THE OUTDOOR HOSPITALITY

2024 INDUSTRY OUTLOOK REPORT

OHI® Advancing Outdoor Hospitality

BROUGHT TO YOU BY newbook

The Outlook is Bright.

Welcome to the 2024 Outdoor Hospitality Industry Outlook Report—one of OHI's premier annual research reports.

The 2024 Outdoor Hospitality Industry Outlook Report is the latest iteration in a long-line of reports of its kind going back decades—all of which you have access to on OHI.org—an exclusive benefit of OHI membership. These reports are created for your benefit and in an effort to maintain a current and ongoing understanding of the industry's landscape. OHI represents the interests and needs of private RV parks, campgrounds, and glamping parks and we strive to provide our members with exclusive access to continuing education, networking, business and marketing tools, member-only benefits and discounts, and advocacy. One way we can set you up for success each year is through our annual research projects like this one. So, I encourage you to dig in to this report, soak it all up, visit OHI.org to watch the accompanying webinar where our team along with the sponsor of the report, Newbook, analyze the data even further.

Knowledge is valuable, and the report you have in front of you is gold. Enjoy!

PAUL BAMBEI
PRESIDENT & CEO
OHI

OHI is a member-driven organization dedicated to serving and advancing the Outdoor Hospitality Industry. We provide the voice, tools, and training to advance the owners, operators, and staff of all the remarkable and unique Outdoor Hospitality businesses that shape the life-long memories of their adventuring customers.

OHI® Advancing Outdoor Hospitality

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RV parks, campgrounds, glamping, and everything in between.

PARK PROFILES

73%

OF PARKS SURVEYED HAVE BEEN IN OPERATION FOR AT LEAST 20 YEARS

PARK PROFILE

KEY FINDINGS

Park/campground longevity is common. 73% have been in operation for at least 20 years, including 36% that have been in operation for at least 50 years. The median report was 35 years.

Three in four (74%) are individual/independently owned small businesses.
Far fewer are corporate-owned (12%), a franchised brand (8%), membership or member-owned (3%), or have some other operational structure (6%).

The typical park/campground has 102 total rentable sites.
Median number of sites is higher among parks in the Northeast and parks that are corporate-owned.

Most parks/campgrounds (94%) have full hook up camping sites. Around two in five have water & electric only sites (44%) and around one in three have rustic/tent sites with no hook up (34%).

Parks report that the most typical length of stay is five nights. Parks located in the South were more likely to report a longer typical length of stay than parks in other regions, with a median of 13 nights.

Parks report that campers are typically booking four months in advance. This finding is in keeping with the results from the 2022 study. What is typical for each park can vary notably, with around one in three (39%) reporting that their typical booking is four weeks out or less and a similar proportion (39%) reporting that their typical is six months out or further.

74%
OF SURVEYED
RV PARKS AND CAMPGFROUNDS
REPORT BEING INDIVIDUAL OR
INDEPENDENTLY OWNED SMALL BUSINESSES

WHO WE'RE TALKING ABOUT

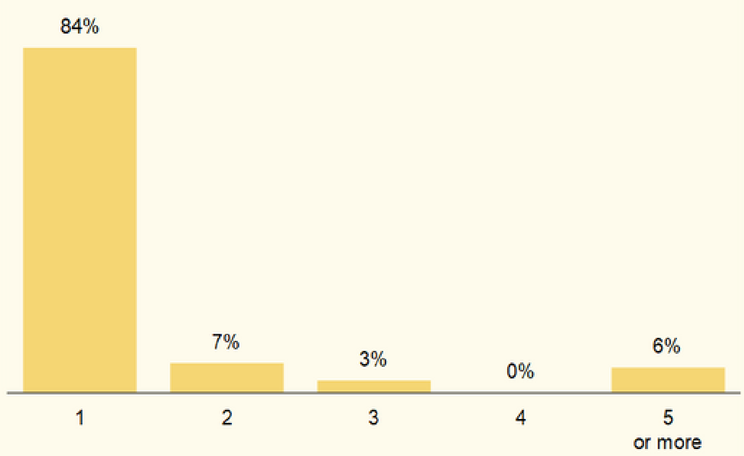
84% of respondents own, manage, operate, or have detailed knowledge about one privately-owned RV park, campground, or glamping park.

The other 16% 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.

Among those reporting that they are an owner, manager, operator or have detailed knowledge of a privately-owned outdoor hospitality business, the typical (median) respondent reports having that role or knowledge for 9 years. One in five (22%) report they have held that role or had detailed knowledge of the business for 20 years or more.

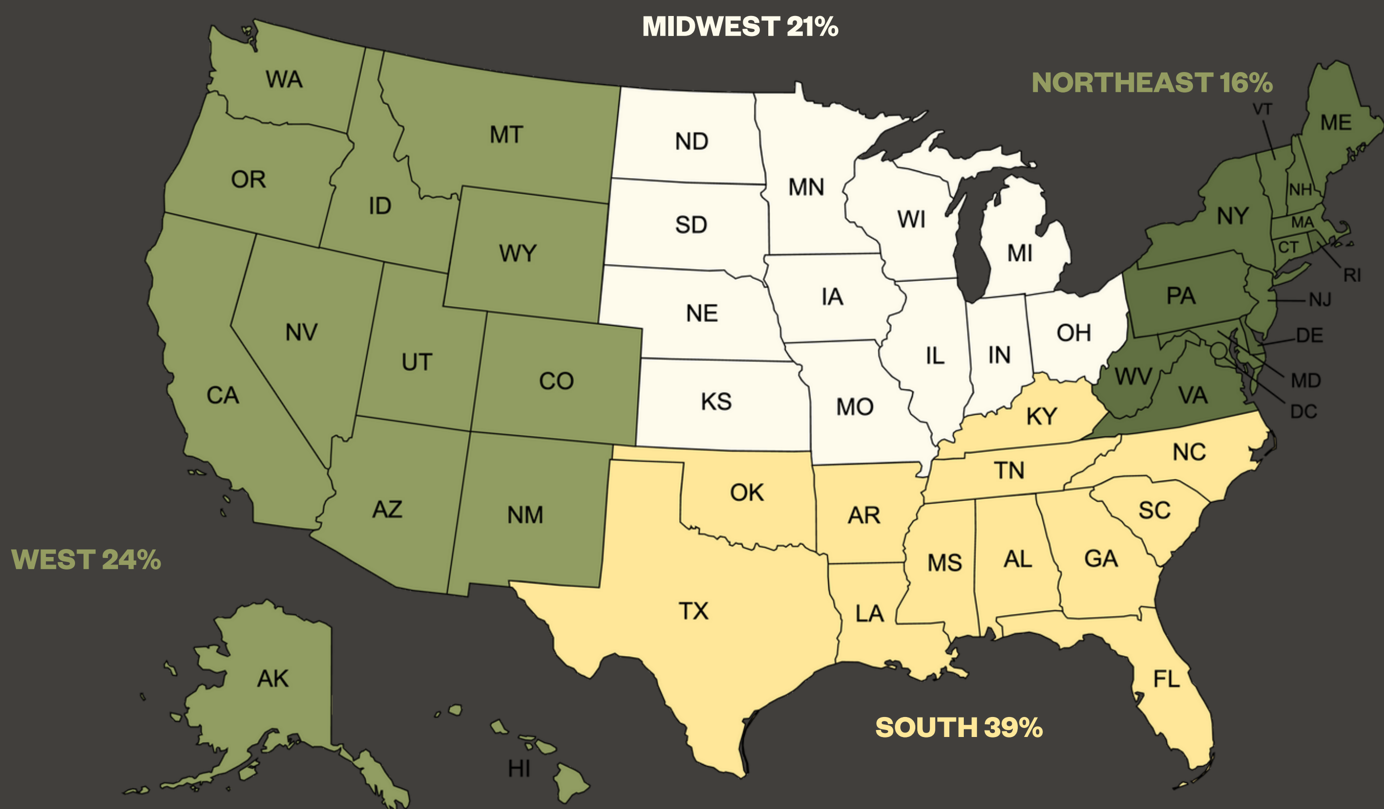
How many privately-owned RV parks, campgrounds or glamping parks does the outdoor hospitality business you own, manage, operate, or have detailed knowledge about have?

base (unweighted): 259 qualified respondents



WE ARE EVERYWHERE

The parks included in this year's report 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. Florida claims 11% of the reported locations while no other individual state accounts for more than 8%.



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

OPERATIONALLY, THERE'S A TREND

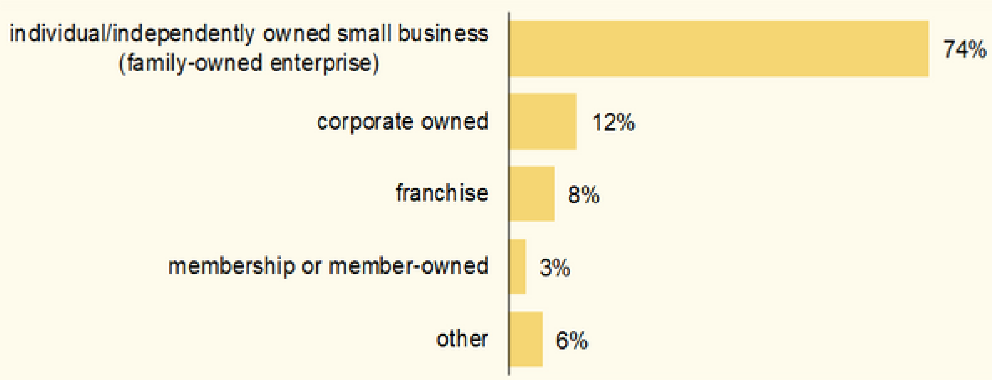
74% of parks are individual or independently owned small businesses, your mom and pop family owned parks.

12% are corporate-owned, 8% are a franchise, 3% are membership or member-owned, and 6% 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.

What is the operational structure of this park/campground?

base (unweighted): 259 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	79%	86%	71%	65%	88%	76%	66%	72%
corporate-owned	3%	8%	16%	16%	12%	5%	17%	18%
franchised brand	13%	4%	4%	14%	2%	9%	10%	7%
membership or member-owned	8%	0%	2%	2%	0%	5%	1%	3%
other	0%	4%	8%	7%	0%	8%	7%	4%

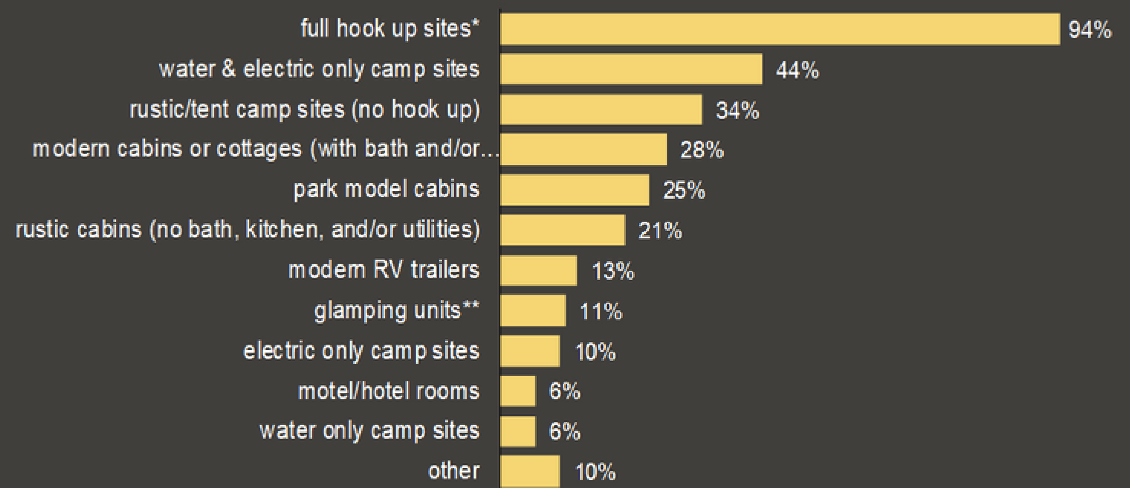
=50% - 64% =65% - 79% =80%+

ACCOMADATIONS AVAILABLE

The vast majority of reported parks (94%) have full hook up camping sites—including water, electric, and sewer. Two in five have water & electric only sites (44%) and around one in three have rustic/tent sites with no hook up (34%). 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.

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

base (unweighted): 259 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*	83%	88%	99%	98%	93%	96%	100%	97%	95%	91%	95%
water & electric only sites	69%	68%	30%	31%	47%	33%	51%	20%	51%	47%	47%
rustic/tent camp sites	44%	48%	25%	32%	33%	38%	47%	23%	27%	43%	42%
modern cabins or cottages (with bath and/or kitchen)	54%	26%	28%	13%	25%	35%	56%	19%	27%	30%	32%
park model cabins (rentals)	32%	15%	21%	36%	20%	31%	53%	12%	17%	27%	45%
rustic cabins (no bath, kitchen, and/or utilities)	41%	36%	8%	16%	22%	15%	38%	12%	14%	22%	39%
modern RV trailers	13%	18%	13%	7%	11%	22%	10%	9%	11%	14%	17%
glamping units**	17%	9%	12%	6%	11%	10%	13%	10%	12%	12%	8%
electric only camp sites	8%	27%	6%	4%	9%	14%	19%	3%	9%	10%	16%
motel/hotel rooms	5%	1%	7%	10%	7%	4%	0%	19%	3%	5%	4%
water only camp sites	17%	3%	6%	1%	7%	2%	0%	5%	8%	3%	6%
other	3%	13%	7%	18%	10%	8%	15%	15%	11%	5%	14%

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

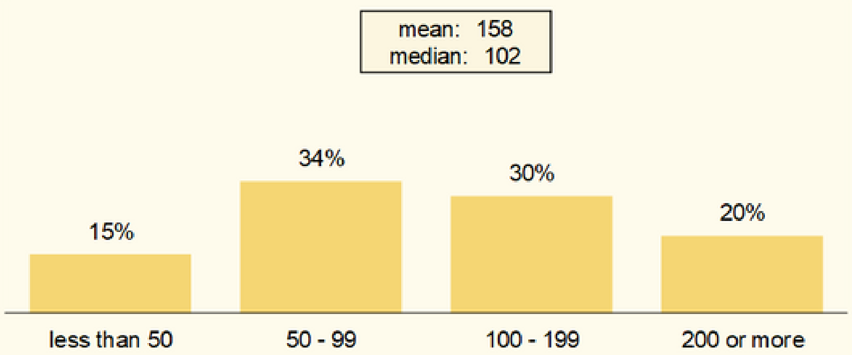
WHO WE'RE TALKING ABOUT

The typical (median) respondent reported their park has **102 total sites or units.**

The average report was higher at 158, influenced by a handful of large parks/campgrounds. Parks in the Northeast and those that are corporate-owned tend to be larger than others.

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

base (unweighted): 259 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	33%	29%	8%	25%	20%	29%	19%
100 - 199	27%	34%	35%	25%	26%	42%	38%
50 - 99	31%	34%	40%	27%	36%	14%	41%
less than 50	10%	4%	18%	22%	17%	14%	3%
mean	180	174	118	198	151	229	129
median	142	110	90	102	94	149	106

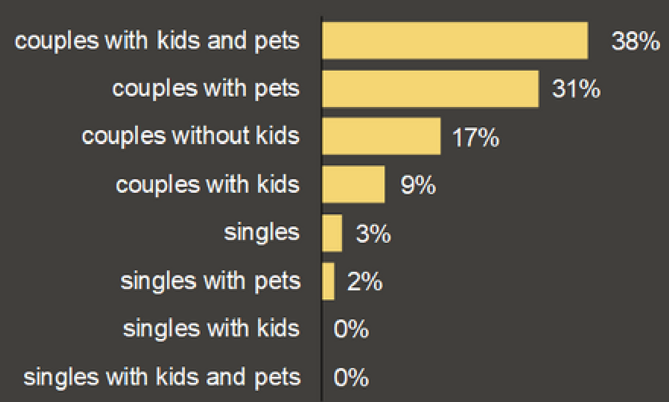
CAMPER DEMOGRAPHIC

Today's camper demographic is changing. There's no doubt about it. Understanding this camper demographic is key to success, so we recommend using this report, which surveys owners and operators, and comparing it with the most recent edition of OHI's Generational Camping Report, which surveys the actual camping consumer.

Couples with kids and pets (38%) are the most commonly reported camper demographic at RV parks/campgrounds/glamping parks, followed by couples with pets (31%) and couples without kids (17%). Far fewer respondents reported couples with kids (9%), single individuals (3%) or singles with pets (2%) to be their most typical demographic.
Some variation in typical camper demographic appears by region and size of park. Comparing this data to the 2023 Generational Camping Report, we see a majority of campers in the Millennial, Gen X and Z generations traveling with kids and friends, while Boomers are typically traveling with pets.

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

base (unweighted): 259 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	58%	47%	35%	21%	22%	29%	45%	52%
couples with pets	23%	23%	29%	45%	42%	46%	19%	16%
couples without kids	3%	17%	18%	23%	17%	14%	22%	14%
couples with kids	13%	11%	8%	4%	3%	6%	9%	16%
singles	0%	3%	6%	0%	3%	4%	1%	0%
singles with pets	0%	0%	1%	5%	3%	0%	3%	0%
singles with kids	0%	0%	1%	0%	3%	0%	0%	0%
singles with kids and pets	0%	0%	1%	0%	3%	0%	1%	0%

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

PLANNING IN ADVANCE

The typical (median) park reported that campers are typically booking **4 months in advance.**

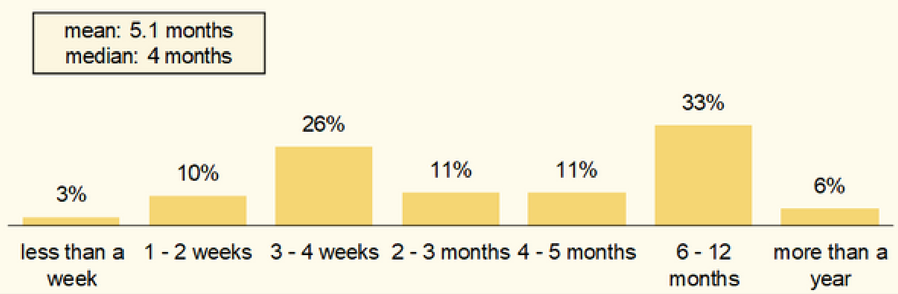
The average response is higher at 5.1 months, due to some respondents reporting that their typical booking is many months out.

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

Half of campers prefer to book their reservation completely online, according to the 2023 Generational Camping Report, so it's imperative for a campground to have a good user experience on their website and booking platform.

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

base (unweighted): 259 qualified respondents; those in each segment



Length of Typical Advanced Booking	# OF SITES/UNITS			
	<50	50-99	100-199	200+
less than a week	5%	4%	3%	1%
1 - 2 weeks	16%	9%	12%	4%
3 - 4 weeks	22%	39%	21%	17%
2 - 3 months	7%	14%	10%	12%
4 - 5 months	18%	5%	13%	12%
6 - 12 months	23%	25%	34%	50%
more than a year	8%	4%	7%	4%
mean (months)	4.7	4.1	5.3	6.4
median (months)	4	2	4	6

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

STAY A WHILE

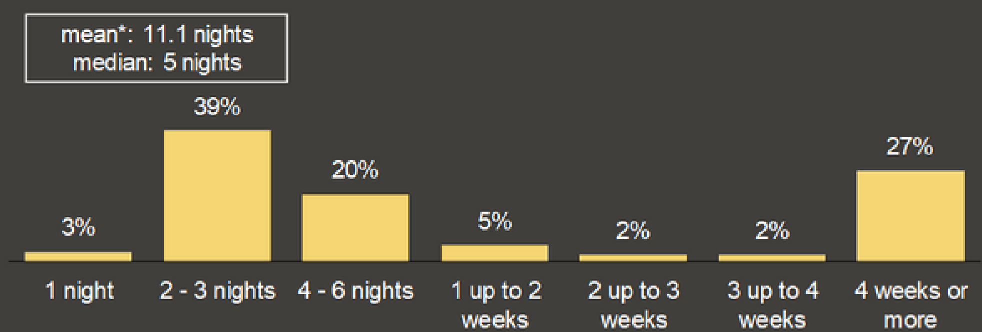
The typical (median) respondent reports that the most typical length of stay at their RV park/campground/glamping park is 5 nights. The average response is substantially higher at 11.1 nights, due to a significant proportion of "seasonal" park respondents reporting their typical length of stay as 4 weeks or more.

Differences in typical length of stay can be seen by region. For example, two in five respondents reporting on a park in the South (42%) report that their typical length of stay is 4 weeks or more, a substantially larger proportion than other regions, but this is also a region with a high number of parks offering seasonal options.

When asking the camping consumer in the 2023 Generational Camping Report how often they have camped in the last 12 months, the median respondent had a typical length of stay for 3 nights while camping, RVing, or "glamping".

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

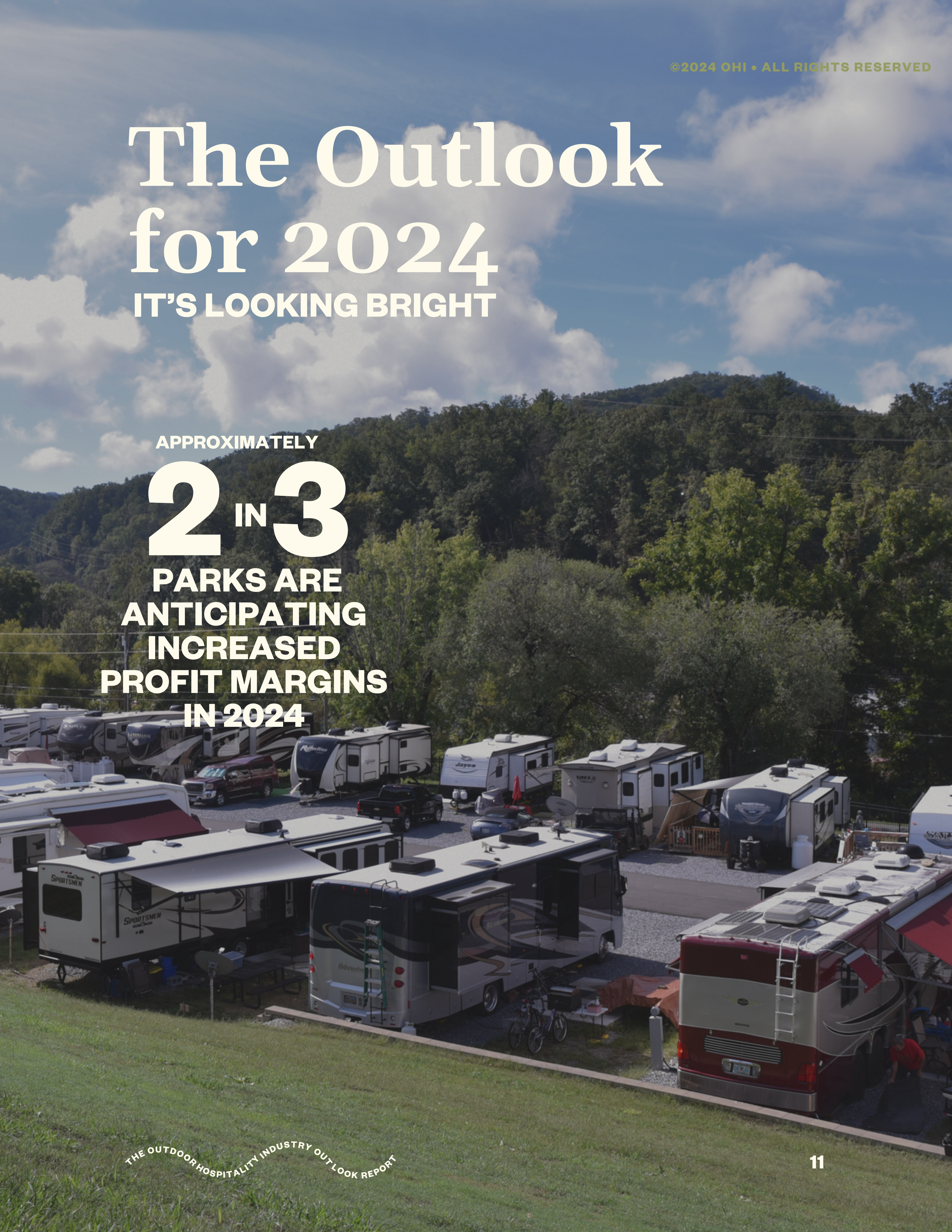
base (unweighted): 259 qualified respondents; those in each segment



**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	2%	3%	1%	5%
2 - 3 nights	49%	51%	26%	42%
4 - 6 nights	39%	21%	15%	17%
1 up to 2 weeks	2%	8%	7%	0%
2 up to 3 weeks	2%	0%	3%	1%
3 up to 4 weeks	0%	0%	3%	2%
4 weeks or more	7%	16%	42%	25%
mean	5.5	7.8	15.5	10.4
median	3	3	13	3

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



The Outlook for 2024

IT'S LOOKING BRIGHT

APPROXIMATELY

2 IN 3

PARKS ARE ANTICIPATING INCREASED PROFIT MARGINS IN 2024

THE OUTLOOK

KEY FINDINGS

Around two in three parks (68%) report that they are confident their park will show an increased profit margin in 2023. Only a small proportion report that they are not confident (7%). This is largely in keeping with the results from the 2022 study, in which 73% reported that they anticipated an increased profit margin in the coming year.

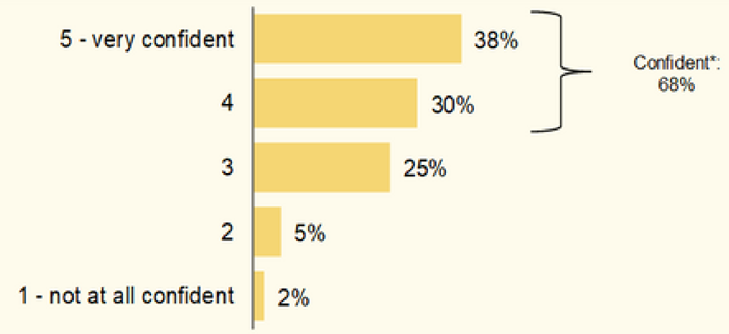
When considering barriers to the success of their park in 2024, respondents most commonly reported staffing issues (22%) as their greatest anticipated barrier. However, a similar proportion (26%) reported that they do not anticipate any barriers to their success in this year. Both of these findings are in keeping with the results from the 2022 study.

THE FUTURE

2 IN 3 PARKS ARE ANTICIPATING INCREASED PROFIT MARGINS IN 2024.

With campers staying at private campgrounds at continually increasing rates since the start of the COVID pandemic, profits at these outdoor hospitality businesses are mirroring this trend and owners/operators have high confidence the trend will continue in 2024.
Around two in three respondents (68%) reported that they are confident that their park will show an increased profit margin for 2024.
Some variation can be seen by region, with parks located in the Midwest being somewhat less likely to report being confident in an increased profit margin (61%) than those in other areas of the country. The Northeast shows the highest confidence at 73%.

What is your level of confidence that your RV park, campground, or glamping park will show an increased profit margin in 2024?
base (unweighted): 259 qualified respondents



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

What is your level of confidence that your RV park, campground, or glamping park will show an increased profit margin in 2024?
base (unweighted): 259 qualified respondents; those in each segment

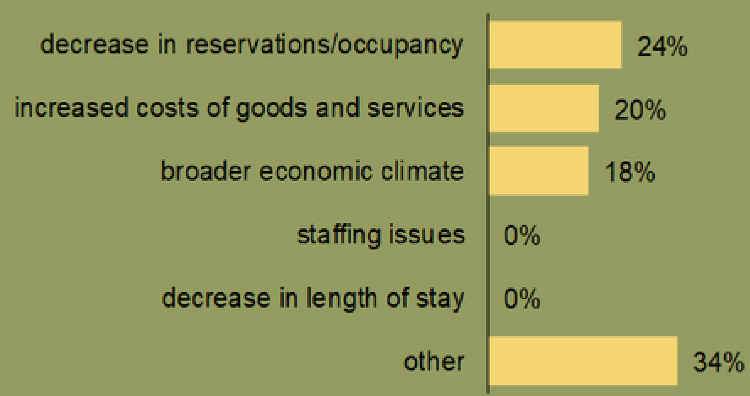
PROFIT MARGINS

Very few respondents reported that they were not confident that their park would show an increased profit margin for 2024.

For the 7% of respondents who said they lacked confidence they would see an increased profit margin in 2024, the most commonly reported reasons for that lack of confidence were decrease in reservations/occupancy (24%) and increased costs of goods and services (20%).

What is the greatest factor that is impacting your lack of confidence in an increased profit margin in 2024?

base (unweighted): 17 qualified respondents who are not confident that their park/campground will show an increased profit margin for 2024*



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

THE BARRIERS TO SUCCESS

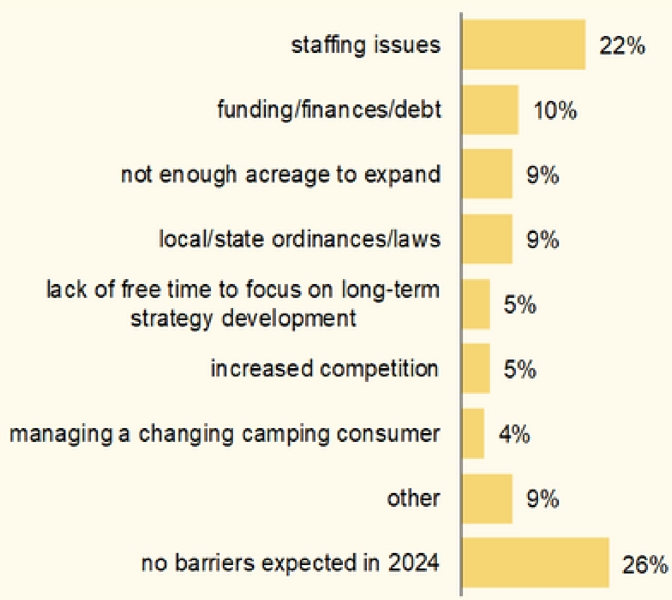
When asked about the greatest anticipated barrier to the success of their park in 2024, **1 in 5 respondents indicated staffing issues.**

Staffing issues continue to remain top of mind with owners/operators in the outdoor hospitality industry. When asked about the greatest anticipated barrier to the success of their park in 2024, one in five respondents (22%) indicated staffing issues. Funding/finances/debt (10%), not having enough acreage to expand (9%), and local/state ordinances/laws (9%) were all mentioned by about one in ten respondents. Managing the changing camping consumer came in at 4%.

One in four respondents (26%) expect no barriers to the success of their park in 2024, which is a slight increase from 25% in 2023, a positive sign for the season to come.

What do you anticipate will be the greatest barrier to the success of your RV park, campground, or glamping park in 2024?

base (unweighted): 259 qualified respondents



Improvements and Additions

67%

OF RESPONDENTS **IMPROVED THEIR** INFRASTRUCTURE (ROADS, CABLE, ELECTRIC, SEWER, ETC.) **WITHIN THE LAST YEAR**

IMPROVEMENTS AND ADDITIONS

KEY FINDINGS

Many parks/campgrounds made improvements in the last year. Two in three (67%) improved their infrastructure (roads, cable, electric, sewer, etc.) and 52% improved their existing amenities (pools, bath houses, etc.). One in four (28%) report having added amenities in the last year, a small decrease in proportion from 2022 (33%).

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 (56%).

In the past year, WiFi has again been the most commonly added amenity—around one in three (30%) of parks that added amenities in the last year added WiFi. WiFi was also the most commonly added amenity for parks in 2022, at 36%.

Expansion plans have remained fairly consistent year-over-year. The typical number of sites added in the last 12 months has remained consistent, with a median of 6 sites added (compared to 8 in 2022). Additionally, 26% of respondents indicated their park plans to expand their existing park/campground in the next 12 months, similar to the 28% reported in the year prior.

Plans for opening a new park have remained steady with 6% reporting a plan to do so in the next 12 months, similar to 2022 (5%). 13% report that there are plans to sell the existing park in the next 12 months (14% in 2022).

GETTING BETTER ALL THE TIME

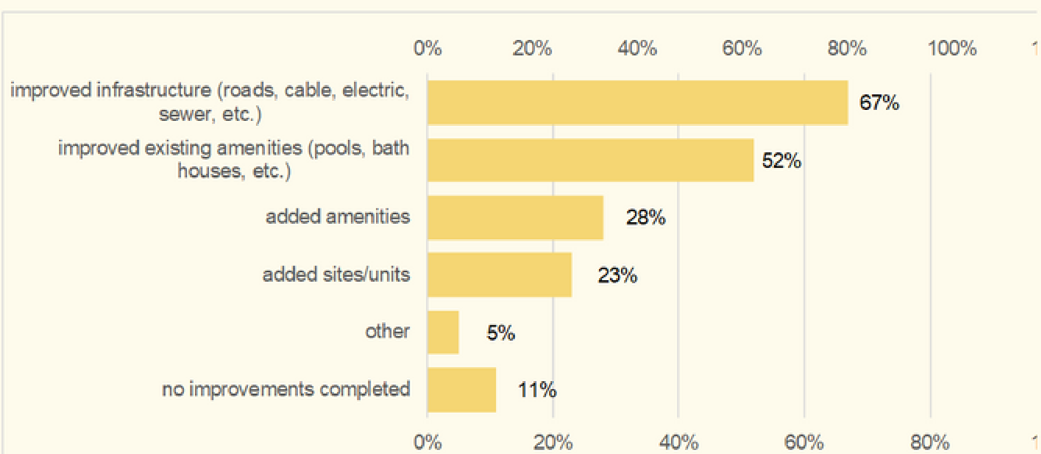
Owners/operators of outdoor hospitality businesses are taking that profit and putting it back into their businesses at record rates —making improvements to meet the needs of the changing camping consumer and ensure a **positive camping experience.**

A majority of respondents (67%) report infrastructure was improved at their RV park/campground/glamping park in past 12 months, 52% improved existing amenities, 28% added amenities, and 23% added sites/units to the park. 11% indicated that no improvements were completed at their park.

Looking at the data regionally, parks in the West were more likely to have improved infrastructure in the last 12 months (75%) when compared with other regions.

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

base (unweighted): 259 qualified respondents (multiple responses); those in each segment



Improvements Made	Northeast	Midwest	South	West
improved infrastructure	68%	65%	65%	75%
improved existing amenities	59%	52%	49%	54%
added amenities	31%	30%	29%	24%
added sites/units	19%	21%	31%	17%
other	3%	10%	1%	6%
no improvements completed	8%	13%	9%	11%

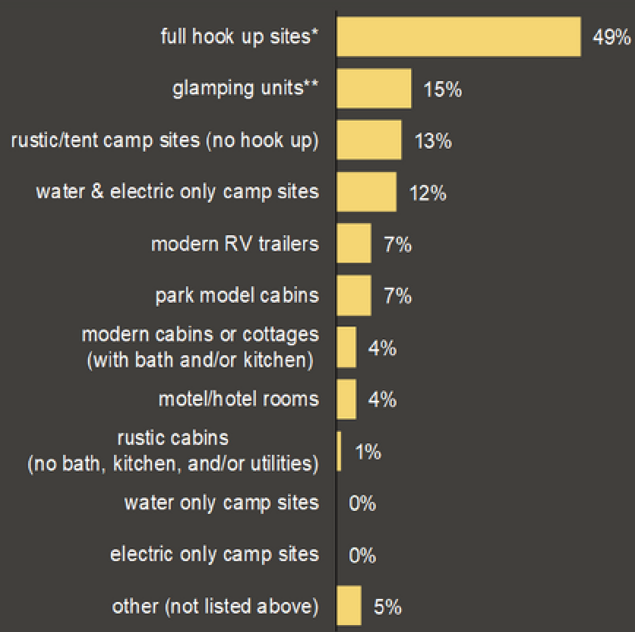
=30% - 49% =50% - 69% =70%+

IMPROVEMENTS AND ADDITIONS

6,000 TO 14,000 SITES ADDED IN THE PAST 12 MONTHS

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

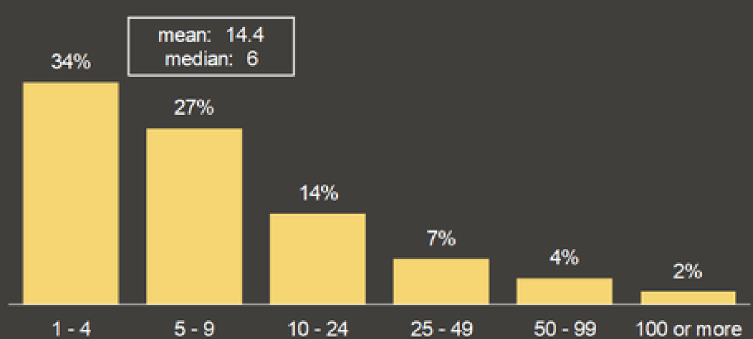
base (unweighted): 60 qualified respondents who added sites/units in the past 12 months (fill-in answers)



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

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

base (unweighted): 60 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			
	Northeast	Midwest	South	West
mean	10.0	24.4	12.1	12.5
median	11	12	6	4

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

Among respondents who report that their RV park/ campground/ glamping park has added sites/units in the past 12 months, half (49%) report adding at least one full hook up camping sites—including water, electric, and sewer.

At parks that added sites/units in the past year, the typical (median) respondent indicated their park added 6 new sites. The average report was more than double that at 14.4 influenced by a handful of locations adding large quantities of sites/units. Using this data, we can extrapolate conservatively that between 6,000 and 14,000 new sites were added in 2023.

Regionally, the Northeast and Midwest added the largest median number of sites per park at 11 and 12 respectively.

SWIMMING IS IN

48% of respondents report swimming pools among the most popular amenities at their park.

When asked to report the top three most popular amenities at their park, owners/operators most commonly mentioned swimming pools (48%), WiFi (38%), and laundry facilities (28%).

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 and typically are located in more seasonally warmer climates.

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	48%	57%	61%	43%	40%	15%	45%	54%	70%
WiFi	38%	31%	39%	37%	42%	55%	39%	37%	26%
laundry facilities	28%	18%	16%	33%	38%	37%	36%	21%	18%
restroom/shower facilities	23%	26%	23%	23%	22%	25%	26%	26%	15%
convenience/camp store	18%	39%	19%	15%	8%	3%	23%	16%	24%
pet area (fenced)	12%	5%	5%	19%	12%	19%	15%	11%	5%
playground	10%	8%	21%	4%	13%	2%	5%	15%	18%
restaurant/snack bar	10%	10%	8%	8%	14%	16%	5%	5%	18%
music (live entertainment, karaoke, DJ, etc.)	9%	18%	14%	3%	8%	2%	7%	8%	18%
hot tub/sauna	8%	3%	3%	8%	16%	2%	4%	16%	6%
recreation hall	7%	2%	7%	11%	4%	13%	3%	10%	5%
propane sales	7%	8%	10%	7%	4%	12%	12%	3%	1%
boat rentals (motor boats, canoes, kayaks, etc.)	6%	13%	9%	6%	1%	15%	4%	6%	5%
club/meeting room	5%	0%	1%	8%	6%	2%	3%	11%	3%
covered pavilion area	5%	2%	4%	7%	2%	8%	5%	4%	1%
marina	4%	2%	1%	6%	5%	6%	5%	4%	1%
arcade/game room	4%	11%	3%	1%	6%	0%	1%	5%	11%
TV: cable	4%	3%	1%	7%	2%	2%	5%	3%	5%
golf cart rentals	4%	8%	1%	5%	0%	0%	4%	4%	5%
other	20%	18%	32%	15%	22%	19%	22%	21%	18%

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

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

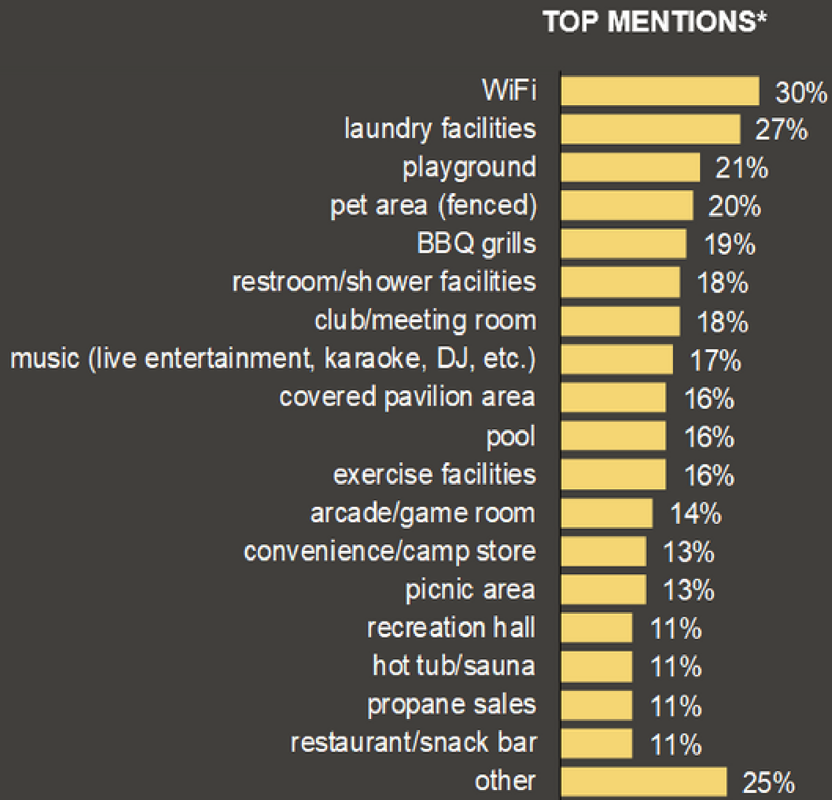
WIFI, LAUNDRY, & PLAYGROUNDS

THE ESSENTIALS

Among parks that added amenities in the past 12 months, the most commonly reported amenity added was WiFi (30%), followed by laundry facilities (27%). NOTE: For the purposes of this report we have historically kept WiFi in the "amenity" category, but WiFi is seen by most in the industry now as a "utility" based on the needs of the changing camping consumer.

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

base (unweighted): 81 qualified respondents who added amenities in the past 12 months



**those selected by at least 10% of the total*

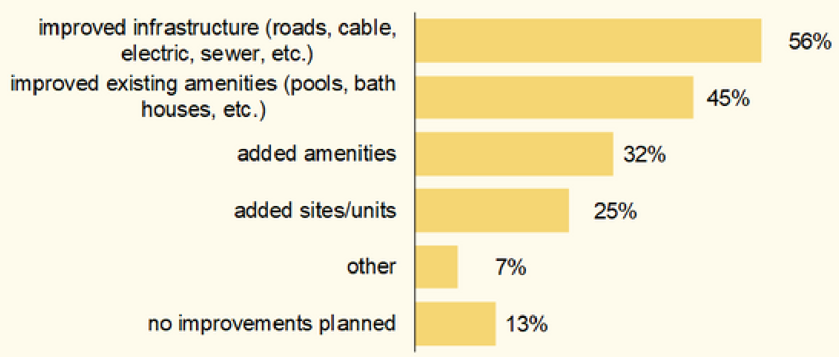
BUILD IT BETTER

56% of respondents plan to make improvements to their park in 2024.

2024 should continue to be a big year for improvements. When reporting planned improvements for the next 12 months, improving infrastructure is again emphasized, with more than half of respondents (56%) indicating that their RV park/campground/glamping park is planning to do so. One in ten (13%) 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, with parks in the Northeast planning more infrastructure and existing amenity improvements and parks in the Midwest and South regions planning to add more amenities and sites/units.

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

base (unweighted): 259qualified respondents (multiple responses); those in each segment



Planned Improvements	Northeast	Midwest	South	West
improve infrastructure	63%	60%	53%	54%
improve existing amenities	51%	51%	40%	44%
add amenities	32%	38%	36%	21%
add sites/units	20%	30%	31%	15%
other	2%	3%	4%	20%
no improvements planned	8%	11%	15%	16%

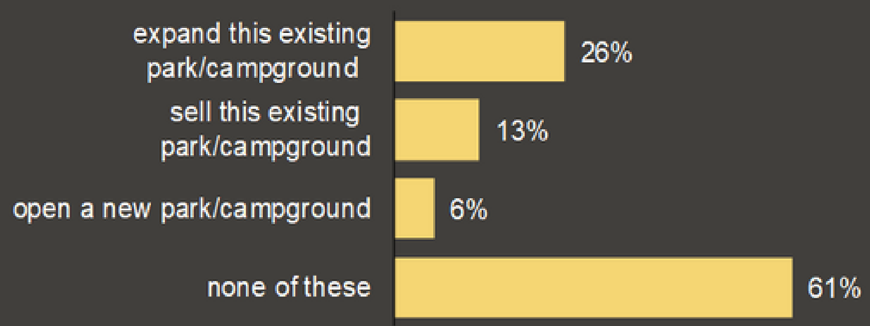
=30% - 49% =50% - 69% =70%+

WHAT'S ON YOUR TO-DO LIST?

One in four respondents indicate that there are plans to expand their existing outdoor hospitality business in the next 12 months (26%), while 6% report that there are plans to open a new location. Parks in the South, on average, were more likely to report plans to expand the existing business in the next 12 months than those in other regions.

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): 259 qualified respondents (multiple answers); those in each segment



Future Plans	Northeast	Midwest	South	West
expand this existing park/campground	21%	21%	33%	24%
sell this existing park/campground	16%	23%	8%	11%
open a new park/campground	0%	0%	17%	0%

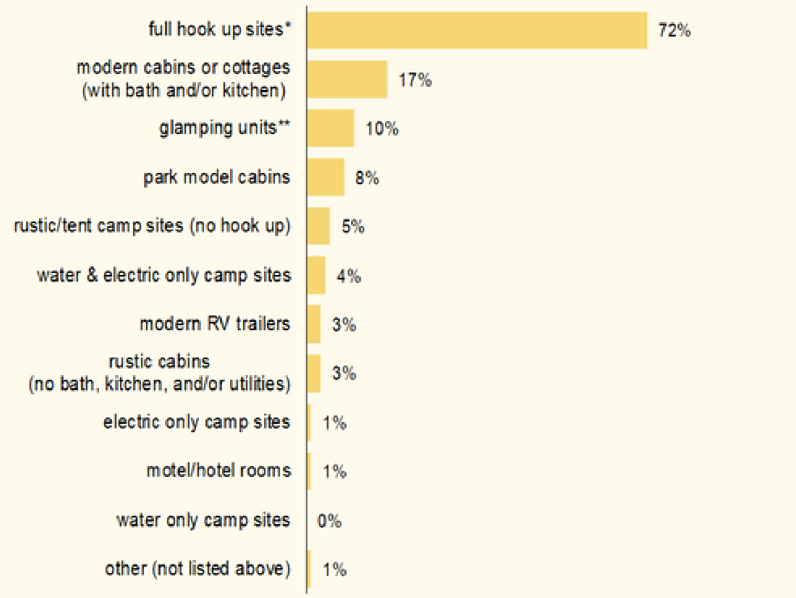
=10% - 19% =20% - 39% =40%+

3 in 4 are planning to add sites in 2024.

Among parks planning to expand in the next 12 months, around three in four (72%) report that they are planning to add at least one full hook up camp site. The typical (median) park is planning to add 25 sites/units. The average is much higher at 41.4, influenced by a handful of parks planning to add large quantities of sites/units.

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

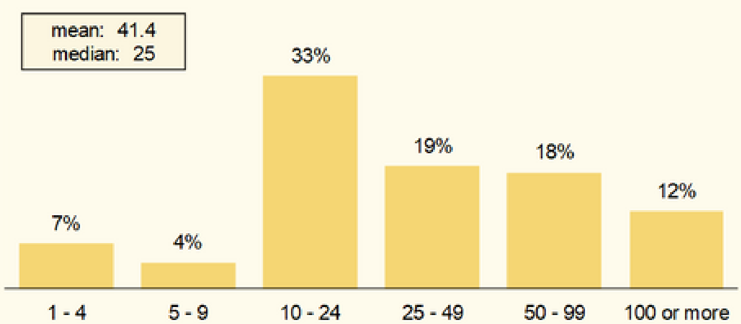
base (unweighted): 61 qualified respondents who plan to expand this existing park/campground in the next 12 months (fill-in answers)



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

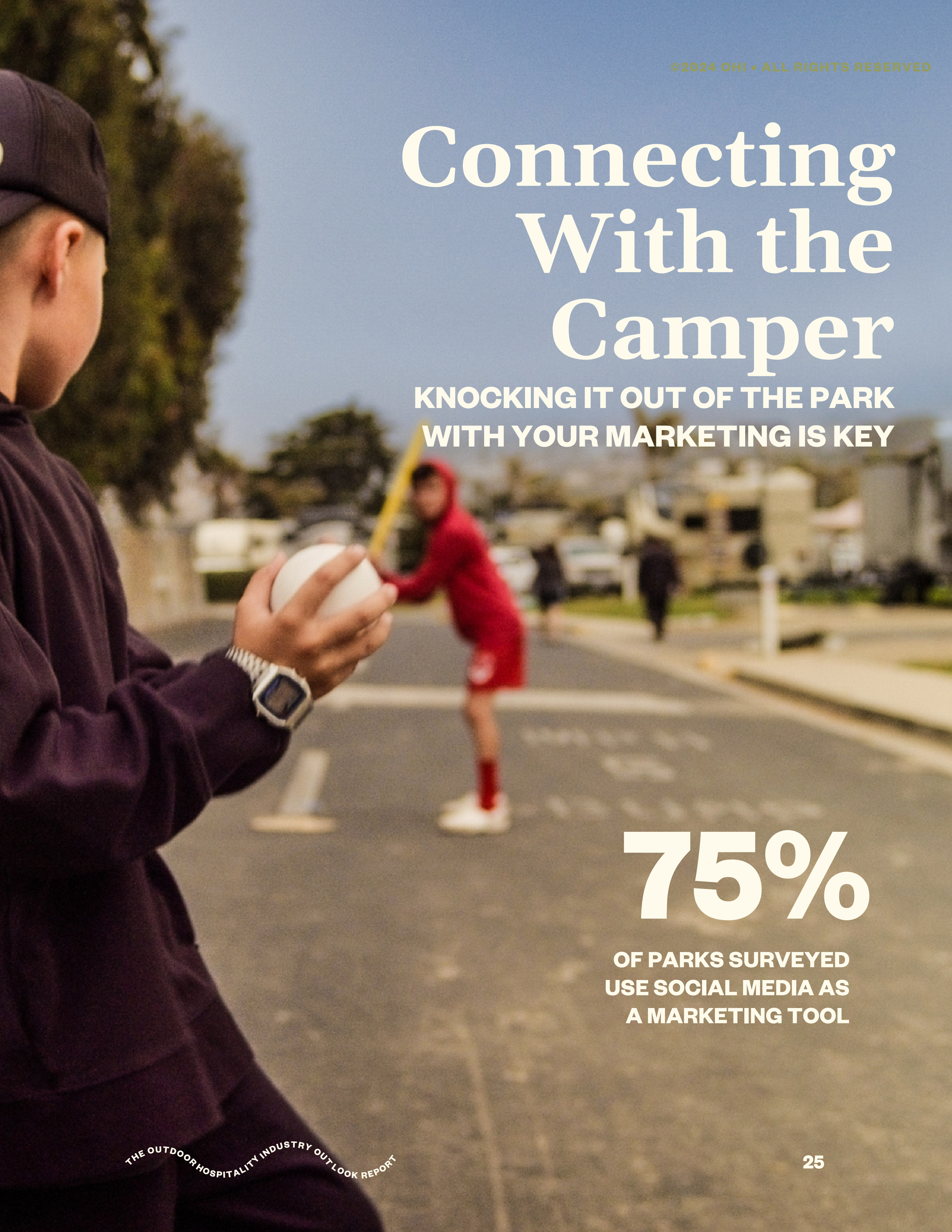
How many sites/units are planned to be added to this existing RV park, campground or glamping park in the next 12 months?

base (unweighted): 61 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			
	Northeast	Midwest	South	West
mean	13.9	48.8	51.9	22.1
median	12	44	40	20

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



Connecting With the Camper

KNOCKING IT OUT OF THE PARK WITH YOUR MARKETING IS KEY

75%

OF PARKS SURVEYED USE SOCIAL MEDIA AS A MARKETING TOOL

CONNECTING WITH THE CAMPER

KEY FINDINGS

The majority of parks engage in at least one type of marketing for their park—only 9% of respondents indicated that their park does not engage in marketing. Most commonly, three in four parks (75%) 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 three parks (34%) currently use an OTA to distribute site inventory, an increase from 24% in 2022. In general, smaller parks were more likely to report currently using an OTA than larger parks.

A majority of parks (71%) report that they currently use a Campground Management System. Respondents most commonly reported improved operational processes (38%) and increased online bookings (34%) as the biggest advantages for using a Campground Management System.

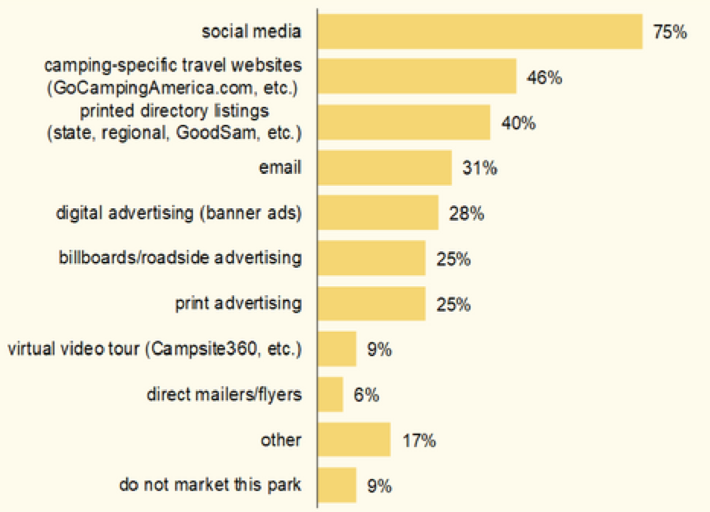
One in four respondents (25%) report that their park is planning on either implementing or upgrading a Campground Management System in the next 12 months.

MARKETING BY SIZE OF PARK

Around three in four respondents (75%) report they market their park on social media. Around two in five market on camping-specific travel websites (46%) and/or printed directory listings (40%). About one in ten (9%) report that they do not engage in marketing for their park.

Differences can be seen in the prevalence of types of marketing used by size of 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 park, when compared with parks of more than 100 sites/units.

How are you currently marketing this RV park, campground or glamping park?
base (unweighted): 259 qualified respondents (multiple answers)



How are you currently marketing this RV park, campground or glamping park?
base (unweighted): 259 qualified respondents (multiple answers); those in each segment

Marketing Used	# OF SITES/UNITS			
	<50	50-99	100-199	200+
social media	56%	72%	83%	81%
camping-specific travel websites (GoCampingAmerica.com, etc.)	30%	47%	51%	47%
printed directory listings (state, regional, GoodSam, etc.)	17%	42%	41%	55%
email	15%	21%	40%	46%
digital advertising (banner ads)	12%	22%	29%	51%
billboards/roadside advertising	22%	24%	24%	30%
print advertising	13%	26%	22%	37%
virtual video tour (Campsite360, etc.)	3%	9%	7%	15%
direct mailers/flyers	0%	2%	6%	16%
other	23%	15%	18%	12%
do not market this RV park, campground or glamping park	23%	11%	3%	4%

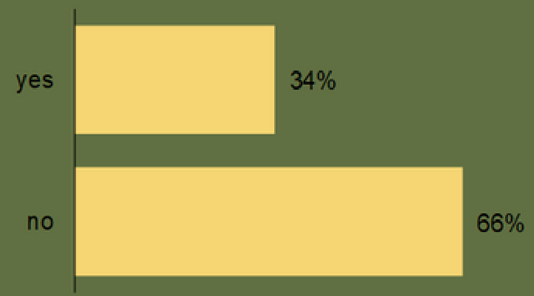
=30% - 49%   =50% - 69%   =70%+

WHO USES AN OTA?

Just more than a third (34%) of respondents report that they currently use an Online Travel Agency (OTA) to distribute site inventory for their park. Of those respondents who do not currently use an OTA, around two in three (66%) report that they are not at all likely to begin using one in the next 12 months. A small proportion, (5%) report that they are likely to begin working with an OTA in the next year.

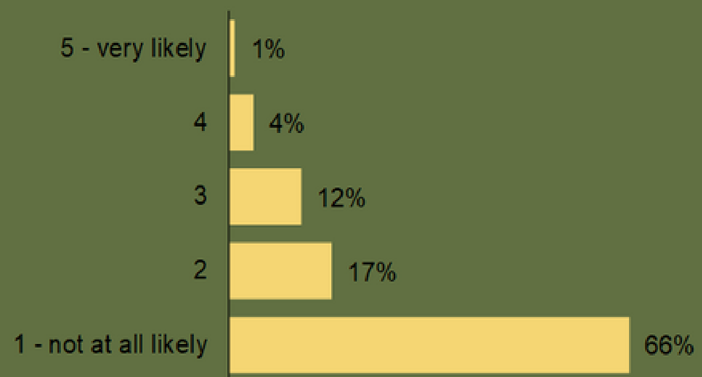
Do you currently use an Online Travel Agency or OTA (Spot2Nite, BookOutdoors, AirBnB, Campspot, etc.) to distribute your site inventory for this RV park, campground or glamping park?

base (unweighted): 259 qualified respondents



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

base (unweighted): 176 qualified respondents who do not currently use an Online Travel Agency



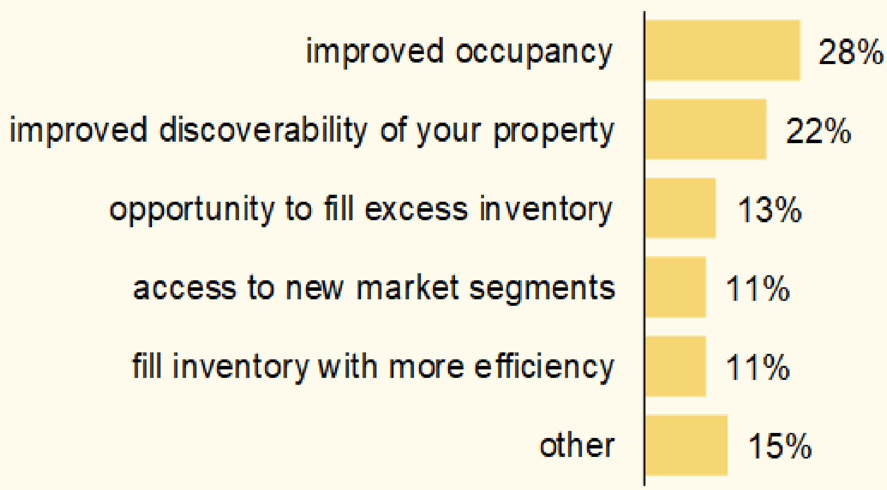
**Likely = rating of 4 or 5 on a 5-point scale where 5=very likely and 1=not at all likely.*

THE BIGGEST ADVANTAGE OF AN OTA?

Of those respondents currently using an OTA, just over one in four (28%) report that the biggest advantage is **improved occupancy and improved discoverability by the camping consumer** (22%).

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

base (unweighted): 83 qualified respondents who currently use an Online Travel Agency

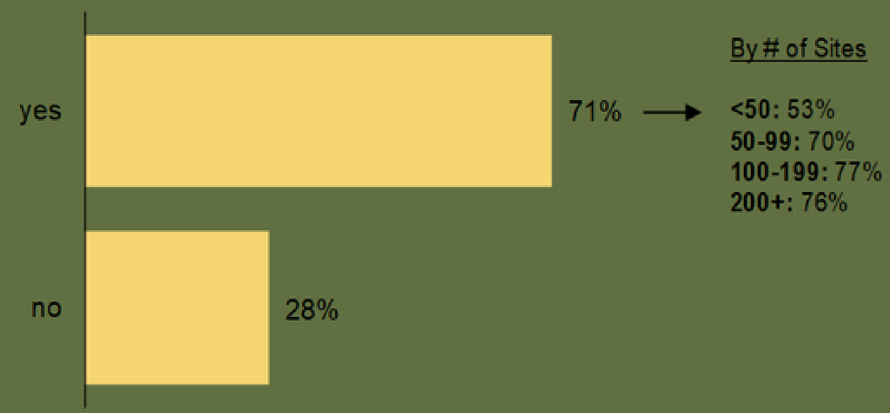


7 IN 10 PARKS

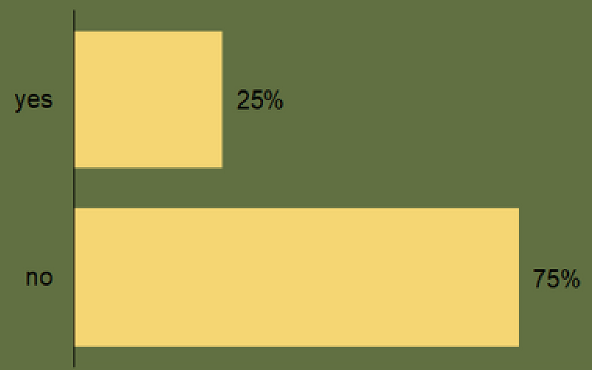
CURRENTLY USE A CAMPGROUND MANAGEMENT SYSTEM

Seven in ten respondents (71%) report that their park currently uses a Campground Management System. Parks with fewer than 50 sites are less likely to report using a Campground Management System, compared to larger parks. One in four respondents (25%) report that their park is planning on either implementing or upgrading a Campground Management System in the next 12 months.

Does your RV park, campground or glamping park currently use a Campground Management System?
base (unweighted): 259 qualified respondents, those in each segment



Does your RV park, campground or glamping park plan on either implementing or upgrading a Campground Management System in the next 12 months?
base (unweighted): 259 qualified respondents

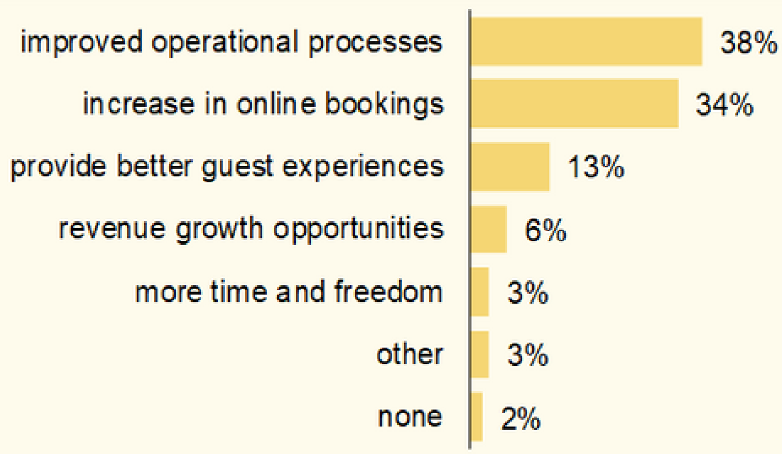


THE BENEFITS OF A CMS

Among those whose parks are using a Campground Management System, two in four (38%) report that the biggest benefit is improved operational processes and **34% report their CMS has brought them increased online bookings.**

What do you see as the biggest benefit of using a Campground Management System for your park?

base (unweighted): 190 qualified respondents whose RV park, Campground or glamping park currently uses a Campground Management System



The Outdoor Hospitality Industry Outlook is Bright.

Whether you are the owner/operator of an existing park or multiple parks, or maybe you are looking to enter the outdoor hospitality industry by purchasing an existing park or building a new one, it is imperative you see the big picture. Once you've read this year's report, we encourage you to dive deeper into the data available by downloading the many resources available to OHI members on OHI.org.

Each year, OHI publishes four major research reports for the outdoor hospitality industry and all past reports are also available for download.

Have questions? Reach out to us any time at ohi-membership@ohi.org.

OHI® Advancing Outdoor Hospitality

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phone: 303-681-0401
hours: M-F 8am-5pm MT

SURVEY DETAILS

Purpose

OHI represents the interests and needs of private RV parks, campgrounds, and glamping parks. OHI 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 OHI in 2023.

Method

The survey sample of 4,186 represented the following two populations:

- 2,353 emailable members of OHI 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
- 1,833 emailable non-members in the OHI 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 (OHI 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	
OHI members	2,353	56%	2,353	213	9%	145	56%
non-members	1,833	44%	1,833	46	3%	115	44%
TOTAL	4,186	100%	4,186	259	6%	260	100%

The survey was designed jointly by OHI 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 Readex.

On August 24, 2023, Readex contacted all sample members via an email on behalf of OHI, 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.

Readex sent three reminder emails prior to the survey closing to those with deliverable email addresses who had not yet responded.

METHODOLOGY

The survey sample of 4,186 represented the following two populations:

- 2,353 OHI-member parks located in the United States at unique parks/campgrounds (one record per park/campground location), and excluding opt-outs and known undeliverable emails
- 1,833 non-members in the OHI database 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 (OHI membership status) to optimize statistical precision for anticipated segment-level analyses.

Responses have been weighted in tabulation to accurately reflect true population proportions.

The survey, sent by OHI's research partner, Readex Research, received a 7% response rate. Results analyzed by Readex Research are based on the 259 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 margin of error (maximum sampling error for percentages at the 95% confidence level) based on all 259 qualified responses is ±5.9 percentage points.

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.