The Data Dig

Insights on campsites
powered by Campspot

March 2025

Brought to you by:

CAMPSPOT

Developed in partnership with:

OHI® Advancing Outdoor Hospitality

The Data Dig: March 2025 Edition

With Q1 behind us, we're starting to see key patterns emerge in the 2025 booking season. In this month's Data Dig, we're diving into March performance, highlighting occupancy trends, Marketplace growth, and shifts in guest behavior that are shaping the months ahead.

Occupancy for March ended in line with last year at 27.3%, while ADR continued to climb, up 3% year-over-year, closing at $28.81. Notably, smaller parks (those with 1–50 sites) saw a 7% YoY increase in occupancy, while mid-to-larger parks remained flat or slightly down, showing that demand growth may be more concentrated in niche or more flexible locations.

We're also keeping a close eye on evolving booking behavior. In March, we observed a modest decline in transient stays and lock site usage, along with fewer short-term reservations (0–27 day booking windows). On the flip side, we're seeing encouraging signs of stronger long-range booking activity, particularly for peak summer dates—signaling that many guests may have shifted to planning further in advance this year.

One of the most exciting highlights from March was the continued growth of Campspot's Marketplace, which reached 8.6% share of online reservations, up from 7.4% in March 2024. This lift aligns with the success of our Biggest Booking Week campaign and reinforces the value of participating in strategic marketing efforts to increase visibility and reach new guests.

While summer occupancy is still pacing behind 2024, we're seeing improvements month over month—and with longer booking windows on the rise, there's good reason to stay optimistic. As always, we'll continue tracking these trends and sharing insights to help you plan ahead and make data-backed decisions. Keep reading for the full breakdown, and let us know if you have questions or want to explore your park's specific performance.

Onward and upwards,

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 April 2nd 2025
- Forward-looking data is based on campgrounds active prior to **January 2024** and data updated April 2nd, 2025

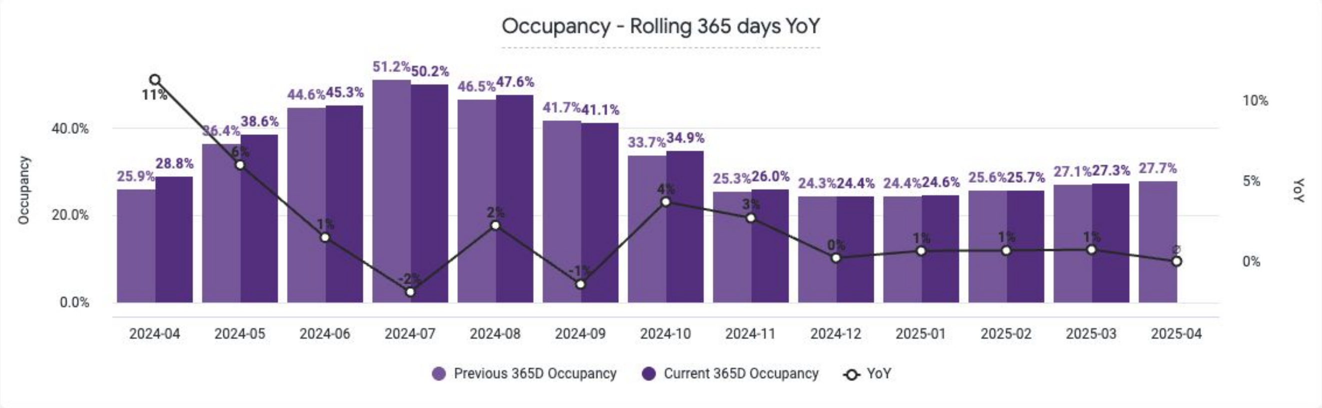
Important Note

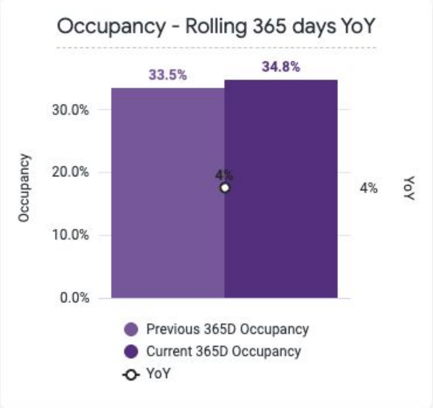
- We have been piloting this report over the past year, and making adjustments based on user feedback. Starting in August 2024, we rolled it out more broadly, and have incorporated some important changes to our data collection and analysis approach that we think makes the information more meaningful.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





- The occupancy story hasn’t changed in March where things were mostly flat with a 1% increase for all months YTD.
- March ended at 27.3% occupancy.
- For the rolling last 365 days, occupancy was up 4% YoY, averaging 34.8% occupancy.

Past Occupancy by Month

Field Notes

In partnership with OHI

"At our two 'destination parks' in Gulf Shores Alabama, both in the mid-size range, occupancy for the month of March was down just 1 and 2% YoY. March is a part of our Snowbird season and considered one of our 'Peak Months' that generates a significant portion of our annual revenue. So we are pleased to have not seen a remarkable decrease in occupancy when compared to 2024. Final ADR for the month of March was up 5.3 and 5.5% YoY. Our primarily transient mid-sized park, was down 4% in occupancy for the month of March year over year. This is consistent with the same overall slight slowdown we've seen in 2025 so far and may be indicative of what to expect for the year as a whole. The final ADR for the month of March was down 1.7% YoY."

Amanda Metz,
OHI member
Owner of Silver Thread Administrator for three parks in Alabama

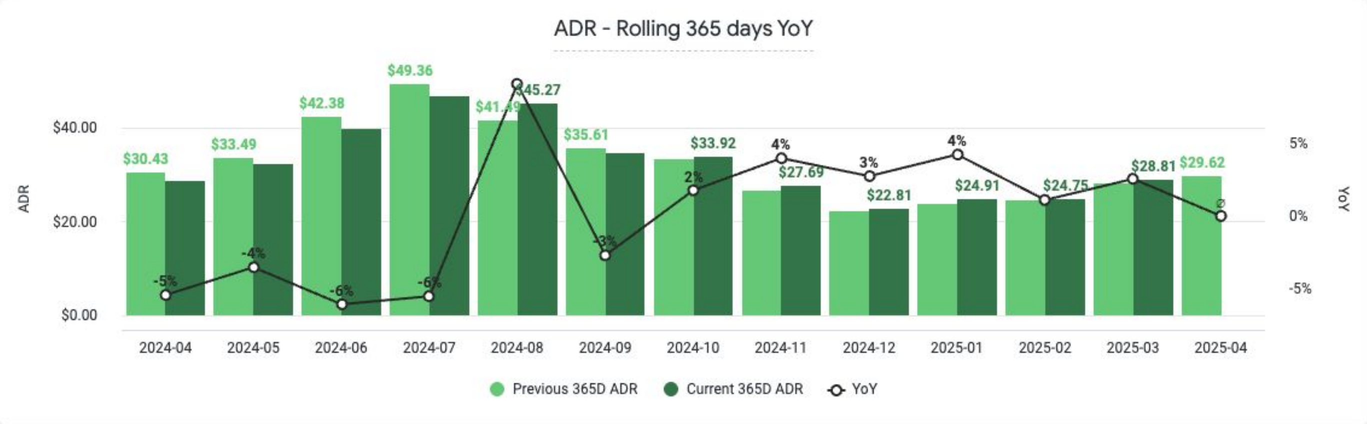
"In Texas, at Camp Riverview, ADR is up while site nights are down. Our area has been in a drought for several years. Because our tourism depends heavily on river recreation, we expect a downward trajectory until we get substantial rain to impact the aquifers and springs. Bookings for summer 2025 are down year over year. However, the % with which they are down is shrinking."

Melissa Cummings,
OHI member
Owner of Silver Thread Basecamp, Colorado

"At Verde Ranch RV Resort (AZ), the peak season is February - April. For March 2025, RV site occupancy overall was down YOY about 14%. While our ADR for transient RV reservations was down, we were able to slightly increase monthly ADR and needed to pivot and change mix to more long term than typical. The property certainly saw a decline in Canadian travel and is also working through absorbing more than 30% new supply to the market in RV sites."

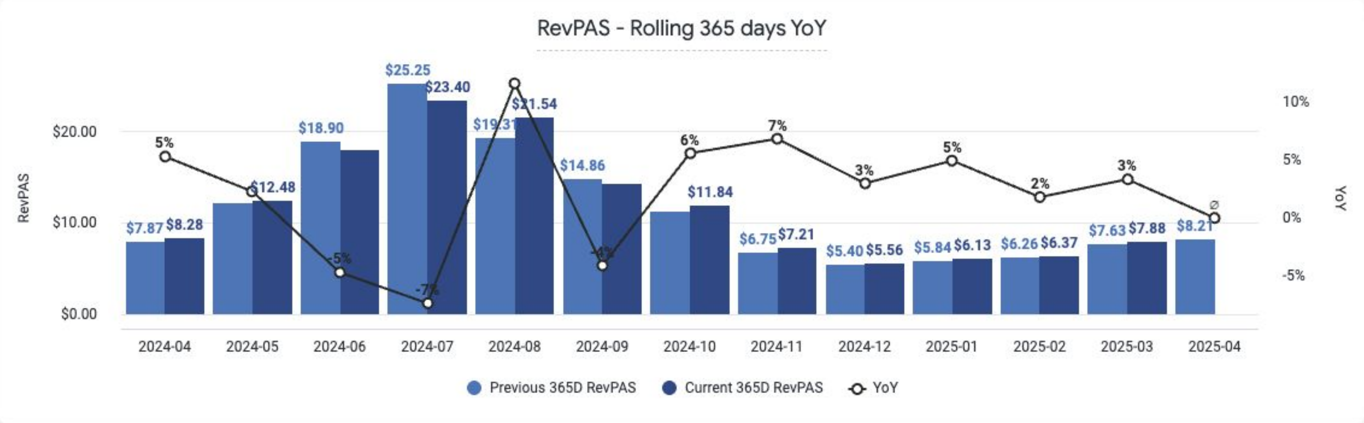
Mike Harrison,
OHI member
COO of CRR Hospitality

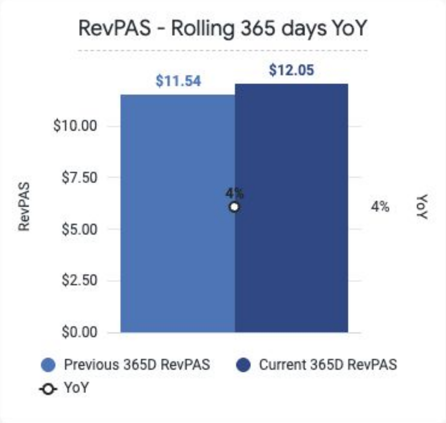
Past ADR by Month



- March saw a bigger increase in ADR vs February. ADR was up 3%, ending at $28.81.
- In the last 365 days, ADR was at $34.66, only 1% higher than the previous year.

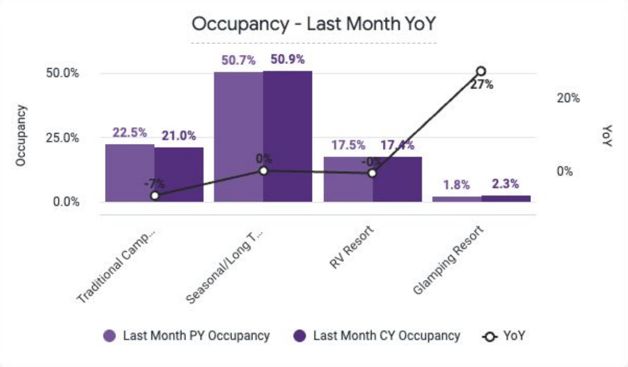
Past RevPAS by Month

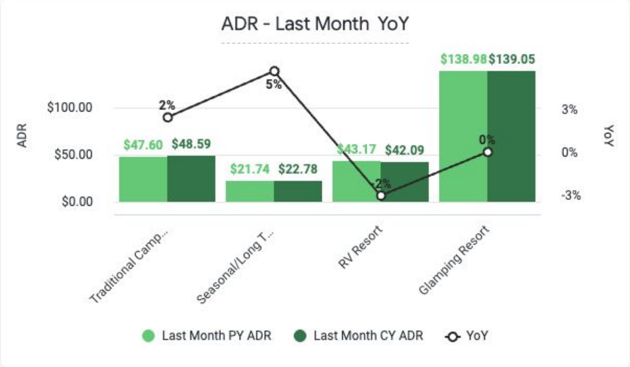


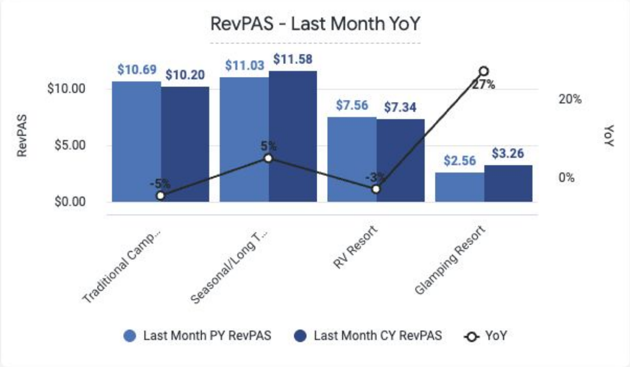


- With both occupancy and ADR up, March RevPAS ended at $7.88, 3% higher than March last year.
- The aggregated last 365 days were up 4% YoY, averaging $12.05.

Last Month Performance by Campground Category



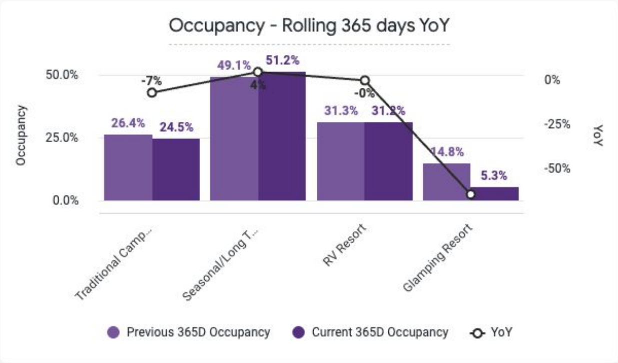


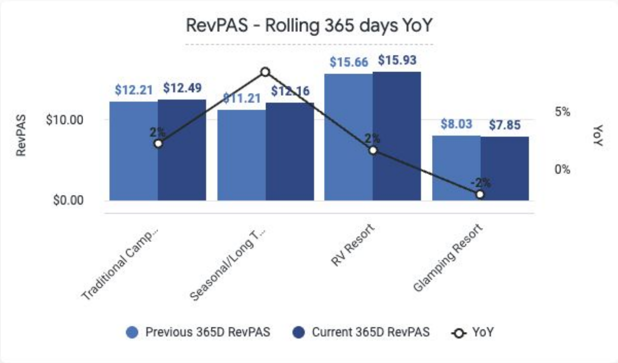


- Traditional campgrounds had a steep drop in occupancy, with -7% YoY, ending at 21%. RevPas was down -5%.
- Seasonal campgrounds had flat occupancy but 5% increase in ADR/RevPAS.
- RV resorts had a negative month with flat occupancy, -2% lower ADR and -3% RevPAS.
- Glamping resorts had flat ADR and a substantial increase (+27%) in Occupancy increase but ending at 2.3%

- **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, Traditional campgrounds have traded occupancy for ADR.
- Seasonal campgrounds have seen a +4% occupancy growth and a +4% ADR growth. Leading to the best RevPAS growth of the cohort.
- RV resorts have seen mostly flat results in all core KPIs.
- Glamping resorts have also traded occupancy for ADR leading to a -2% decline in RevPAS.

- **RV Resorts**: Parks with at least 3 key resort amenities.
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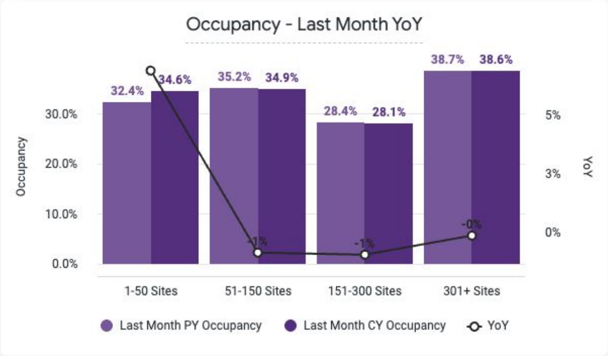
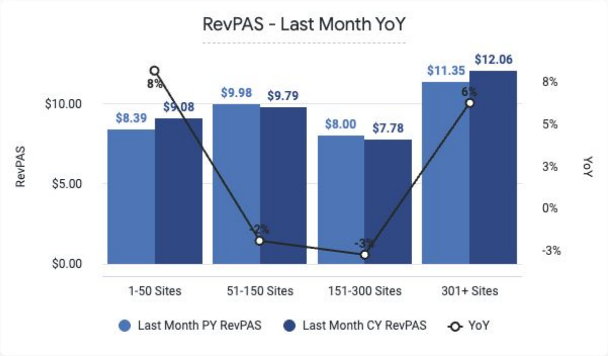
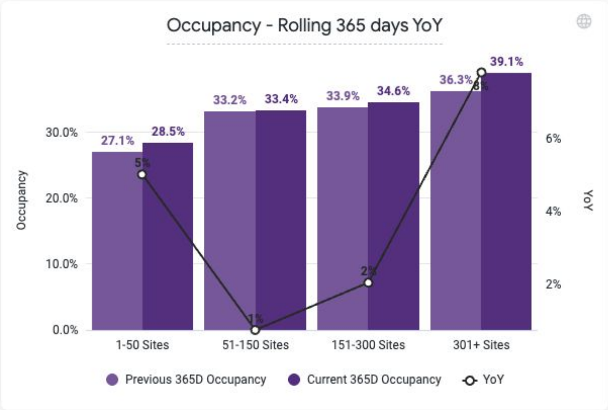
Last Month Performance by Campground Size

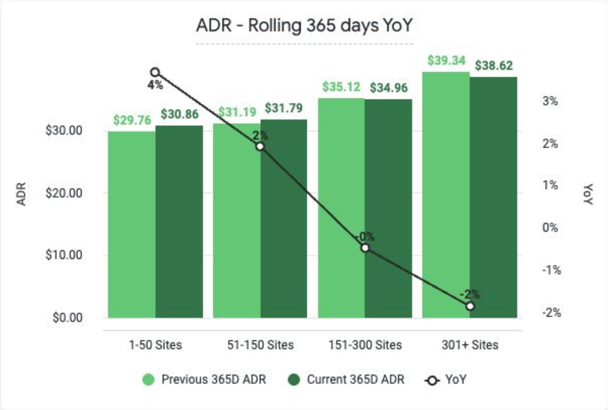


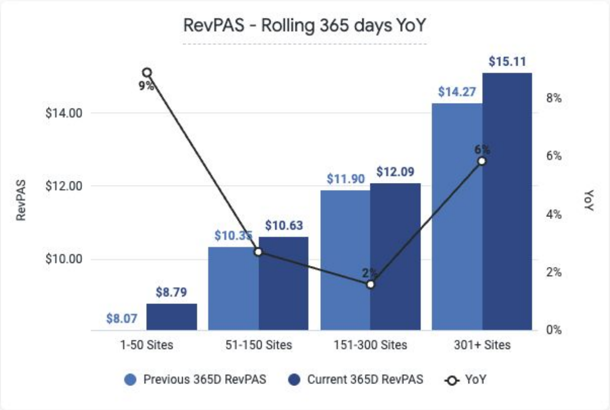


- In February, smaller campgrounds have seen a +7% growth in occupancy YoY while bigger parks have stayed stable.
- Larger campgrounds had the highest ADR growth in March at +6%.
- Small campgrounds have had a +8% growth in RevPAS in March and grew every month this year.

Past Performance Indicators by Campground Size



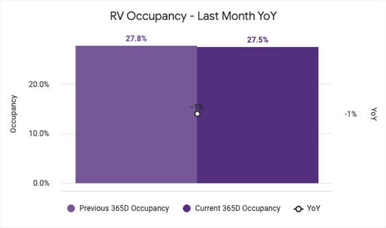


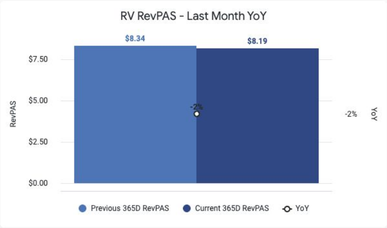


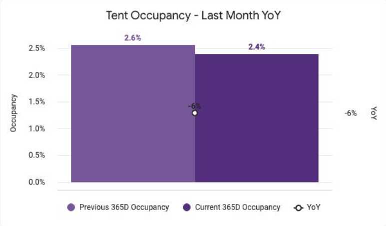
- In the last year, both small (1-50 sites) and large campgrounds (301+ sites) have seen occupancy growth while mid-size parks have been stable.
- 301+ sites campgrounds have seen the steepest drop in overall ADR with -2% YoY.
- Overall, all categories have seen some level of RevPAS growth with smaller and larger campgrounds leading the way with +9% and +6% respectively.

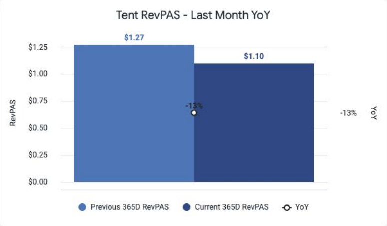
Last Month Performance by Site Category

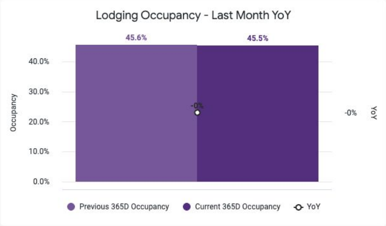
- In March, RV and Lodging sites we’re mostly flat in occupancy while tent site occupancy dropped by -6%, ending at 2.4%.
- RV and Tent sites both saw ADR drop, a contrast from last month, of -1% and -8% respectively while Lodging sites grew 12%.
- Lodging was the only category with RevPAS growth with +12%, ending at $17.53. RV sites were flat and Tent Sites took a steep decline at -13%.

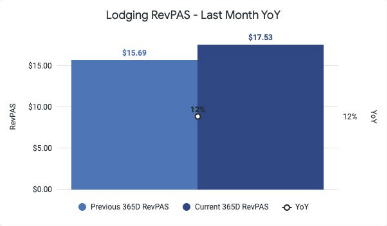






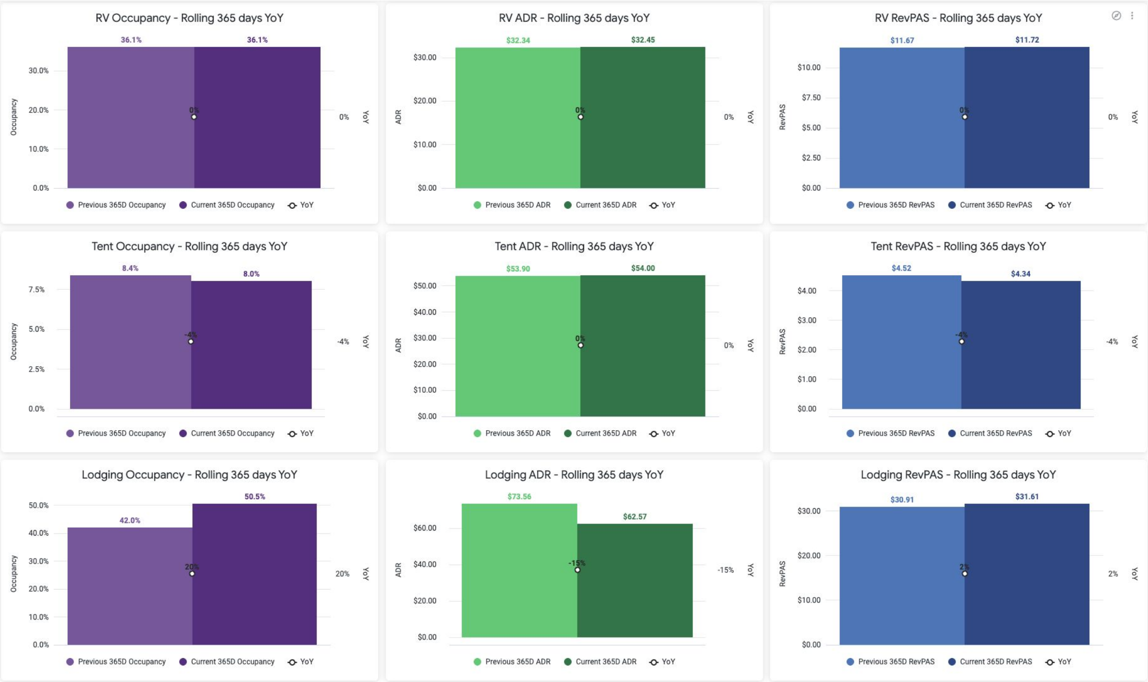




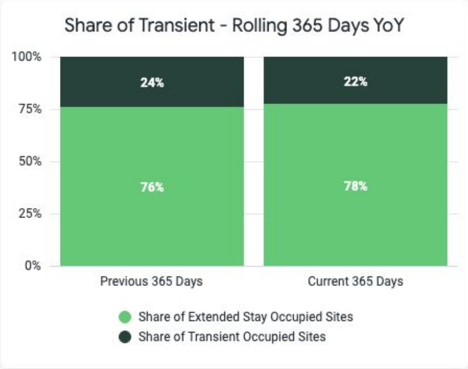


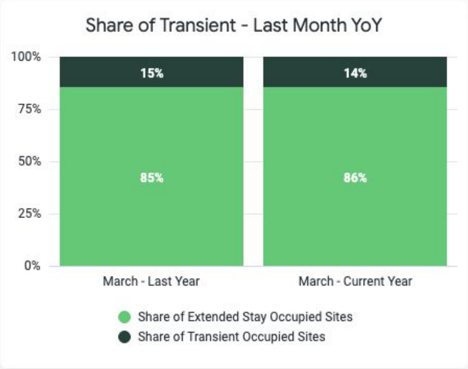
Past Performance Indicators by Site Category

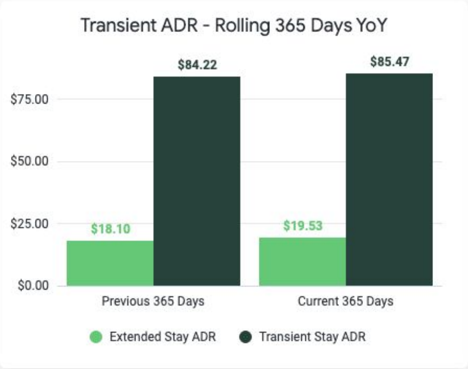
- In the last year, RV sites have seen flat occupancy rates, ADR and RevPAS.
- Tent sites have had a slight decrease in occupancy and flat ADR, leading to a -4% decline in RevPAS.
- Lodging sites have seen a 20% increase in occupancy at the cost of -15% in ADR. Landing at a +2% RevPAS YoY.



Past Share of Extended Stay

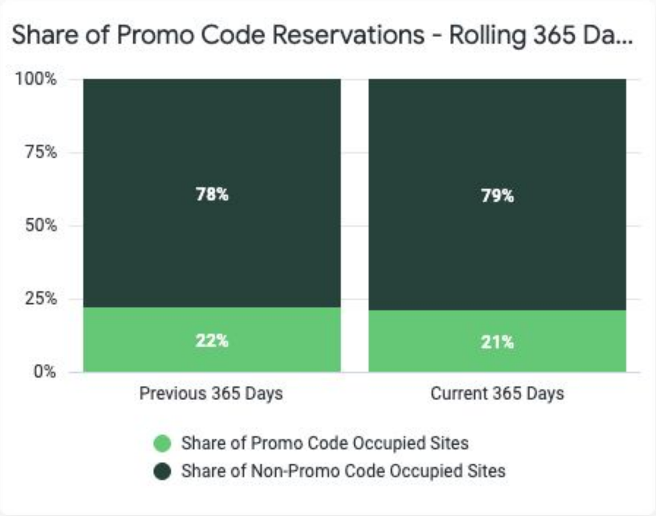






- This year, the share of transient stays more than doubled from January to March, but with a slightly lower share than March last year.
- Transient stays had lower ADR in March this year vs last year.
- Extended Stays ADR has been climbing slowly YoY.

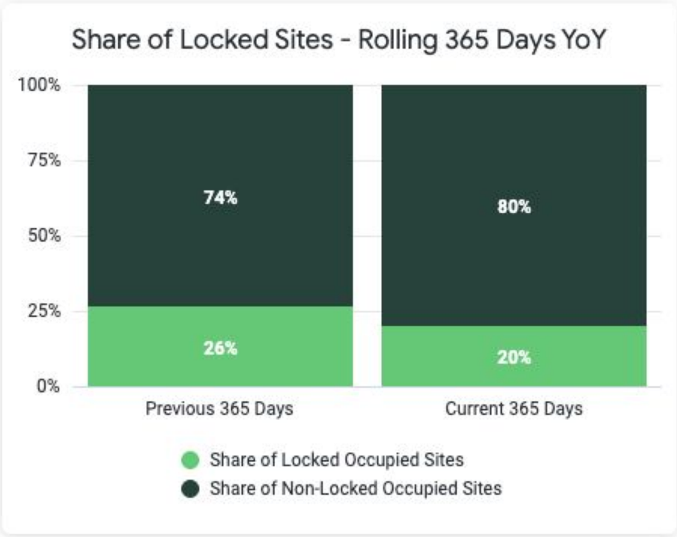
Past Reservations with Promo Code

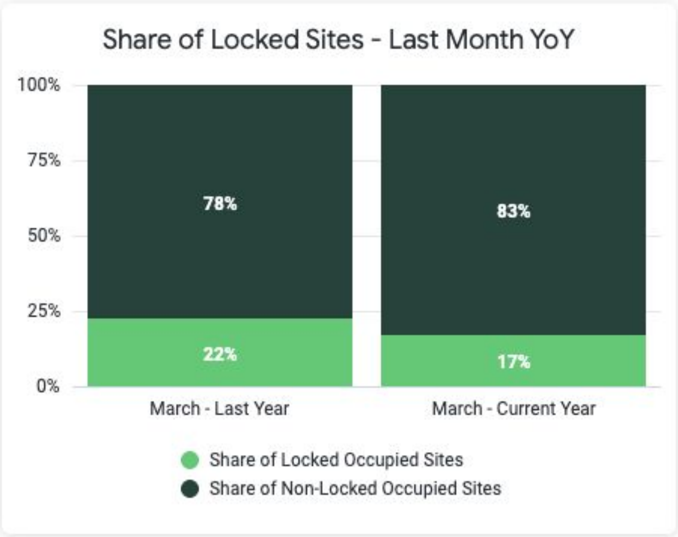


- Promo code utilization was slightly down in March this year.
- Overall, the share of site nights with Promo Code has been stable at 21%.

Past Reservations with Locked Sites

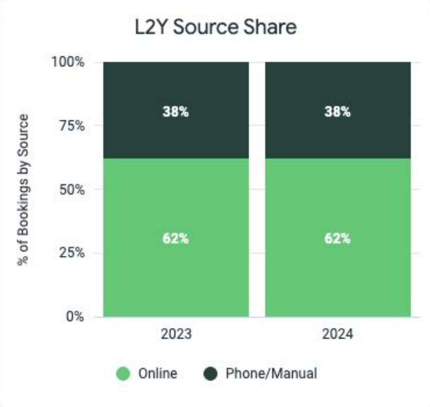
- Lock site nights decreased by -5% in March 2025 vs 2024.
- Share of locked site nights was also down on the full year by -6%.

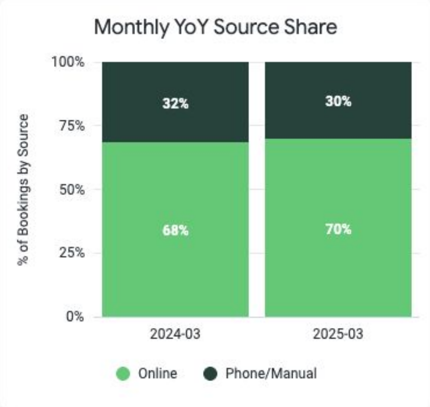


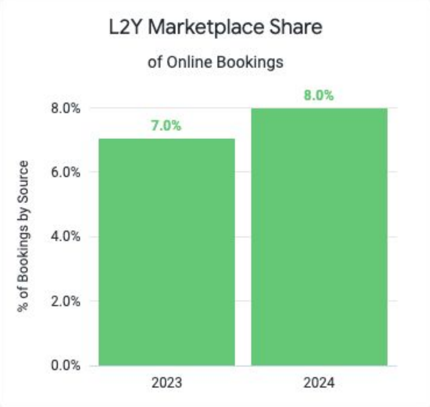


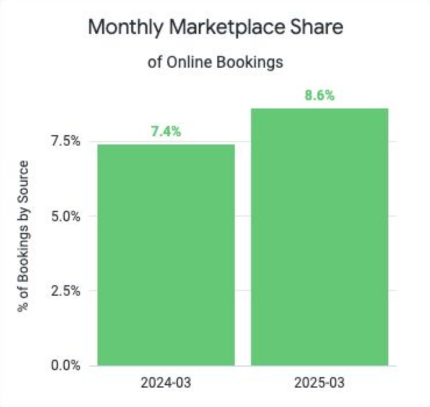
Past Reservations by Booking Source

- In the last 2 years, overall share of online vs phone bookings has been stable at 62% online.
- March 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 March 2025 was 8.6%, up +1.2% from last year.





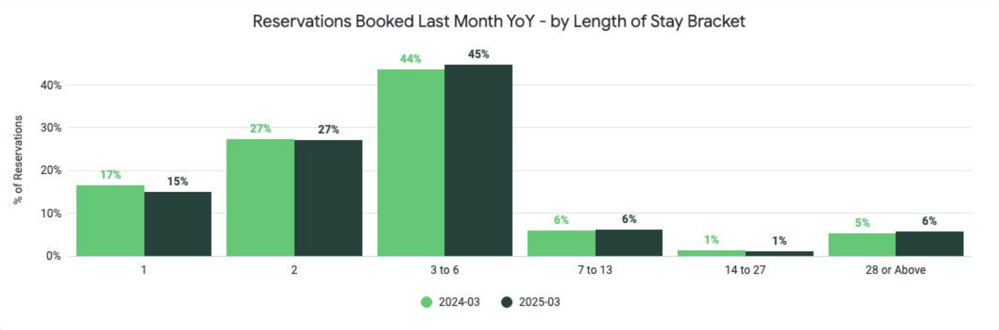




Last Month Booking Window and Length of Stay

- In March, we did see less reservations within the month with booking windows 0-27 days out being down YoY. We are seeing more reservations coming in longer booking window covering most of the high season.
- For reservations booked last month vs March of last year, we have seen less 1 night reservations and more 3-6 nights bookings.

Timeframe	Date from April 1st
90 days	June 30th, 2025
120 days	July 30th, 2025
150 days	August 29th, 2025
180 days	September 28th, 2025
270 days	December 27th, 2025



Last Month Booking Window and Length of Stay

Advancing Outdoor Hospitality

Field Notes

In partnership with OHI

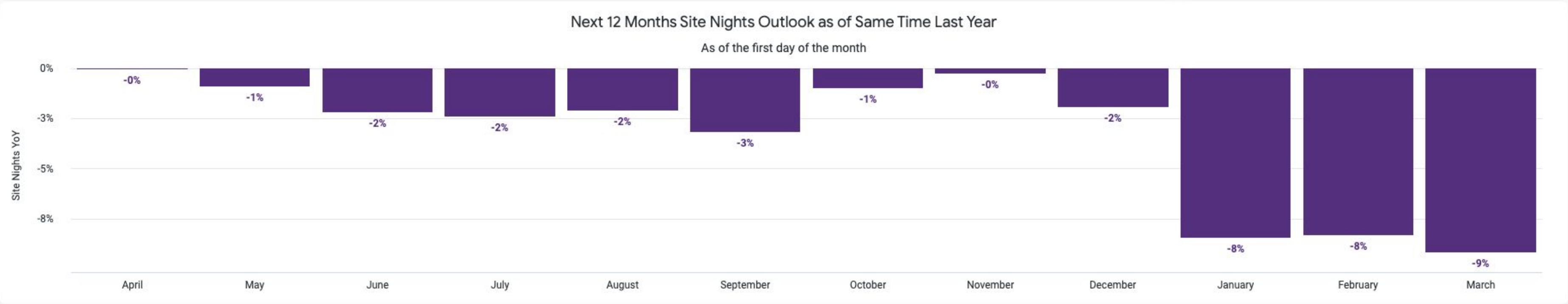
"At all our CRR properties we are seeing a shorter booking window for 2025 compared to 2024, which while creates some angst it is also helpful and driving more short-term bookings in the month for the month. The portfolio saw almost 20% of total RV Site revenue booked in March 2025 for the month in the month."

Mike Harrison,
OHI member
COO of CRR Hospitality

"Birmingham South RV Park (AL) is primarily transient, and the average booking window is almost identical YoY, at 34 versus 35 nights, and the average length of stay remains the same YoY at 3 nights. Combined with a 4% decrease in occupancy so far in 2025, this data suggests that slightly fewer guests in our market are travelling and looking for overnight stops, but those that are travelling have not significantly changed their travel behaviors."

Amanda Metz,
OHI member
Owner of Silver Thread Administrator for three parks in Alabama

Next 12 Month Occupancy Outlook



- As of April 1st, site nights for all future months are down vs the same time last year.
- The summer months are all trending slightly better than they were in February, meaning we could see some more last minute pick up this year.

Next 12 Month Occupancy Outlook

Advancing Outdoor Hospitality

Field Notes

In partnership with OHI

"Projected summer occupancy is down at all 3 of our campground locations from where projections were this time last year. But we were able to pick up an additional 8-10% in forward bookings for the summer season in the month of March alone. We are hopeful that this is a sign that people have simply been waiting a little longer to book, and that our peak season will eventually get to the same or close to the same occupancy as last year."

Amanda Metz,
OHI member
Owner of Silver Thread Administrator for three parks in Alabama

"In Colorado, at Silver Thread Basecamp, bookings are up for summer 2025, campsite bookings are way up yet, lodging bookings are down. We are already seeing day-of, drop-in reservations in Colorado. All indicators for Colorado are pointing to a strong summer."

Melissa Cummings,
OHI member
Owner of Silver Thread Basecamp, Colorado

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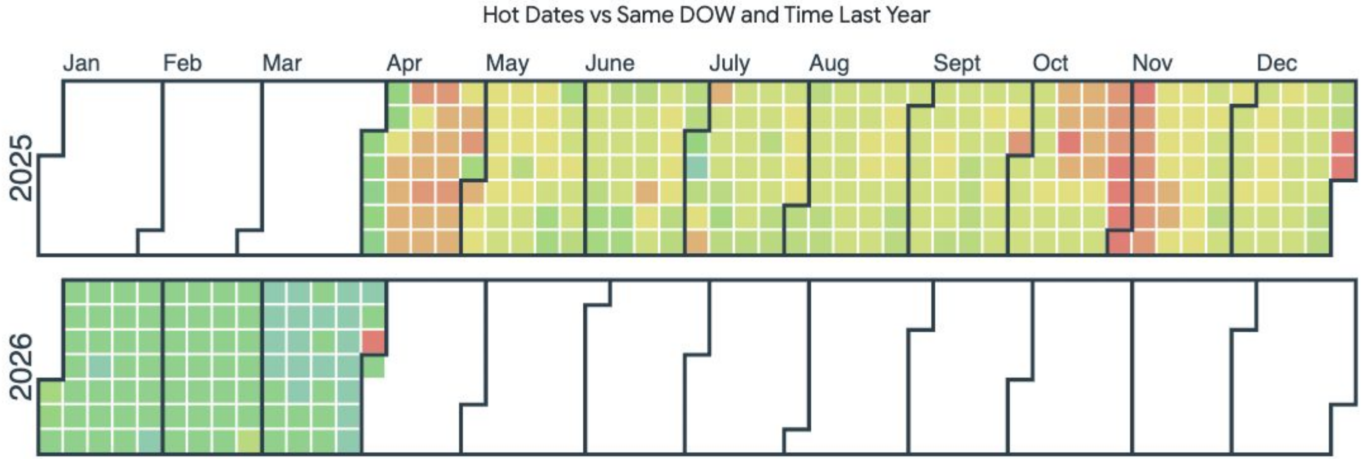
Next 12 Month Average Daily Rate (ADR) Outlook

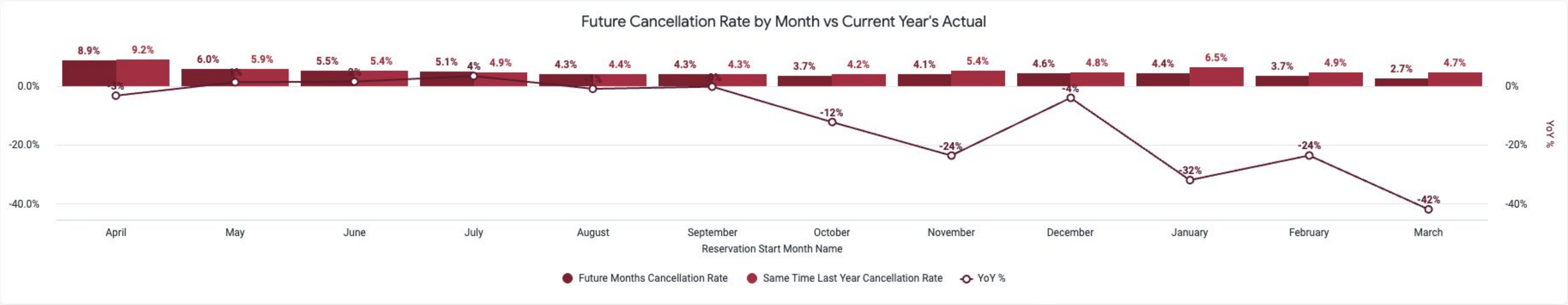
- While ADR is mostly up, it seems like the increases are slightly down versus what we saw in February.
- We are now seeing modest increases for the Summer months and declines for August and September YoY.

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, the last 2 weeks of June and the last week of July seem to have slightly more interest vs last year.
- July 4th weekend seems to have more demand than last year, along with the month of October.

Future Months Cancelation Rates



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

What We're Digging This Month:
Reach More Campers with Campspot's Biggest Booking Week Promo

- Each year, Campspot's Biggest Booking Week delivers a surge in demand by tapping into one of the busiest weeks of the camping season.
- Campsot's 2025 Biggest Booking Week promotion proved just how powerful Campspot's Marketplace can be as a growth engine for parks of all sizes.
- **Campgrounds that participated in the 2025 Biggest Booking Week saw:**
    - 74% increase in Marketplace reservations
    - 24% increase in Marketplace site revenue
    - 71% of bookings from new customers
- **Bonus:** Campspot garnered 78 national media placements exposing Biggest Booking Week participating parks with a reach of nearly 30 million readers!

"The BIG 25 promotion really exceeded our expectations this year! We first took part in this annual promotion in 2024, and were very encouraged to see it generate 136 reservations and $27k+ in revenue for our property. 2024's promo seemed like a great success with just a one week promotional window.

When we launched it for 2025, we expected to see similar results, but we were happily surprised to see many more reservations generated—and with that, more revenue than we expected! The BIG 25 promotion yielded 229 new reservations for us and over $37k+ in revenue. **That represented a 40% increase in the number of reservations using the promo and a 25% increase in revenue compared to 2024."**

- Lake Hemet Campground Management
Lake Hemet Campground | Mountain Center, CA

Thank you!

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