2023

OUTDOOR HOSPITALITY INDUSTRY BENCHMARKING REPORT

arvc®

National Association of RV Parks & Campgrounds

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KEY FINDINGS

Overall, park/campground demographics reported in 2023 are similar to 2021 survey results (operational structure, operational tenure, types of campsites, etc.).

- **Park/campground longevity remains common.** 70% have been in operation for at least 20 years, including 42% that have been in operation for at least 50 years. The median report was 40 years, consistent with the findings of the 2021 study.
- **Just under four-fifths (78%) are individual/independently owned small businesses, consistent with previous studies.** Far fewer are corporate-owned (9%), a franchised brand (6%), membership or member-owned (4%), or have some other operational structure (8%).
- **The typical park is 23 acres in size, similar to the finding of 25 acres in 2021.** Parks in the Northeast report a higher median acreage than those elsewhere in the country, at 42.
  - Around two in three parks (65%) report having acreage available for development/expansion, a somewhat larger proportion than the 55% of parks reported in 2021.
- **Main season months vary by region.** In the South, every month of the year is part of the main season for a majority of reported parks/campgrounds. Those in other regions have bell curve shapes (particularly strong in the Northeast and Midwest), peaking in the summer months
- **Around half of parks (49%) report that they employ a general manager separate from the owner.** The typical (median) annual salary for a general manager is $52,200. Parks with 100 or more units and those located in the Northeast report a higher median salary.
- **For general staff, the typical hourly wage is $15.01.** Parks in the West report the highest median hourly wage for general staff at $16.92.
- **Competition is strong for good employees.** Three in four parks (75%) report having to typically pay above minimum wage to attract qualified employees. Around two in five parks (42%) report that they typically need to pay *much* higher than minimum wage ($3 or more above minimum wage) in order to attract qualified employees.

Camping Sites and Accommodations

- **The typical park/campground has 92 total rentable sites.** Median number of sites is higher in the Northeast than in other regions.
  - Most parks/campgrounds (89%) have full hook up camping sites. Around half have water & electric only sites (49%) and around two in five (43%) have rustic/tent sites with no hook up. Other site offerings vary, with the least common being water only camp sites and motel/hotel rooms (each reported by 5% of parks).
- **Occupancy rates vary based on the type of site/unit**. Parks/campgrounds with full hook up camp sites reported an average occupancy rate of 68% for these sites in their months of operation during the past 12 months. The occupancy rate for rustic/tent camp sites was the lowest at 25%.
- **Rate plans vary considerably by type of site/unit.** See pages 26, 27, and 29. Around two in three parks (64%) reported increasing their 2023 main season nightly/weekly rates compared with 2022. 29% reported no change while a small proportion (2%) reported decreases.

KEY FINDINGS

Amenities and Activities Offered

- **Parks/campgrounds offer a wide variety of amenities**—Wi-Fi, laundry, and restroom/shower facilities among the most common. Differences in amenities offered appear by region, and not surprisingly the likelihood of certain amenities offered increases with park/campground size (for example, 23% of parks with fewer than 50 sites/units offer a pool compared with 81% of parks with 200 or more sites/units).
- **Similarly, parks/campgrounds offer a variety of recreational activities**—fishing, swimming, and hiking/nature trails are among the most common (a finding consistent with 2021's results). As was seen with amenities offered, significant differences in certain recreation activities offered appear by region, and the likelihood of certain recreational activities offered increases with park/campground size.

Revenue and Expenses

- **Total revenue varies significantly by region and park size.** Overall, the median park answering reported a revenue of $3.52 million over the past 12 months, the majority of this coming from nightly site revenue ($1.43 million) and monthly/seasonal site rental revenue ($1.02 million).
- **Similarly, total expenses show significant variation across region and park size**—Overall, the median park answering reported expenses totaling $2.89 million for the past 12 months.

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.

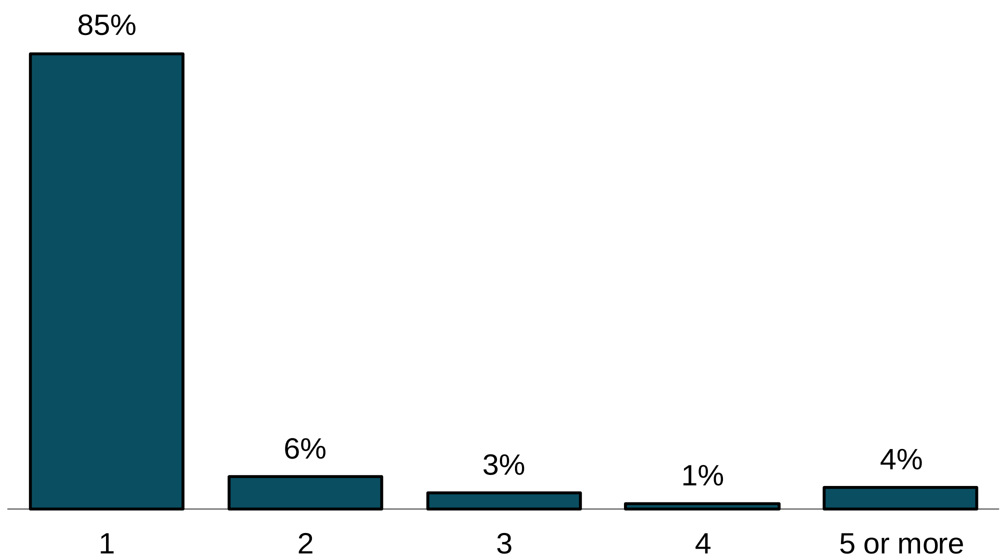
FINDINGS: Park/Campground Profile

Four in five respondents[1] (85%) 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 14% 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): 282 qualified respondents



[1] Throughout this report "Respondents" refers to the 282 individuals who responded to the survey and indicated in the first few survey questions they own, manage, operate, 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.

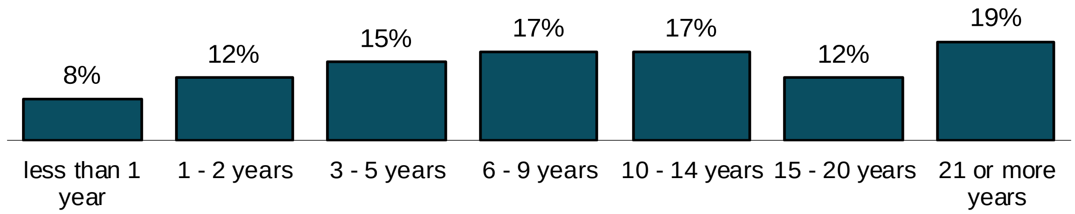
FINDINGS: Park/Campground Profile

Among those reporting that they are an owner, manager, operator or have detailed knowledge of a privately-owned outdoor hospitality business, around half (48%) 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): 307 owners, managers, operators, and those with detailed knowledge of a privately-owned outdoor hospitality business



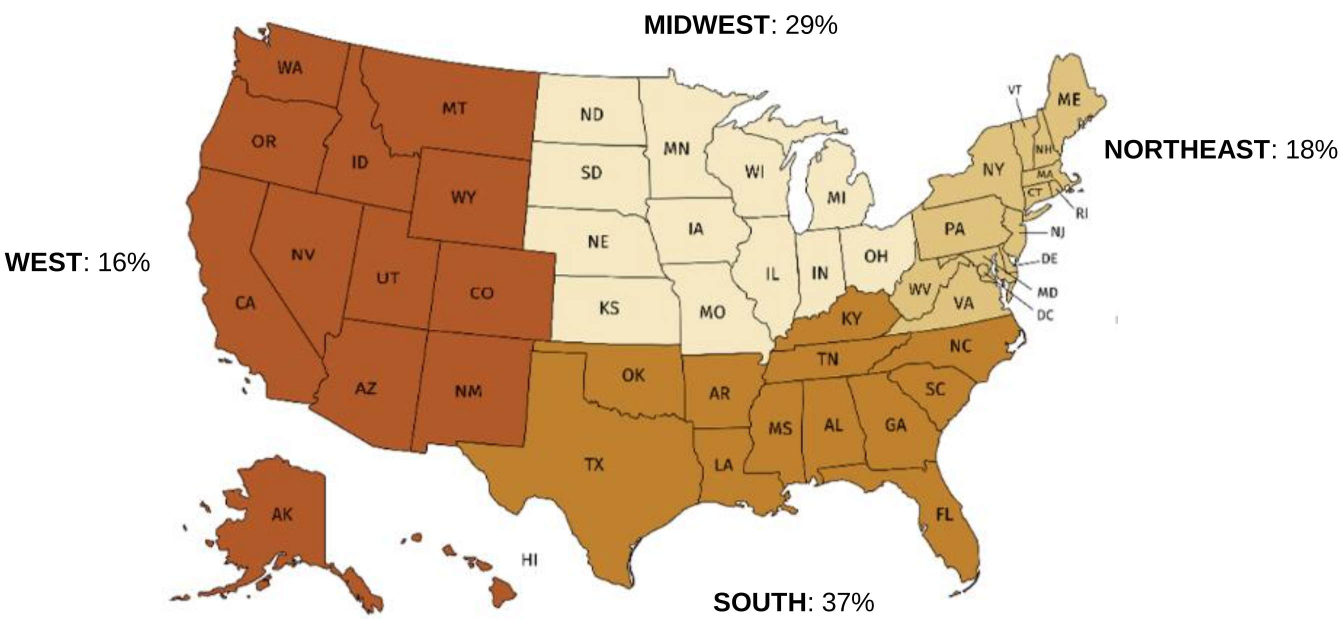
FINDINGS: Park/Campground Profile

The parks for which respondents reported on are dispersed relatively across four geographic regions (which closely mirror the Census regions but with slight modifications) with a moderately higher proportion in the midwestern and southern states. Florida 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): 282 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

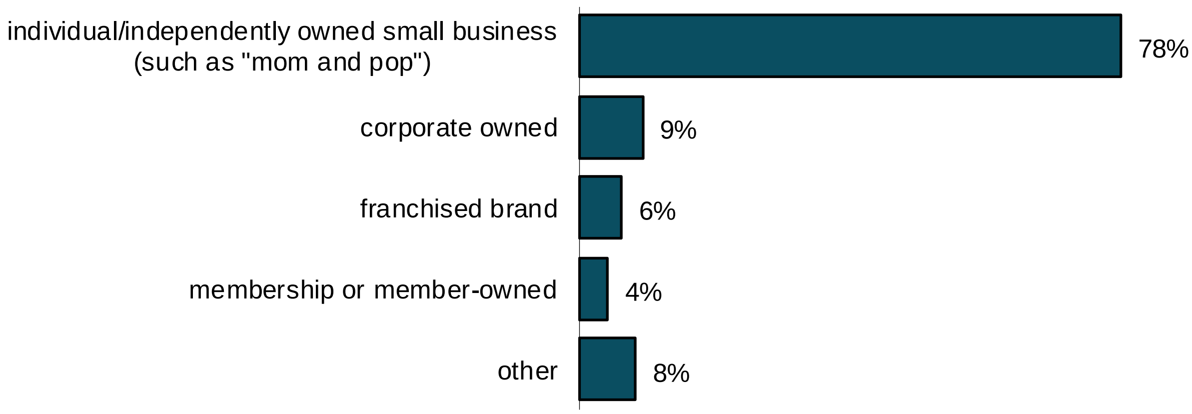
In terms of operational structure, 78% of reported RV parks/campgrounds/glamping parks are individual/independently owned small businesses (such as "mom and pop"), 9% are corporate-owned, 6% are a franchised brand, 4% are membership or member-owned, and 8% have some other operational structure.

The likelihood of being an individual/independently owned small business is greater for parks of fewer than 50 sites/units (88%) 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 RV park, campground or glamping park?

base (unweighted): 282 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	77%	84%	76%	74%	88%	76%	80%	66%
corporate-owned	16%	5%	7%	10%	1%	7%	8%	24%
franchised brand	4%	5%	9%	2%	1%	9%	6%	5%
membership or member-owned	0%	5%	5%	5%	3%	5%	5%	3%
other	11%	5%	8%	10%	7%	9%	7%	7%

=65% - 79%   =80%+

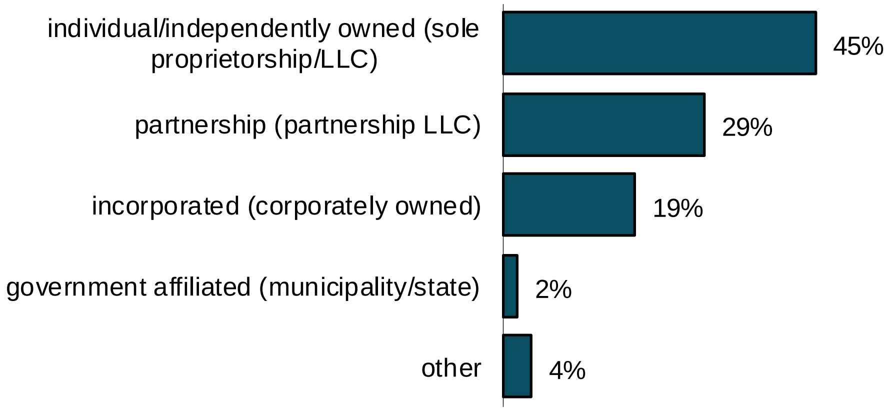
FINDINGS: Park/Campground Profile

In terms of ownership structure, 45% of reported parks are individual/independently owned (sole proprietorship/LLC) 29% are a partnership LLC, 19% are incorporated, 2% are government-affiliated, and 4% have some other ownership structure.

Ownership Structure

What best describes the ownership of this RV park, campground or glamping park?

base (unweighted): 282 qualified respondents (multiple answers)



FINDINGS: Park/Campground Profile

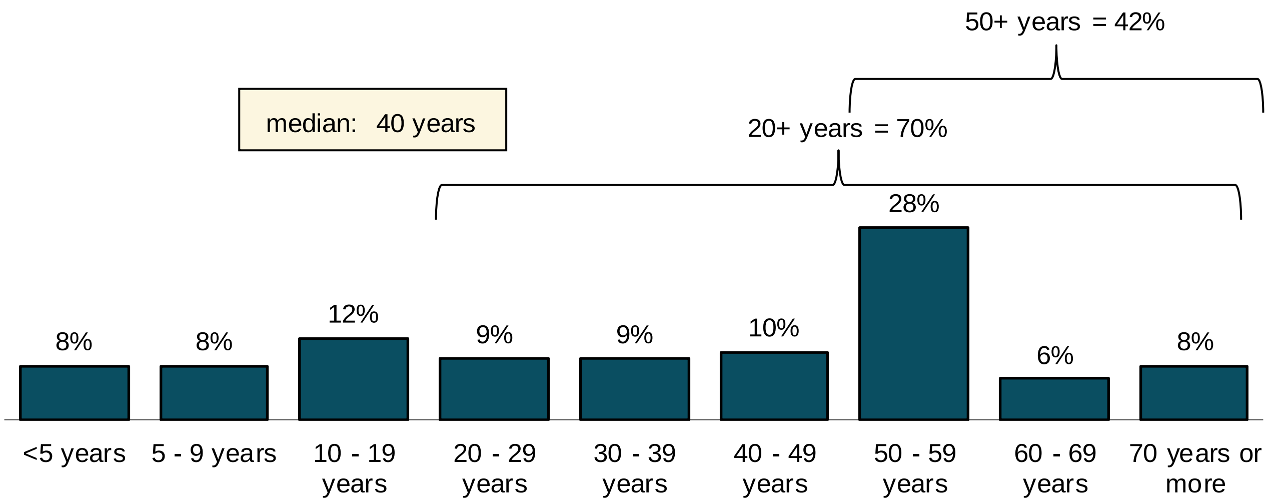
Most parks reported organizational longevity; 70% have been in operation for at least 20 years, including 42% that have been in operation for at least 50 years. The typical (median[2]) respondent indicated their park/campground has been in operation for 40 years.

Those in the South and those with an independent/membership 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): 282 qualified respondents (fill-in answers); those in each segment



Operational Tenure	median years
GEOGRAPHIC REGION	
Northeast	50
Midwest	50
South	25
West	45
OPERATIONAL STRUCTURE	
independent/membership	39
corporate-owned	50
franchised brand	54
SIZE (# of sites/units)	
200+	50
100 - 199	38
50 - 99	50
<50	27

[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

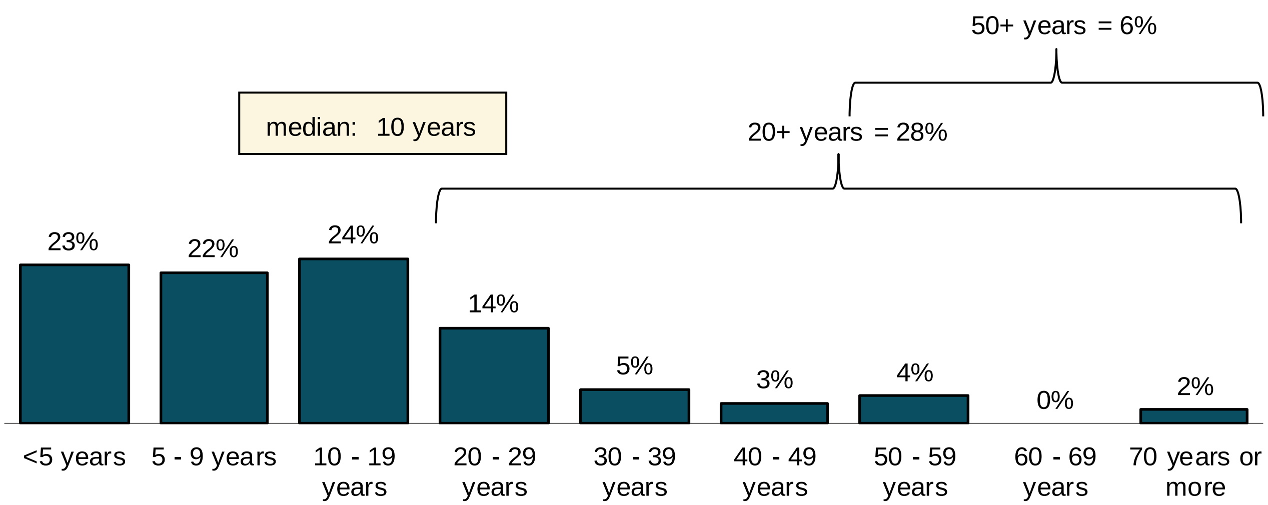
Ownership tenure is notably shorter than operational tenure; 28% have had the same ownership for at least 20 years, including 6% having the same ownership for 50 years or more. The typical (median) respondent indicated their park/campground has had the same ownership for 10 years.

Some variation in ownership tenure can be seen region, operational structure, and size. For example, corporate-owned parks had a higher median ownership tenure at 15 years, compared with franchised brands and independent/membership (11 and 10 years, respectively).

Owner Tenure

How long has this RV park, campground or glamping park been owned by its current owner?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment



Owner Tenure	median years
GEOGRAPHIC REGION	
Northeast	13
Midwest	9
South	10
West	16
OPERATIONAL STRUCTURE	
independent/membership	10
corporate-owned	15
franchised brand	11
SIZE (# of sites/units)	
200+	20
100 - 199	11
50 - 99	10
<50	6

FINDINGS: Park/Campground Profile

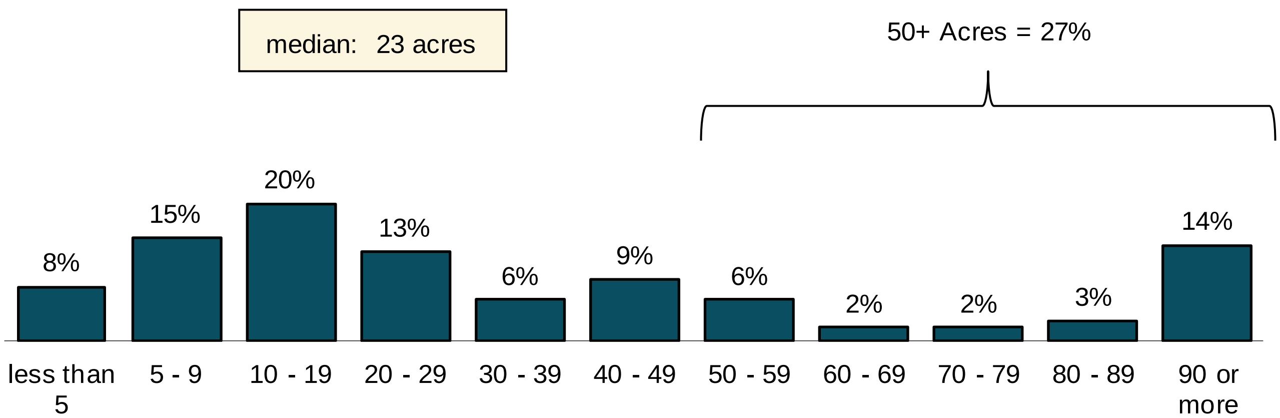
The typical park is 23 acres, with 27% of parks having 50 or more acres.

As would be expected, parks with higher number of units report a higher median number of acres. Parks in the Northeast and corporate-owned parks also report higher median acres.

Acreage

What is the total approximate acreage for this RV park, campground or glamping park?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment



Acreage	median acres
GEOGRAPHIC REGION	
Northeast	42
Midwest	35
South	20
West	8
OPERATIONAL STRUCTURE	
independent/membership	20
corporate-owned	52
franchised brand	24
SIZE (# of sites/units)	
200+	73
100 - 199	33
50 - 99	18
<50	8

FINDINGS: Park/Campground Profile

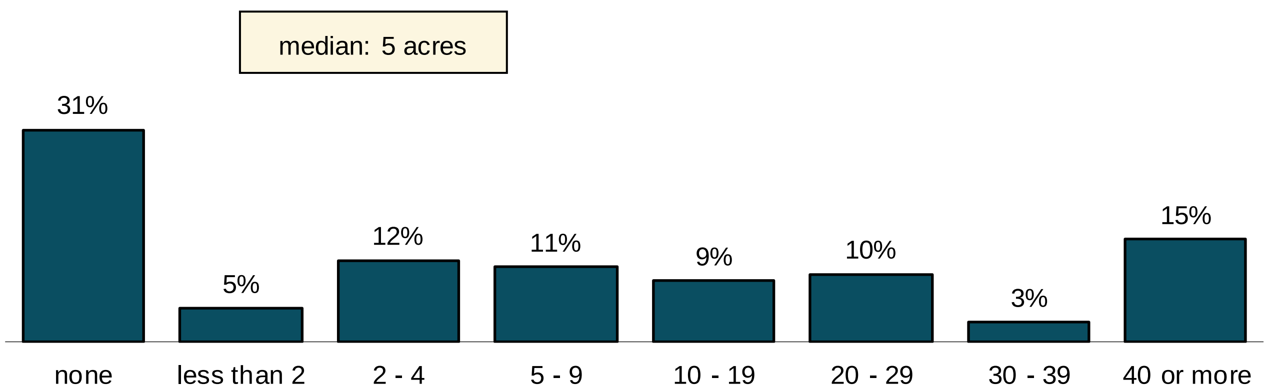
The typical park has 5 acres available for development/expansion.

Around a third of parks (31%) report no acreage available for development, while 15% report 40 or more acres.

Acreage Available for Development/Expansion

Approximately how many acres are available for additional development/expansion?

base (unweighted): 282 qualified respondents (fill-in answers)



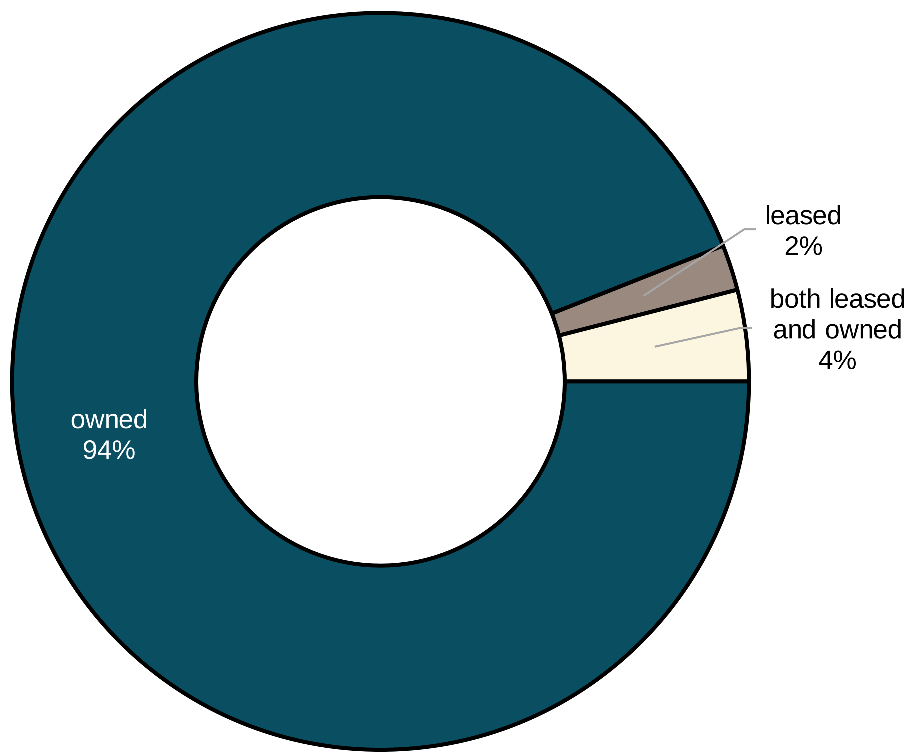
FINDINGS: Park/Campground Profile

The wide majority of parks (94%) report that their land is owned by the park/campground owner. 4% report that their land is both leased and owned and 2% report that they lease the land.

Land Owned or Leased

Is the land for this RV park, campground or glamping park leased or owned by the park/campground owner?

base (unweighted): 282 qualified respondents



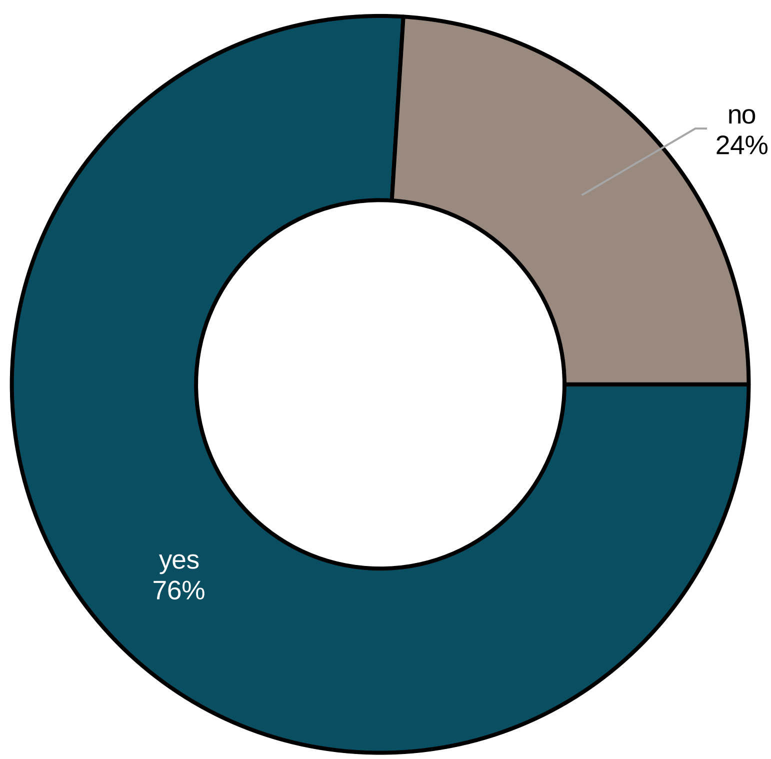
FINDINGS: Park/Campground Profile

Three in four parks (76%) report that they are located within 25 miles of a government-owned park.

Location Near Government-Owned Parks

Is your RV park, campground or glamping park located within 25 miles of a government-owned park (i.e., US Forest Service, National Park, a US Army Corp of Engineers Park or State Park)?

base (unweighted): 282 qualified respondents



FINDINGS: Park/Campground Profile

A majority of respondents reported each of the months from May through October as being in their park/ campground's main season.

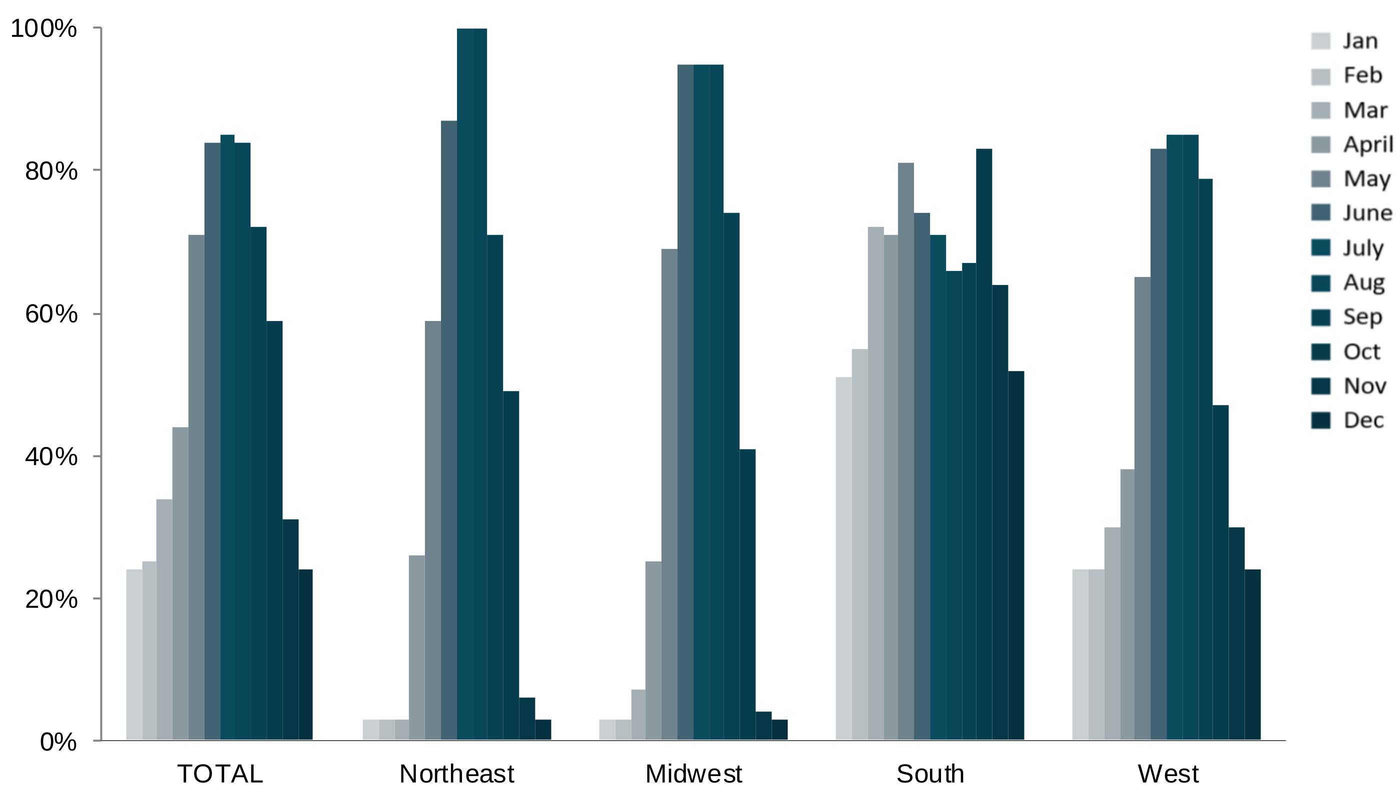
As would be expected, main seasons vary by region. In the South, all 12 months are part of the main season for a majority (more than half) of reported parks/campgrounds, whereas those in other regions have bell curve shapes (particularly strong in the Northeast and Midwest), peaking in the summer months.

Main Season Month(s)

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?

base (unweighted): 282 qualified respondents (multiple answers); those in each segment

MONTH(S) INCLUDED IN MAIN SEASON(S)



FINDINGS: Park/Campground Profile

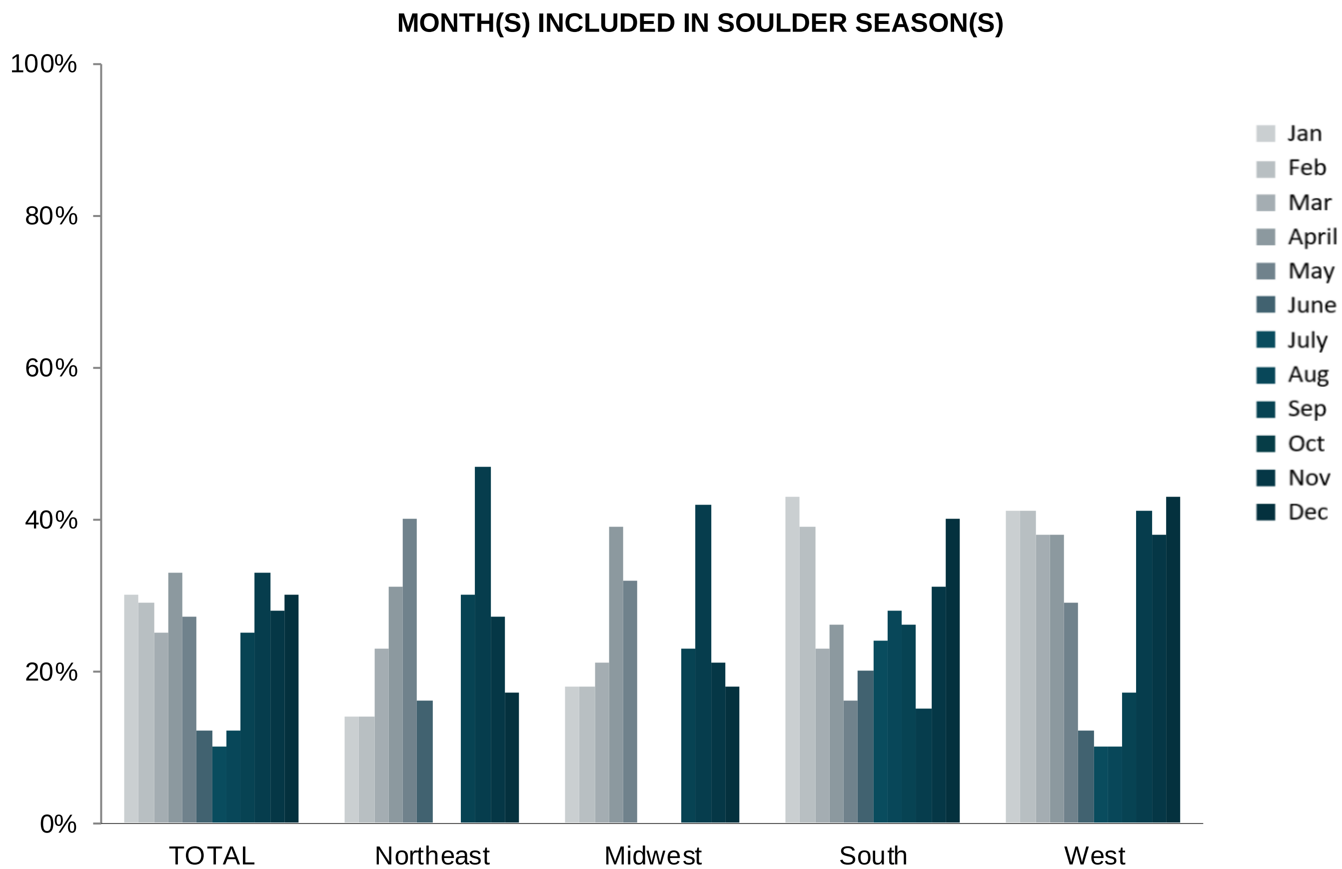
In the Northeast, April-May and September-November are the most common shoulder season months. In the Midwest the most common shoulder season months are April and October.

The proportion of parks/campgrounds in the South reporting shoulder season months is more moderately consistent throughout the year, with January-February and December reported somewhat more frequently. The proportion of parks reporting shoulder season months is also fairly consistent throughout the year for parks in the West, with the exception of dipping significantly in June-August.

Shoulder Season Month(s)

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?

base (unweighted): 282 qualified respondents (multiple answers); those in each segment



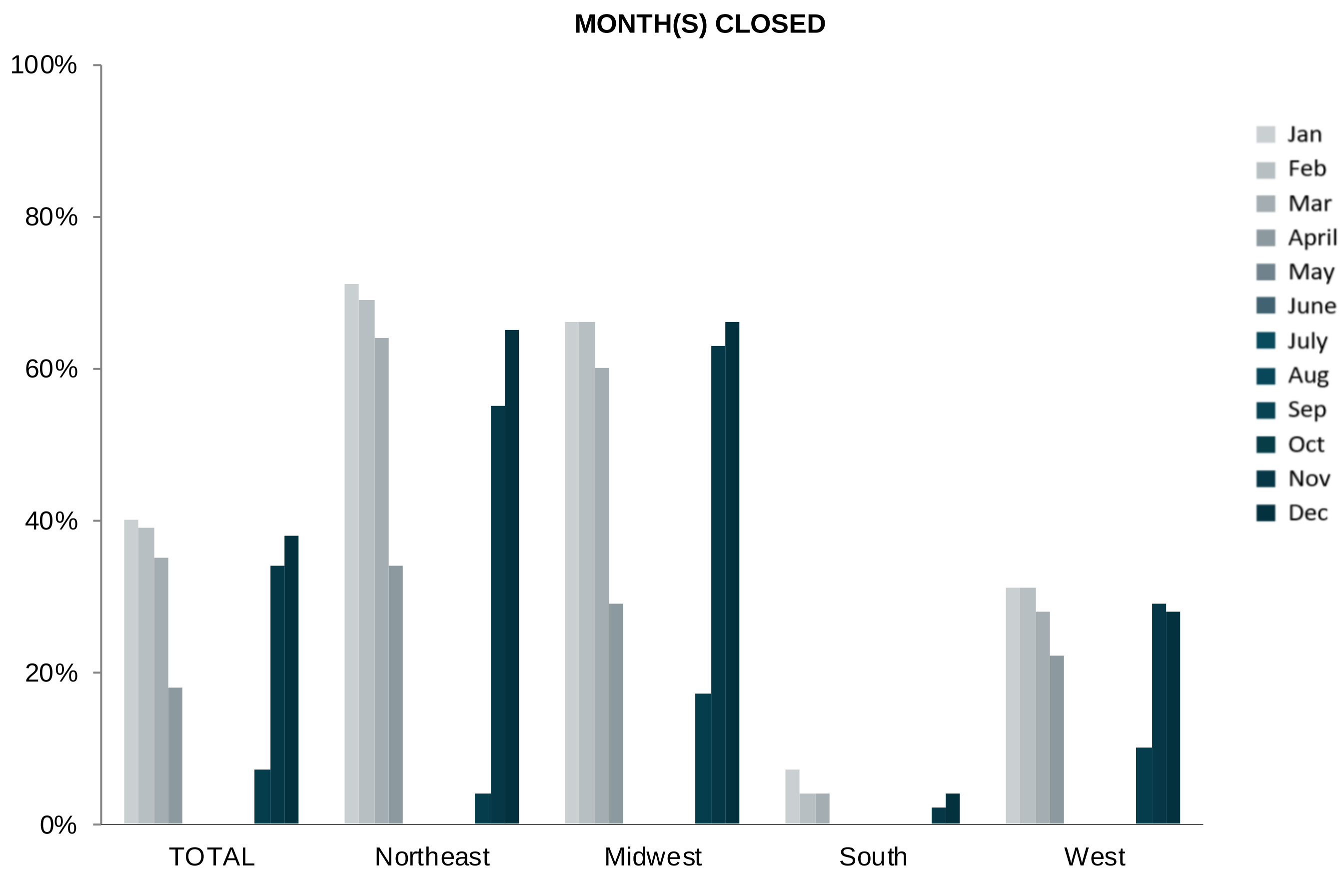
FINDINGS: Park/Campground Profile

A majority of parks/campgrounds in the Northeast and Midwest are closed January-March and November-December. These are the same months in which the highest proportion of parks/campgrounds in the South are closed, but to a much lesser extent.

Month(s) Closed

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?

base (unweighted): 282 qualified respondents (multiple answers); those in each segment



FINDINGS: Park/Campground Profile

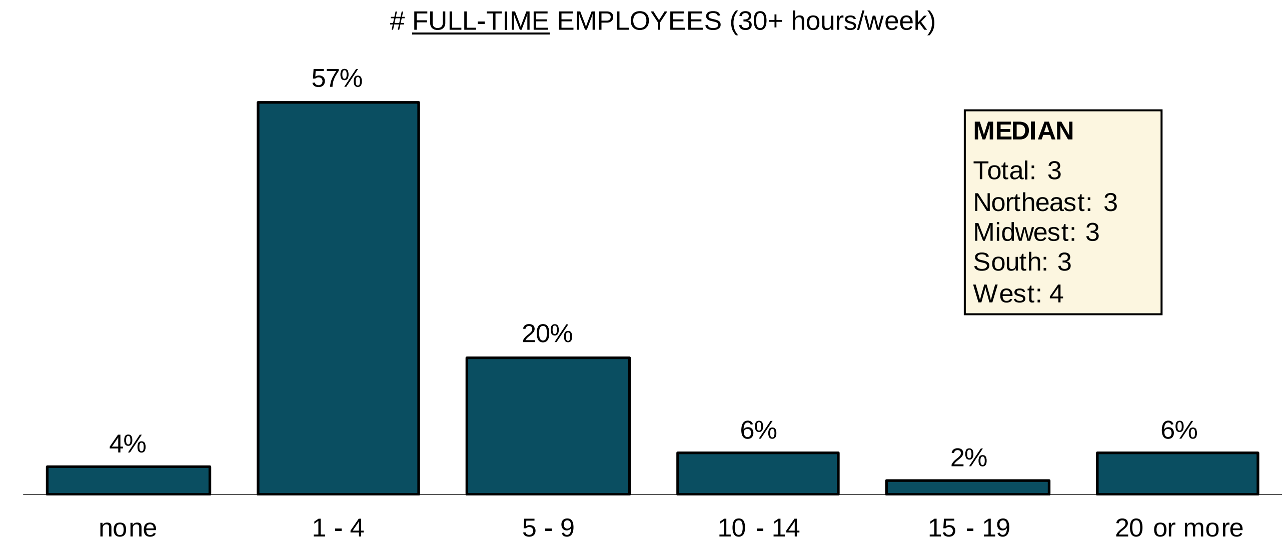
Just over half of parks/campgrounds (57%) employ 1-4 full-time employees (30 or more hours per week) during their main seasons; 34% employ more than that. A similar proportion of reported parks/campgrounds (50%) employ 1-4 part-time employees (1-29 hours per week); 23% employ more than that.

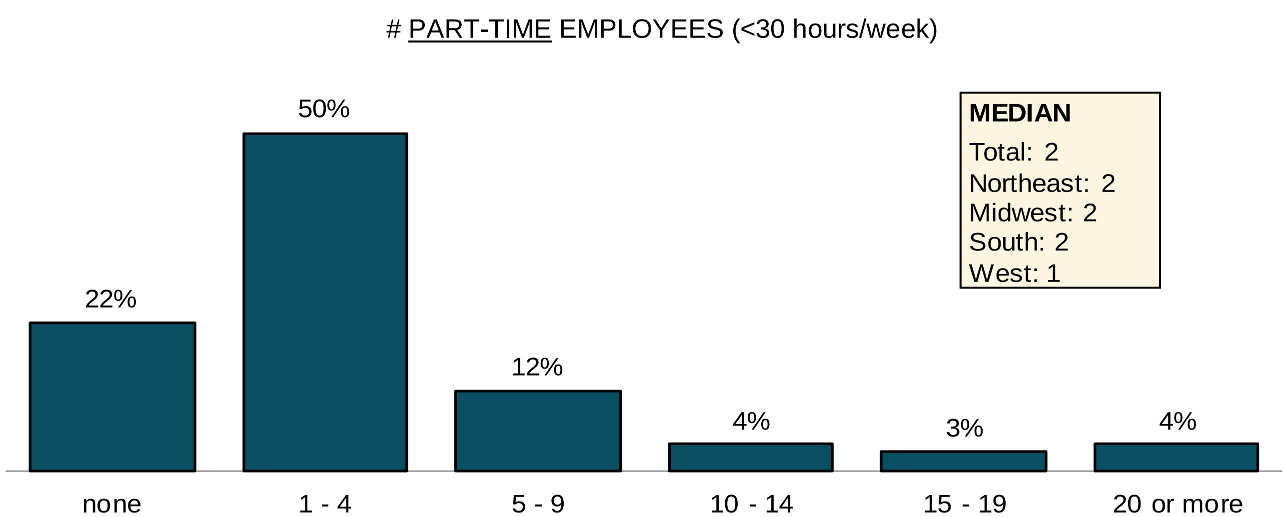
The typical (median) park/campground employs 3 full-time and 2 part-time individuals weekly (on average) during its main season.

Number of Employees

During the main season(s), how many employees work at this RV park, campground or glamping park per week, on average?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment





FINDINGS: Park/Campground Profile

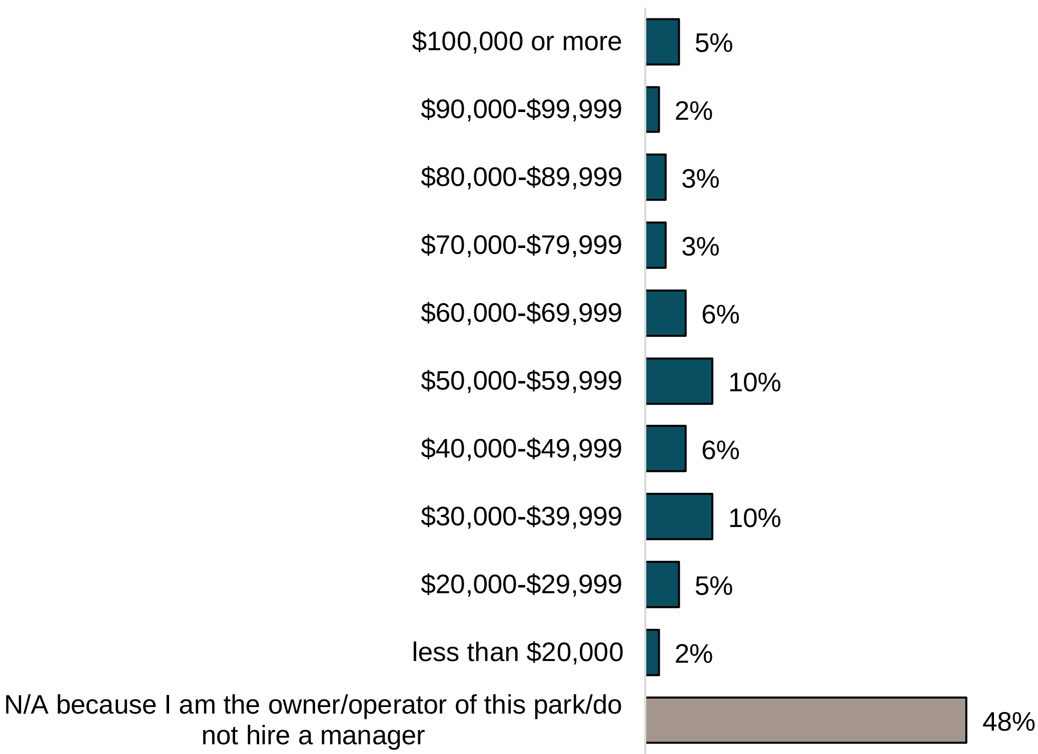
Around half of parks (48%) do not hire a manager separate from the owner/operator. Among those that do, the typical general manager's annual salary is $52,200.

Some variation in median salary can be seen by region, with parks in the Northeast reporting a higher median general manager salary, at $60,000, than those in other regions.

Typical General Manager Salary

What is the typical annual salary for this RV park, campground or glamping park's general manager?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment



Mean: $55,000
Median: $52,200

General Manager Salary	median salary
GEOGRAPHIC REGION	
Northeast	$60,000
Midwest	$50,000
South	$51,800
West	$50,000
SIZE (# of sites/units)	
200+	$59,300
100 - 199	$60,000
50 - 99	$39,100
<50	$37,200

FINDINGS: Park/Campground Profile

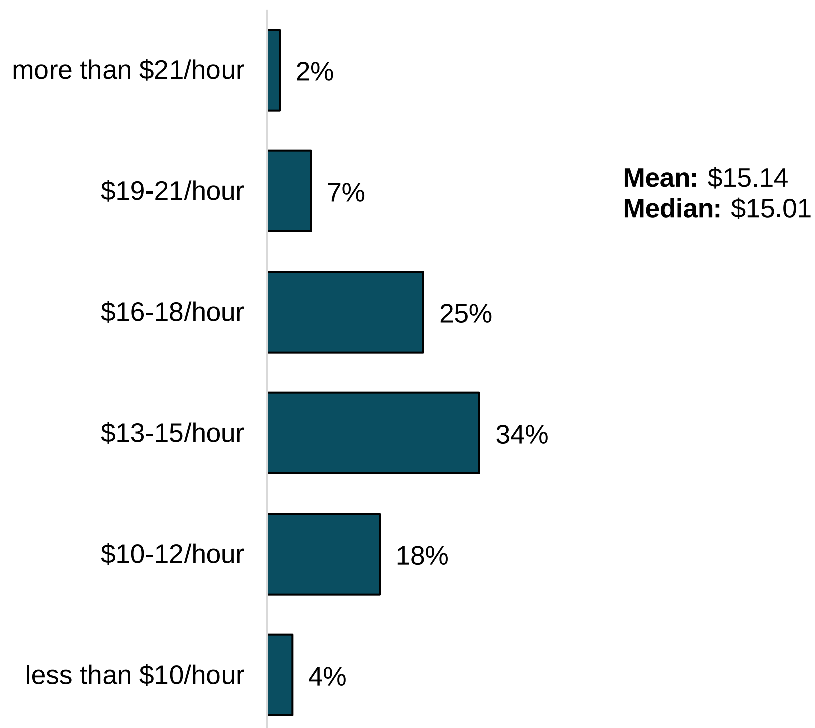
For general staff, the typical park pays a rate of $15.01 per hour, with around one in ten (9%) paying more than $19 per hour.

Parks in the West report the highest median hourly wage for general staff at $16.92, while parks in the South report the lowest compared with other regions at $14.28.

Typical Hourly Rate for General Staff

What is the typical hourly rate for this RV park, campground or glamping park's general staff?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment



Hourly Rate for General Staff	median rate
GEOGRAPHIC REGION	
Northeast	$16.14
Midwest	$14.38
South	$14.28
West	$16.92

FINDINGS: Park/Campground Profile

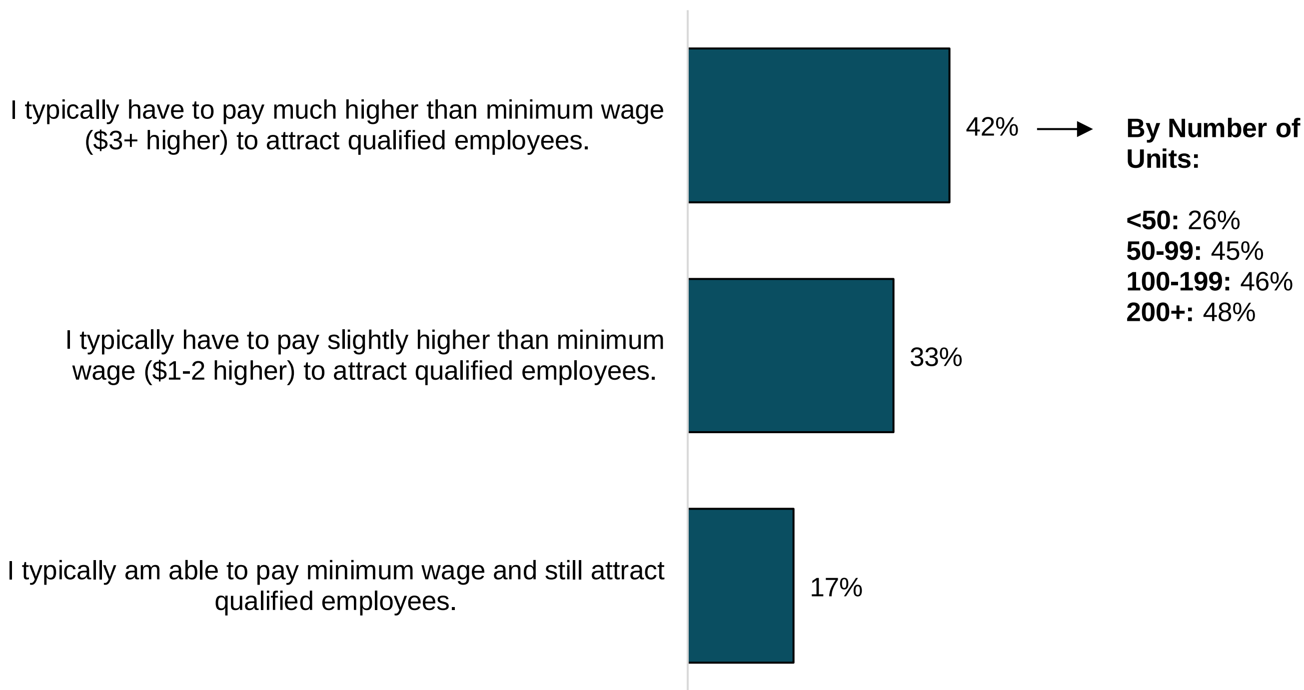
When asked to report what level of pay for general staff their park typically needs to offer in order to attract qualified employees (compared to minimum wage), two in five respondents (42%) report that they typically need to pay much higher than minimum wage. One in three (33%) report needing to pay slightly higher than minimum wage and 17% report that they typically can pay minimum wage and stay attract qualified employees.

Parks with 50 or more sites/units are more likely to report that they typically need to pay much higher than minimum wage to attract qualified employees.

Typical Payment Needed to Attract Qualified Employees

Based on your answer to the previous question, which of the following statements is most true for your RV park, campground or glamping park?

base (unweighted): 282 qualified respondents; those in each segment



FINDINGS: Amenities and Activities

WiFi and laundry facilities are among the most common amenities offered by report parks/campgrounds. Significant differences appear by region and size of park/campground (number of sites/units) for some of the listed amenities.

Amenities Offered

What amenities are offered at this RV park, campground or glamping park?

base (unweighted): 282 qualified respondents (multiple answers); those in each segment

Amenities Offered		REGION				# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	<50	50-99	100-199	200+
WiFi	82%	84%	75%	87%	83%	77%	83%	82%	90%
laundry facilities	81%	88%	72%	87%	75%	67%	79%	85%	97%
restroom/shower facilities	79%	94%	76%	77%	74%	61%	83%	78%	98%
firewood	74%	90%	90%	65%	44%	70%	81%	70%	69%
cell phone service	67%	73%	62%	70%	62%	67%	70%	64%	64%
playground	64%	88%	77%	53%	38%	42%	63%	72%	81%
covered pavilion area	61%	73%	57%	72%	29%	40%	56%	66%	88%
picnic area	58%	51%	53%	65%	55%	58%	52%	64%	57%
convenience store	57%	78%	60%	47%	46%	26%	62%	60%	83%
propane sales	47%	65%	43%	47%	28%	16%	41%	61%	72%
BBQ grills	46%	51%	41%	47%	51%	42%	48%	45%	54%
pool	45%	68%	37%	49%	24%	23%	32%	57%	81%
fenced pet area	42%	38%	37%	53%	32%	26%	45%	47%	50%
club/meeting room	40%	39%	35%	48%	32%	27%	33%	47%	57%
waterfront	37%	35%	47%	33%	28%	32%	33%	42%	41%
forest access	31%	43%	35%	26%	20%	25%	36%	30%	27%
recreation hall	29%	52%	28%	26%	13%	15%	16%	34%	67%
TV: cable	29%	33%	19%	33%	31%	30%	29%	25%	34%
live entertainment	28%	45%	31%	25%	9%	14%	16%	34%	60%
library	27%	23%	28%	33%	20%	19%	21%	28%	51%
arcade/game room	26%	49%	34%	13%	11%	11%	17%	30%	53%
restaurant/snack bar	24%	31%	23%	20%	24%	13%	18%	22%	54%
music	23%	35%	29%	20%	7%	12%	7%	30%	60%
vending	17%	22%	12%	26%	2%	5%	10%	26%	29%
boat rentals	16%	26%	23%	11%	3%	10%	19%	13%	26%
hot tub/sauna	15%	20%	9%	14%	22%	13%	7%	17%	34%
exercise facilities	15%	9%	6%	21%	24%	5%	8%	18%	36%
TV: satellite	14%	17%	10%	15%	17%	9%	15%	13%	21%
golf cart rentals	12%	11%	12%	18%	0%	3%	8%	11%	38%
bike (pedal) rentals	10%	6%	15%	7%	11%	7%	9%	9%	15%
marina	8%	10%	6%	9%	7%	9%	8%	5%	12%
EV charging (pedestal at campsite)	8%	11%	3%	7%	14%	4%	7%	11%	9%
chapel/religious services	7%	4%	6%	10%	7%	3%	4%	7%	22%
EV charging stations (stand-alone)	5%	9%	5%	2%	8%	1%	8%	2%	12%
ATV/four-wheeler rentals	2%	1%	3%	2%	5%	1%	1%	5%	2%
day spa facilities	2%	1%	1%	2%	5%	0%	0%	3%	7%
gaming/casino	2%	1%	4%	1%	2%	1%	3%	1%	3%
bike (e-bike) rentals	2%	1%	1%	0%	7%	1%	2%	2%	2%
horse facility	2%	1%	1%	2%	2%	0%	0%	2%	7%

=20% - 49% =50% - 79% =80%+

FINDINGS: Amenities and Activities

Fishing and swimming are among the most common recreation activities offered by parks. As was seen with amenities offered, significant differences appear by region and size of park (number of sites/units) for some of the listed recreation activities.

Recreational Activities Offered

What recreation activities are offered at this RV park, campground or glamping park?

base (unweighted): 282 qualified respondents (multiple answers); those in each segment

TOP MENTIONS*

Recreational Activities Offered		REGION				# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	<50	50-99	100-199	200+
fishing	53%	64%	60%	52%	30%	40%	56%	54%	65%
swimming	40%	47%	46%	40%	24%	21%	34%	47%	67%
hiking/nature trails	40%	51%	46%	37%	28%	29%	41%	48%	39%
bird watching	35%	35%	41%	32%	29%	28%	36%	37%	36%
volleyball	33%	46%	48%	21%	20%	13%	33%	33%	65%
basketball	33%	65%	41%	17%	17%	12%	31%	35%	63%
wildlife viewing	32%	27%	31%	31%	40%	35%	34%	28%	29%
horseshoes	31%	51%	34%	25%	19%	19%	38%	27%	42%
arts and crafts	30%	55%	35%	22%	10%	12%	24%	37%	57%
canoeing	26%	30%	37%	24%	7%	14%	30%	25%	38%
kayaking	26%	27%	41%	22%	9%	19%	30%	24%	31%
biking trails	22%	20%	28%	19%	22%	13%	20%	26%	31%
boating	21%	25%	30%	19%	7%	11%	23%	18%	38%
gaga ball (gaga pit)	14%	24%	22%	4%	9%	1%	11%	16%	32%
sand beach with lake swimming	14%	9%	25%	9%	9%	5%	16%	14%	18%
pickleball	12%	13%	12%	12%	14%	3%	6%	13%	39%
shuffleboard	12%	19%	12%	12%	5%	7%	7%	7%	40%
bocce	11%	17%	10%	8%	15%	2%	14%	10%	22%
paddleboats	10%	10%	13%	10%	2%	2%	12%	8%	19%
mini golf	8%	19%	10%	3%	2%	0%	6%	12%	17%
river rafting	8%	9%	13%	2%	9%	5%	18%	2%	2%
baseball	7%	14%	12%	2%	3%	3%	5%	8%	17%
jumping pillow	7%	11%	12%	3%	0%	0%	2%	7%	26%
ATV/four wheeling	7%	3%	12%	3%	11%	6%	7%	6%	5%
senior activities	6%	1%	6%	9%	8%	5%	3%	3%	21%
geocaching	6%	9%	4%	4%	9%	3%	9%	2%	8%
Frisbee golf	5%	4%	6%	6%	3%	5%	4%	5%	9%
golfing	5%	3%	5%	5%	9%	4%	3%	2%	19%
water park/slides	5%	7%	6%	5%	0%	0%	3%	5%	19%
soccer	5%	13%	4%	2%	4%	3%	4%	3%	13%
tennis	4%	7%	4%	3%	3%	1%	0%	3%	19%

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

*those selected by at least 4% of the total

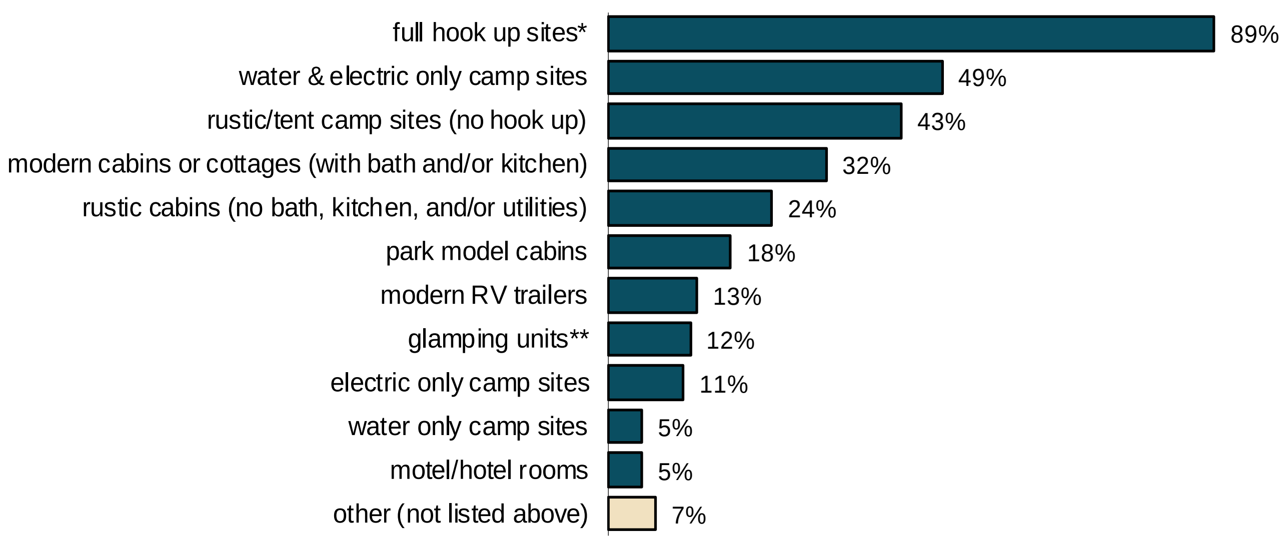
FINDINGS: Accommodations

The vast majority of reported RV parks/campgrounds/glamping parks (89%) have full hook up camping sites—including water, electric, and sewer. Around half have water & electric only sites (49%) and around two in five (43%) have rustic/tent camp sites (with no hook up). 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 sites/units are available at this RV park, campground or glamping park?

base (unweighted): 282 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*	91%	82%	93%	91%	89%	97%	100%	78%	91%	93%	95%
water & electric only sites	74%	64%	32%	31%	46%	51%	68%	29%	51%	56%	60%
rustic/tent camp sites	65%	45%	31%	43%	42%	51%	55%	29%	59%	40%	36%
modern cabins or cottages (with bath and/or kitchen)	42%	40%	22%	28%	31%	34%	50%	26%	33%	29%	44%
rustic cabins (no bath, kitchen, and/or utilities)	40%	30%	15%	15%	21%	43%	82%	11%	29%	25%	34%
park model cabins	17%	15%	22%	17%	19%	12%	32%	14%	19%	18%	24%
modern RV trailers	34%	14%	4%	9%	14%	9%	13%	10%	17%	13%	10%
glamping units**	14%	14%	8%	16%	13%	3%	9%	8%	20%	10%	7%
electric only camp sites	13%	21%	2%	12%	12%	0%	22%	12%	16%	10%	3%
water only camp sites	12%	6%	1%	7%	5%	0%	9%	0%	10%	5%	3%
motel/hotel rooms	0%	1%	5%	16%	4%	10%	0%	3%	9%	3%	2%
other (not listed above)	7%	11%	6%	5%	9%	3%	13%	2%	10%	5%	14%

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

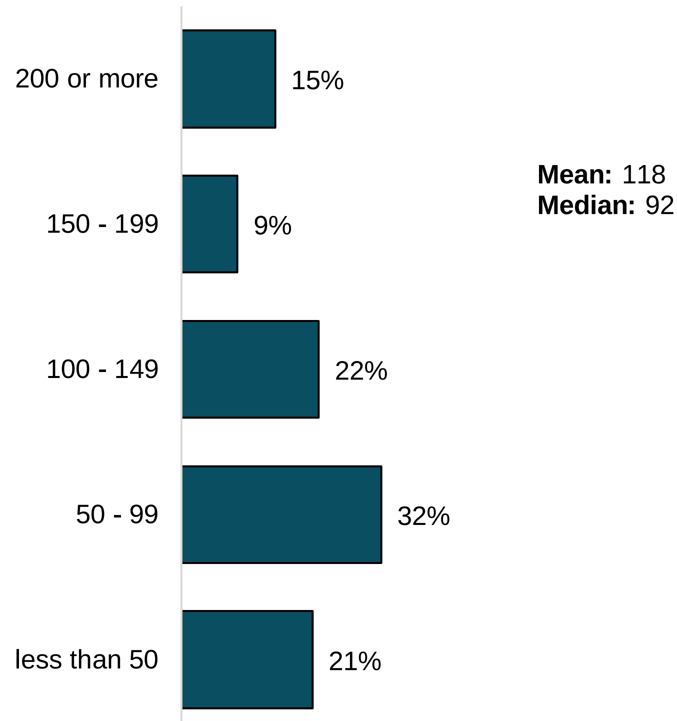
FINDINGS: Accommodations

The typical (median) respondent reported their RV park/campground/glamping park has 92 total sites/units; the average report was higher at 118, 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 Sites: Total

How many sites/units are available at this RV park, campground or glamping park?

base (unweighted): 282 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
mean	161	116	106	97	110	198	122
median	120	93	87	78	88	135	90

FINDINGS: Rates

Respondents were asked to report their park/campground's average main season rate plans (mid-week, weekend, holiday/special, and weekly rates) for each type of site/accommodation they offer. Median reports are tabled below (among those offering rate plans for each) and on page 26. Results based on fewer than 30 (unweighted) respondents are noted via grey shading; results based on fewer than 10 are suppressed.

Mid-Week and Weekend Rate Per Night (Main Season)

During your main season(s), what are your average rate plans at this RV park, campground or glamping park?

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

MEDIAN Summary: Mid-Week Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$55**	$60	$50	$54	$64	$53	$71	$63	$50	$50	$56	$76
water & electric only	**$48**	$55	$49	$38	$54	$45	$52	$55	$41	$45	$49	$58
rustic/tent	**$35**	$36	$30	$30	$40	$34	$42		$35	$34	$33	$47
electric only	**$40**		$35			$40				$35	$45	
water only	**$35**					$34						
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$155**	$156	$195	$120		$150			$125	$162	$143	$199
rustic cabins	**$80**	$80	$85	$80		$75		$82		$75	$80	$95
park model cabins	**$158**	$195	$168	$125		$152				$150	$147	$182
modern RV trailers	**$130**	$130	$102			$115				$81	$154	
glamping units	**$107**	$112				$115				$99		
motel/hotel rooms												

MEDIAN Summary: Weekend Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$58**	$65	$52	$55	$65	$55	$71	$73	$50	$52	$60	$85
water & electric only	**$50**	$58	$51	$38	$55	$50	$52	$55	$46	$45	$50	$68
rustic/tent	**$36**	$40	$35	$32	$40	$35	$42		$41	$35	$35	$58
electric only	**$45**		$40			$41				$38		
water only	**$36**											
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$166**	$173	$200	$142		$159			$154	$169	$150	$225
rustic cabins	**$81**	$80	$85	$80		$80		$85		$70	$82	$100
park model cabins	**$161**	$214	$175	$125		$160				$157	$153	$227
modern RV trailers	**$135**	$145				$130				$85	$152	
glamping units	**$117**					$113				$119		
motel/hotel rooms												

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

FINDINGS: Rates

Holiday/Special and Weekly Rate Per Night (Main Season)

During your main season(s), what are your average rate plans at this RV park, campground or glamping park?

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

MEDIAN Summary: Holiday/Special Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$60**	$71	$55	$56	$65	$58	$73	$84	$50	$55	$60	$94
water & electric only	**$55**	$74	$55	$39	$55	$54	$58	$67	$45	$50	$58	$75
rustic/tent	**$40**	$45	$40	$35	$40	$40	$51			$35	$40	$62
electric only	**$45**		$42			$43						
water only	**$39**											
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$187**	$173	$209	$125		$169			$152	$174	$162	$228
rustic cabins	**$85**	$87	$89			$85		$93		$85	$82	$117
park model cabins	**$175**	$224	$175	$125		$172				$174	$163	$229
modern RV trailers	**$145**	$147				$140				$92	$152	
glamping units	**$143**					$146				$155		
motel/hotel rooms												

MEDIAN Summary: Weekly Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$312**	$356	$300	$282	$384	$300	$365		$275	$288	$323	$537
water & electric only	**$271**	$293	$271	$210		$270			$245	$267	$274	$404
rustic/tent	**$210**	$234	$183	$149		$210				$201	$207	
electric only	**$248**		$240			$248				$243		
water only												
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$942**	$810	$1,000			$771				$600	$992	$1,177
rustic cabins	**$464**	$464	$539			$450				$457	$450	
park model cabins	**$931**					$903						
modern RV trailers	**$599**	$682				$594				$528		
glamping units												
motel/hotel rooms												

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

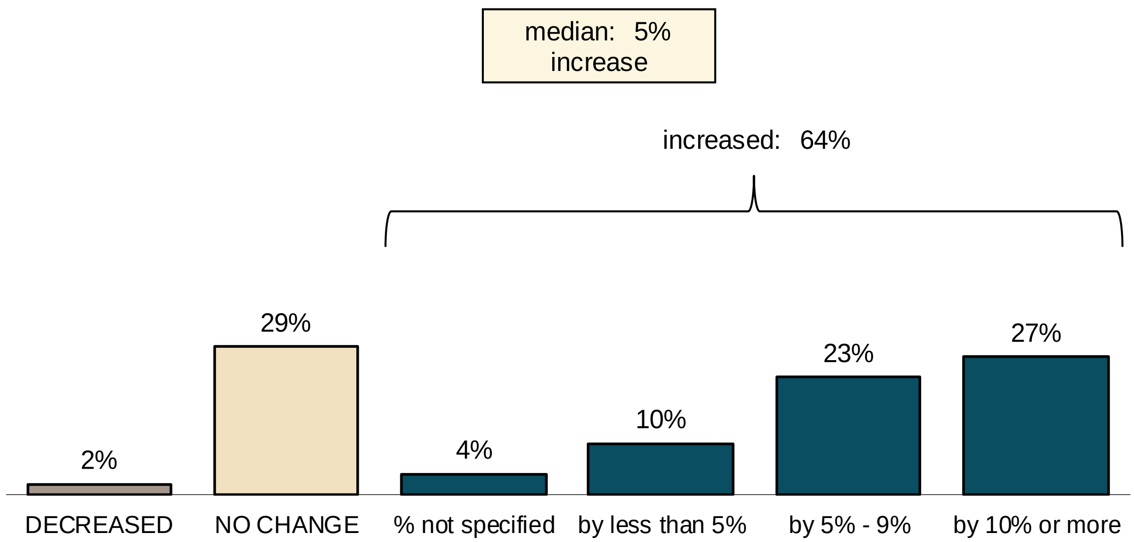
FINDINGS: Rates

Two out of three parks (64%) report having increased their 2023 main season nightly/weekly rates compared with 2022. 29% reported no change while a small portion (2%) reported rate decreases. The typical (median) park increased their rates by 5%.

Change in Nightly/Weekly Rates

Compared with 2022, how have this RV park, campground or glamping park's 2023 main season nightly/weekly rates changed?

base (unweighted): 282 qualified respondents (fill-in answers); those in each segment



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FINDINGS: Rates

A majority of respondents (82%) indicated their park/campground offers monthly or seasonal rates for at least one site/unit type. Median reports are tabled below (among those offering rate plans for each). Results based on fewer than 30 (unweighted) respondents are noted via grey shading; results based on fewer than 10 are suppressed.

Monthly and Seasonal Monthly Rate (Main Season)

Does this RV park, campground or glamping park offer monthly and/or seasonal rates for any of its sites/units?

During your main season(s), what are your average monthly and/or seasonal rates at this RV park, campground or glamping park?

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

MEDIAN Summary: Monthly Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$800**	$1,037	$829	$642	$850	$750	$1,112	$850	$600	$762	$800	$1,200
water & electric only	**$800**	$1,114	$703			$700				$811	$700	$1,170
rustic/tent												
electric only												
water only												
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$1,100**					$1,100						
rustic cabins												
park model cabins	**$1,940**					$1,940						
modern RV trailers												
glamping units												
motel/hotel rooms												

MEDIAN Summary: Seasonal Monthly Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$850**	$1,304	$970	$725	$773	$832	$1,143	$854	$689	$750	$875	$1,093
water & electric only	**$800**	$982	$933			$758				$769	$1,239	$1,992
rustic/tent												
electric only												
water only												
OTHER ACCOMMODATIONS												
modern cabins or cottages												
rustic cabins												
park model cabins												
modern RV trailers												
glamping units												
motel/hotel rooms												

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

FINDINGS: Rates

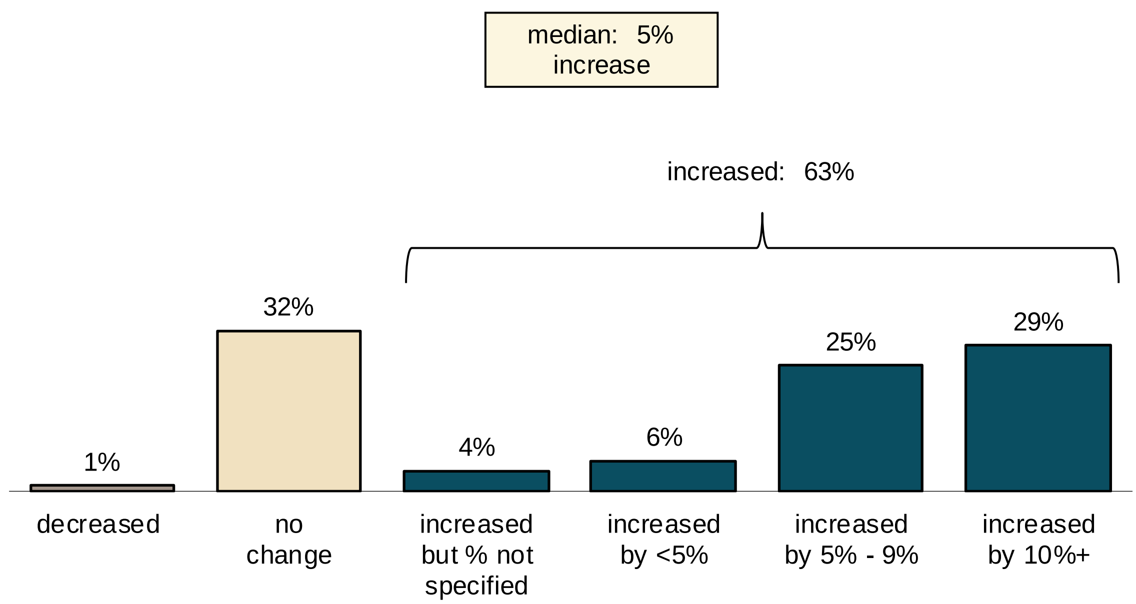
Similarly to nightly/weekly rates, among parks offering monthly/seasonal rates, about two out of three (63%) increased their 2023 main season monthly/seasonal rates compared with 2022. About one in three (32%) reported no change while 1% reported decreases.

The typical (median) park offering monthly/seasonal rates increased those rates by 5%.

Change in Monthly/Seasonal Rates

Compared with 2022, how have this RV park, campground or glamping park's 2023 main season monthly and/or seasonal rates changed, on average?

base (unweighted): 234 qualified respondents whose RV park/campground/glamping park has monthly and/or seasonal rates (fill-in answers); those in each segment



FINDINGS: Occupancy

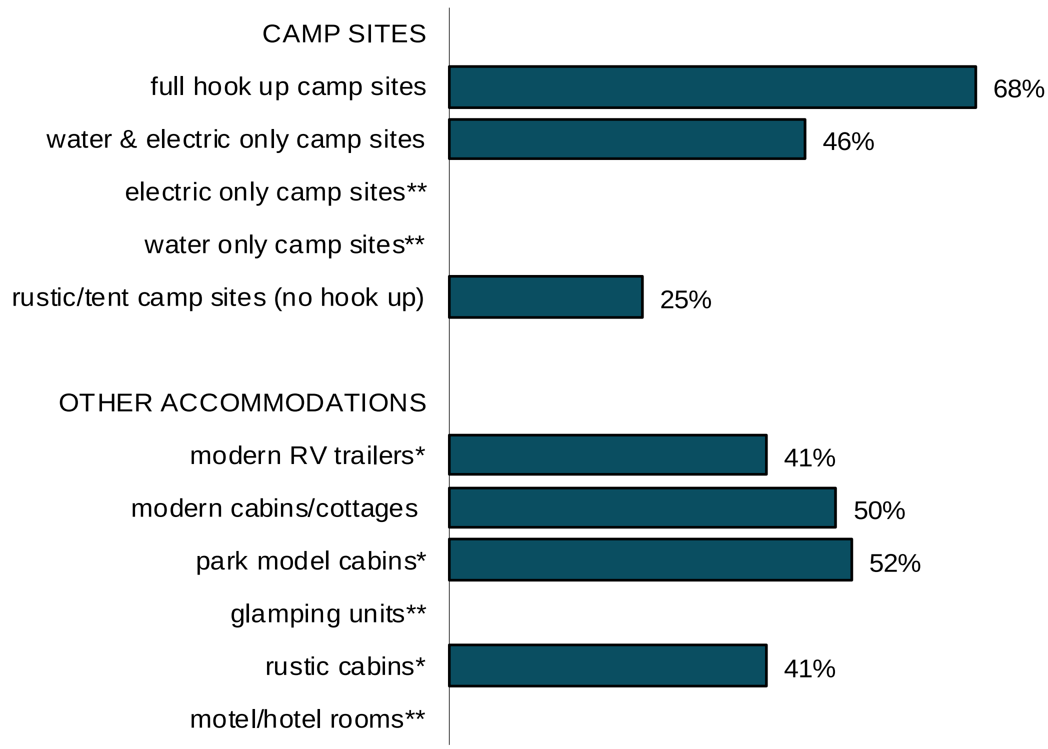
Parks with full hook up camp sites reported an average occupancy rate of 68% for these sites in their months of operation (including main and shoulder seasons) during the past 12 months. The occupancy rate for rustic/tent camp sites was the lowest of all the camp sites at 25%.

Average occupancy rates for each of the other types of non-camp site accommodations ranged from 41% for rustic cabins and modern RV trailers to 52% for park model cabins (results based on fewer than 30 responses).

Occupancy Rate: Mean Summary

In your months of operation (including main and shoulder seasons) during the past 12 months, what was the total number of potential nights and the total number of nights sold for each type of site/unit at this RV park, campground or glamping park?

base (unweighted): qualified respondents with this site/accommodation at their RV park/campground/glamping park answering both potential nights and nights sold (fill-in answers)



**based on fewer than 30 responses and considered statistically unstable*
***based on fewer than 10 respondents (suppressed)*

FINDINGS: Financials

The typical (median) park brought in a total of $3.52 million in the past 12 months. Of this total, $1.43 million came from nightly site rentals and $1.02 million from monthly/seasonal site rentals.

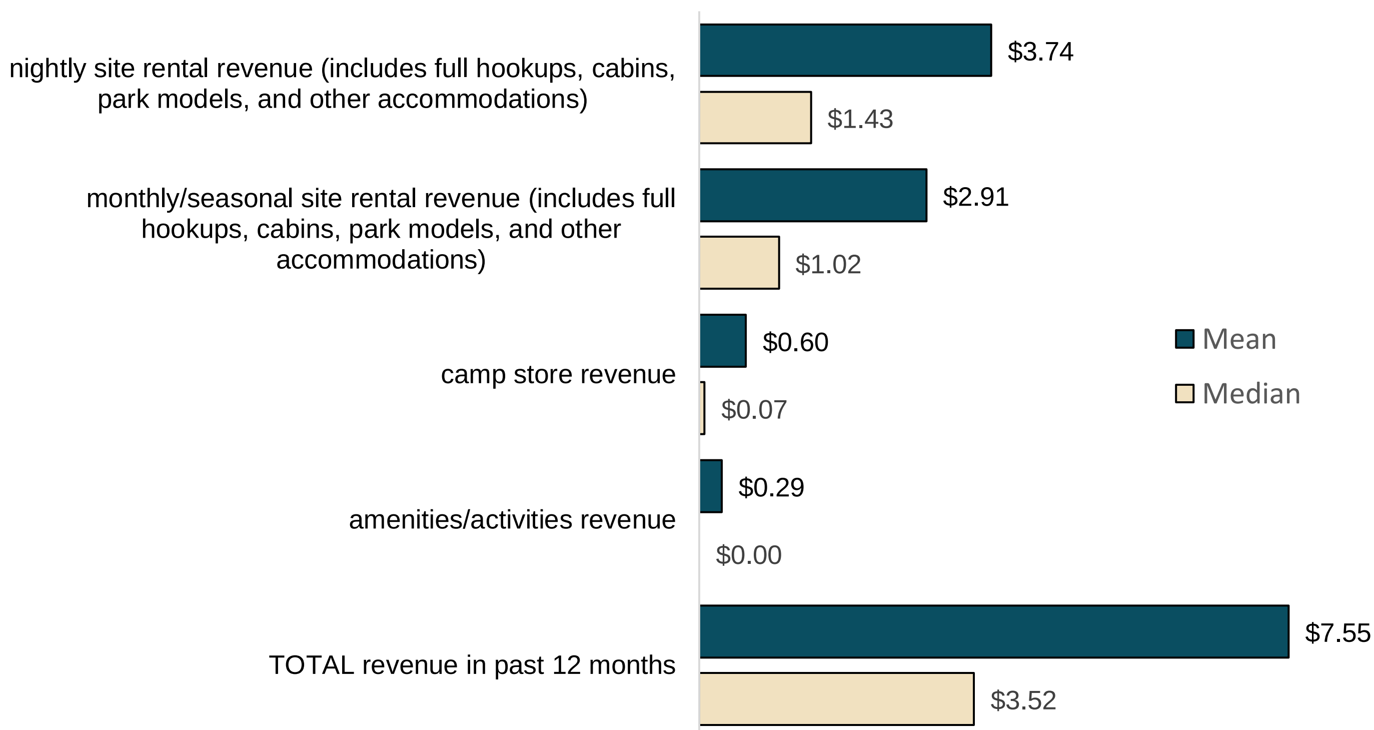
The average reported total revenue was substantially higher at $7.55 million, influenced by a handful of large parks. Some variation in mean and median revenue by region and number of sites/units.

Revenue: Mean and Median Summary

What was this RV park, campground or glamping park's approximate total revenue in the past 12 months?

base (unweighted): qualified respondents answering (fill-in answers)

MEAN/MEDIAN SUMMARY (in Millions)



Total Revenue (in Millions)	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
mean	$8.97	$5.47	$7.59	$9.40	$2.06	$4.65	$8.31	$19.52
median	$3.48	$3.44	$3.52	$5.00	$1.67	$2.62	$8.47	$20.29

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

FINDINGS: Financials

The typical (median) park reports total expenses of $2.89 million in the past 12 months. Of this total, $1.85 million consisted of general expenses and $300,000 from capital expenses.

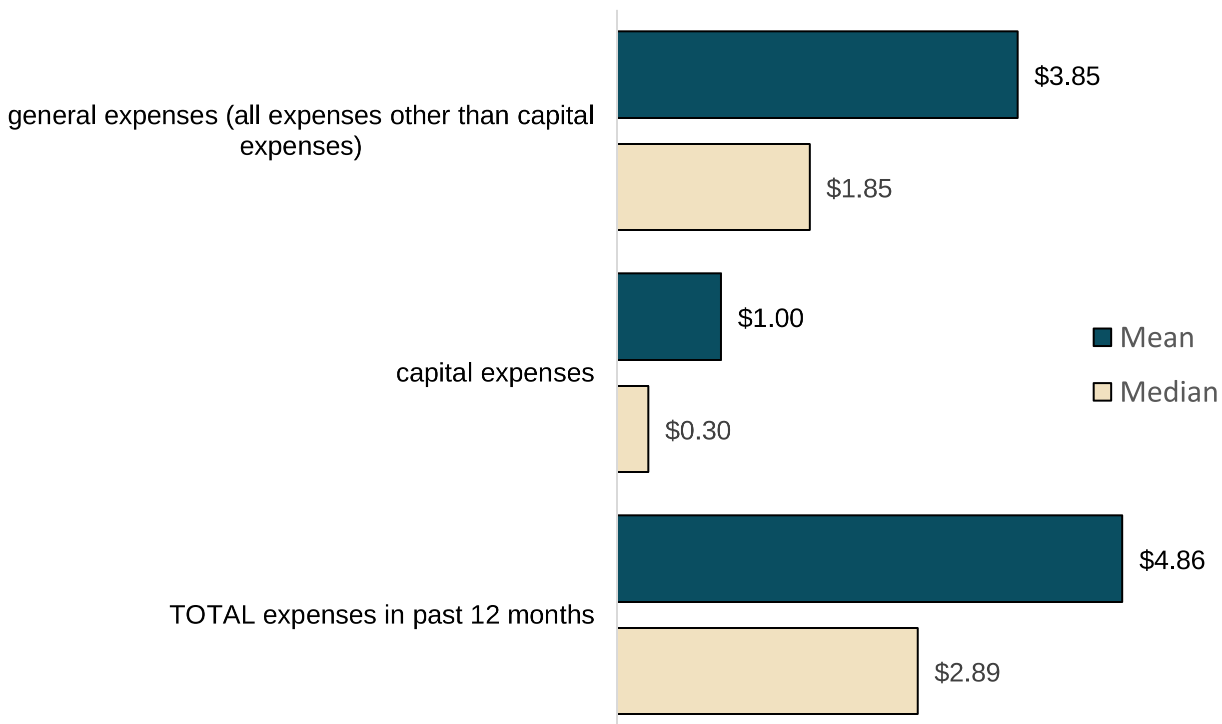
Similar to revenue, the average total expenses was substantially higher at $4.86 million, influenced by a handful of large parks. Also in line with revenue, some variation in mean and median expenses can be seen by region and size of park.

Expenses: Mean and Median Summary

What were this RV park, campground or glamping park's approximate total expenses in the past 12 months?

base (unweighted): qualified respondents answering (fill-in answers)

MEAN/MEDIAN SUMMARY (in Millions)



Total Expenses (in Millions)	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
mean	$5.23	$3.98	$4.85	$5.88	$1.17	$3.23	$6.10	$11.30
median	$4.13	$2.50	$1.94	$3.44	$0.98	$2.07	$4.52	$9.89

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

FINDINGS: Financials

One in four respondents (27%) indicated their park spent money on site/unit expansion in the past 12 months (among those answering this question). The median report was zero, due a significant proportion reporting their park/campground spent nothing, while the average report was $153,000.

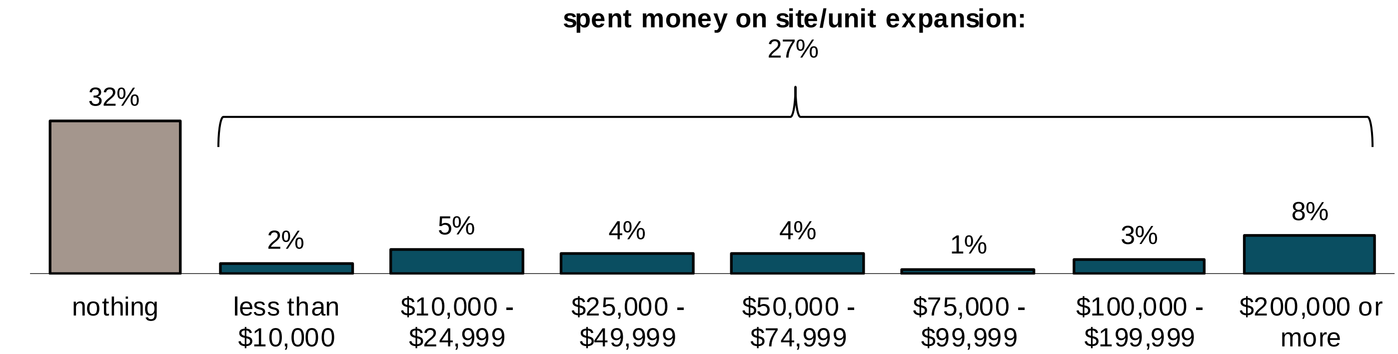
The typical park under 100 sites/units did not spend any money on expansion, however, parks with 100-199 had a median spend of $17,000 and those with 200 or more sites/units spent a median of $20,000.

Amount Spent on Site/Unit Expansion

Approximately how much money was spent on site/unit expansion at this RV park, campground or glamping park in the past 12 months?

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

mean: $153,000
median: $0



Amount Spent on Site/Unit Expansion	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
spent money on site/unit expansion	26%	28%	30%	22%	21%	26%	30%	34%
mean	$34,000	$163,000	$215,000	$119,000	$42,000	$162,000	$157,000	$313,000
median	$7,000	$0	$10,000	$0	$0	$0	$17,000	$20,000

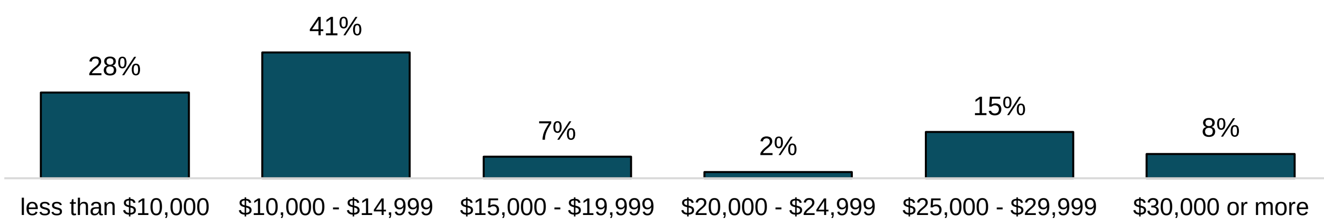
FINDINGS: Financials

Among those whose existing park added new full-hookup sites in the past 12 months, 69% reported the average cost per new full-hook up site added was under $15,000. On the other hand, those whose park/campground owner developed a new park/campground in the past 12 months, 60% reported the average cost per new full-hookup site developed was $15,000 or more, including 20% who reported $30,000 or more.

Average Cost for New Full-Hook Up Site: EXISTING Park/Campground*

If your existing RV park, campground or glamping park added new full-hookup sites in the past 12 months, what was the average cost per new full-hook site it added?

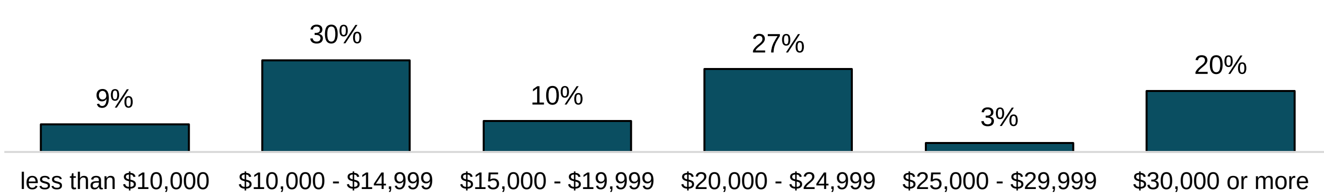
base (unweighted): 37 qualified respondents whose existing RV park/campground/glamping park added new full-hookup sites in the past 12 months answering



Average Cost for New Full-Hook Up Site: NEW Park/Campground

If your RV park, campground or glamping park owner developed a new RV park, campground or glamping park, in the past 12 months, what was the average cost per new full-hook site developed?

base (unweighted): 22 qualified respondents whose park owner developed a new RV park/campground/glamping park with full-hookup sites in the past 12 months answering



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 Benchmarking survey sponsored by ARVC in 2023.

Method

The survey sample of 4,823 represented the following two populations:

- 2,336 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
- 2,487 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	2,336	48%	2,336	193	8%	138	49%
non-members	2,487	52%	2,487	89	4%	142	51%
TOTAL	**4,823**	**100%**	**4,823**	**282**	**6%**	**280**	**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 jointly by ARVC and Readex.

On May 3, 2023 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 four 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). Additionally, Readex sent five follow-up emails in the name of "Readex on Behalf of ARVC" to help bolster response.

SURVEY DETAILS (continued)

Response

The survey was closed for tabulation on June 28, 2023, with 321 total responses—a 7% response rate. Results are based on the 282 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/glamping park for at least one year ("qualified" respondents). The other 39 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 282 qualified responses is ±5.6 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.