The Data Dig

Insights on campsites
powered by Campspot

January 2025

Brought to you by:

CAMPSPOT

Developed in partnership with:

OHI® Advancing Outdoor Hospitality

The Data Dig: January 2025 Edition

As we step into 2025, we're reflecting on the past year while setting our sights on what's ahead. With this first Data Dig edition of the year, we're bringing an updated dataset—now including parks that were live before January 2024, ensuring a more comprehensive view of trends shaping our industry.

Looking at January's numbers, we saw flat YoY occupancy (24.7%), but strong rate growth continues to drive revenue. ADR climbed +8% YoY (ending at $24.63), pushing RevPAS up by +9%. This signals that while demand remains steady, parks are capturing more revenue per available site.

However, as we look ahead to peak season (May–September), early booking trends show a -2% decrease in site nights compared to the same time last year. This presents an opportunity to strategize around pricing, promotions, and guest experience to drive demand leading into the busy months.

The new year brings new opportunities—to learn, adapt, and grow. We're excited to continue providing data-driven insights to help you navigate the road ahead. Stay tuned for deeper dives throughout the year, and as always, happy camping!

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 February 4th, 2025
- Forward-looking data is based on campgrounds active prior to **January 2024** and data updated February 4th, 2025

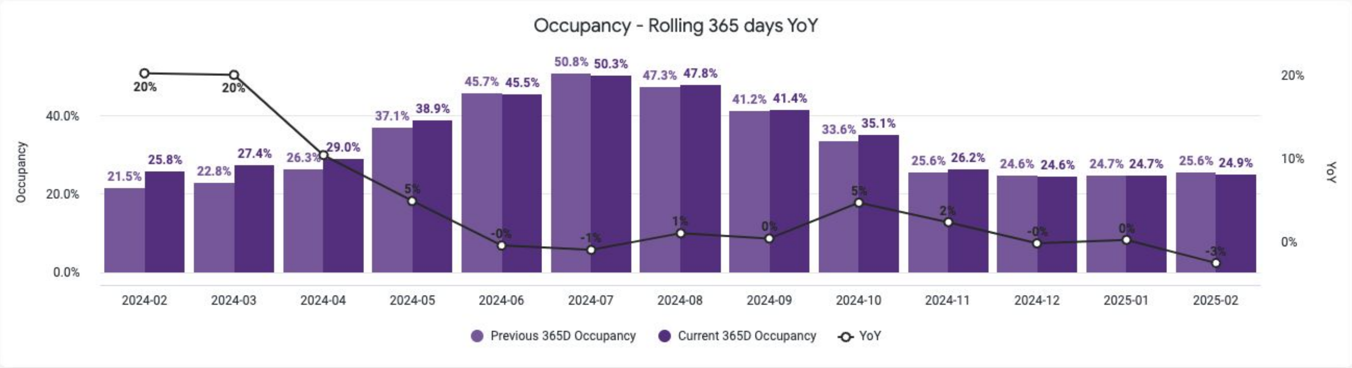
Important Note

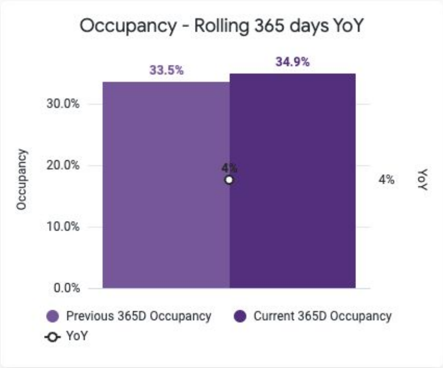
- We have been piloting this report over the past year, and making adjustments based on user feedback. Starting in August 2024, we rolled it out more broadly, and have incorporated some important changes to our data collection and analysis approach that we think makes the information more meaningful.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



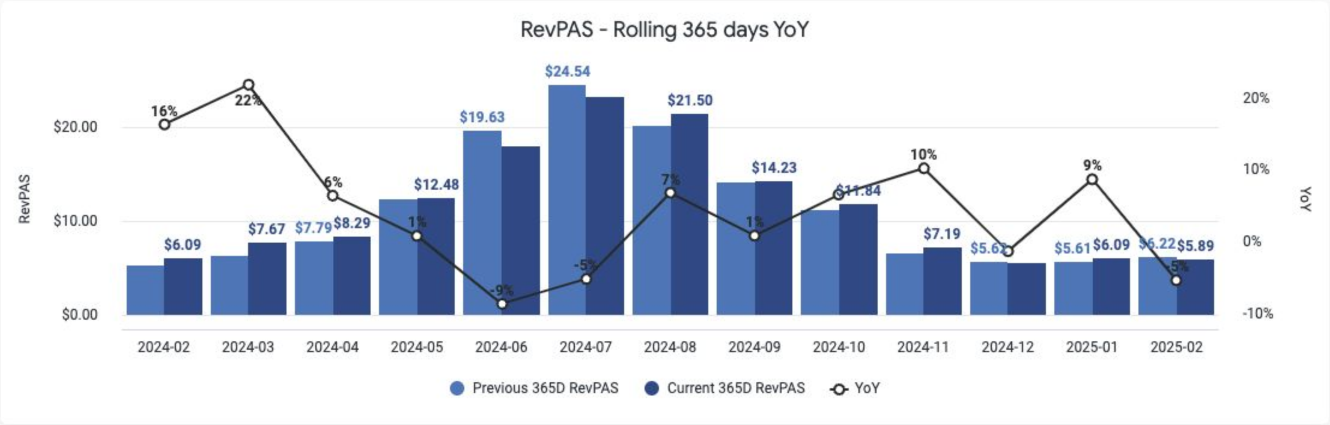


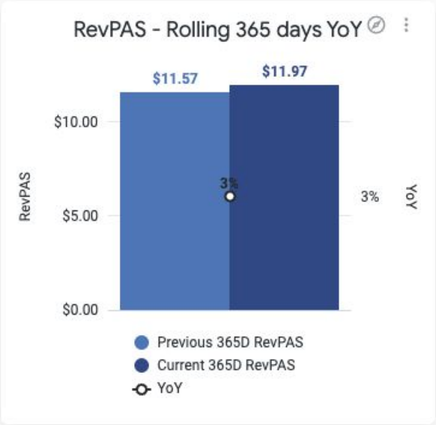
- Occupancy for the first month of the year was flat, ending at 24.7% occupancy.
- For the rolling last 365 days, occupancy was up 4% YoY, averaging 34.9% occupancy.

Past ADR by Month

- ADR was up 8% in January, averaging $24.63 vs $22.72 the previous year.
- Rolling last 365 days, ADR is mostly flat at $32.28.

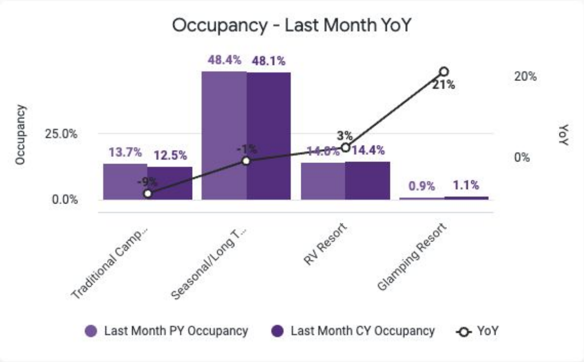
Past RevPAS by Month

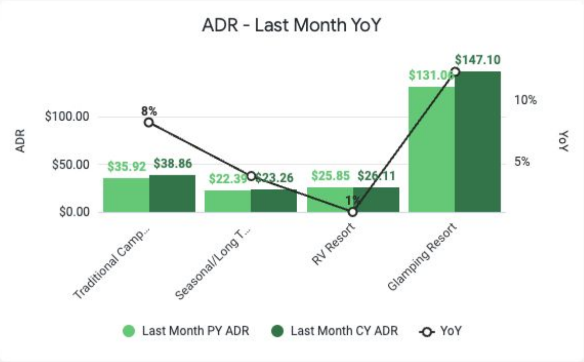


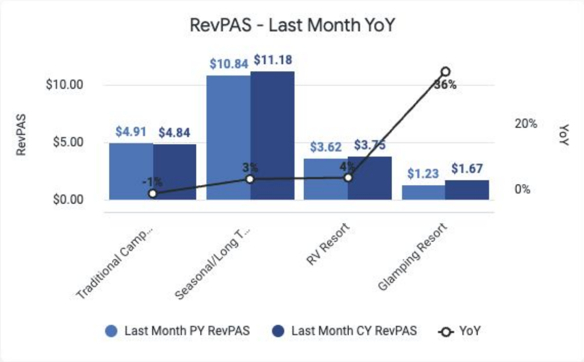


- January saw an increase of 9% in RevPAS, ending at $6.09.
- The aggregated last 365 days were up 3% YoY, averaging $11.97

Last Month Performance by Campground Category



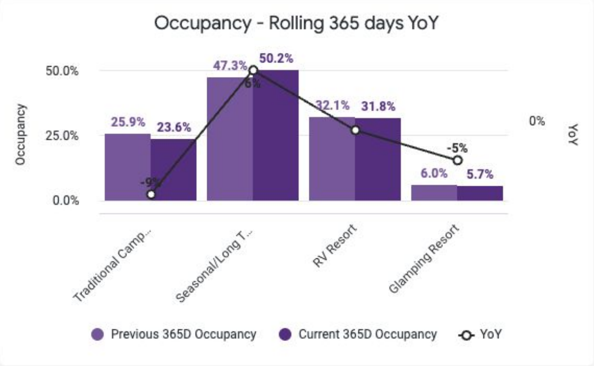


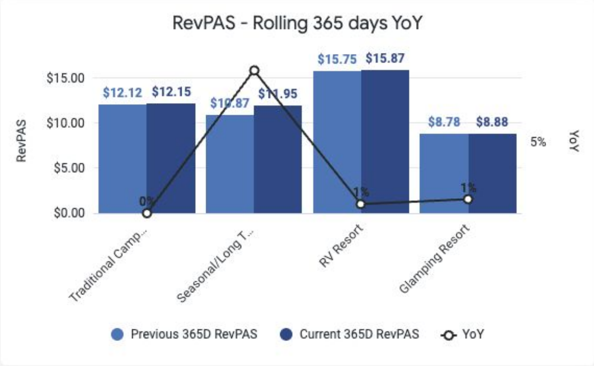


- Traditional campgrounds ended up trading occupancy for ADR leading to a -1% in RevPAS YoY.
- Seasonal campgrounds were mostly flat for January YoY.
- RV resorts had a +3% increase in occupancy and mostly flat ADR, ending January with a +4% RevPAS YoY.
- Glamping resorts, while having low occupancy, saw an increase in all core KPI, ending with +36% RevPAS 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 +1% RevPAS growth.

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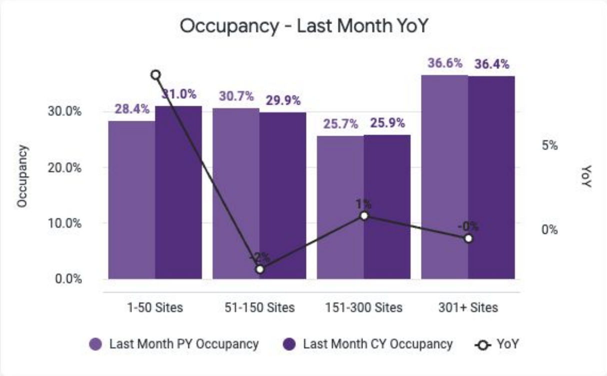
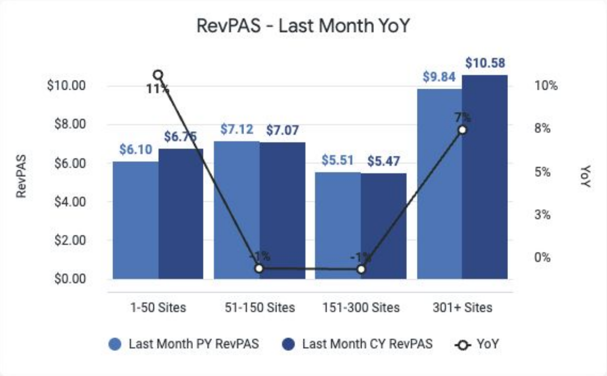
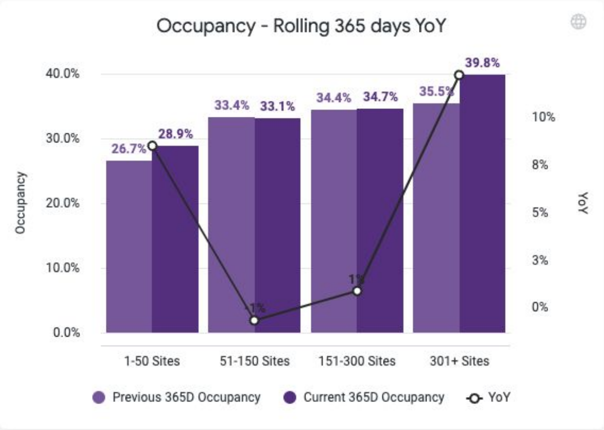
Last Month Performance by Campground Size

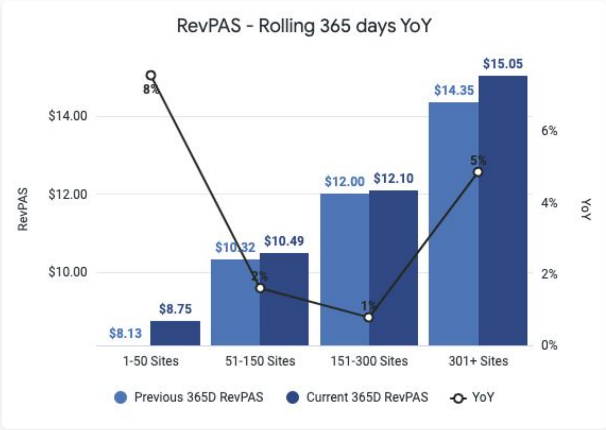




- In January, smaller campgrounds have seen a +9% growth in occupancy YoY while bigger parks have stayed stable.
- Larger campgrounds are the only category with a significant ADR increase at +8%. They also have the highest overall ADR at $29.06.
- Both small and large campgrounds have seen RevPAS growth with +11% and +7% respectively.

Past Performance Indicators by Campground Size

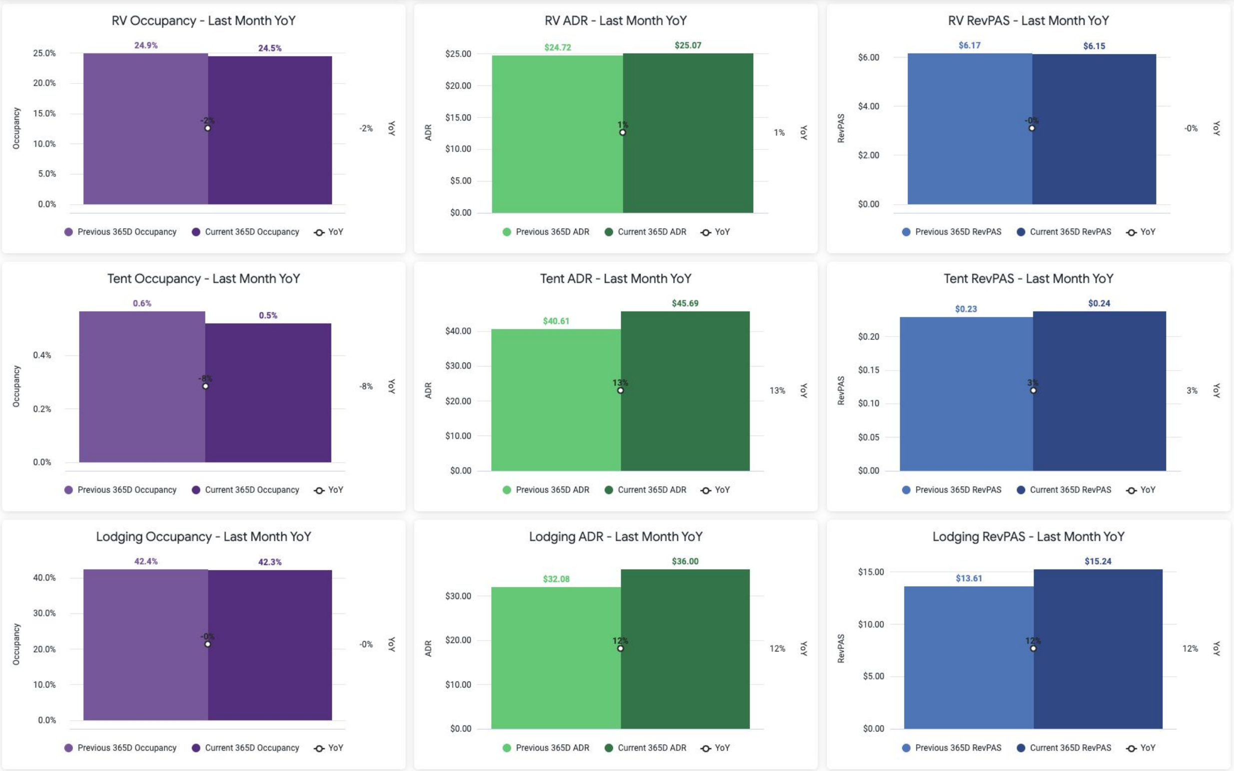




- In the last year, both small and large campgrounds have seen occupancy growth while mid-size parks have been stable.
- 301+ sites campgrounds have seen the steepest drop in overall ADR with -7% YoY.
- Overall, all categories have seen some level of RevPAS growth with smaller and larger campgrounds leading the way with +8% and +5% respectively.

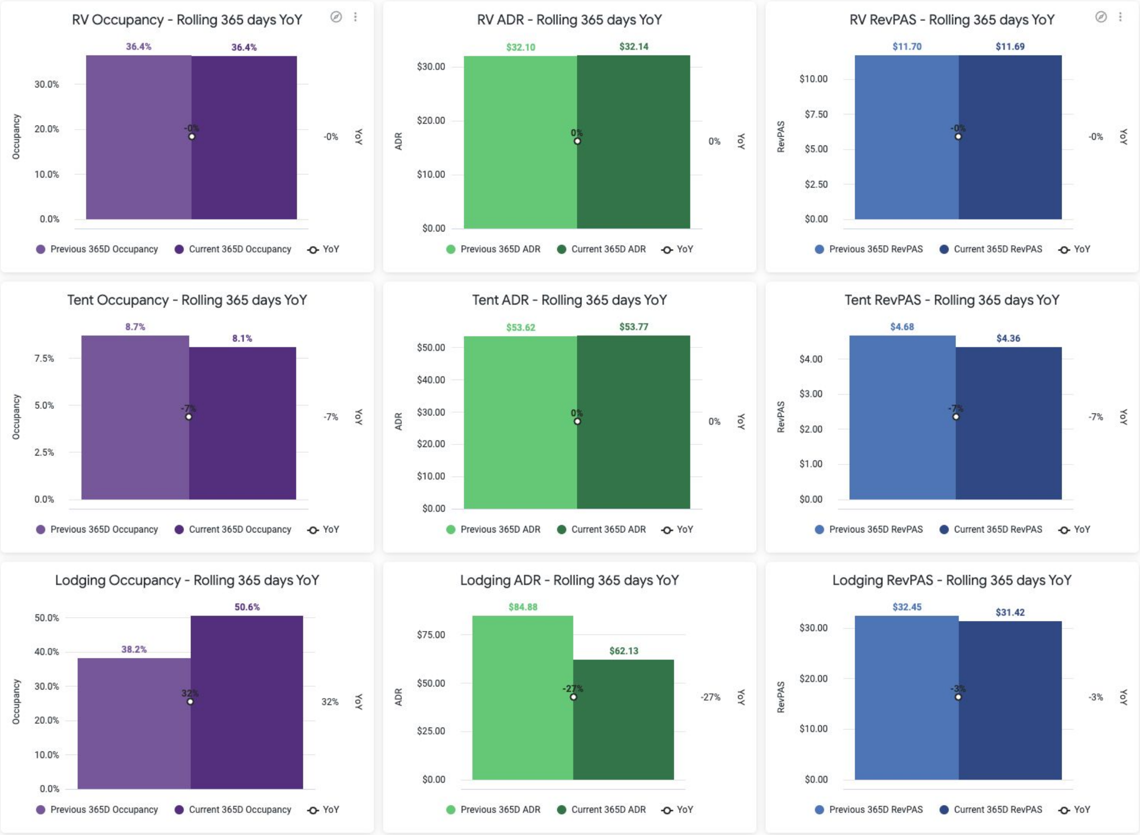
Last Month Performance by Site Category

- Occupancy for all site categories was mostly flat YoY for January
- Tent and Lodging sites have seen over +10% growth YoY
- RevPAS was flat for RV sites, up +3% YoY for tent sites and up +12% YoY for lodging sites.



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.
- Lodging sites were more popular with a 32% increase in occupancy at the cost of -27% in ADR. Landing at a -3% RevPAS YoY.



Past Performance Indicators by Site Category

Advancing Outdoor Hospitality

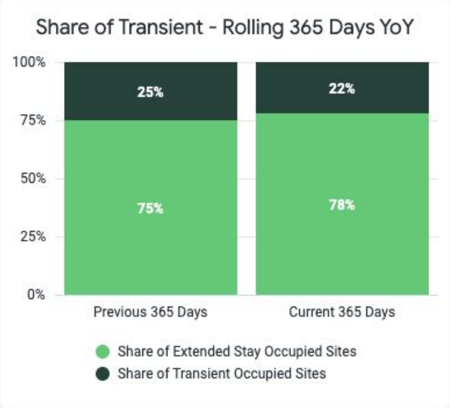
Field Notes

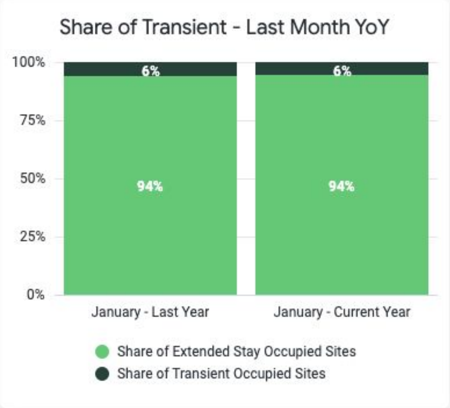
In partnership with OHI

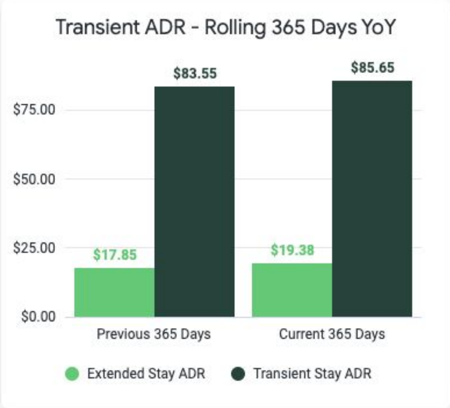
"Speaking from our statistics at Hidden Acres Family Campground, we're seeing this as well. We are finding a decrease in our tent site occupancy, so we've begun replacing the majority of our tent sites with RV capabilities by increasing electrical services, restructuring our sites and adding cement slabs for convenience. RV sites, so far, are consistent with the 2024 season as well as the 2023 season. We have a limited number of rental accommodations (three rental cabins and a rental trailer), booking for these have been up for the "peak-season" months by about 5% as compared to the 2024 camping season. We plan to see continued growth in our rentals and are looking to expand occupancy in the spring and fall months."

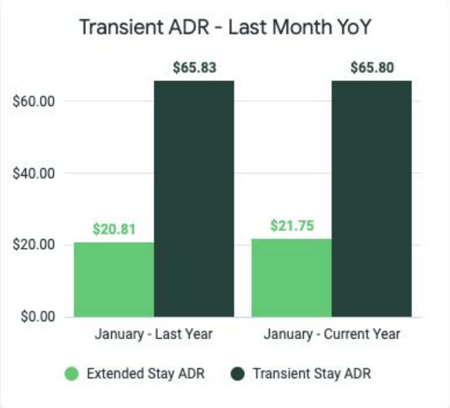
Ashley Cary,
OHI member
Hidden Acres Family Campground in Preston, CT

Past Share of Extended Stay



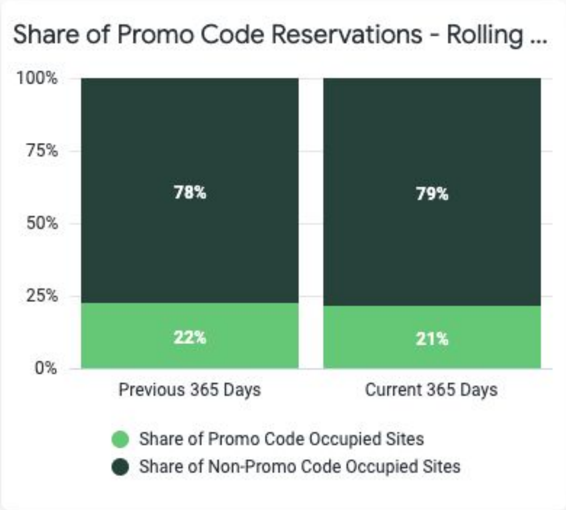


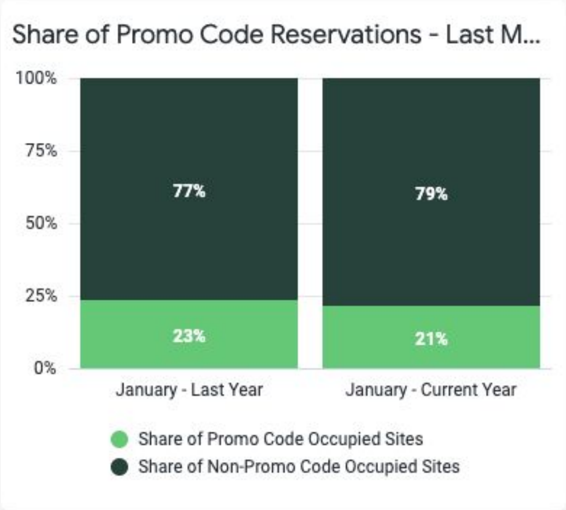




- In 2024, we have seen slightly higher Extended Stay share vs 2023.
- Both Transient and Extended Stay ADR were up on the full year.
- January was marked by mostly extended stays at 94% of occupied sites.
- ADR for last months were slightly higher for extended stays and flat for transient stays

Past Reservations with Promo Code

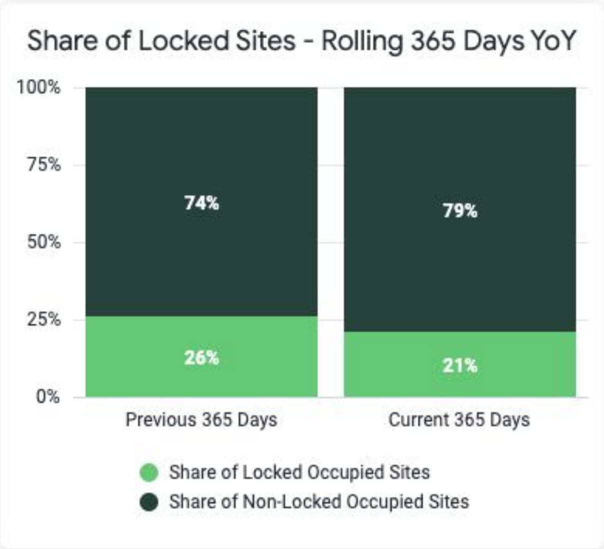


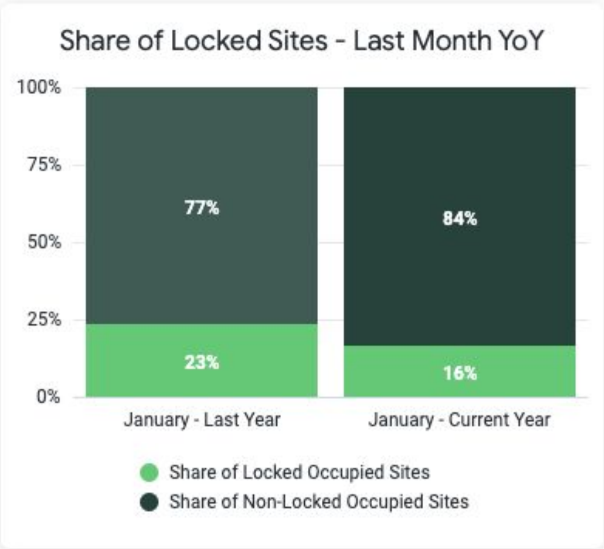


- Promo code utilization was slightly down in January and on the full year.

Past Reservations with Locked Sites

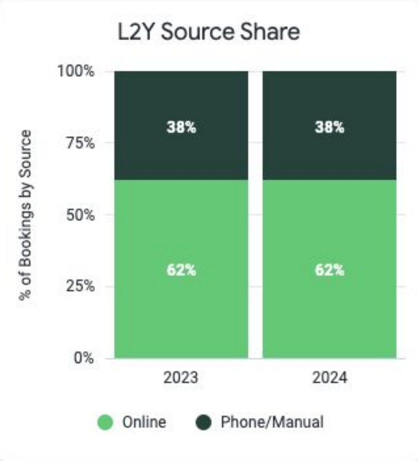
- Lock Site utilization decreased by 7% in January 2025 vs January 2024
- Share of locked site was also down on the full year but by 5%.

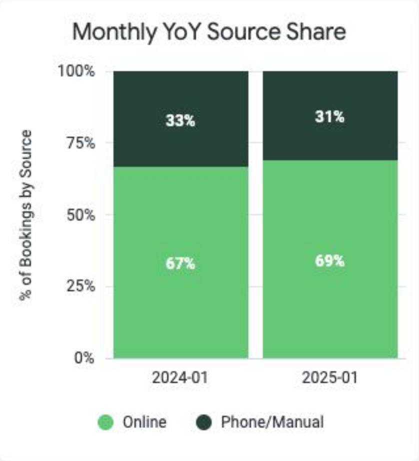


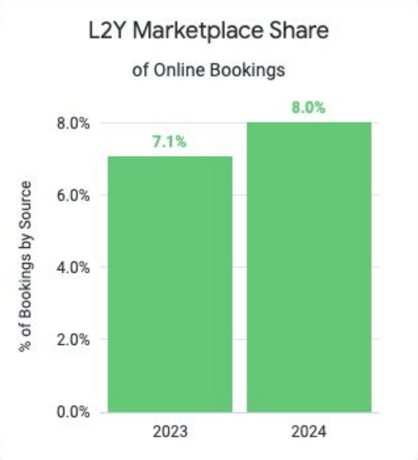


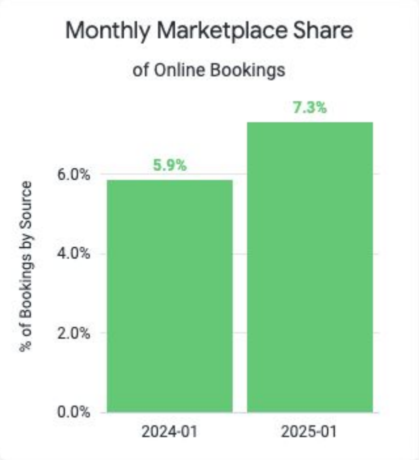
Past Reservations by Booking Source

- In the last 2 years, overall share of online vs phone bookings has been stable at 62% online.
- January 2025 saw 69% of bookings being made online (2% higher than January 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 January 2025 was 7.3% (1.4% higher than January last year.





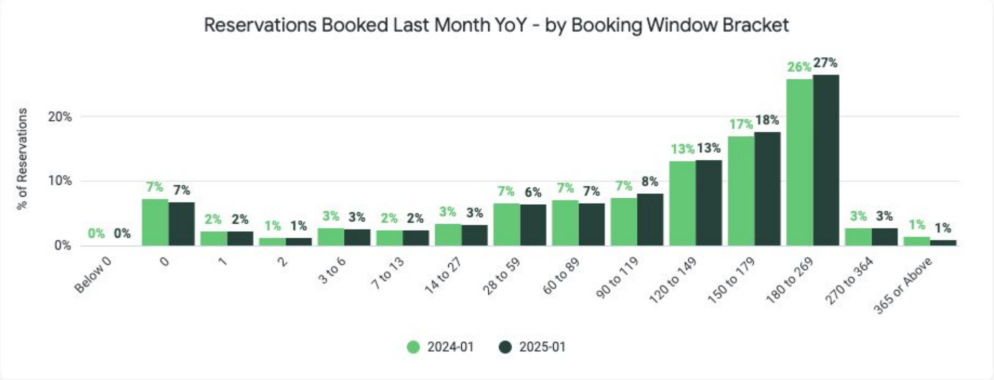


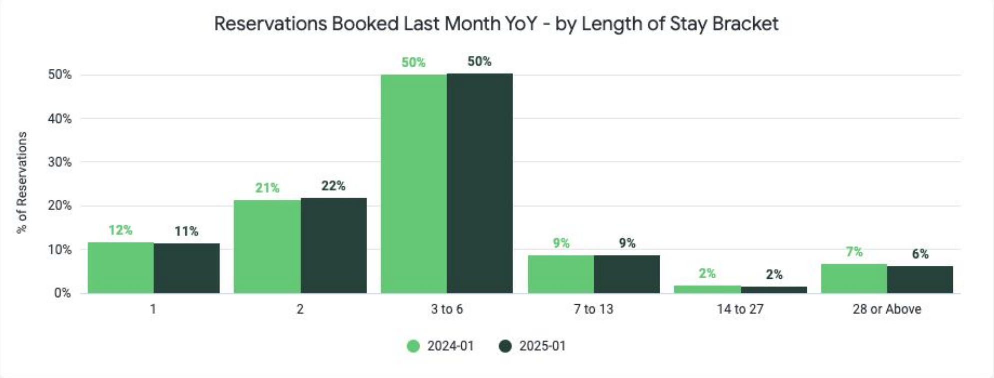


Last Month Booking Window and Length of Stay

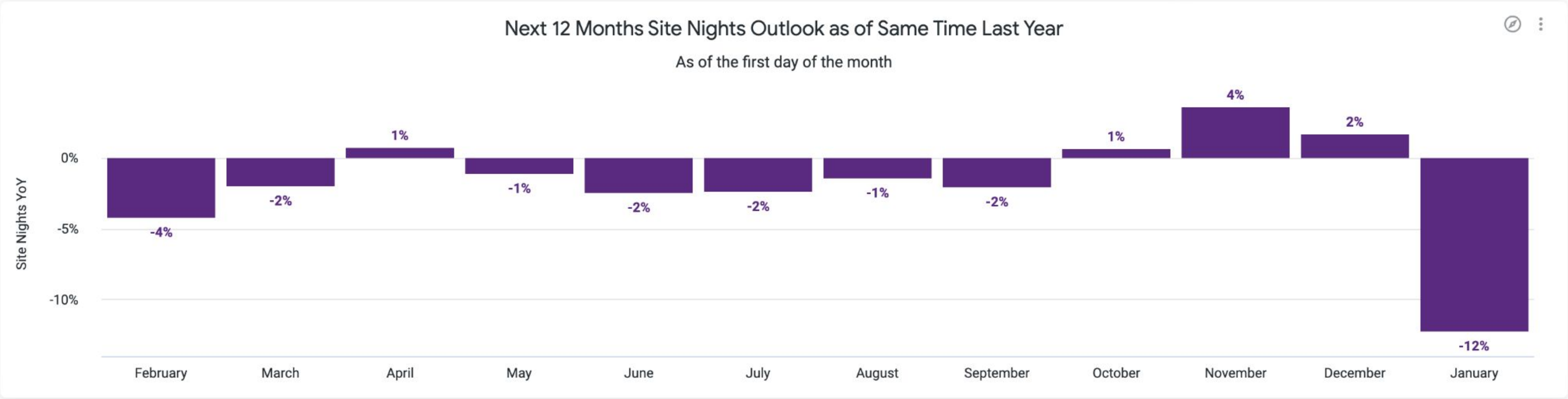
- We are seeing very similar booking window patterns in January of this year vs last year, but moving a bit towards a longer 90 days+
- For reservations booked last month vs January of last year, Length of Stay patterns are also very stable.

Timeframe	Date from Feb 1st
90 days	May 2nd, 2025
120 days	June 1st, 2025
150 days	July 1st. 2025
180 days	July 31st, 2025
270 days	October 29th, 2025





Next 12 Month Occupancy Outlook



- January was slower on reservations this year and we have seen most months erasing the lead gained in November and December.
- The summer months are all trending about -2% down vs last year in terms of sites nights booked.

Next 12 Month Occupancy Outlook

Advancing Outdoor Hospitality

Field Notes

In partnership with OHI

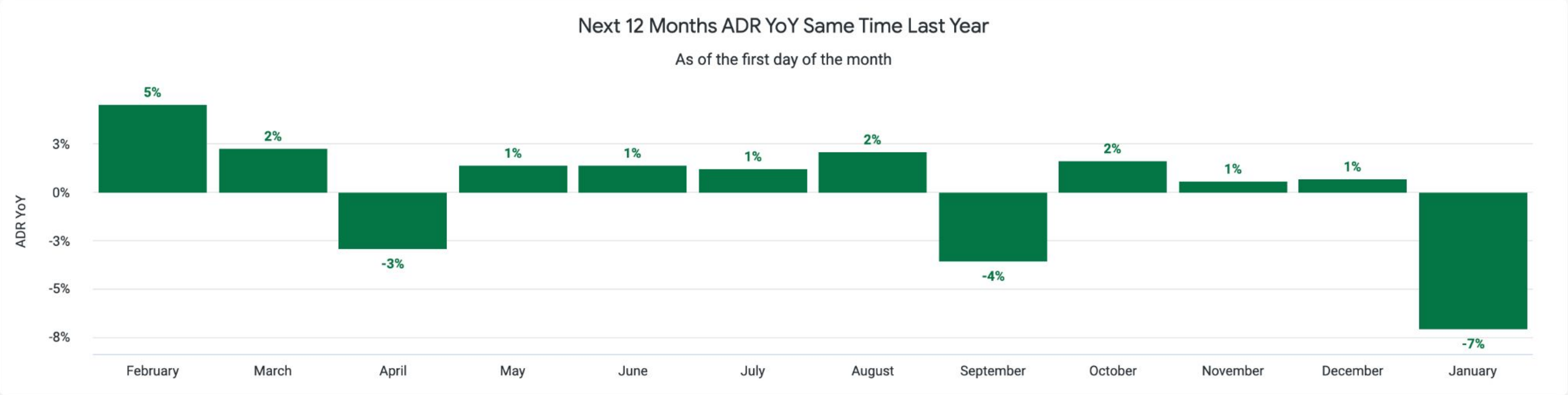
"For the 2025 camping season, we just began officially taking reservations. However, we did offer an early booking to several of our repeat campers. We're not seeing a decrease in bookings so far and generally seeing an increase in fall camping. During the 2024 season, bookings from the month of September until our closing date in October were up by 40% compared to 2023. The majority of fall campers staying the entire last six weeks of our camping season (roughly September 1st until October 14th). So far this season we are remaining to see an increase in fall bookings and estimate continued growth."

Ashley Cary,
OHI member
Hidden Acres Family Campground in Preston, CT

"We are definitely seeing further declines for 2025. It is too early to say what percentage we might be down. Our booking window is shorter than many parks, so this might still turnaround. We are reluctant to discount rates, but I think in this climate, lower rates would make a difference in occupancy."

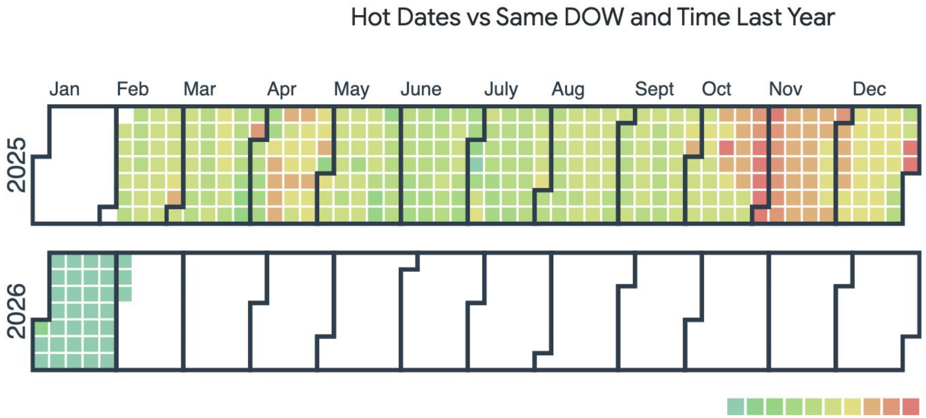
Mike Gurevich,
OHI member
Cherry Hill Park Campground, College Park, MD

Next 12 Month Average Daily Rate (ADR) Outlook



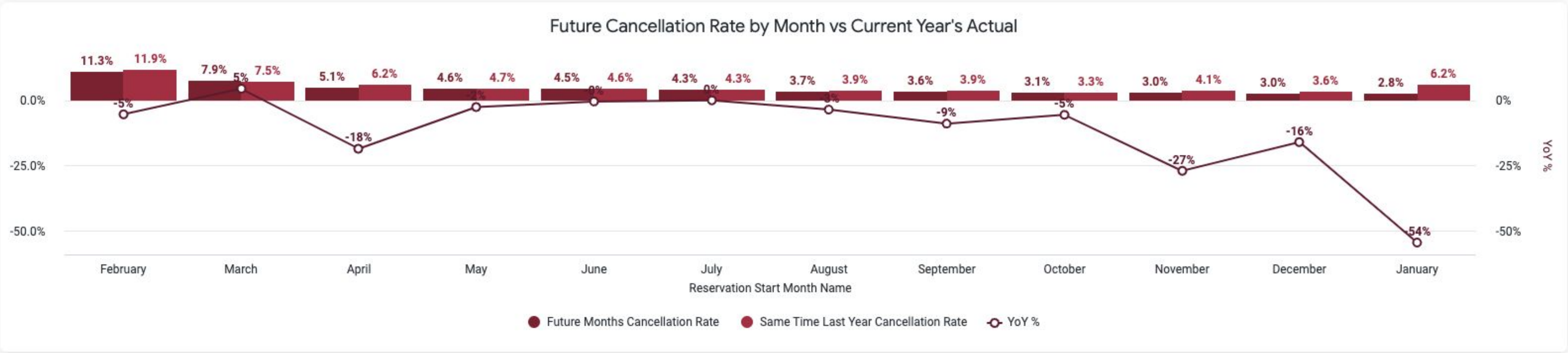
- It seems like we are seeing a direct correlation between the increase in ADR and the decline in Site Nights vs same time last year.
- Summer months are marked by a 1-2% increase in ADR.

Future Hot Dates vs Same Day of Week Last Year



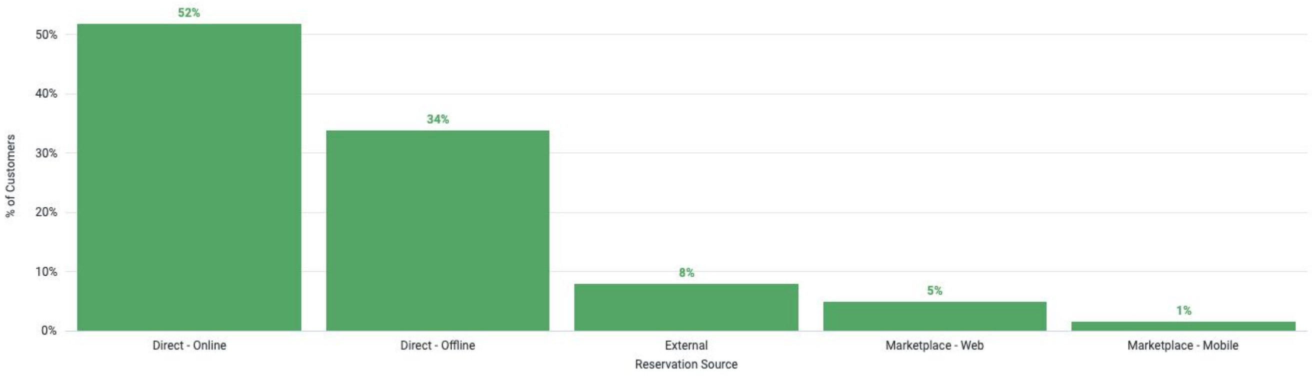
- We are noticing a slight increase in demand for the month of April against same time last year.
- As for the summer months, early May and August seem to have slightly more interest vs last year.

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.

What We're Digging This Month:
Guest Acquisition by Reservation Source



- For customers that had their first booking at a park in 2024:
  - 86% booked directly with the park (online or offline)
  - Campspot Marketplace accounted for 6% of new guests at a park.

What We're Digging This Month:

Repeat Customers - Did you know?

60%	32%
Of current future reservations booked, are from repeat guests at a park	Of customers have had multiple bookings at the same park (for parks that have been on Campspot for at least 2 years)

What We're Digging This Month:

Repeat Customers - Did you know?

60%	32%
Of current future reservations booked, are from repeat guests at a park	Of customers have had multiple bookings at the same park *(for parks that have been on Campspot for at least 2 years)*

Field Notes

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"At Normandy Farms, we offer an exclusive Credit Card Authorization (CCA) Program designed to provide our guests with special benefits and ease when booking their stays. For a one-time fee, members enjoy perks such as 10% off camping reservations, the convenience of reserving without a deposit, and exclusive access to a members-only waitlist for sought-after camping sites. Over the years, we've seen the CCA Program grow in popularity, with members tending to book more frequently, particularly during our shoulder seasons and throughout the summer. The ability to reserve without a deposit makes it easier for our guests to plan multiple weekends or weekly trips, enhancing their experience with us."

Taylor Nutbrown,
OHI member
Normandy Farms Family Campground, Foxboro, MA

What We're Digging This Month

OHI® CONNECT
Connecting the Dots for the Outdoor Hospitality Industry

If you're navigating revenue or cost challenges, looking to sharpen your strategic vision, curious to learn more about the industry and all it entails, or yearning for networking opportunities with your fellow RV park and campground operators then let OHI connect the dots for you.

📅 March 25-26, 2025 (Optional Advocacy Capitol Hill Visit Day Add-On Experience-March 27)

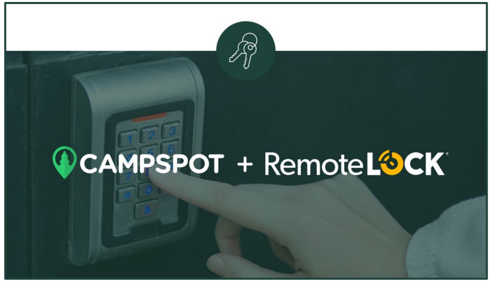
📍 Cherry Hill Park Campground *(a chance to stay at and tour an OHI member campground with a rich 65-year history!)* | 9800 Cherry Hill Road, College Park, MD 2074

Register Now

Dig in Further

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

RemoteLock Announcement



Campspot's RemoteLock integration just got an upgrade and now extends the original functionality to individual lodging accommodations in addition to the shared gated spaces.

Learn More

Going to the WACO conference?

Attending the 2025 WACO Convention & Trade Show March 12-16, 2025? Us too! Let us know if you'd like to connect before, there or after!

Let's Connect

Thank you!

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