The Data Dig

Insights on campsites
powered by Campspot

February 2025

Brought to you by:

CAMPSPOT

Developed in partnership with:

OHI® Advancing Outdoor Hospitality

The Data Dig: February 2025 Edition

Welcome to the February edition of The Data Dig!

Before we dive into the numbers, we're excited that many of us will be in market this Spring, attending various association events and tradeshows. If you're planning to be there too, we'd love to connect, chat about trends, and hear what's happening in your world. Keep an eye out for our team—we hope to see you!

This past month, we saw 2% RevPAS growth, primarily driven by ADR increases, while occupancy remained flat year-over-year. One standout trend? Smaller campgrounds led the way with the highest occupancy and RevPAS growth, showing strong demand in more intimate, lower-capacity locations.

Looking ahead to summer, we're seeing -4% site nights compared to the same time last year, though ADR continues to climb. This signals a shift in booking behavior that we'll continue to monitor—are guests waiting longer to book, or are higher prices impacting demand? As always, we'll keep digging into the data to uncover insights that help you plan for the season ahead. Stay tuned for more updates!

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 campgrounds active prior to **January 2024** and updated March 3rd, 2025
- Forward-looking data is based on campgrounds active prior to **January 2024** and data updated March 3rd, 2025

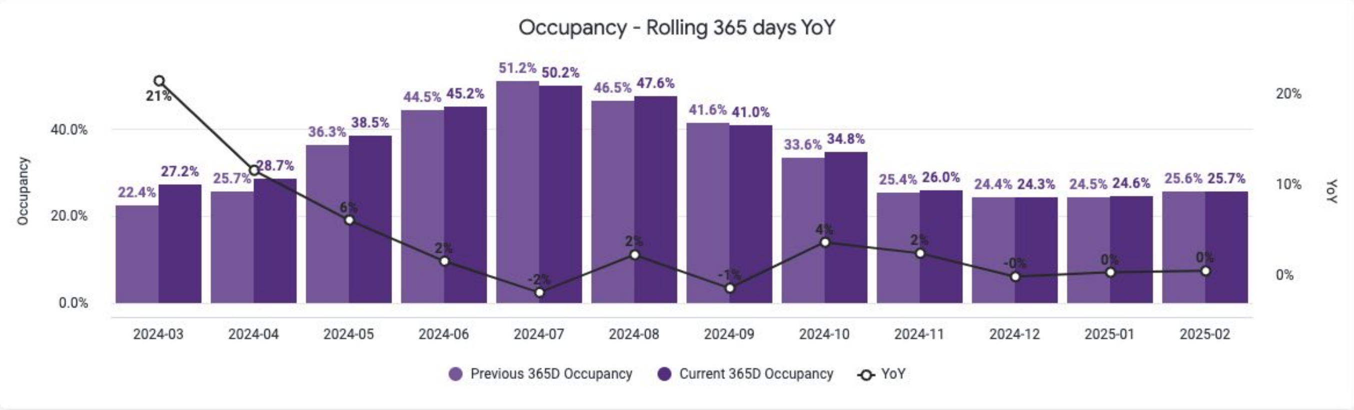
Important Note

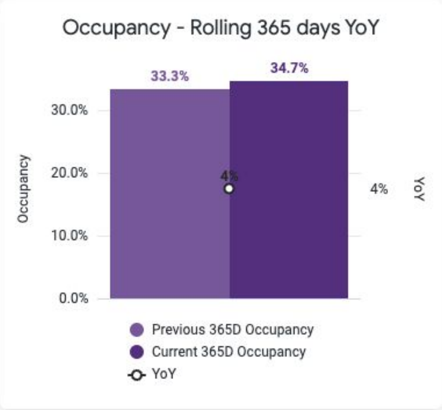
- We have been piloting this report over the past year, and making adjustments based on user feedback. Starting in August 2024, we rolled it out more broadly, and have incorporated some important changes to our data collection and analysis approach that we think makes the information more meaningful. 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.

The Data Dig Dictionary

Terminology	Description
ADR	Average Daily Rate, calculated by doing the sum of all campsite revenue charges divided by the number of occupied sites
Occupancy	Calculated by doing the sum of all occupied sites divided by the sum of active sites at a campground. Ex: A 50-site campground with 25 occupied sites would have an occupancy of 50%.
RevPAS	Revenue per Available Sites, calculated by multiplying the ADR by the occupancy. Ex: A campground with an ADR of $35 and a 50% occupancy would have a RevPAS of $17.50 (35 * 0.5).
CY / PY	Current Year (2024) / Previous Year (2023)
YTD	Year to Date
YoY / MoM / WoW	Year over Year / Month over Month / Week over Week

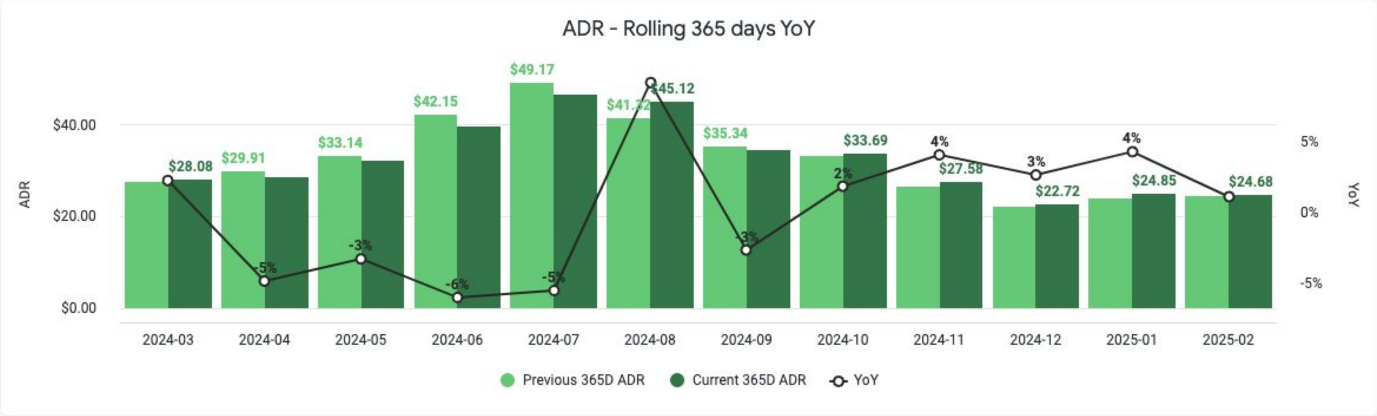
Past Occupancy by Month





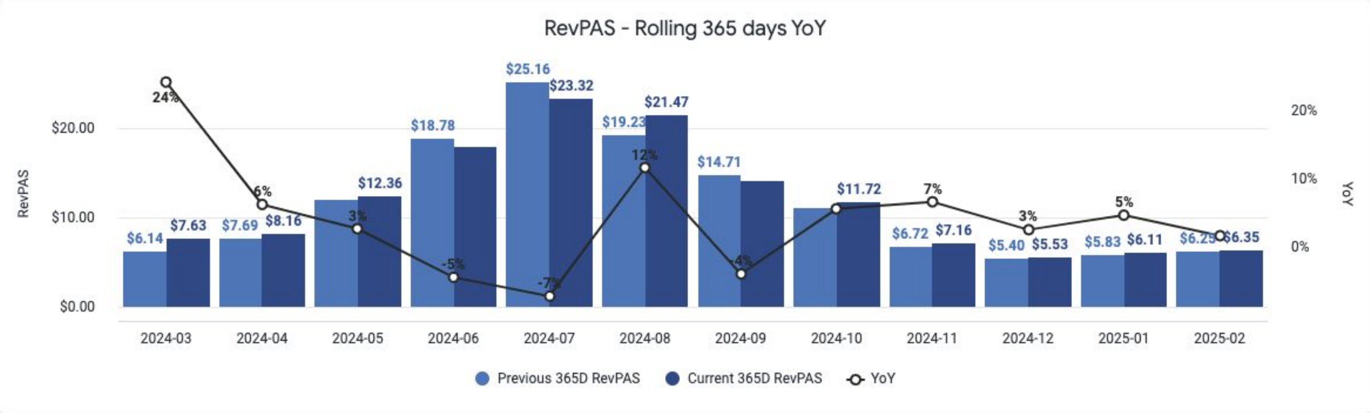
- Occupancy in February was mostly flat YoY, ending at 25.7%
- For the rolling last 365 days, occupancy was up 4% YoY, averaging 34.7% occupancy.

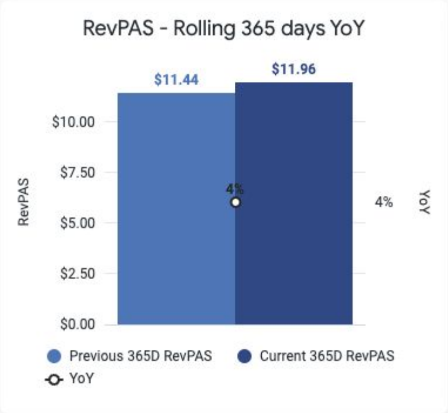
Past ADR by Month



- ADR was up 1% in February, averaging $24.68 vs $24.40 the previous year.
- Rolling last 365 days, ADR is mostly flat at $34.46.

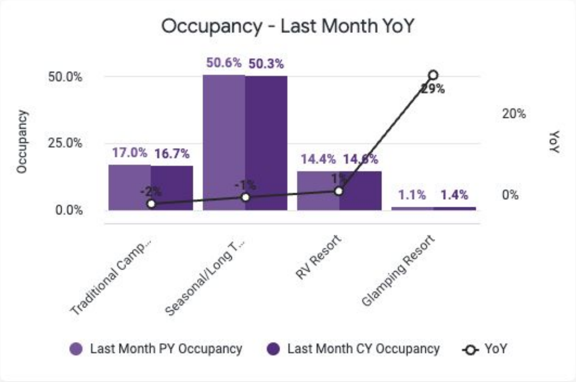
Past RevPAS by Month

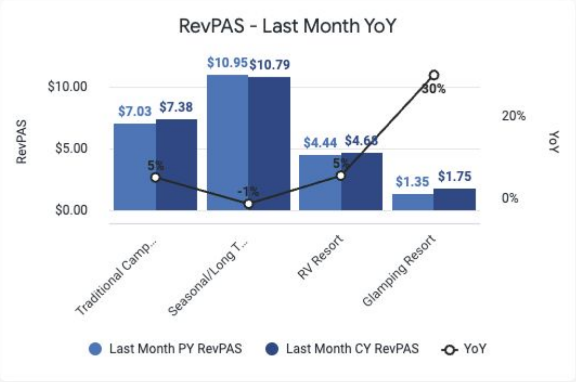




- February saw an increase of 2% in RevPAS, ending at $6.35.
- The aggregated last 365 days were up 4% YoY, averaging $11.96.

Last Month Performance by Campground Category

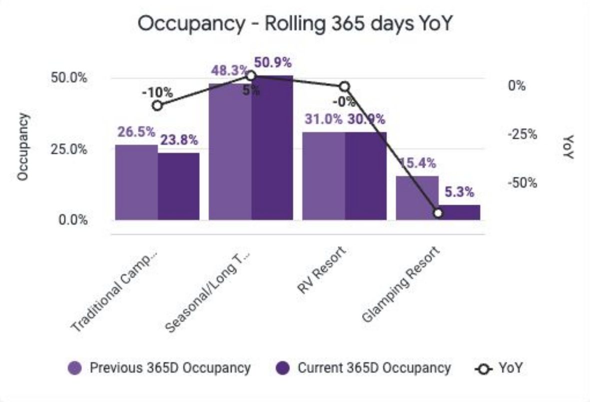


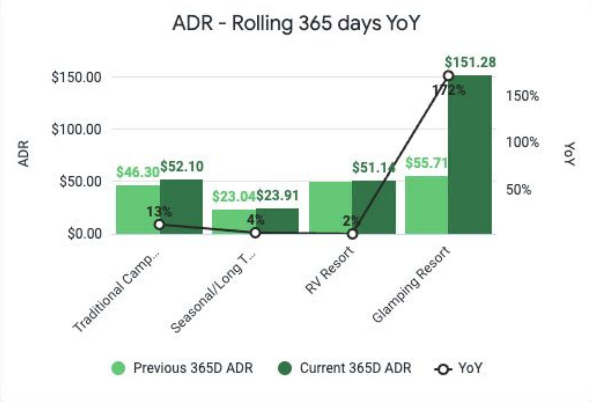


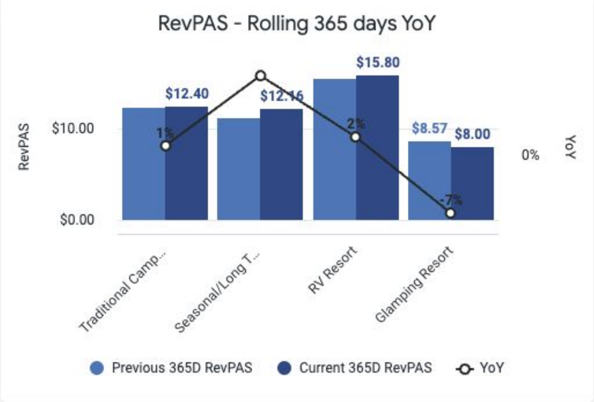
- Traditional campgrounds ended up trading occupancy for ADR leading to a +5% in RevPAS YoY.
- Seasonal campgrounds were mostly flat for February YoY.
- RV resorts had a mostly flat occupancy and +4% ADR growth, ending January with a +5% RevPAS YoY.
- Glamping resorts lowered their ADR by $22 from last month ending flat 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 Category







- In the last year, the same story applies for Traditional campgrounds trading occupancy for ADR.
- Seasonal campgrounds have seen a +5% occupancy growth and a +4% ADR growth.
- RV resorts have seen mostly flat results in all core KPIs.
- Glamping resorts have also traded occupancy for ADR leading to a -7% decline in RevPAS.

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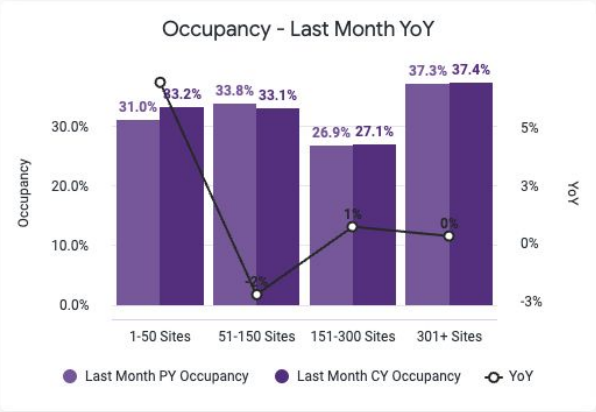
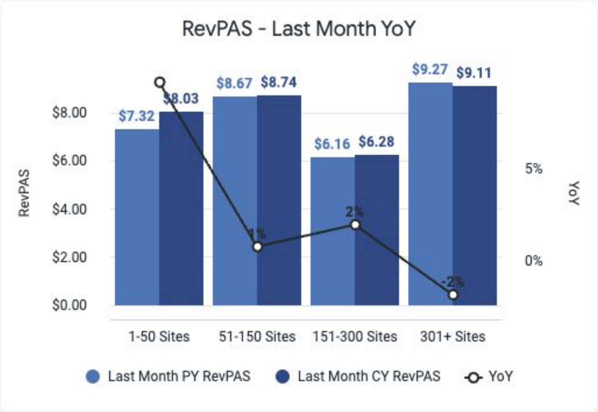
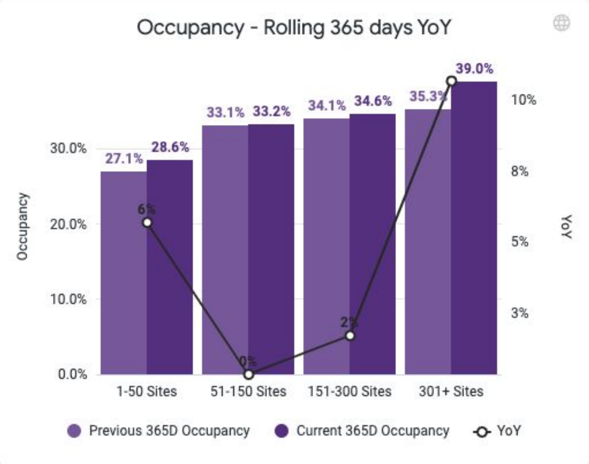
Last Month Performance by Campground Size

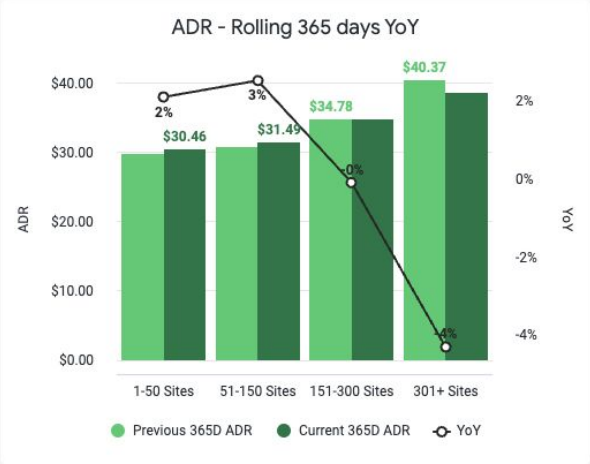


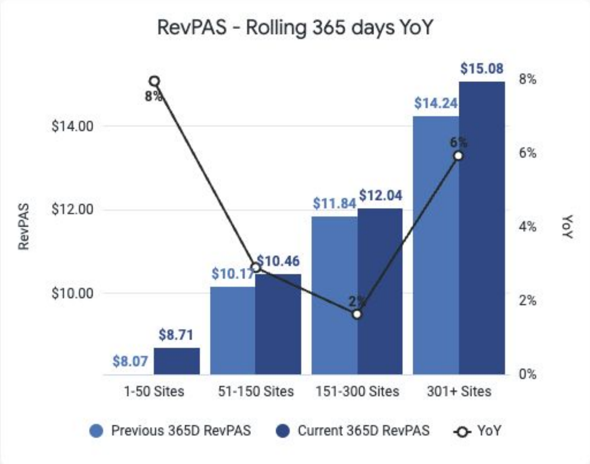


- In February, smaller campgrounds have seen a +7% growth in occupancy YoY while bigger parks have stayed stable.
- Larger campgrounds had the highest ADR growth in January but that trend stopped in February. Large Parks have seen a -2% decrease in ADR last month.
- Small campgrounds have had a 10%+ growth in RevPAS for the second month in a row this year.

Past Performance Indicators by Campground Size



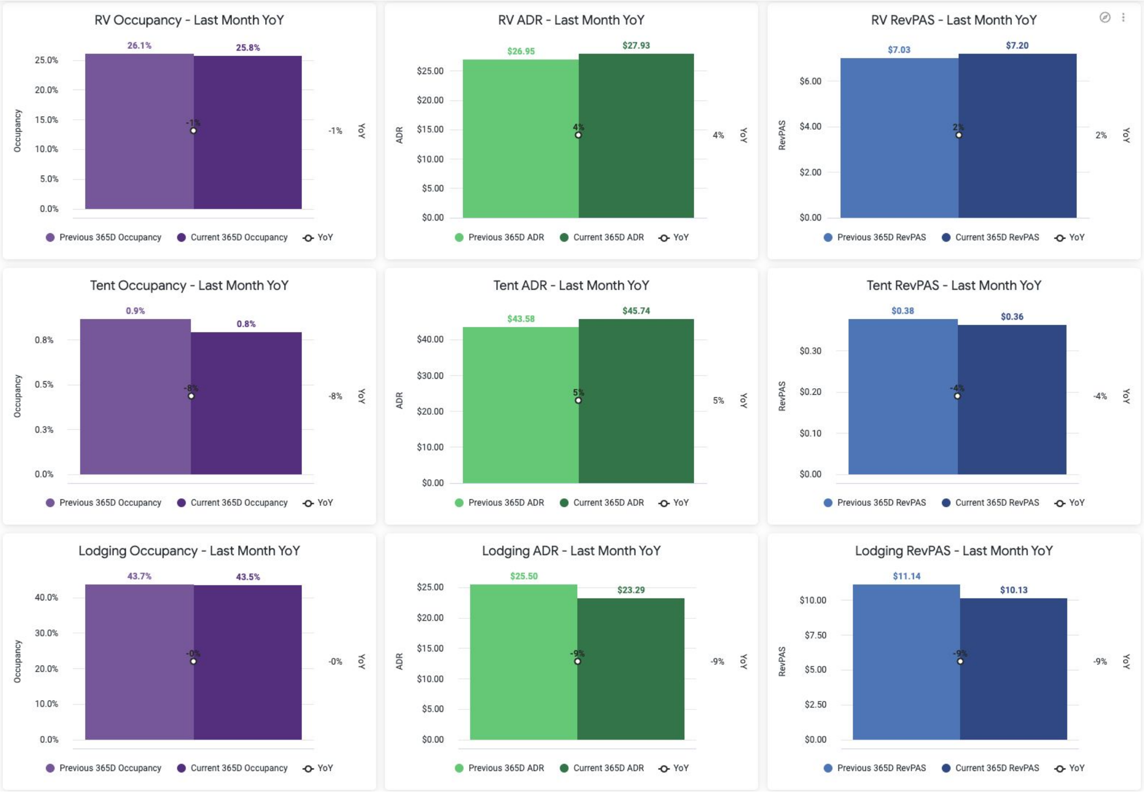




- In the last year, both small and large campgrounds have seen occupancy growth while mid-size parks have been stable.
- 301+ sites campgrounds have seen the steepest drop in overall ADR with -4% YoY.
- Overall, all categories have seen some level of RevPAS growth with smaller and larger campgrounds leading the way with +8% and +6% respectively.

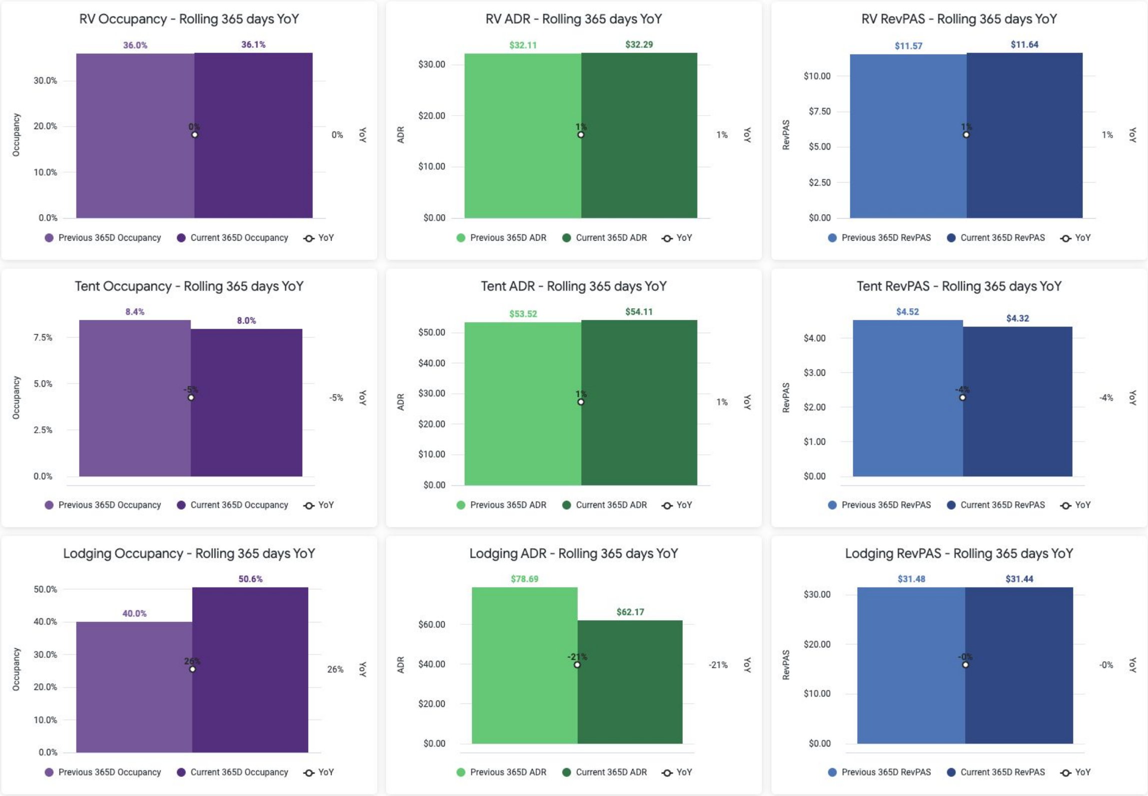
Last Month Performance by Site Category

- In February, RV and Lodging sites had mostly flat occupancy YoY. Tent sites saw an -8% decline.
- RV and Tent sites both saw ADR growth of 4% and 5% respectively while Lodging sites have dropped by -9% YoY.
- RV Sites had the only positive RevPAS growth with +2% YoY while Tent sites declined by -4% and Lodging sites by -9% YoY.

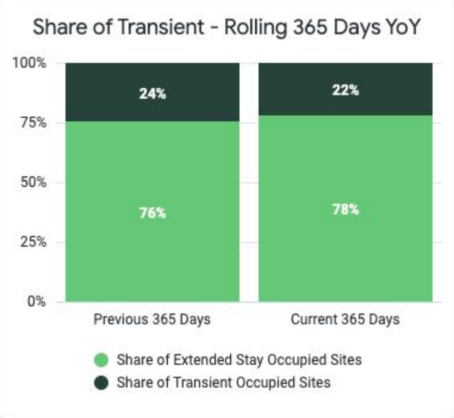


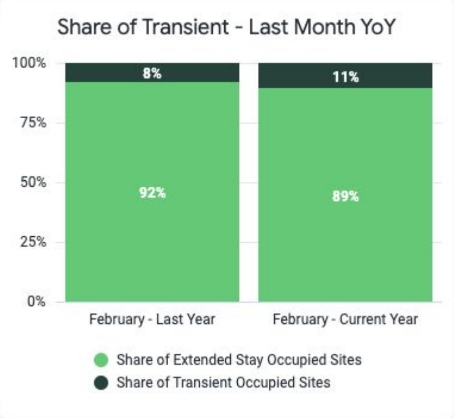
Past Performance Indicators by Site Category

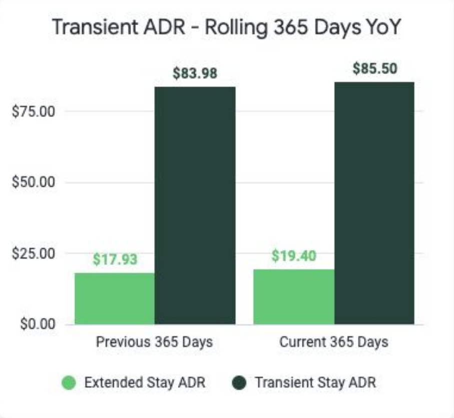
- In the last year, RV sites have seen flat occupancy rates, ADR and RevPAS.
- Tent sites have had a slight decrease in occupancy and flat ADR, leading to a -4% decline in RevPAS.
- Lodging sites have seen a 26% increase in occupancy at the cost of -21% in ADR. Landing at a -1% RevPAS YoY.

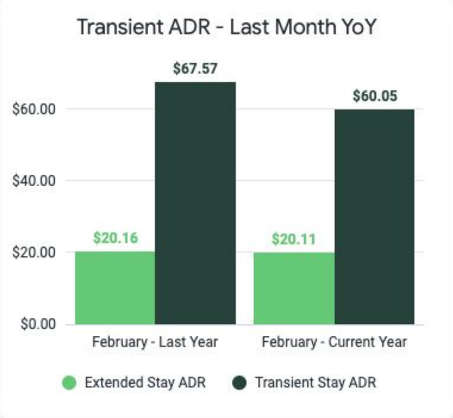


Past Share of Extended Stay



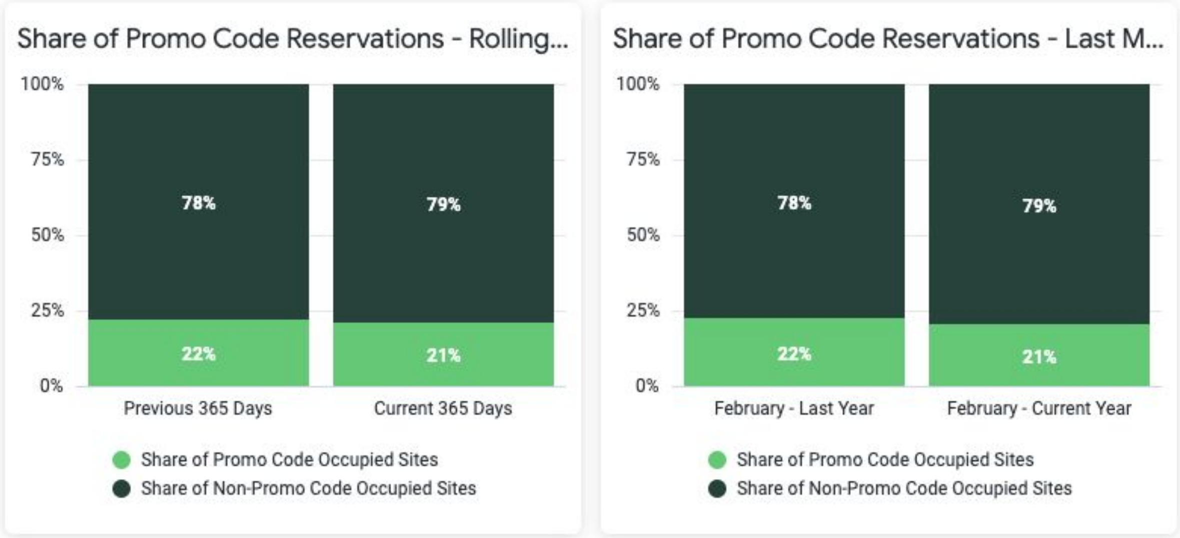






- The share of transient stays almost doubled from January to February.
- Transient stays had lower ADR in February this year vs last year and lowered by $5.75 vs January.
- Extended Stays ADR has been stable YoY.

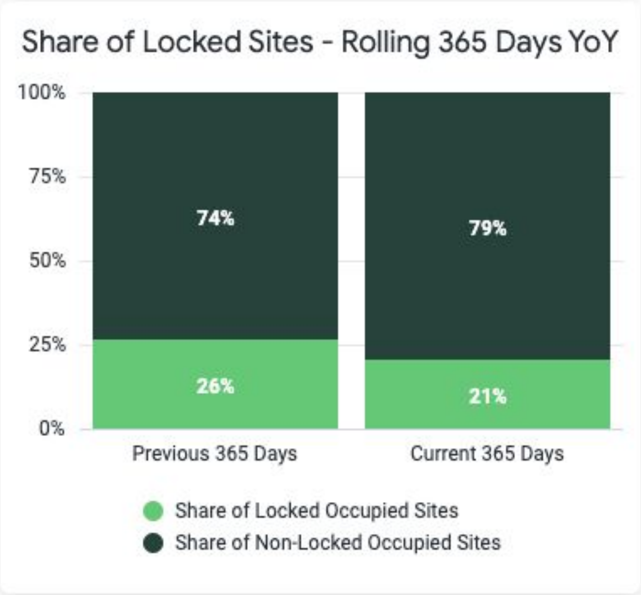
Past Reservations with Promo Code

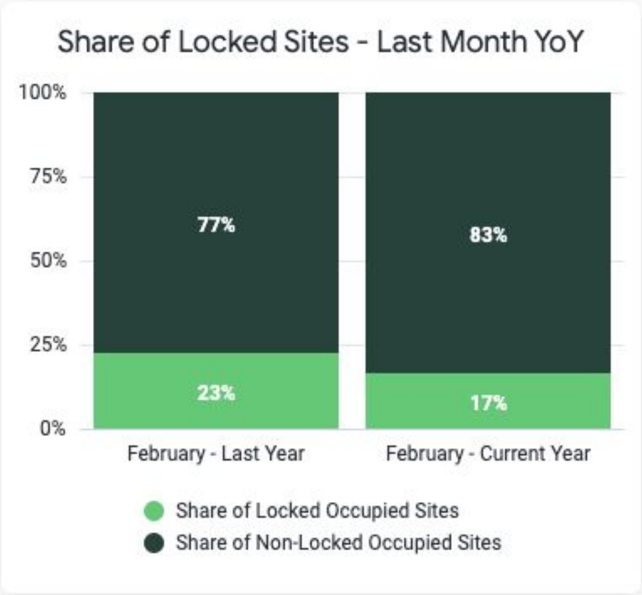


- Promo code utilization was slightly down in February and on the full year.
- Overall, the share of site nights with Promo Code has been stable at 21%.

Past Reservations with Locked Sites

- Lock site nights decreased by 6% in February 2025 vs February 2024.
- Share of locked site nights was also down on the full year but by 5%.





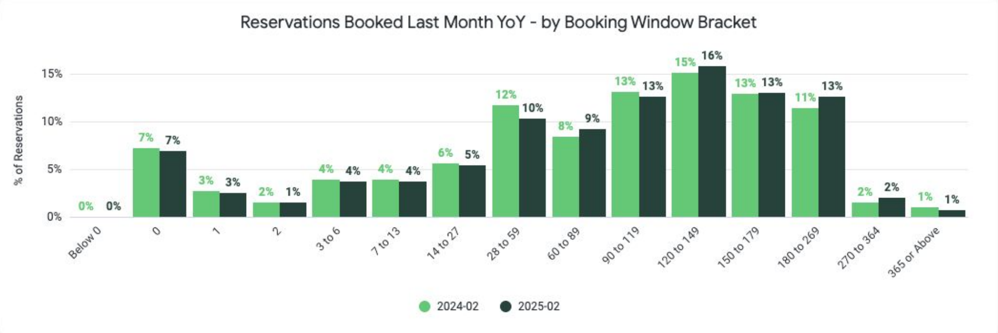
Past Reservations by Booking Source

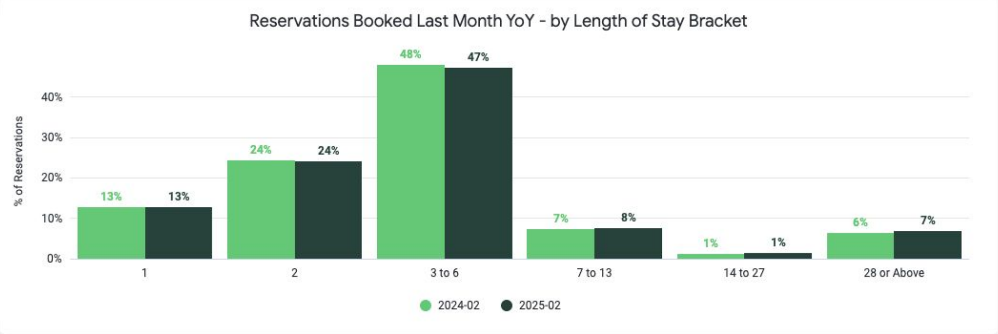
- In the last 2 years, overall share of online vs phone bookings has been stable at 62% online.
- February 2025 saw 70% of bookings being made online (2% higher than 2024).
- The Campspot Marketplace brought about 8% of all Online bookings in 2024, compared to 7.1% in 2023.
- Marketplace's share of online bookings in February 2025 was 7.5%.

Last Month Booking Window and Length of Stay

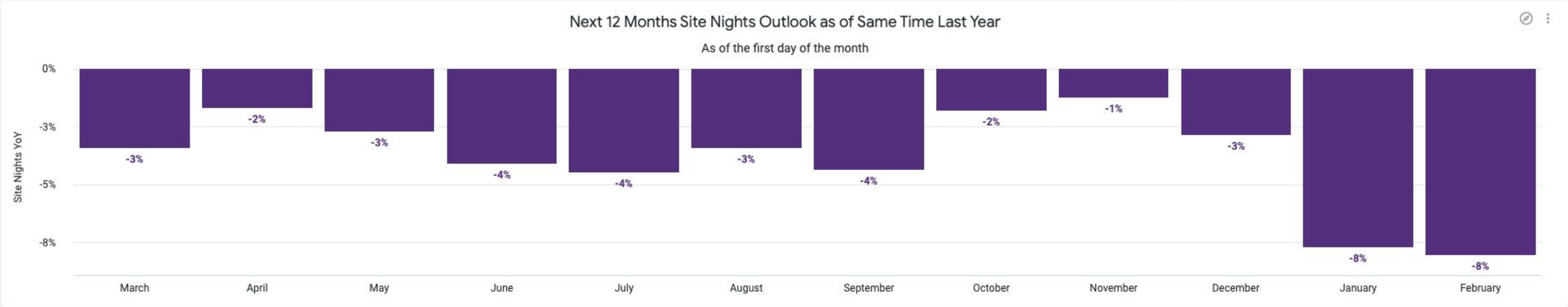
- We are seeing very similar booking window patterns in February of this year vs last year, but moving a bit towards a longer 120 days+. We are also seeing less reservations coming in the 28-60 days window.
- For reservations booked last month vs February of last year, Length of Stay patterns are also very stable.

Timeframe	Date from March 1st
90 days	May 30th, 2025
120 days	June 29th, 2025
150 days	July 29th. 2025
180 days	August 28th, 2025
270 days	November 26th, 2025





Next 12 Month Occupancy Outlook

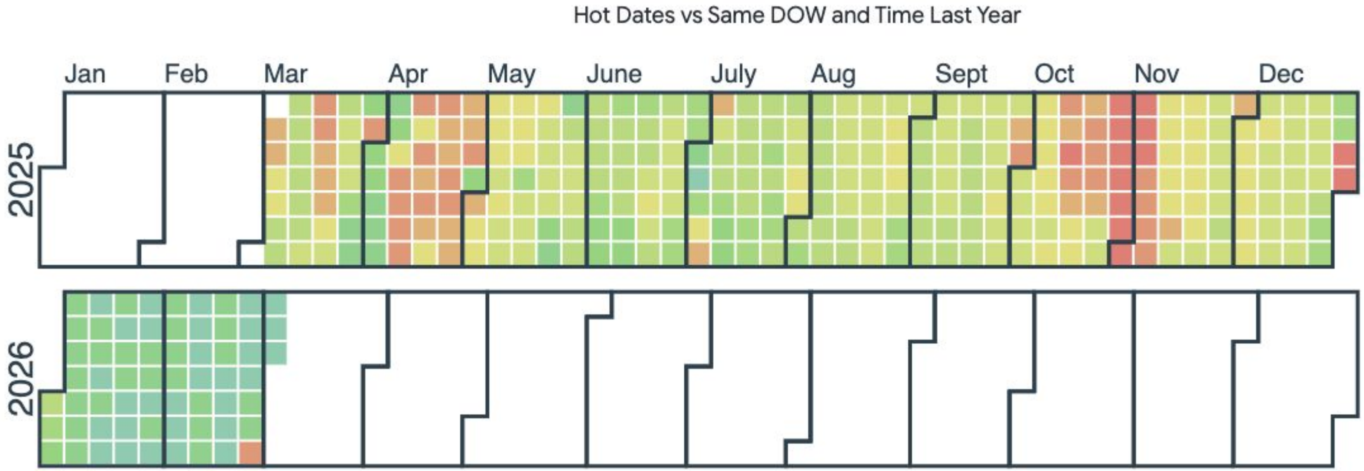


- As of March 1st, site nights for all future months are down vs the same time last year
- The summer months are all trending about -4% down vs same time last year.

Next 12 Month Average Daily Rate (ADR) Outlook

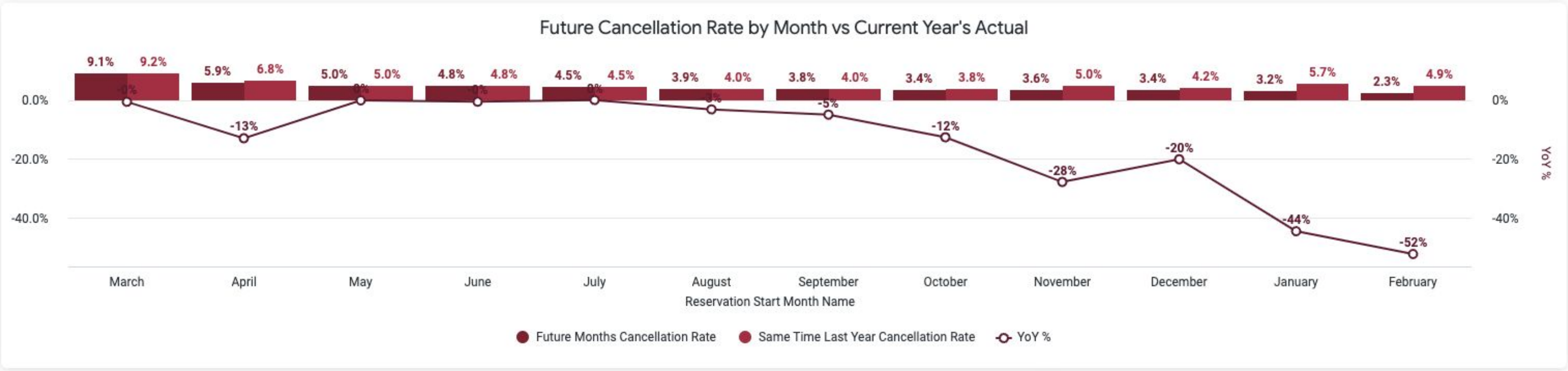
- It seems like we are seeing a direct correlation between the increase in ADR and the decline in Site Nights vs same time last year.
- Summer months are marked by a 1-2% increase in ADR.
- September is the only month where we are seeing a lower ADR this year (-3%)

Future Hot Dates vs Same Day of Week Last Year



- We are noticing a slight increase in demand for the month of April against same time last year.
- As for the summer months, early May and August seem to have slightly more interest vs last year.
- July 4th weekend seems to have more demand than last year

Future Months Cancelation Rates

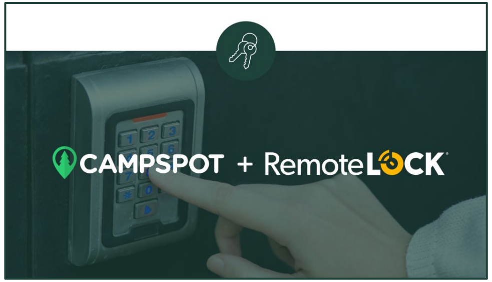


- Cancelation rates are mostly in line with last year if not slightly lower.
- April and Q4 2025 are skewed by a few outliers.

Dig in Further

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

Campspot + RemoteLock Integration



Campspot's RemoteLock integration just got an upgrade! Version 1 of the integration gave campgrounds the ability to use RemoteLock for gated community areas. Version 2, now live, extends that functionality to individual lodging accommodations in addition to the shared gated spaces.

[Learn More]

Going to the Western States Summit conference?

Let's connect in Reno at the Campground Solutions Summit West, April 1-3:

- Stop by our booth (#1) and say hi!
- Check out the reservation software solutions session (Apr 1 @ 5:30)
- Join the general "Hash it Out" session on Apr 3 @ 3:15 to join the Campspot talk about the online customer experience

Thank you!

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