, etc.)	21%	35%	31%	37%
ability to network with/get advice from other owners, operators	19%	35%	28%	30%
employee recruiting tools	10%	20%	28%	51%
templates to improve communications with campers	25%	20%	24%	28%
marketing assistance	27%	27%	26%	18%
employee development and training	5%	21%	22%	34%
assistance working with local authorities	10%	14%	14%	20%
improved reservation systems/online booking options	27%	11%	12%	12%
information on financing/refi options	21%	12%	10%	4%
other	2%	6%	3%	2%
none	28%	15%	18%	11%

=20% - 29% =30% - 39% =40%+

FINDINGS: Outlook For 2023

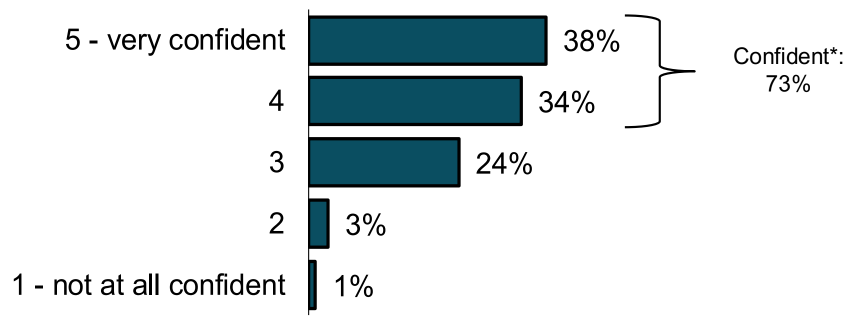
Around three in four respondents (73%) reported that they are confident* that their park will show an increased profit margin for 2023.

Some variation can be seen by region, with parks located in the West less likely to report being confident in an increased profit margin (57%) than those in other areas of the country.

Confidence of Increased Profit Margin in 2023

What is your level of confidence that your RV park, campground, or glamping park will show an increased profit margin in 2023?

base (unweighted): 246 qualified respondents



**Confident = rating of 4 or 5 on a 5-point scale where 5=very confident and 1=not at all confident.*

Confidence of Increased Profit Margin in 2023, Confident* Summary by Region

What is your level of confidence that your RV park, campground, or glamping park will show an increased profit margin in 2023?

base (unweighted): 246 qualified respondents; those in each segment

FINDINGS: Outlook For 2023

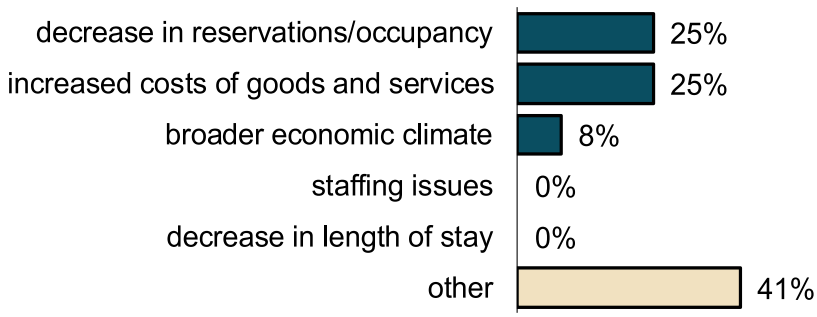
Very few respondents reported that they were not confident that their park would show an increased profit margin for 2023.

Among those who were not confident, the most commonly reported reasons for that lack of confidence were decrease in reservations/occupancy (25%) and increased costs of goods and services (25%). However, these results are based upon few responses.

Reasons for Lack of Confidence in Increased Profit Margin

What is the greatest factor that is impacting your lack of confidence in an increased profit margin in 2023?

base (unweighted): 10 qualified respondents who are not confident that their park/campground will show an increased profit margin for 2023*



**Results are based on fewer than 30 (unweighted) responses and considered statistically unstable.*

SURVEY DETAILS

Purpose

The National Association of RV Parks and Campgrounds (ARVC) represents the interests and needs of private RV parks, campgrounds, and glamping parks. ARVC provides its members with access to continuing education, networking, business and marketing tools, member-only benefits and discounts, and advocacy. In addition, it has for many years conducted an annual State of the Industry survey project, in an effort to maintain a current and ongoing understanding of the industry's landscape, with results made available to survey participants. In 2022, in an effort to provide more detailed and nuanced research for its members, the State of the Industry study was split into two studies: An Industry Benchmarking study and an Industry Outlook study. The findings cited in this report are based on the updated Industry Outlook survey sponsored by ARVC in 2022.

Method

The survey sample of 4,555 represented the following two populations:

- 2,434 emailable **members** of ARVC who are located in the United States at unique parks/campgrounds (one record per park/campground location), and excluding opt-outs and known undeliverable emails
- 2,121 emailable **non-members** in the ARVC database who are located in the United States at unique parks/campgrounds (one record per park/campground location), and excluding opt-outs and known undeliverable emails

The sample was stratified by sample segment (ARVC membership status) to optimize statistical precision for anticipated segment-level analyses. Responses have been weighted in tabulation to accurately reflect true population proportions.

sample segment	population and proportion		# invited to participate	response count and rate		weighted response	
ARVC members	2,434	53%	2,434	215	9%	149	53%
non-members	2,121	47%	2,121	64	3%	130	47%
TOTAL	**4,555**	**100%**	**4,555**	**279**	**6%**	**279**	**100%**

The survey was designed jointly by ARVC and Readex, building on prior survey executions. Development and hosting of the survey website and cleaning/tabulation of survey responses were handled by Readex. Emailing of survey invitations was handled by ARVC.

On November 17, 2022, ARVC contacted all sample members via an email in the name of ARVC's president/CEO, asking for participation in the study via a unique link included in the email. As an incentive to participate, respondents were able to enter into a drawing for a chance to win one of five $100 Visa gift cards. It was also mentioned that survey recipients would receive a copy of this year's State of the Industry, Industry Outlook Report before anyone else.

ARVC sent six reminder emails prior to the survey closing to those with deliverable email addresses who had not yet responded (prior to each reminder deployment, Readex provided ARVC with the list of non-respondents).

SURVEY DETAILS (continued)

Response

The survey was closed for tabulation on January 16, 2023, with 279 total responses—a 6% response rate. Results are based on the 246 respondents who indicated in the first few survey questions they have owned, managed, operated, or have had detailed knowledge about a privately-owned RV park/campground for at least one year ("qualified" respondents). The other 33 respondents who did not meet this profile were thanked for their interest in the study and were terminated from the survey.

As with any research, the results should be interpreted with the potential of non-response bias in mind. It is unknown how those who responded to the survey may be different from those who did not respond. In general, the higher the response rate, the lower the probability of estimation errors due to non-response and thus, the more stable the results.

The margin of error (maximum sampling error for percentages at the 95% confidence level) based on all 246 qualified responses is ±6.1 percentage points. The margin of error for percentages based on smaller sample sizes will be larger.

This report was prepared by Readex in accordance with accepted research standards and practices. Percentages may not add to 100 for single answer questions due to rounding and/or non-response.

ABOUT READEX RESEARCH

Readex Research is a nationally recognized independent research company located in Stillwater, Minnesota. Its roots are in survey research for the magazine publishing industry, but specialization in conducting high-quality survey research (by mail and/or online) has brought clients from many other markets, including associations, corporate marketers and communicators, and government agencies. Since its founding in 1947, Readex has completed thousands of surveys for hundreds of different clients.

As a full-service survey research supplier, Readex offers professional services and in-house processing of all phases of each project (traditional mailing, broadcast emailing, and data processing) to ensure complete control over project quality and schedule. Analytical capabilities include a range of multivariate statistics and modeling techniques in addition to the more traditional stub-and-banner tabulations.