The Data Dig

Insights on campsites
powered by Campspot

August 2024

Brought to you by:

CAMPSPOT

Developed in partnership with:

OHI® Advancing Outdoor Hospitality

Welcome to The Data Dig

As we transition from the bustling summer season into the golden hues of autumn, we want to take a moment to reflect on the trends we've observed and the opportunities ahead for our industry. First and foremost, we're seeing a promising uptick in future reservations—a clear indicator that campers are eager to plan their next adventure. With this momentum, now is the perfect time to load your rates for the upcoming year. Ensuring your inventory is ready and accessible will allow you to capitalize on this growing demand.

As we analyze the data from this summer, it's evident that certain trends have carried through into August. We've noticed a shift in the market: while overall occupancy rates were lower compared to last year, we saw an increase in both Average Daily Rate (ADR) and Revenue Per Available Site (RevPAS). This suggests that while fewer campers were on the ground, those who were present were willing to spend more on their experiences.

August was a month of resilience. It started with occupancy trailing 4% behind last year but closed the gap to just -2% by month's end. This improvement is a testament to the agility and adaptability of our campground partners, who continue to find innovative ways to attract and retain guests.

However, the Labor Day weekend presented some challenges, with lower occupancy, ADR, and RevPAS compared to last year. It's a reminder that even in times of growth, our industry must remain vigilant and ready to adapt to the evolving landscape. A standout performance comes from the Northeast states, which have managed to secure top rankings in RevPAS, driven by exceptionally high ADR. This region's success underscores the importance of strategic pricing and value-driven offerings that resonate with today's campers.

Campspot and OHI remain committed to providing you with the tools and insights needed to navigate these trends and maximize your potential. As you prepare for the rest of the year ahead, know that we're here to support you every step of the way. Thank you for your continued partnership.

Warm regards,

Michael Scheinman, Campspot CEO

David Basler, OHI Chief Strategy Officer

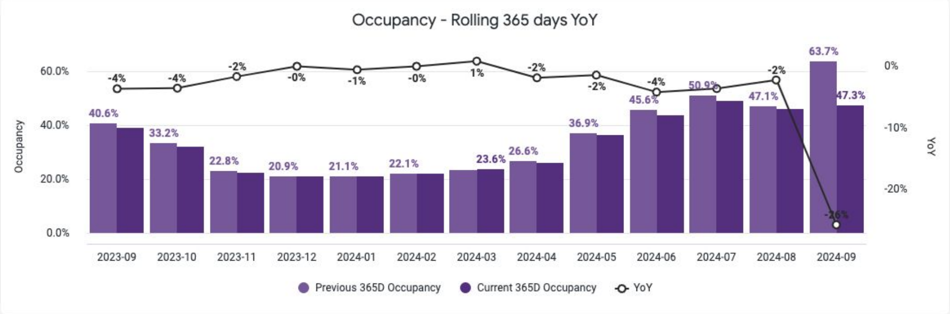
Methodology

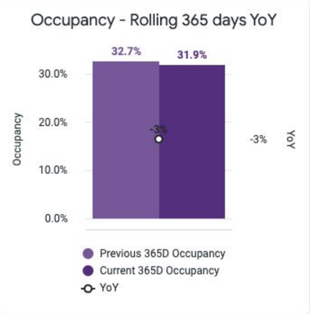
- Anonymized, aggregated data from Campspot platform
- Unless otherwise noted, all historical data based on all active campgrounds at time of comparison and updated September 3, 2024
- Forward-looking data is based on campgrounds active prior to January 2023 and data updated September 1, 2024

Important Note

- We have been piloting this report over the past year, and making adjustments based on user feedback. Starting in August 2024, we are rolling it out more broadly, and have incorporated some important changes to our data collection and analysis approach that we think makes the information more meaningful. For that reason, you may see differences compared to previous versions of the report.
- Two notable changes we've made are:
  - We have excluded a small number of customers that underwent massive expansions YoY and therefore skewed the overall market average
  - We have limited the data to only those customers with active sites in both current and prior period
- As always, we note that this report reflects a representative sample but should not be considered a definitive view of market performance. Please use it among other tools at your disposal to understand trends and key drivers of those trends.

Past Occupancy by Month





- We have seen a much lower campground occupancy rate this summer compared to last year.
- August started at -4% occupancy versus last year but caught up and ended at -2% versus last year.

Advancing Outdoor Hospitality

Field Notes

In partnership with OHI

"Our occupancy rate remained roughly the same for the 2024 season vs. the 2023 season. Our highest occupancy rate was shown in July/early August, with an influx of fall (September 2024) campers. Several of our campers arrived for Labor Day weekend and are scheduled to stay through Columbus Day weekend in October, to finish out our season with us. We have noticed, since the pandemic in 2020, families are able to work remotely and spend more time at the campground throughout the summer months than they were in previous years."

Ashley Migliaccio,
OHI member
General Manager of Hidden Acres Family Campground in Preston, CT

More thoughts on.... Past Occupancy by Month

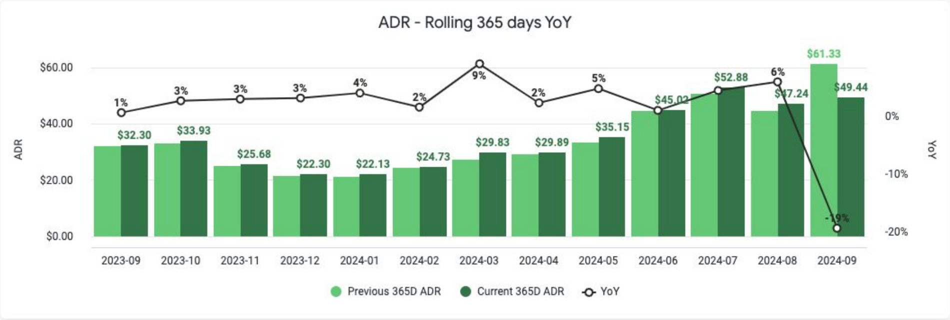
"Cherry Hill Park (CHP) has also seen lower occupancy this year. Through August, Camper nights are down 12% for the year, with the biggest losses coming in the spring and early summer. Rental nights went the other way and are up slightly, 3%. Though for some reason, July was down significantly. Despite that, rental numbers are up."

Mike Gurevich
OHI member
Owner of Cherry Hill Park in College Park, MD

"We are seeing a mixed bag of occupancy and revenue depending on geography. Weather certainly played a big part in our early season occupancy especially in the Midwest. With prolonged cold weather, we saw a soft Memorial Day weekend in the Midwest, but a very strong Memorial Day weekend in the south."

Sean Vidrine
OHI members in Louisiana, Mississippi, Texas, Illinois, Indiana, Iowa and Pennsylvania
Owner of Four Points RV Resort

Past ADR by Month



- Inflation and rising costs have impacted ADR, with May, July and August seeing the biggest increase at 5-6% year over year.
- We saw ADR drop as the month of August progressed, but still had the strongest increase YoY.
- Looking at the average daily rate over the last 365 days, we saw a 3% increase versus last year.

Advancing Outdoor Hospitality

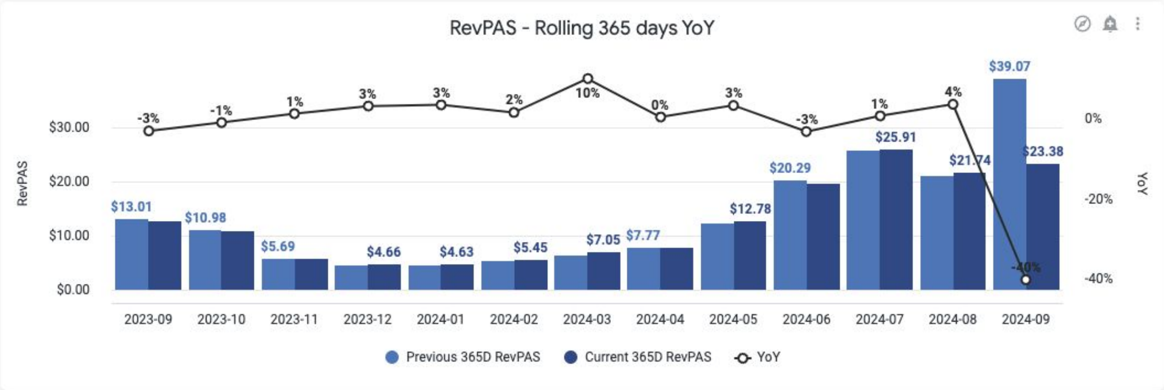
Field Notes

In partnership with OHI

"Our ADR has also increased, and to the detriment of occupancy. We use dynamic pricing not just to raise revenue, but also to ease the pressure on times when we are over 90% occupancy. So, our lower occupancy rate has definitely been impacted for those weekends, but we also suspect higher rates in general has probably cut into occupancy even when we are not filling up."

Mike Gurevich,
OHI member
Owner of Cherry Hill Park in College Park, MD

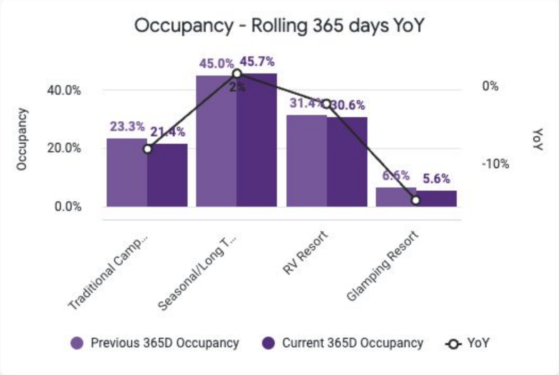
Past RevPAS by Month

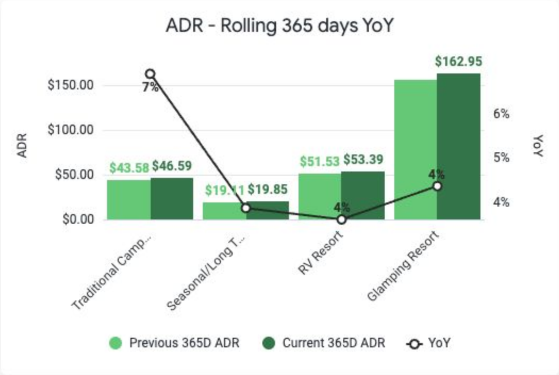


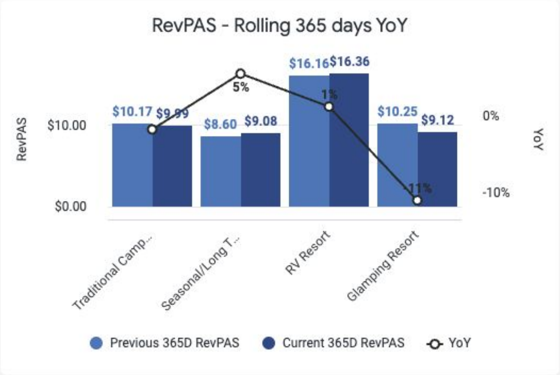
- Stronger ADR helped keeping a positive RevPAS most of the year, with only June showing overall decline year over year.
- August started with a negative RevPAS YoY, but finished 3% higher.
- Looking at the rolling 365 days, RevPAS is fairly flat, hitting $11.71 overall.

- **RevPAS** (or Revenue per Available Site) is calculated by multiplying the ADR by the occupancy rate.

Past Performance Indicators by Campground Category



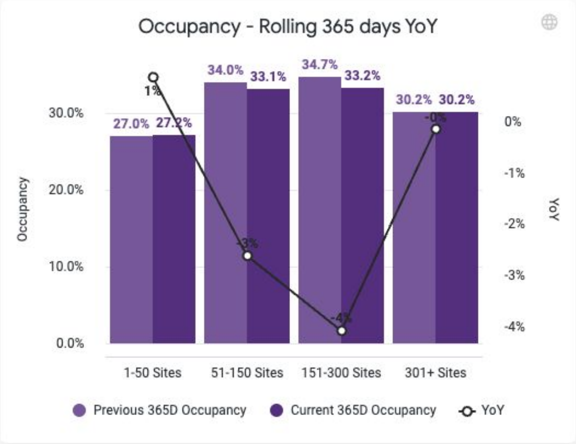


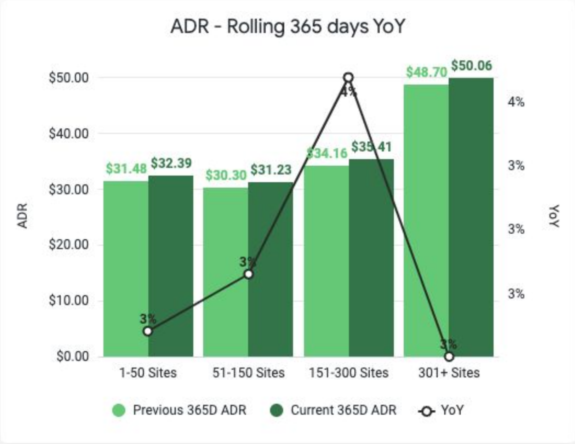


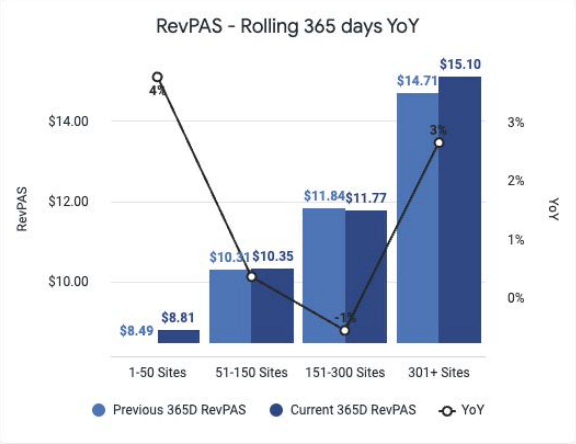
- In the last 365 days, stronger ADR came at the cost of Occupancy.
- Seasonal campgrounds are still seeing the strongest RevPAS growth.
- Glamping resorts have seen the biggest decline with -11% YoY.

- **RV Resorts**: Parks with at least 3 key resort amenities.
- **Traditional Campgrounds**: Parks that have less than 70% seasonal RV reservations.
- **Seasonal/Long Term Campgrounds**: Parks with more than 70% of their reservations being seasonal.
- **Glamping Resorts**: Parks with over 50% of their inventory as lodging.

Past Performance Indicators by Campground Size



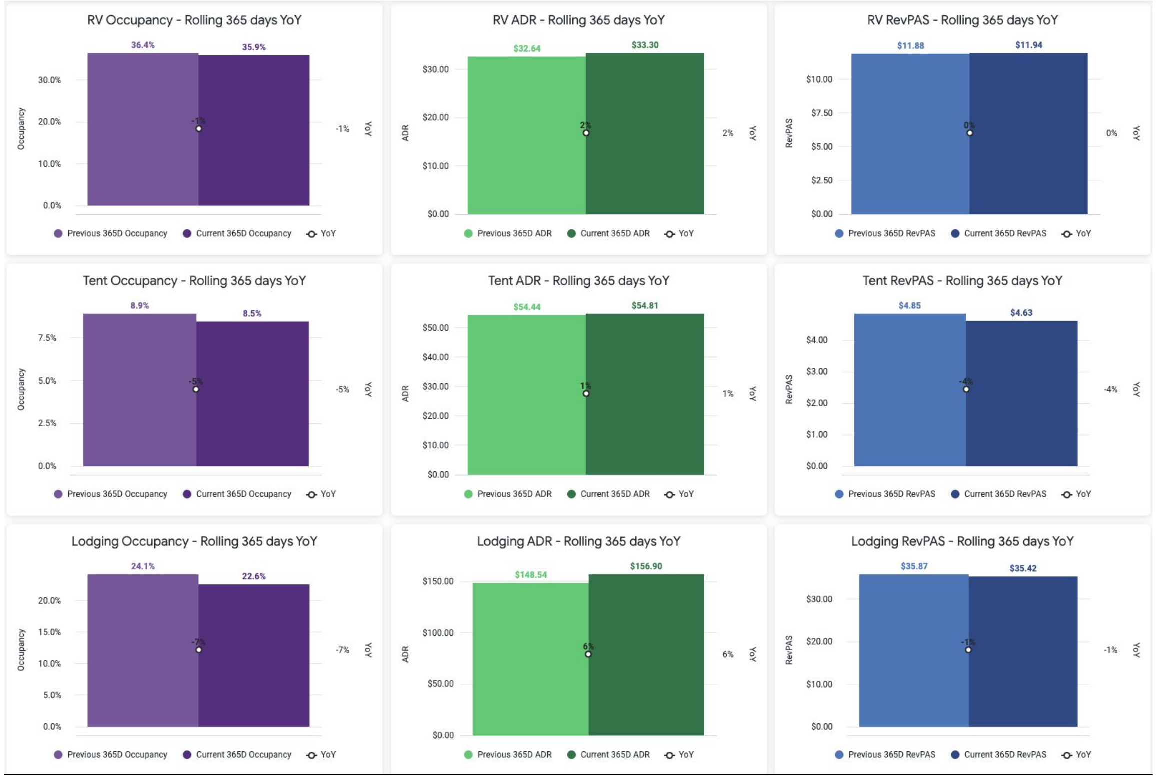




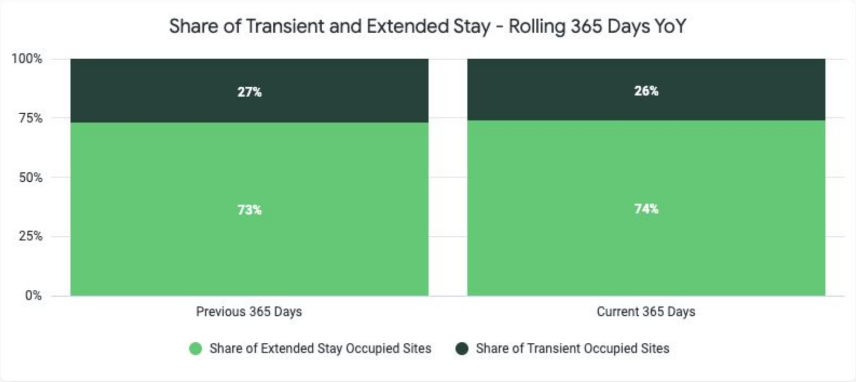
- We are still seeing RevPAS growth in most segment but with a slight decline vs last month.
- The decline in occupancy vs last month was the biggest drag on RevPAS.
- 151-300 sites campgrounds took the highest hit on occupancy and the highest ADR increase but ended up losing on RevPAS overall.

Past Performance Indicators by Site Category

- Last month, only RV occupancy had a slight growth, but that advance was nulled by the end of August.
- ADR is still positive over last year for all 3 campsite categories.
- Only RV sites had a positive RevPAS growth.

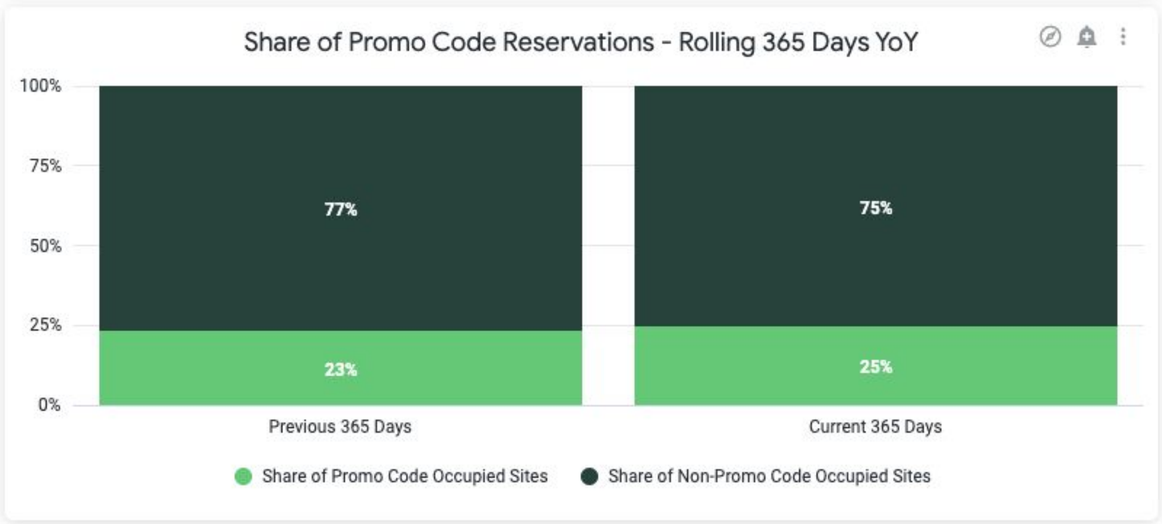


Past Share of Extended Stay



- Share of stays hasn’t moved MoM and are seeing a steady 74% of Site Nights being for Extended Stays.
- The higher ADR trend is seen both YoY and compared to last month.

Past Reservations with Promo Code



- Promo code utilization stayed flat month over month for the rolling 365 days.
- We are still seeing 25% of reservations having a promo code, a 2% increase compared to same time last year.

Advancing Outdoor Hospitality

Field Notes

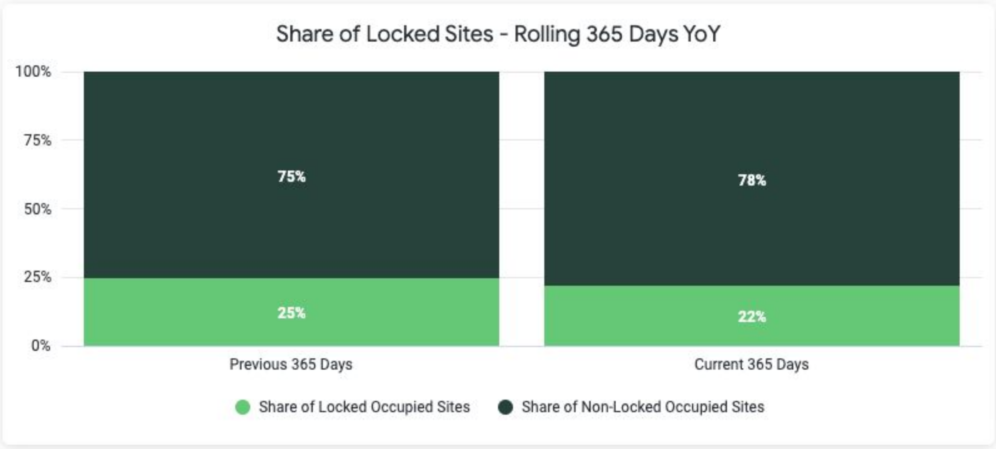
In partnership with OHI

"We utilized promo codes at both parks in the high season which we do not normally do. In Colorado, we used them to promote lodging. In Texas we used them for promotion of RV, tent, and lodging options."

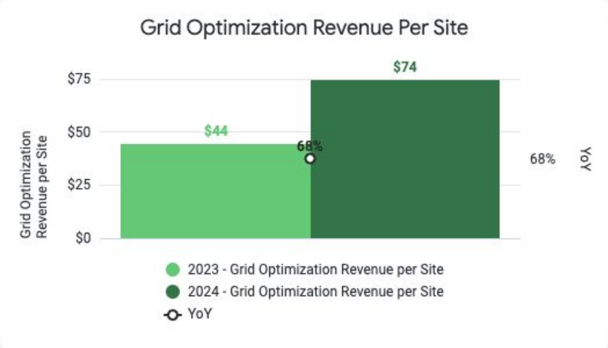
Melissa Cummings,
OHI member
Owner of Camp Riverview in Concan, TX & Silver Thread Basecamp in South Fork, CO

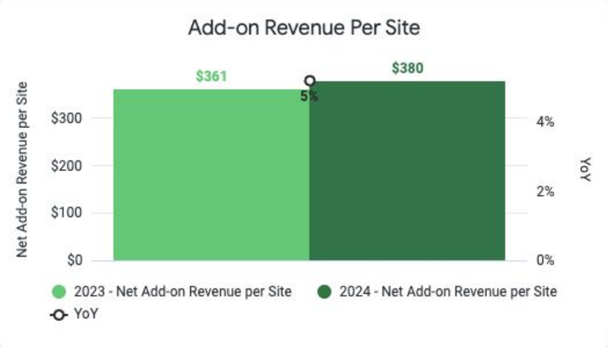
Past Reservations with Locked Sites

- Lock Site utilization has stayed flat from last month.
- We are noting a slight decline compared to same time last year. Conscious shoppers might be trying to cut on overall cost.



Monetization per Site





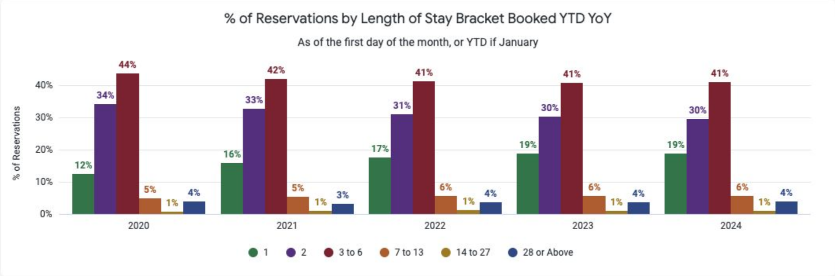
- In August, we saw an increase in average revenue per site in all monetization options.
- We saw a steady increase in revenue due to grid optimizations.
- As summer is winding down, the growth month over month is slowing but still well above last year's numbers.

Past Reservations by Booking Source

- Online reservation share hasn't moved year over year.
- The Campspot Marketplace keeps growing and reached 5.2% share, up 0.1% from last month.

Past Booking Window and Length of Stay

- Booking Window trends are mostly in line with last year.
- Almost half the reservations are booked 0-27 days prior to check-in.
- We are still seeing about 90% of reservations being 6 days or less.



Advancing Outdoor Hospitality

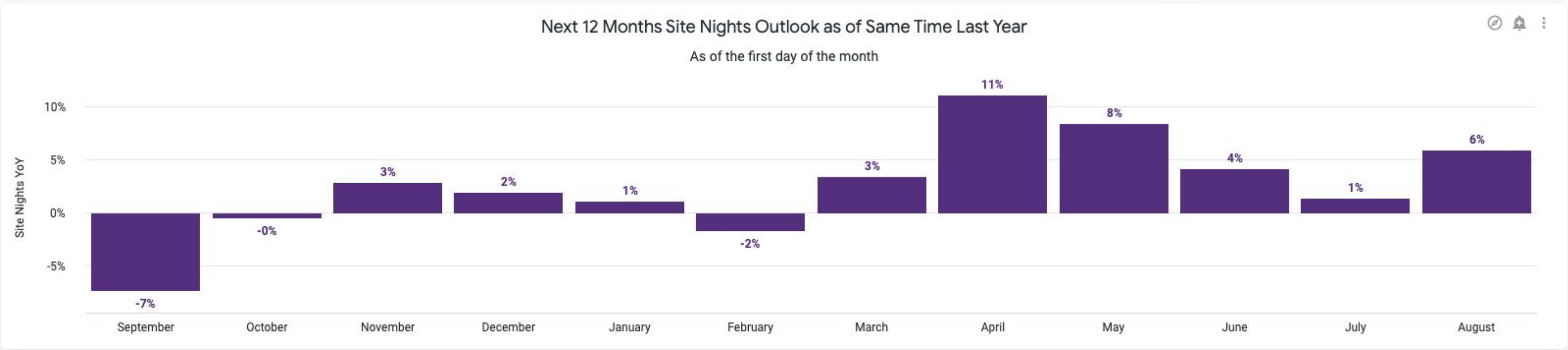
Field Notes

In partnership with OHI

"The majority of our campers do book their stay within the 0-27 day period. I would agree that it's about 60% of our campers, those that stay monthly (or long term) tend to book well in advance. We have about 40 reservations in the system for next season already, for those looking to stay 2 weeks or more. We anticipate more of an uptick in future long-term reservations before the end of our 2024 season."

Ashley Migliaccio
OHI member
General Manager of Hidden Acres Family Campground in Preston, CT

Next 12 Month Occupancy Outlook

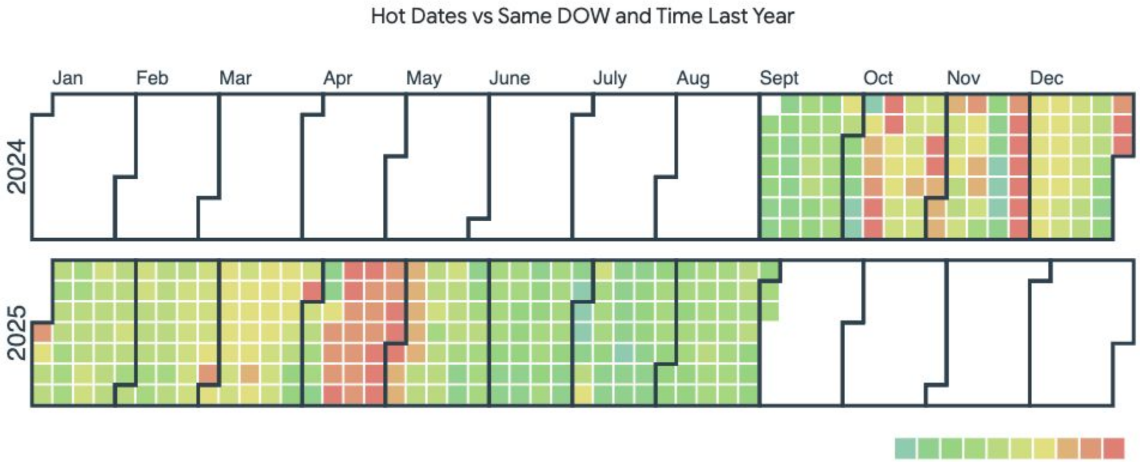


- August saw a really great uptick in future reservations.
- September is still seeing a 7% decline year over year and flat demand for October.
- However, all future months except February are seeing an increase year over year.
- Last month we had seen a decline for most future months year over year, signaling a positive trend as we head into the slower months and for next year.

Next 12 Month Average Daily Rate (ADR) Outlook

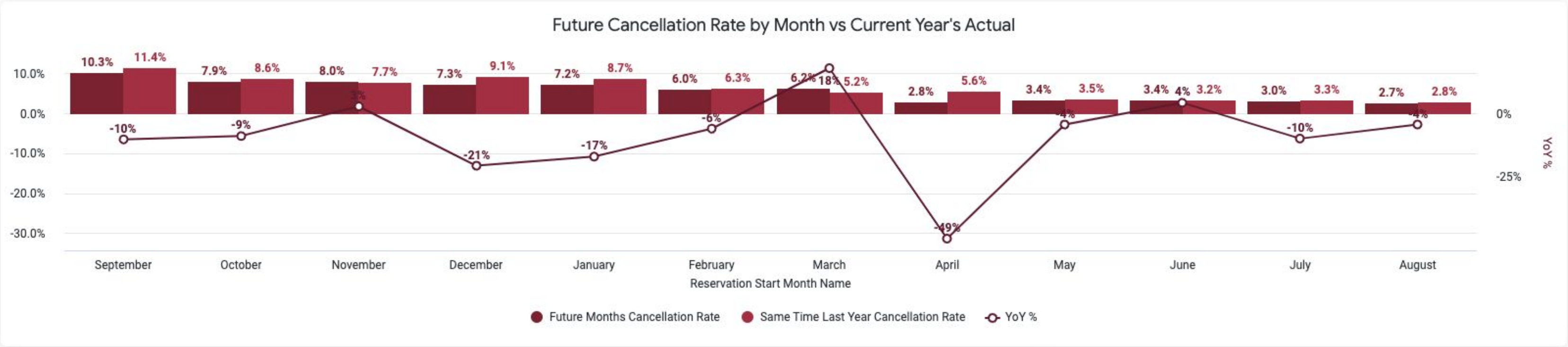
- We are seeing strong ADR growth YoY except for September. Campgrounds showing lower occupancy than last year could be lowering rates to attract customers.
- A 1% increase in ADR is noticed across most future months.

Future Hot Dates vs Same Day of Week Last Year



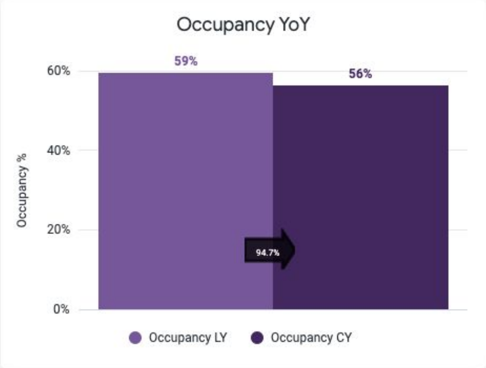
- The second and third week of October, along with the last week of November are seeing higher occupancy than normal vs last year.
- We are also noticing an increase in occupancy for next April and the first week of May.

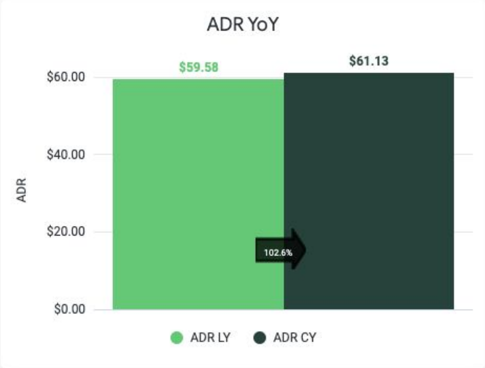
Future Months Cancellation Rates

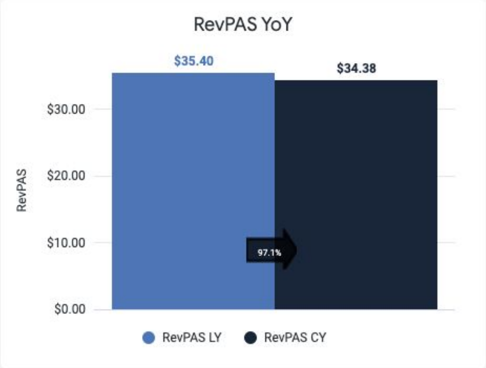


- In a change from last month, September cancellations are down vs same time last year.
- We are seeing a slower growth MoM in cancellations for August.
- Customers are not cancelling as much as they did for future months vs last year.
- December and April are skewed by isolated anomalies.

What We're Digging This Month:
Labor Day Analysis (Friday through Monday incl.)

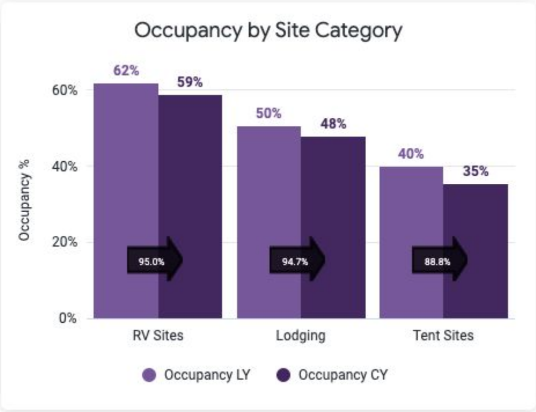


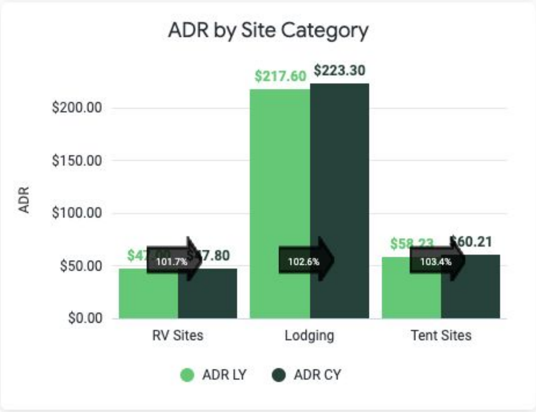


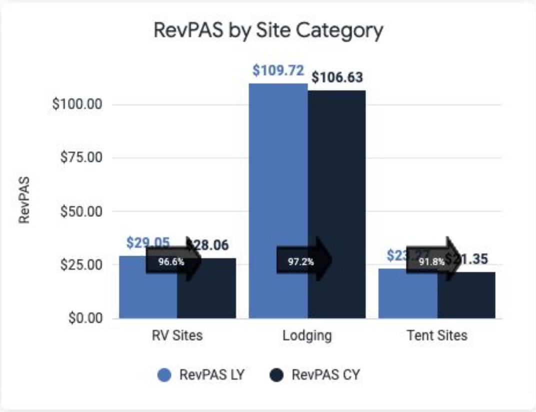


- Continuing the summer trend, occupancy was slightly down and ADR was up compared to last year.
- The steep decline in occupancy made RevPAS lower than last year, breaking off the RevPAS growth we had seen over the summer.

What We're Digging This Month:
Labor Day Analysis (Friday through Monday incl.)



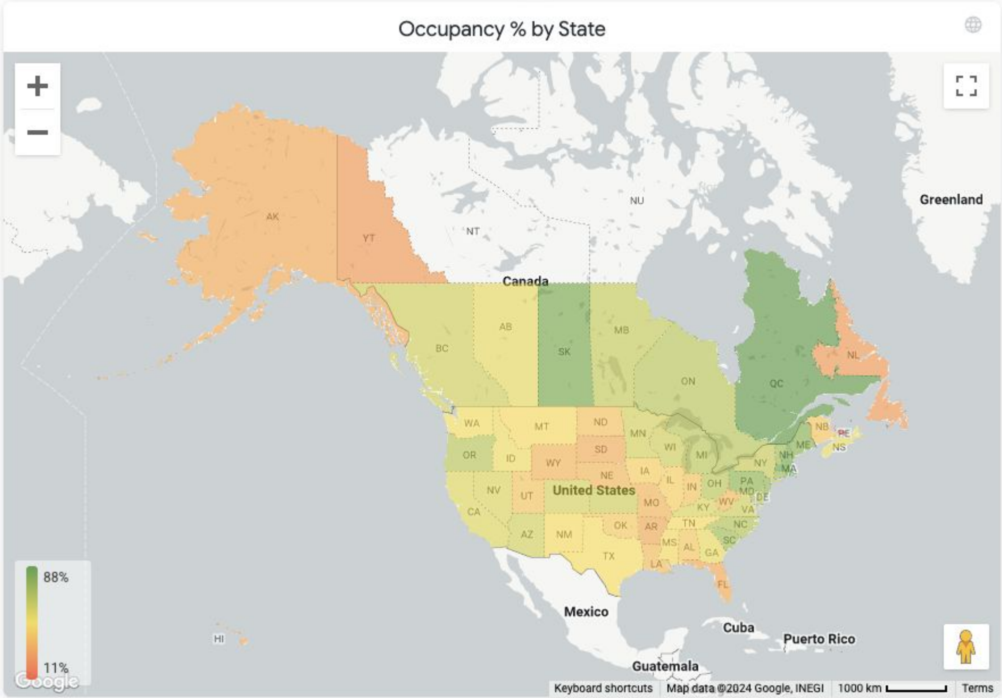




- Each campsite category had the same story with declining occupancy and climbing ADR.
- Tent sites have seen the sharpest decline in RevPAS, mainly due to their much lower occupancy.
- Lodging sites had the smallest loss of RevPAS out of the 3 categories.

What We're Digging This Month:
Labor Day Analysis (Friday through Monday incl.)

- Rhode Island, Massachusetts and New Hampshire had the highest occupancy of the long weekend.
- Arizona, Delaware and Maryland had the highest ADR.
- Arizona, Maryland and Delaware came on top of the RevPAS ranking due to their very high ADR.



Note: As we are not comparing vs last year here, all currently active Campspot parks have been included, except a small number of customers that underwent massive expansions YoY.

What We're Digging This Month:
Labor Day Analysis (Friday through Monday incl.)

Stats by States

	Park Park State	Occupancy %	ADR	RevPAS	Occupancy Rank	ADR Rank	RevPAS Rai
1	AZ	57%	$265.68	$152.69	20	1	1
2	MD	66%	$141.05	$93.72	10	3	2
3	DE	58%	$142.65	$82.62	19	2	3
4	MA	82%	$68.45	$55.93	2	11	4
5	NH	79%	$67.78	$53.58	3	12	5
6	CO	57%	$90.96	$51.43	22	5	6
7	NJ	72%	$71.61	$51.22	6	8	7
8	VA	58%	$86.81	$50.70	16	6	8
9	CA	55%	$83.92	$46.16	25	7	9
10	ME	74%	$62.18	$45.91	4	16	10
11	NC	64%	$68.53	$44.04	11	10	11
12	SC	68%	$64.64	$44.00	9	14	12
13	VT	68%	$61.78	$42.18	8	17	13
14	HI	35%	$116.25	$41.03	50	4	14
15	CT	70%	$57.80	$40.20	7	21	15
16	PA	72%	$51.38	$37.19	5	26	16
17	NY	60%	$57.26	$34.17	15	22	17
18	RI	84%	$39.89	$33.38	1	38	18
19	MS	48%	$65.39	$31.15	33	13	19
20	WI	58%	$51.99	$30.27	17	25	20
21	LA	41%	$71.27	$29.10	41	9	21
22	OR	63%	$45.79	$28.84	12	32	22
23	MT	48%	$59.85	$28.72	32	18	23
24	TN	48%	$59.04	$28.36	31	19	24
25	UT	43%	$63.55	$27.35	39	15	25

Stats by States

	Park Park State	Occupancy %	ADR	RevPAS	Occupancy Rank	ADR Rank	RevPAS Rai
26	KY	56%	$47.94	$26.72	24	30	26
27	GA	52%	$50.82	$26.56	26	28	27
28	WA	50%	$50.88	$25.54	28	27	28
29	IN	43%	$58.55	$25.40	38	20	29
30	MI	63%	$40.01	$25.14	13	37	30
31	OH	62%	$39.78	$24.84	14	40	31
32	ID	51%	$47.58	$24.35	27	31	32
33	MN	57%	$39.84	$22.66	21	39	33
34	TX	50%	$44.77	$22.43	29	36	34
35	NM	49%	$44.77	$21.94	30	35	35
36	SD	37%	$56.29	$20.79	46	23	36
37	AK	36%	$55.01	$19.82	49	24	37
38	WY	39%	$48.24	$18.87	44	29	38
39	WV	40%	$44.83	$18.15	42	34	39
40	MO	39%	$45.40	$17.75	45	33	40
41	OK	44%	$39.69	$17.66	36	41	41
42	IA	46%	$37.65	$17.14	35	43	42
43	AL	44%	$35.91	$15.92	37	45	43
44	NV	56%	$27.98	$15.63	23	47	44
45	NE	39%	$34.89	$13.77	43	46	45
46	FL	36%	$38.12	$13.75	48	42	46
47	AR	36%	$37.33	$13.53	47	44	47
48	KS	58%	$23.09	$13.43	18	50	48
49	IL	46%	$27.66	$12.59	34	48	49
50	ND	42%	$25.94	$10.98	40	49	50

Note: As we are not comparing vs last year here, all currently active Campspot parks have been included, except a small number of customers that underwent massive expansions YoY.

What We're Digging This Month

DATA & INTEGRATIONS

The Most Requested Integrations on Campspot (and What We're Working on Next)

AUGUST 30, 2024
HALEY DALIAN

Learn about Campspot's suite of powerful existing and upcoming integration options.

Learn More

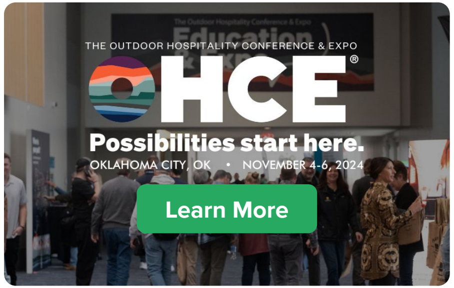
Dig in Further

Practical tips, ideas, and content to help you and your campground thrive.

From OHI

Webinar

Join us!



Thank you!

We'll see you next month for the next edition of The Data Dig.