ARVC
National Association of RV Parks & Campgrounds

2019 INDUSTRY TRENDS AND INSIGHTS REPORT

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Introduction

The privately-owned RV parks and campground industry across America is growing.

The proof is in the data featured in this year's (2019) ARVC Industry Trends and Insights Report.

For the past few years, the RV manufacturers have been producing units at a historic paceand dealers have been enjoying record numbers as well. Amongst rumors private RV parks and campgrounds weren't keeping up, we started fielding questions from members of the collective outdoor hospitality and recreation industries.

The only data we had at the time was anecdotal, but we shared what we had and assured them the private RV and campground industry was far from stagnant. The proof is in the numbers though, and now we have them.

With this year's Industry Trends and Insights Report, we were able to dive deeper into expansion in three ways: 1) new park growth; 2) existing park expansion; and 3) potential for growth (aka the number of acres available for expansion).

You'll see in the Key Findings of this report that private RV parks and campgrounds have been growing steadily for the past five years and we anticipate exponential growth in the coming year. I am personally very proud of the growth our industry is enjoying. It is a testament to the steadily growing economy, sure, but more so it is a testament to the grit and determination members of our industry showcase each and every day.

In my travels across America visiting ARVC members at their RV parks and campgrounds and at industry events, I continue to be inspired by the growth mindset I encounter each and every time.

For those familiar with our 2017 Industry Trends and Insights Report, the growth and expansion data isn't the only new information you'll find in this year's report. While we've kept some of the mainstay information, such as amenities and seasonal rates, we've also added valuable data on expansion cost per site, guest composition and demographics, and marketing trends.

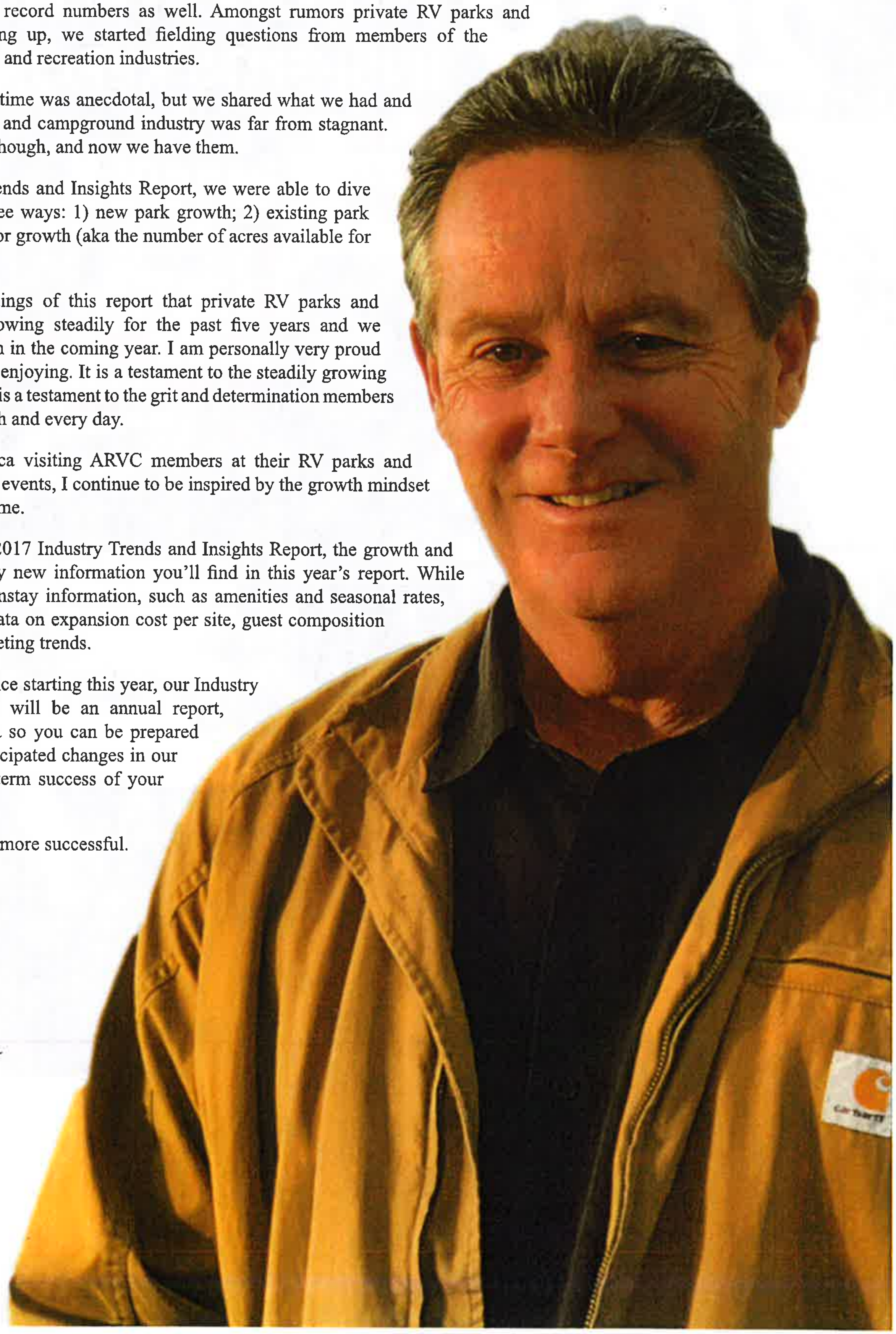
We're also pleased to announce starting this year, our Industry Trends and Insights Report will be an annual report, giving you more timely data so you can be prepared for upcoming trends and anticipated changes in our industry to ensure the long-term success of your business.

ARVC is here to help you be more successful.

Have a great 2020!

Regards,

Paul Bambei
ARVC President and CEO



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KEY FINDINGS

Park/Campground Profile

- **Park/campground longevity is common**; 69% have been in operation for at least 20 years, including 23% that have been in operation for at least 50 years. The median report was 32 years.
- **About three-fourths (78%) are individual/independently owned small businesses.** Far fewer are corporate-owned (14%), a franchised brand (7%), are membership or member-owned (2%), or have some other operational structure (5%). The typical (median) park/campground employs 3 full-time and 2 part-time individuals during its main season.
- **A majority (93%) indicated their park/campground land is owned (versus leased) by its owner.** The typical park/campground has 20 acres. Median acreage is higher in the Northeast and Midwest than in the South and West.
- **Main season months vary by region.** In the South, each of the 12 months are part of the main season for a majority of reported parks/campgrounds, whereas those in other regions have bell curve shapes (particularly strong in the Northeast and Midwest), peaking in the summer months.

Guest Composition and Demographics

- **Seasonal guests are the most common primary guest type**, closely followed by vacation leisure guests and overnight guests. Membership guests are uncommon as a primary or secondary guest type. Parks/campgrounds in the Northeast and South are more likely than those in the Midwest and West to report seasonal guests as their primary guest type. Conversely, those in the Midwest and West are more likely than those in the other regions to report overnight guests as their primary guest type.
- **Boomers/seniors are the most common primary guest demographic**, followed by Gen X guests and families with children. Parks/campgrounds in the South and West are more likely than those in the Midwest and Northeast to report Boomers/seniors as their primary guest demographic. Conversely, those in the Midwest and Northeast are more likely than those in the other regions to report families with children as their primary guest demographic.

Amenities, Activities, and Services Offered

- **Parks/campgrounds offer a wide variety of amenities**—WiFi, laundry facilities, and restroom/shower facilities among the most common. Significant differences appear by region. For example, parks/campgrounds in the Northeast and Midwest are about twice as likely as those in other regions to offer firewood and playgrounds. And, not surprisingly, for many of the listed amenities, the likelihood of being offered increases with park/campground size.
- **Likewise, parks/campgrounds offer a variety of recreational activities**—fishing, swimming, horseshoes, and hiking/nature trails among the most common. As was seen with amenities offered, significant differences in certain recreation activities offered appear by region. For example, 66% of parks/campgrounds in the Northeast offer basketball compared with only 14% of parks/campgrounds in the West. And, for many recreation activities, the likelihood of being offered increases with park/campground size.

Camping Sites and Accommodations

- **Most parks/campgrounds (92%) have full hook up camping sites.** Just under half have water & electric only sites (48%) and/or rustic/tent sites with no hook up (43%). About one in ten have electric only sites (13%) and/or water only sites (9%).
- **Two-thirds of parks/campgrounds (65%) have at least one type of accommodation available for rent in addition to camping sites**—modern cabins/cottages, rustic cabins, park model cabins, modern RV trailers, glamping units, motel/hotel rooms, etc. Those most likely to offer at least one type of other accommodation listed include parks/campgrounds in the Northeast and Midwest, franchised brands, and larger parks.
- **The typical (median) park/campground has 92 total sites/units.** Those in the Northeast and those that are corporate-owned tend to be larger than others.
- **Occupancy rates vary based on the type of site/unit**. Parks/campgrounds with full hook up camp sites reported an average occupancy rate of 69% for these sites during the past 12 months. The occupancy rate for rustic/tent camp sites was the lowest at 25%. The typical (median) park/campground reported that their 2019 main season overall occupancy was up 2% compared with 2018.

Improvements/Expansion

- **Park/campground improvements have been prevalent in recent years.** A majority of parks/campgrounds have improved their infrastructure (79%) and/or existing amenities (64%) in the past five years. Just under half added amenities (46%) and/or added sites/units (44%) in that timeframe. In general, parks/campgrounds in the Northeast, franchised brands, and those with at least 200 sites/units were more likely than others to have made the aforementioned improvements.
- **62% of parks/campgrounds have acreage available for additional development/expansion.** Those in the Northeast tend to have more acreage available for additional development/expansion than those in other regions.
- **Nearly half (46%) indicated their park owner plans to expand in the next 12 months**—44% plan to add additional sites/units to the existing park/campground and 5% plan to open a new park/campground. Among those whose park plans to expand the *existing* park/campground in the next 12 months, the median number of sites/units they plan to add is 12.

Rates and Financials

- **Rates plans vary considerably by type of site/unit** (see pages 27, 28, and 30). Half of reported parks/campgrounds (50%) increased their 2019 main season nightly/weekly rates compared with 2018. The other half (47%) reported no change (3% did not answer the question).
- **The typical (median) park/campground reported $174,000 in general expenses and $26,600 in capital expenses in the past 12 months.** Median reports were much higher among those in the Northeast and West than those in the Midwest and South. And, not surprisingly, median reports correlate positively with park/campground size (by number of units/sites).
- **Three in five respondents (59%) anticipate their park/campground's profits to be up in 2019** compared with 2018; another 31% feel their profits will be about the same. Very few (5%) expect to see a decrease.

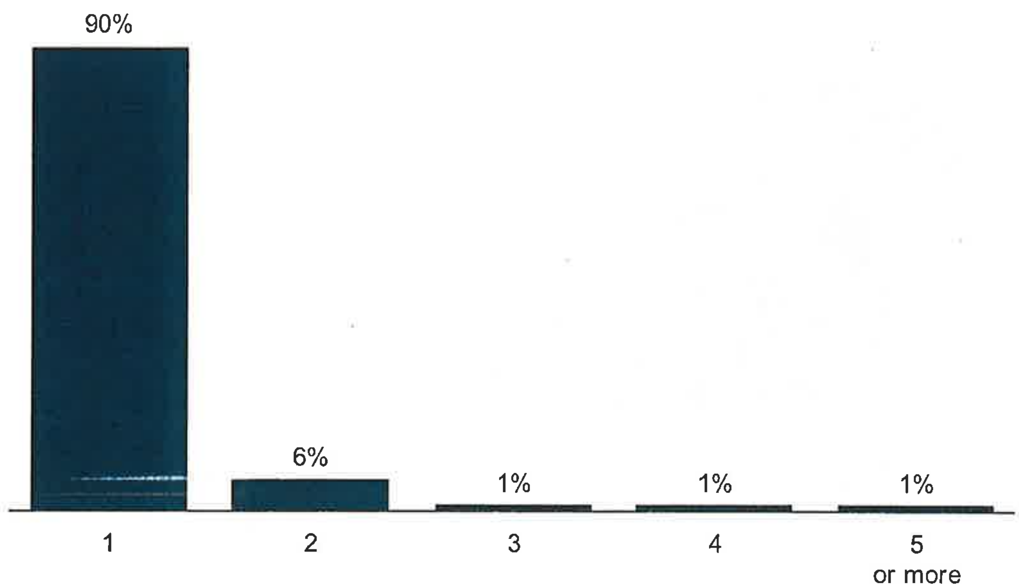
FINDINGS: Park/Campground Profile

Nine in ten respondents[1] own, manage, operate, or have detailed knowledge about one privately-owned RV park or campground. The other 10% were instructed to answer the survey for what they consider to be the most average park/campground they own, manage, operate, or have detailed knowledge about.

Number of Parks/Campgrounds

How many privately-owned RV parks or campgrounds do you own, manage, or operate, or have detailed knowledge about?

base (unweighted): 614 qualified respondents



[1] "Respondents" refers to the 614 individuals who responded to the survey and indicated in the first few survey questions they have owned, managed, operated, or have had detailed knowledge about a park/campground for at least one year.

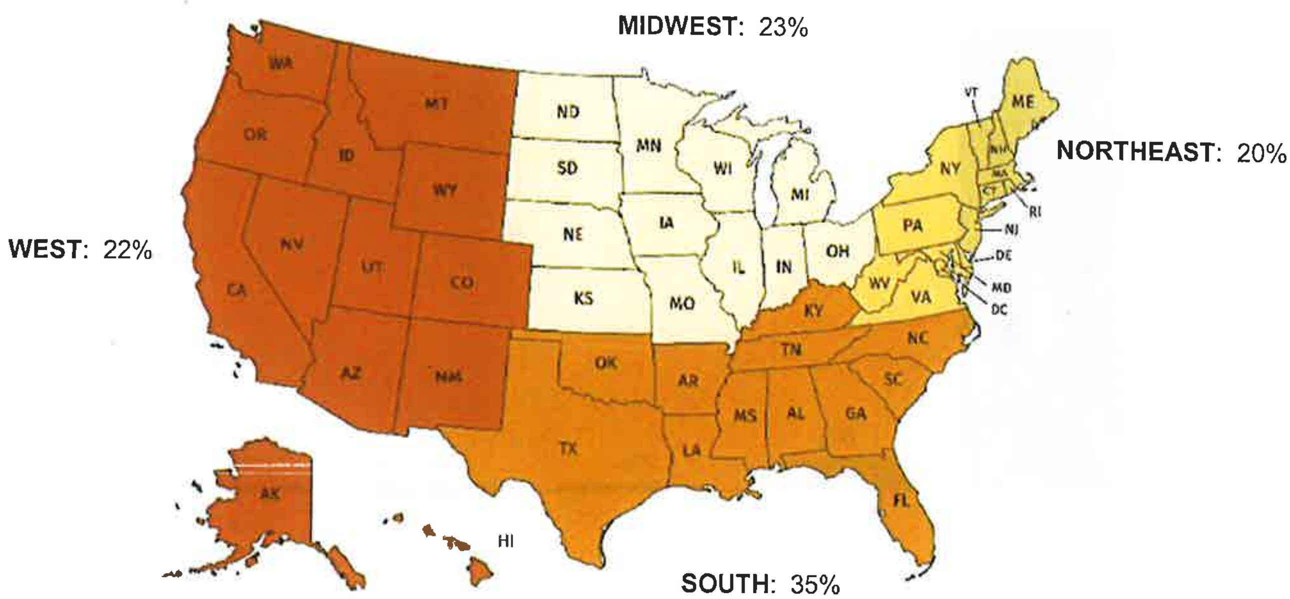
FINDINGS: Park/Campground Profile

The parks/campgrounds for which respondents reported on 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 southern states. Texas claims 17% of the reported parks/campgrounds while no other individual state accounts for more than 5%.

Geographic Distribution: Modified Census Regions

In what zip code is this park/campground?

base (unweighted): 614 qualified respondents



Geographic Regions Defined
Northeast: CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV
Midwest: IA, IL, IN, KS, MI, MN, MO, NE, ND, OH, SD, WI
South: AL, AR, FL, GA, KY, LA, MS, NC, OK, SC, TN, TX
West: AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

FINDINGS: Park/Campground Profile

The vast majority of respondents (93%) indicated their park/campground land is owned (versus leased) by its owner. 4% indicated it's both leased and owned, while only 2% indicated the land is leased exclusively.

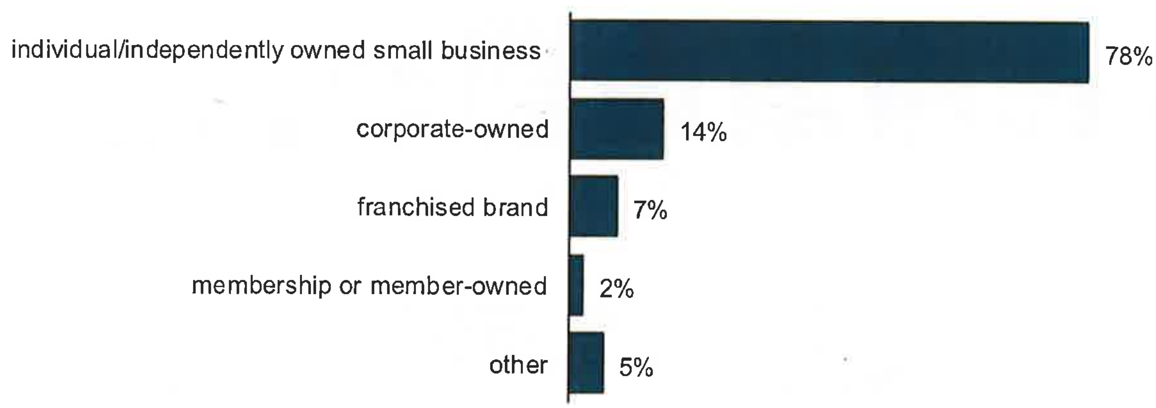
In terms of ownership structure, 49% of reported parks/campgrounds are sole proprietorships/LLCs, 23% are partnership LLCs, 23% are corporately-owned, 1% are government-affiliated, and 4% have some other ownership type.

In terms of operational structure, 78% of reported parks/campgrounds are individual/independently owned small businesses (such as "mom and pop"), 14% are corporate-owned, 7% are a franchised brand, 2% are membership or member-owned, and 5% have some other operational structure. The likelihood of being an individual/independently owned small business increases as the number of sites/units at the park/campground decreases. Relatively minor differences in operational structure appear by region.

Operational Structure

What is the operational structure of this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



OPERATIONAL STRUCTURE	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
individual/independently	81%	81%	78%	72%	91%	84%	71%	64%
corporate-owned	12%	12%	14%	21%	8%	13%	16%	22%
franchised brand	9%	6%	7%	6%	1%	8%	9%	8%
membership or member-owned	2%	2%	2%	3%	0%	2%	3%	4%
other	1%	4%	7%	5%	4%	6%	4%	5%

=50% - 74% =75% - 89% =90%+

FINDINGS: Park/Campground Profile

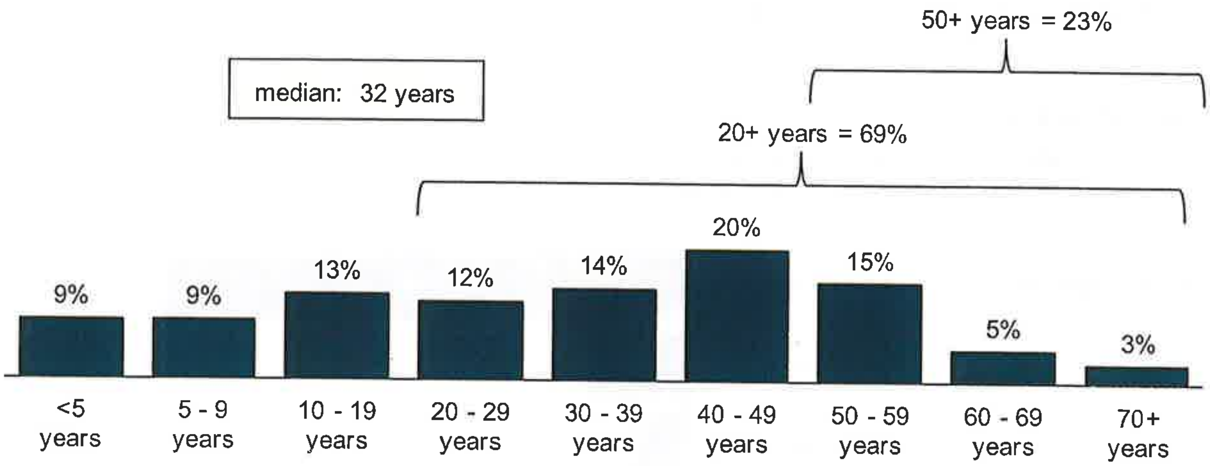
Most parks/campgrounds reported organizational longevity; 69% have been in operation for at least 20 years, including 23% that have been in operation for at least 50 years. The typical (median[2]) respondent indicated their park/campground has been in operation for 32 years.

Operational tenure tends to increase with park/campground size (by number of sites/units). Those in the Northeast and Midwest, and those at corporate or franchised operations reported greater median tenures than others.

Operational Tenure

Approximately how long has this park/campground been in operation?

base (unweighted): 612 qualified respondents answering; those in each segment (fill-in answers)



Operational Tenure	median years
GEOGRAPHIC REGION	
Northeast	45
Midwest	40
South	20
West	30
OPERATIONAL STRUCTURE	
independent/membership	31
corporate-owned	38
franchised brand	41
SIZE (# of sites/units)	
200+	42
100 - 199	40
50 - 99	30
<50	19

[2] A **median** is the value that lies at the middle of a distribution: that is, 50% of the values are above it and 50% are below. It represents the "typical" response, and is not influenced by extreme values.

FINDINGS: Park/Campground Profile

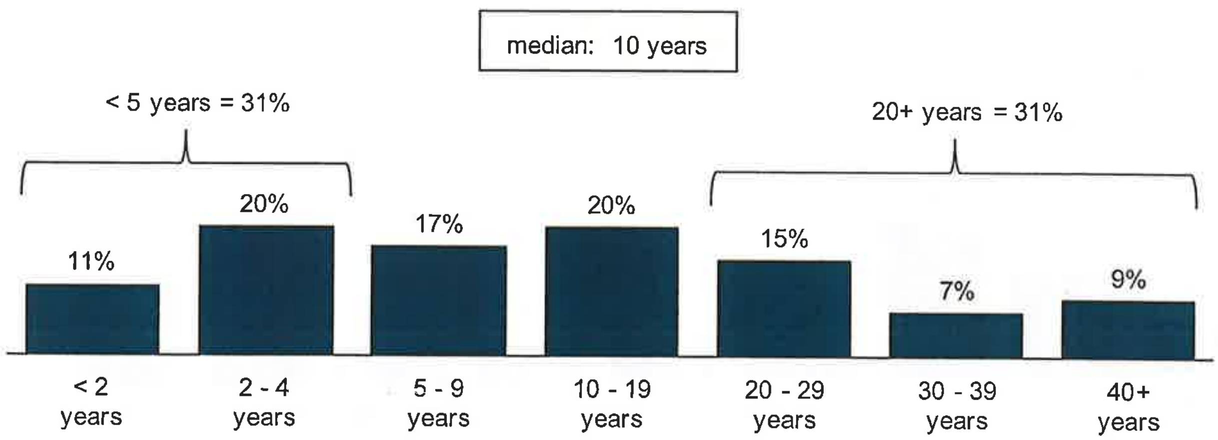
Park/campground ownership tenure varies considerably. While 31% of respondents indicated their park/campground has been owned by its current owner for fewer than 5 years, the same proportion reported their current owner has been in place for 20 years or more. The typical (median) responded indicated their park/campground has been owned by its current owner for 10 years.

As was seen with operational tenure, ownership tenure correlates positively with park/campground size (by number of sites/units). Ownership tenure varies somewhat by geographic region and operational structure, too.

Ownership Tenure

How long has this this park/campground been owned by its current owner?

base (unweighted): 611 qualified respondents answering; those in each segment (fill-in answers)



Operational Tenure	median years
GEOGRAPHIC REGION	
Northeast	16
Midwest	11
South	8
West	10
OPERATIONAL STRUCTURE	
independent/membership	10
corporate-owned	6
franchised brand	12
SIZE (# of sites/unites)	
200+	25
100 - 199	12
50 - 99	9
<50	5

FINDINGS: Park/Campground Profile

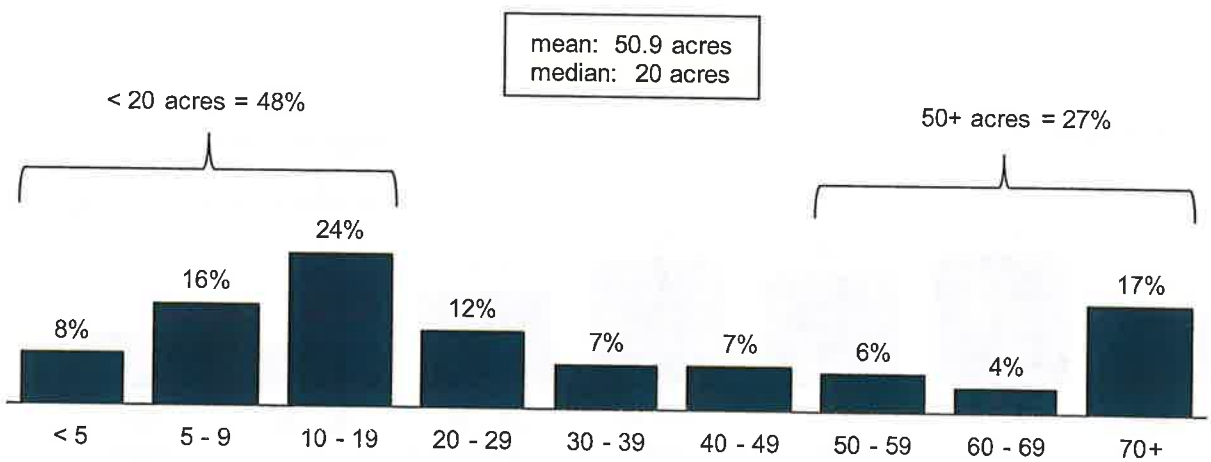
About half of respondents (48%) reported their park/campground's total approximate acreage as fewer than 20; conversely, about a quarter (27%) are at parks/campgrounds with at least 50 acres. While the median report was 20 acres, the average (mean[3]) was much higher at 50.9 acres, influenced by a handful reporting large acreage amounts.

Parks/campgrounds in the Northeast and Midwest reported larger median acreage than those in the South and West. The average report in the South is three times its median, influenced by outlier(s) in this region.

Acreage

What is the total approximate acreage for this park/campground?

base (unweighted): 602 qualified respondents answering; those in each segment (fill-in answers)



Acreage	Northeast	Midwest	South	West
70 or more	31%	18%	13%	8%
60 - 69	7%	8%	2%	1%
50 - 59	9%	7%	5%	3%
40 - 49	11%	9%	6%	3%
30 - 39	11%	10%	2%	6%
20 - 29	9%	14%	13%	12%
10 - 19	12%	18%	32%	29%
5 - 9	7%	12%	17%	26%
less than 5	2%	5%	11%	12%
mean	**77.5**	**53.5**	**50.8**	**23.1**
median	**47**	**30**	**15**	**14**

=10% - 14%   =15% - 24%   =25%+

[3] A **mean** is the arithmetic average of a distribution (i.e., a set of values). Means are very much influenced by extremely large or extremely small values in the distribution.

FINDINGS: Park/Campground Profile

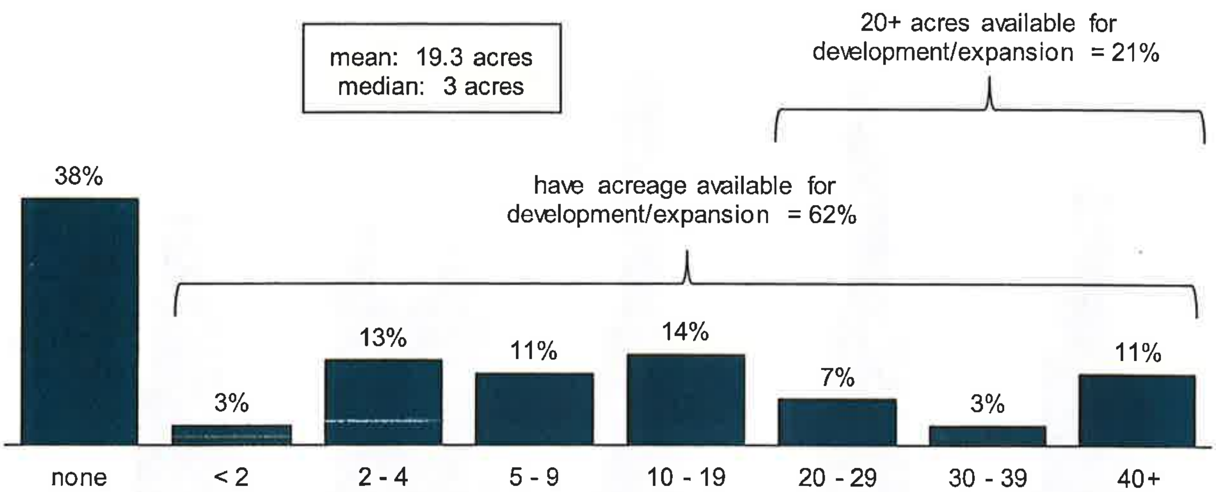
Three in five parks/campgrounds (62%) have acreage available for additional development/expansion. The median report was 3 acres while the average was much higher at 19.3 acres, influenced by a handful reporting a significant amount of acreage available for development/expansion.

Parks/campgrounds in the Northeast tend to have more acreage available for additional development/expansion than those in other regions.

Acreage Available for Development/Expansion

Approximately how many acres are available for additional development/expansion?

base (unweighted): 601 qualified respondents answering; those in each segment (fill-in answers)



Acreage Available for Development/Expansion	Northeast	Midwest	South	West
40 or more	19%	15%	10%	2%
30 - 39	5%	3%	2%	1%
20 - 29	13%	8%	5%	2%
10 - 19	15%	16%	12%	15%
5 - 9	8%	10%	12%	12%
2 - 4	6%	11%	20%	12%
less than 2	2%	2%	3%	6%
none	31%	34%	35%	51%
mean	**28.9**	**20.6**	**20.0**	**7.8**
median	**10**	**5**	**3**	**0**

=15% - 29% =30% - 49% =50%+

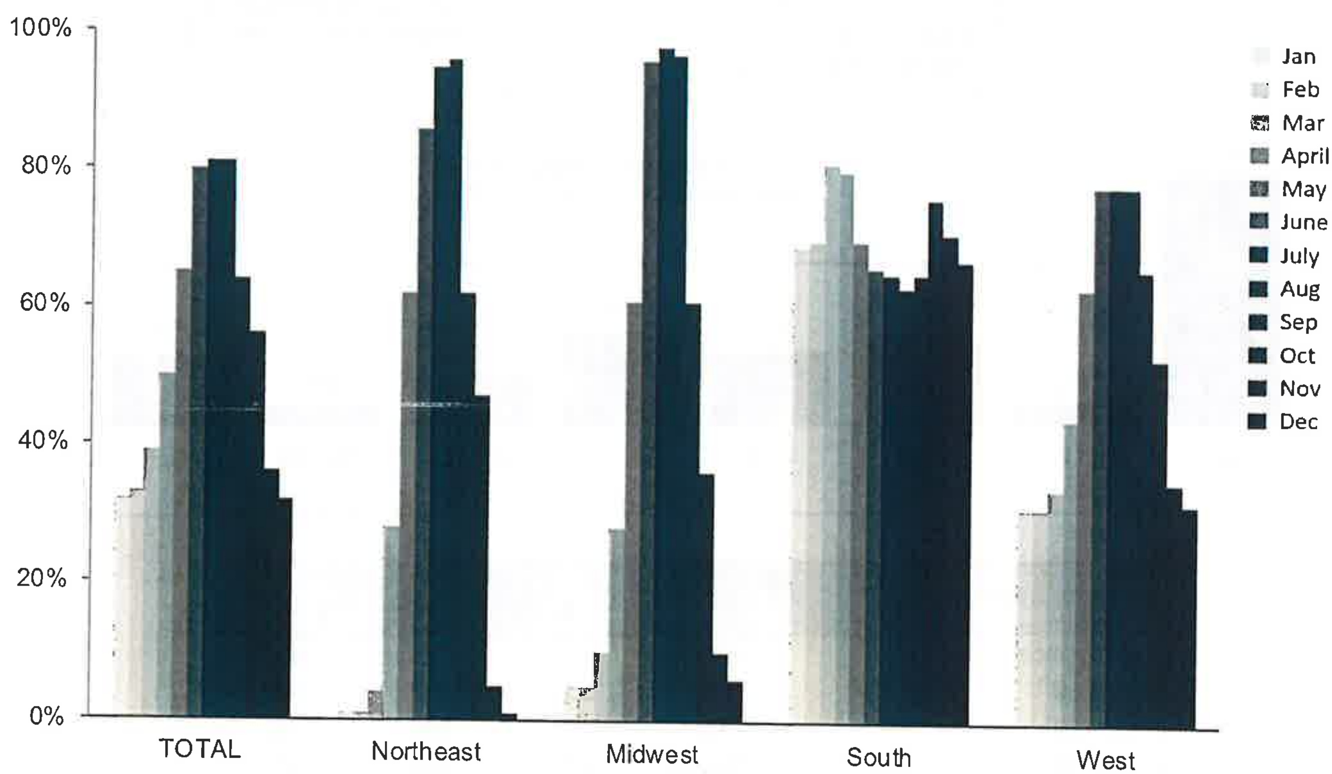
FINDINGS: Park/Campground Profile

A majority of respondents reported each of the months from May through October as being in their park/campground's main season. As would be expected, main seasons vary by region. In the South, each of the 12 months are part of the main season for a majority of reported parks/campgrounds, whereas those in other regions have bell curve shapes (particularly strong in the Northeast and Midwest), peaking in the summer months.

Main Season Month(s)

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?
base (unweighted): 614 qualified respondents; those in each segment (multiple answers)

MONTH(S) INCLUDED IN MAIN SEASON(S)



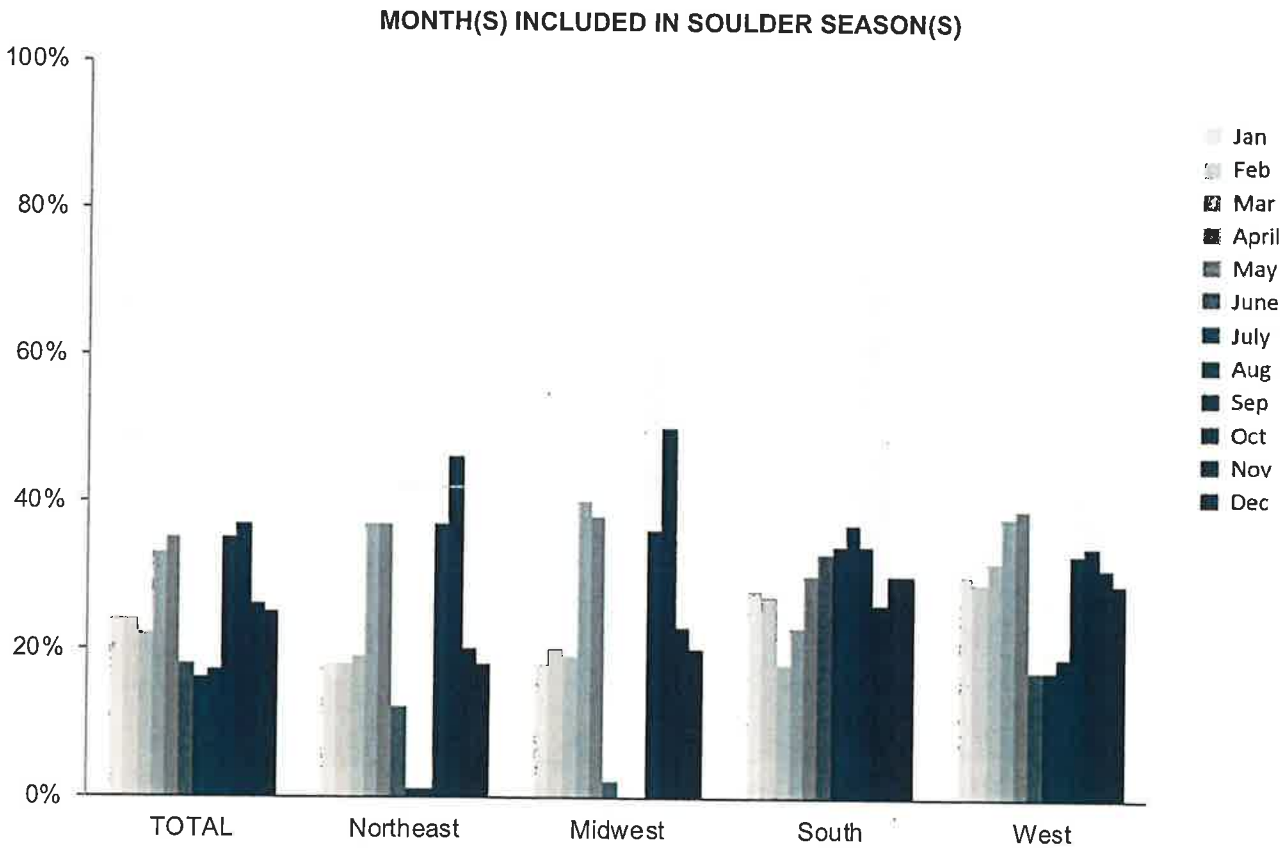
FINDINGS: Park/Campground Profile

In the Northeast and Midwest, April-May and September-October are the most common shoulder season months. The proportion of parks/campgrounds in the South reporting shoulder season months is relatively consistent across the year. In the West, the proportion reporting shoulder season months is moderately consistent with the exception of dipping significantly in June-August.

Shoulder Season Month(s)

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)

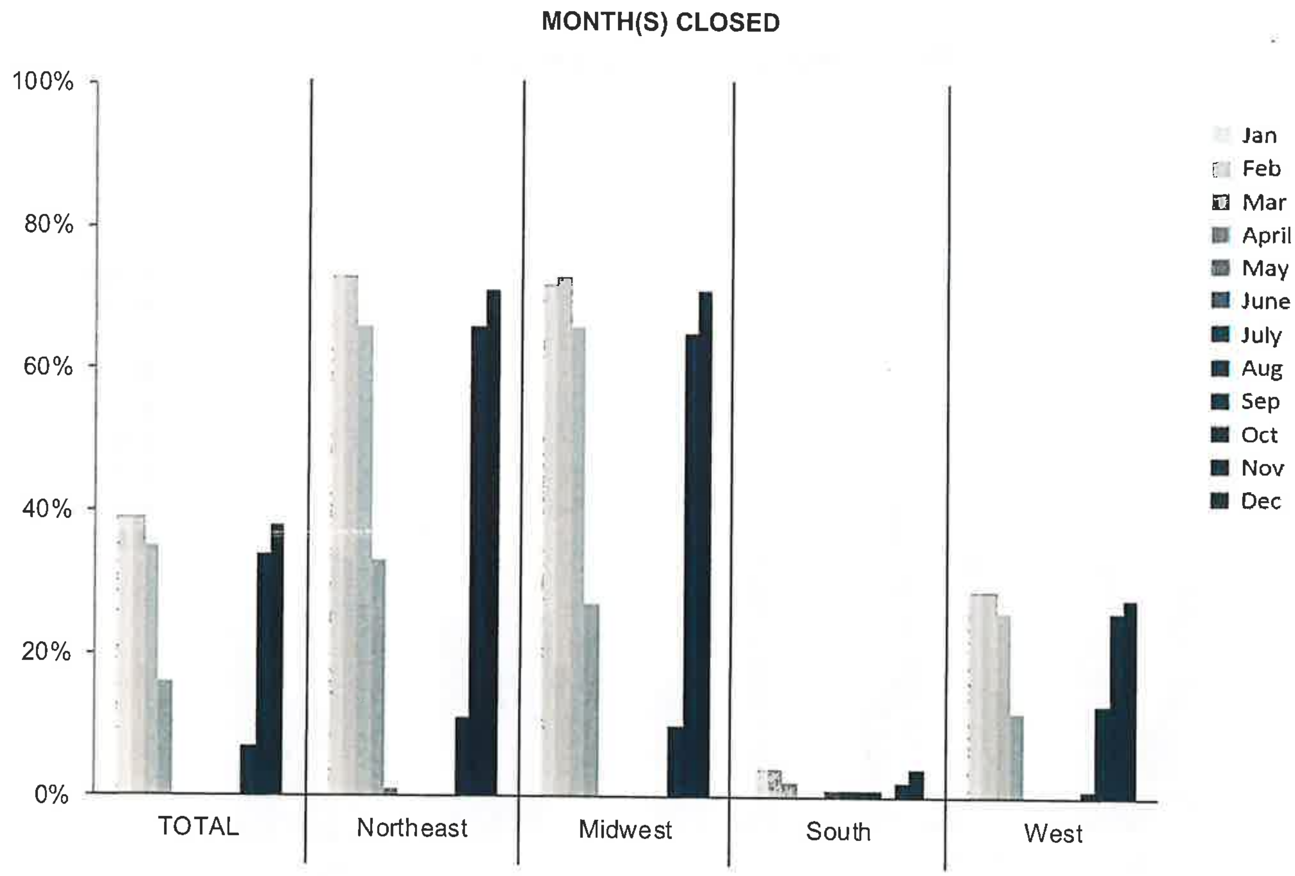


FINDINGS: Park/Campground Profile

A majority of parks/campgrounds in the Northeast and Midwest are closed January-March and November-December. These are the same months in which the highest proportion of parks/campgrounds in the West are closed, although a minority (roughly a quarter). Very few parks/campgrounds are closed each month in the South.

Month(s) Closed

What months are included in the main season(s) and shoulder season(s) for this park/campground, and in what months is it closed?
base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



FINDINGS: Park/Campground Profile

Just over half of reported parks/campgrounds (58%) employ 1-4 full-time employees (30 or more hours per week) during their main seasons; 35% employ more than that. Just under half of reported parks/campgrounds (46%) employ 1-4 part-time employees (1-29 hours per week); 24% employ more than that.

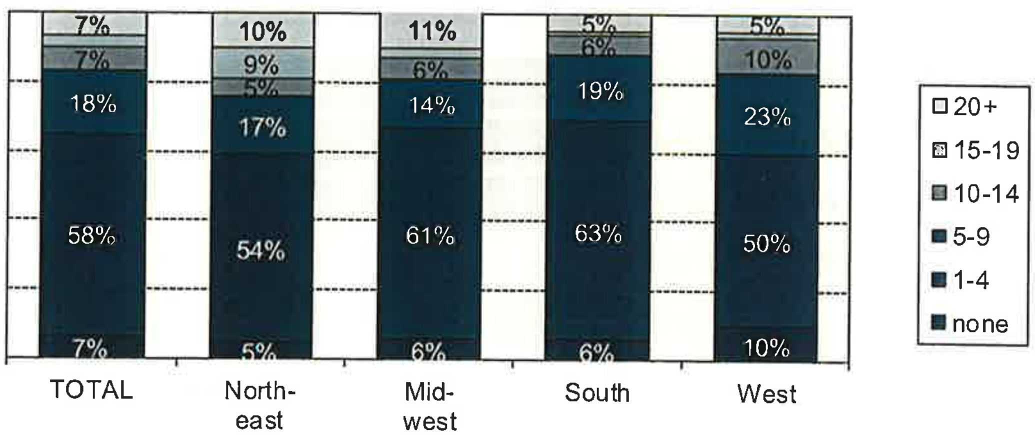
The typical (median) park/campground employs 3 full-time and 2 part-time individuals during its main season. Minor differences in median full-time employee levels appear by region.

Number of Employees

During the main season(s), how many employees work at this park/campground per week, on average?

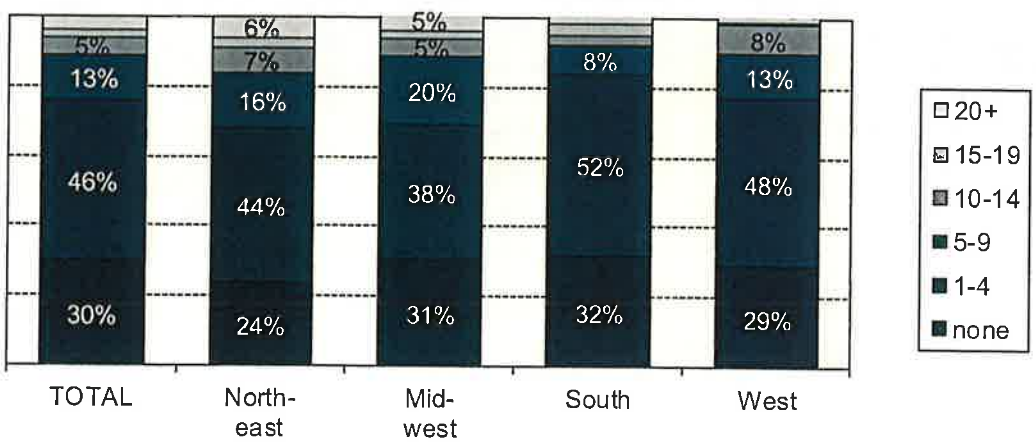
base (unweighted): 591 qualified respondents answering; those in each segment (fill-in answers)

FULL-TIME EMPLOYEES (30+ hours/week)



median = 3 4 3 3 4

PART-TIME EMPLOYEES (<30 hours/week)



median = 2 2 2 2 2

percentages <5% charted but numbers not displayed

FINDINGS: Guest Composition and Demographics

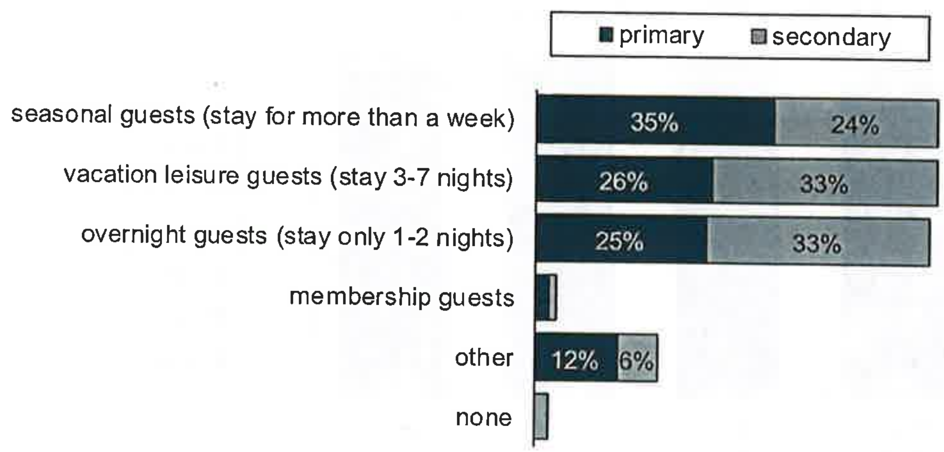
Seasonal guests (those who stay for more than a week) are the most common primary guest type at reported parks/campgrounds, closely followed by vacation leisure guests and overnight guests. Membership guests are uncommon.

Differences in guest composition appear by region. For example, parks/campgrounds in the Northeast and South are more likely than those in the Midwest and West to report seasonal guests as their primary guest type.

Primary/Secondary Guest Composition

What best describes the primary [secondary] guest composition at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment



percentages <5% charted but numbers not displayed

Guest Composition	Northeast		Midwest		South		West	
	primary	second-ary	primary	second-ary	primary	second-ary	primary	second-ary
seasonal guests	45%	24%	29%	28%	40%	25%	22%	19%
vacation leisure guests	26%	34%	27%	34%	22%	29%	30%	39%
overnight guests	22%	38%	38%	31%	11%	34%	36%	29%
membership guests	1%	0%	2%	0%	2%	1%	5%	1%
other	7%	2%	4%	5%	25%	8%	6%	9%
none		2%		1%		3%		0%

=20% - 29% =30% - 39% =40%+

FINDINGS: Guest Composition and Demographics

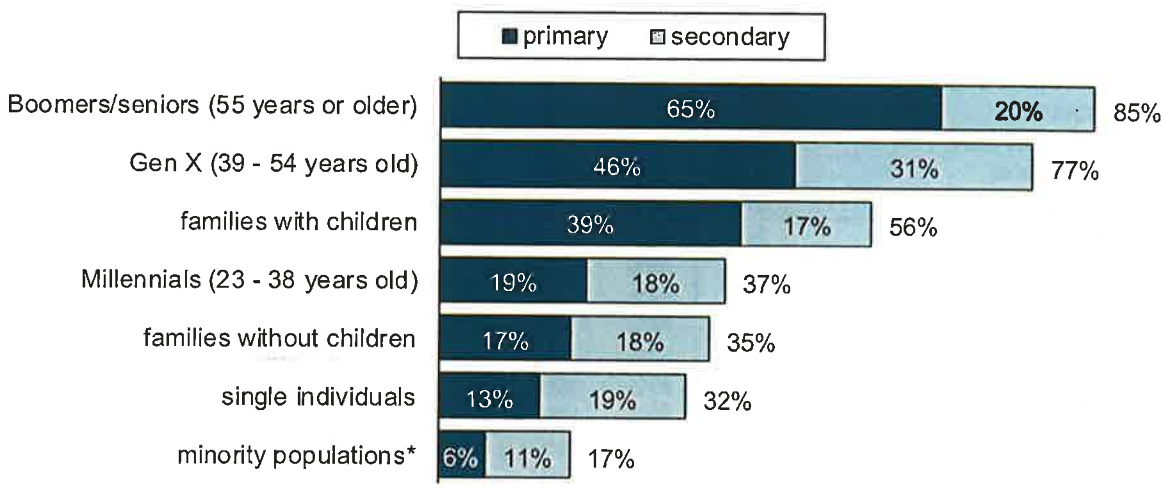
Boomers/seniors are the most common primary guest demographic at reported parks/campgrounds, followed by Gen X guests and families with children. Millennials, families without children, and single individuals are less common as the primary guest demographic.

Differences in guest demographics appear by region. For example, parks/campgrounds in the South and West are more likely than those in the Midwest and Northeast to report Boomers/seniors as their primary guest demographic. Those in the Midwest and Northeast on the other hand are more likely than those in the South and West to report families with children as their primary guest demographic.

Primary/Secondary Guest Demographics

What demographics best describe the primary [secondary] guest composition at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



Primary/Secondary Guest Demographics	Northeast		Midwest		South		West	
	primary	second-ary	primary	second-ary	primary	second-ary	primary	second-ary
Boomers/seniors (55 years or older)	59%	25%	55%	22%	68%	20%	77%	11%
Gen X (39-54 years old)	52%	26%	50%	28%	43%	33%	43%	35%
families with children	53%	21%	50%	18%	25%	16%	35%	13%
Millennials (23-38 years old)	21%	16%	30%	18%	13%	17%	16%	22%
families without children	19%	18%	10%	23%	19%	14%	19%	19%
single individuals	5%	18%	8%	17%	18%	20%	15%	21%
minority populations*	6%	12%	4%	14%	5%	7%	8%	11%

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

*including African-American, Asian or Pacific Islander, Hispanic or Latino, LGBTQ+

FINDINGS: Amenities, Activities, and Services Offered

WiFi, laundry facilities, and restroom/shower facilities are among the most common amenities offered by reported parks/campgrounds. Significant differences appear by region and size of park/campground (number of sites/units) for some of the listed amenities.

Amenities Offered

What amenities are offered at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)

Amenities Offered		REGION				# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	<50	50-99	100-199	200+
WiFi	90%	89%	83%	92%	93%	84%	92%	92%	92%
laundry facilities	86%	82%	80%	90%	89%	69%	91%	89%	93%
restroom/shower facilities	85%	92%	89%	79%	84%	68%	84%	90%	98%
firewood	65%	95%	87%	42%	49%	58%	64%	70%	64%
cell phone service	64%	67%	61%	64%	66%	60%	64%	64%	72%
covered pavilion area	60%	70%	65%	55%	51%	44%	54%	64%	83%
playground	59%	85%	86%	41%	37%	36%	54%	75%	70%
convenience store	55%	79%	67%	37%	49%	29%	49%	72%	67%
propane sales	53%	72%	56%	44%	47%	27%	47%	67%	71%
picnic area	52%	47%	60%	53%	47%	43%	52%	57%	52%
pool	52%	62%	57%	50%	38%	19%	45%	64%	83%
club/meeting room	48%	39%	41%	58%	47%	26%	44%	54%	68%
BBQ grills	44%	44%	40%	40%	53%	42%	44%	45%	43%
recreation hall	41%	54%	37%	42%	33%	11%	32%	56%	70%
fenced pet area	39%	33%	21%	48%	50%	29%	35%	43%	52%
library	39%	35%	35%	42%	43%	28%	41%	39%	48%
TV: cable	39%	49%	19%	42%	46%	27%	36%	45%	48%
arcade/game room	33%	57%	45%	20%	20%	17%	29%	36%	57%
forest access	28%	45%	35%	16%	25%	26%	29%	29%	27%
waterfront	26%	34%	28%	26%	19%	21%	18%	31%	41%
live entertainment	25%	40%	19%	24%	20%	7%	14%	27%	64%
restaurant/snack bar	20%	28%	31%	11%	16%	7%	11%	25%	47%
music	19%	34%	15%	19%	10%	4%	11%	20%	50%
TV: satellite	18%	17%	15%	21%	17%	17%	20%	18%	16%
vending	17%	22%	15%	18%	12%	5%	16%	20%	31%
boat rentals	17%	31%	24%	9%	7%	10%	13%	19%	28%
exercise facilities	16%	5%	7%	25%	20%	4%	13%	18%	29%
hot tub/sauna	14%	4%	10%	17%	23%	4%	6%	19%	36%
bike rentals	11%	9%	24%	5%	9%	2%	11%	13%	17%
chapel/religious services	10%	11%	6%	14%	6%	2%	7%	8%	30%
golf cart rentals	10%	12%	12%	9%	6%	1%	3%	11%	28%
marina	7%	7%	9%	7%	3%	6%	6%	6%	10%
electric car charging stations	5%	5%	5%	4%	8%	8%	4%	4%	4%
horse facility	4%	1%	0%	6%	6%	4%	6%	3%	0%
gaming/casino	2%	1%	4%	1%	5%	1%	3%	3%	3%
day spa facilities	1%	0%	1%	1%	4%	0%	2%	2%	2%
ATV/four-wheeler rentals	1%	2%	0%	1%	2%	1%	1%	1%	2%
other	18%	16%	20%	22%	12%	12%	15%	20%	26%

=20% - 49% =50% - 79% =80%+

FINDINGS: Amenities, Activities, and Services Offered

Fishing, swimming, horseshoes, and hiking/nature trails are among the most common recreation activities offered by reported parks/campgrounds. As was seen with amenities offered, significant differences appear by region and size of park/campground (number of sites/units) for some of the listed recreation activities.

Recreational Activities Offered

What recreation activities are offered at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)

TOP MENTIONS*

Recreational Activities Offered		REGION				# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	<50	50-99	100-199	200+
fishing	48%	66%	54%	47%	27%	37%	40%	58%	60%
swimming	45%	66%	54%	41%	26%	23%	38%	56%	69%
horseshoes	39%	47%	42%	28%	46%	29%	35%	43%	52%
hiking/nature trails	39%	52%	44%	28%	38%	35%	39%	37%	44%
basketball	35%	66%	54%	19%	14%	14%	26%	46%	60%
bird watching	35%	34%	37%	31%	40%	35%	39%	35%	27%
volleyball	30%	53%	48%	14%	14%	12%	20%	41%	50%
arts and crafts	27%	50%	23%	24%	15%	8%	14%	34%	65%
wildlife viewing	26%	23%	27%	24%	32%	33%	25%	27%	19%
biking trails	24%	30%	31%	14%	28%	21%	23%	28%	23%
canoeing	22%	35%	29%	16%	13%	20%	17%	25%	29%
kayaking	20%	32%	24%	15%	13%	17%	14%	22%	30%
boating	19%	34%	25%	14%	9%	17%	16%	20%	29%
shuffle board	16%	18%	17%	19%	9%	1%	8%	23%	40%
bocce	14%	21%	13%	10%	16%	8%	12%	14%	29%
mini golf	14%	24%	21%	6%	8%	3%	7%	19%	31%
paddleboats	13%	20%	24%	5%	6%	6%	9%	14%	25%
senior activities	13%	6%	3%	24%	10%	6%	9%	13%	29%
sand beach with lake swimming	10%	16%	22%	4%	3%	7%	6%	12%	20%
pickleball	9%	7%	6%	10%	15%	3%	3%	11%	28%
Frisbee golf	9%	12%	11%	5%	8%	5%	7%	9%	17%
gaga ball (gaga pit)	8%	16%	16%	3%	2%	1%	3%	12%	23%
baseball	7%	19%	10%	2%	1%	1%	3%	11%	14%
ATV/four wheeling	6%	5%	7%	2%	13%	7%	8%	4%	7%
geocaching	6%	4%	9%	3%	9%	5%	7%	5%	7%
golfing	5%	2%	6%	6%	7%	0%	4%	7%	12%
jumping pillow	5%	9%	12%	2%	1%	1%	1%	7%	14%
tennis	5%	7%	5%	4%	4%	1%	0%	7%	16%
water park/slides	5%	5%	8%	5%	1%	1%	0%	6%	16%

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

*those selected by at least 5% of the total

FINDINGS: Amenities, Activities, and Services Offered

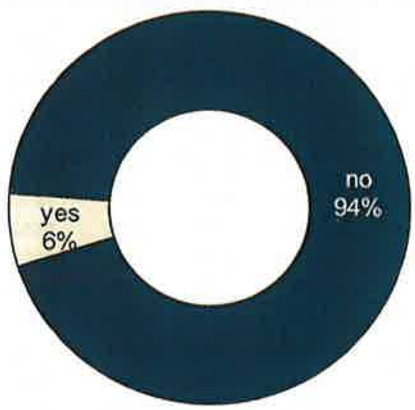
A minority of respondents (6%) indicated their park/campground has an RV repair/maintenance shop on site. Among those who do, the median number of repairs performed per month is seven.

The typical (median) park/campground that does *not* have an RV repair/maintenance shop on site indicated that four campers approach them each month with repair/maintenance issues. The occurrence does not differ drastically by region or size of park/campground—even the largest parks/campgrounds (those with 200 or more sites/units) reported a median of five campers approaching them with repair/maintenance issues.

Proportion With an RV Repair/Maintenance Shop

Does your park/campground have an RV repair/maintenance shop on site?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



Number of Campers With Repair/Maintenance Issues [Among Those Without an RV Repair/Maintenance Shop on Site]

How many campers approach you each month with repair/maintenance issues?

base (unweighted): 572 qualified respondents whose park/campground does not have an RV repair/maintenance shop on site; those in each segment

	median
TOTAL	4
GEOGRAPHIC REGION	
Northeast	4
Midwest	4
South	3
West	4
SIZE (# of sites/unites)	
200+	5
100 - 199	4
50 - 99	4
<50	2

FINDINGS: Camping Sites and Accommodations

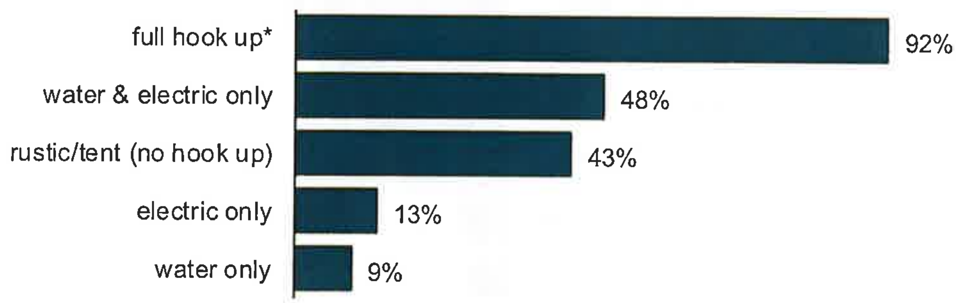
The vast majority of reported parks/campgrounds (92%) have full hook up camping sites—including water, electric, and sewer. Just under half have water & electric only sites (48%) and/or rustic/tent sites with no hook up (43%). About one in ten have electric only sites (13%) and/or water only sites (9%).

Camp site offerings varies by region. Parks/campgrounds in the South and West regions are slightly more likely than others to offer full hook up sites, but are much less likely than others to offer water & electric only site and rustic/tent (no hook up) sites. Parks/campgrounds in the Midwest are twice as likely as those in other regions to offer electric only sites.

Camping Sites Available

Which of these types of camping sites are available at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



**includes water, electric, and sewer*

Camping Sites Available	Northeast	Midwest	South	West
full hook up	88%	85%	97%	93%
water & electric only	75%	66%	26%	38%
rustic/tent (no hook up)	56%	60%	24%	44%
electric only	13%	27%	5%	12%
water only	14%	8%	5%	14%

=25% - 49% =50% - 74% =75% - 89% =90%+

FINDINGS: Camping Sites and Accommodations

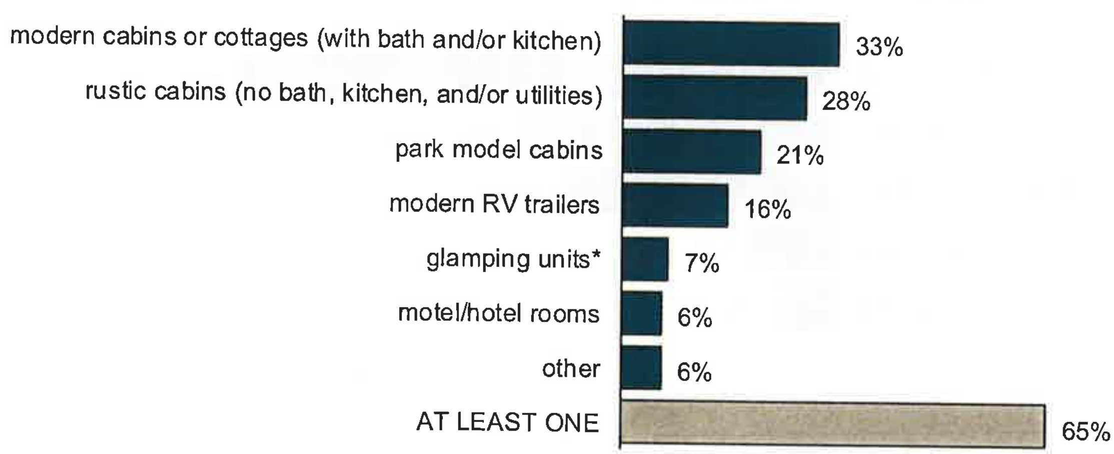
Two-thirds of reported parks/campgrounds (65%) have at least one type of accommodation available for rent in addition to camping sites. A similar proportion offer modern cabins (with bath and/or kitchen) as do rustic cabins (no bath, kitchen, or utilities)—33% versus 28%, respectively. Slightly fewer offer park model cabins (21%) and fewer yet modern RV trailers (16%). Glamping units and motel/hotel rooms are uncommon (7% and 6%, respectively).

Differences in accommodations offered appear by region, operational structure, and size of the park/campground. Those most likely to offer at least one type of accommodation listed include those in the Northeast and Midwest, franchised brands, and larger parks (by number of sites/units).

Other Accommodations Available

What types of other accommodations are available at this park/campground for rent?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



*including remodeled vintage RVs, glamping tents, safari tents, treehouses, yurts, etc.

Other 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+
modern cabins or cottages	43%	38%	28%	25%	31%	31%	67%	19%	32%	38%	39%
rustic cabins	47%	41%	10%	24%	27%	26%	71%	15%	27%	34%	29%
park model cabins	23%	16%	24%	22%	18%	30%	50%	7%	16%	28%	36%
modern RV trailers	24%	20%	13%	10%	17%	15%	13%	10%	15%	20%	20%
glamping units	13%	8%	4%	7%	6%	7%	23%	4%	8%	8%	6%
motel/hotel rooms	3%	5%	6%	11%	7%	5%	4%	10%	4%	6%	7%
other	5%	4%	8%	6%	7%	5%	0%	2%	10%	5%	6%
AT LEAST ONE	78%	73%	52%	63%	63%	66%	91%	44%	65%	72%	73%

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

FINDINGS: Camping Sites and Accommodations

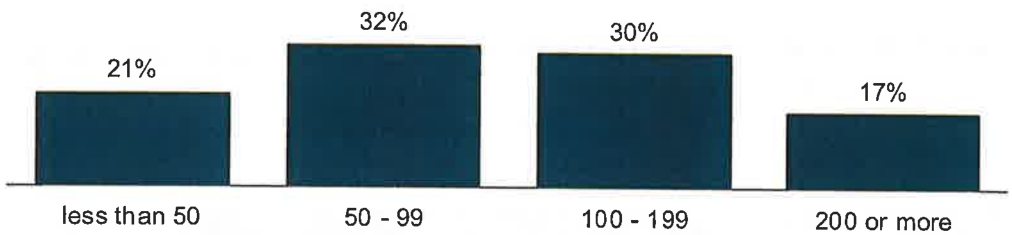
The typical (median) respondent reported their park/campground has 92 total sites/units; the average report was higher at 130, influenced by a handful of large parks/campgrounds. Parks/campgrounds in the Northeast and those that are corporate-owned tend to be larger than others.

Number of Sites/Units

How many sites/units are available at this park/campground?

base (unweighted): 614 qualified respondents; those in each segment (fill-in answers)

mean: 130
median: 92



Number of Sites/Units	REGION				OPERATIONAL STRUCTURE		
	Northeast	Midwest	South	West	ind./mem	corp.-owned	fran-chised
200 or more	27%	17%	14%	13%	14%	26%	18%
100 - 199	39%	30%	29%	23%	28%	34%	40%
50 - 99	22%	38%	32%	35%	34%	29%	38%
less than 50	12%	15%	26%	28%	24%	11%	3%
mean	164	118	126	118	118	173	149
median	130	90	90	80	88	125	112

FINDINGS: Camping Sites and Accommodations

Among parks/campgrounds with each type of site/unit, median reports of each are below. For example, the median number of full hook up sites available *among parks/campgrounds with this type of site* is 68.

Median reports of the various site/unit types differ by region. Some of the largest discrepancies include:

- Among those with full hook up sites, the median number available per park is highest in the Northeast, followed by the South.
- Among those with water & electrical sites, the median number available per park is highest in the Midwest, followed by the Northeast.
- Among those with motel/hotel rooms, the median report is substantially higher in the Northeast than in any other region.

Differences emerge by operational structure, too. For many of the listed sites/units, median reports are highest among parks/campgrounds that are corporate-owned.

Median Number of Sites/Units Among Those With Each Type at Their Park/Campground

How many sites/units are available at this park/campground?

base (unweighted): qualified respondents with each site/accommodation at their park/campground answering; those in each segment (fill-in answers)

Median # of Sites/Units [Among Those With Each Type]		REGION				OPERATIONAL STRUCTURE		
	TOTAL	Northeast	Midwest	South	West	ind./mem	corp.-owned	fran-chised
CAMP SITES								
full hook up	**68**	84	57	76	57	63	85	80
water & electric only	**22**	30	40	11	10	21	31	18
rustic/tent	**10**	10	11	10	10	10	10	10
electric only	**10**	4	11		10	8		
water only	**5**	9				5		
OTHER ACCOMMODATIONS								
modern cabins or cottages	**4**	3	4	4	6	4	6	6
rustic cabins	**3**	3	3	3	4	3	6	5
park model cabins	**3**	3	5	3	3	3	3	5
modern RV trailers	**3**	3	3	3		3	2	
glamping units	**2**	2	1			2		2
motel/hotel rooms	**6**				11	6		
other (not listed above)	**3**					3		

grey shading denotes results based on fewer than 30 (unweighted) respondents; results based on fewer than 10 are suppressed

FINDINGS: Recent and Future Improvements and Additions

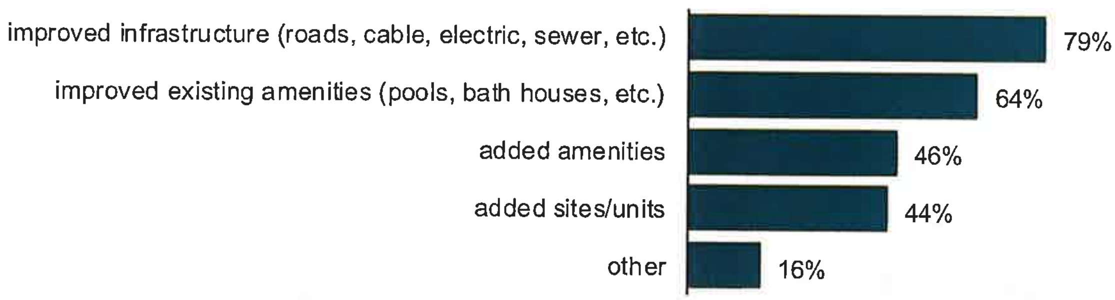
A majority of parks/campgrounds have improved their infrastructure (roads, cable, electric, sewer, etc.) and/or existing amenities (pools, bath houses, etc.) in the past five years. Just under half have added amenities and/or sites/units.

In general, parks/campgrounds in the Northeast, franchised brands, and those with at least 200 sites/units were more likely than others to have made the listed improvements.

Improvements Made

Which of the following improvements have been completed at this park/campground during the past five years?

base (unweighted): 614 qualified respondents; those in each segment (fill-in answers)



Improvements Made	REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
improved infrastructure	87%	79%	78%	72%	80%	78%	95%	68%	79%	78%	92%
improved existing amenities	65%	66%	62%	62%	60%	79%	81%	46%	61%	64%	89%
added amenities	55%	50%	45%	34%	43%	56%	76%	34%	35%	50%	71%
added sites/units	50%	43%	46%	37%	43%	46%	81%	38%	46%	42%	51%
other	8%	10%	21%	21%	16%	13%	22%	18%	17%	15%	14%

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

FINDINGS: Recent and Future Improvements and Additions

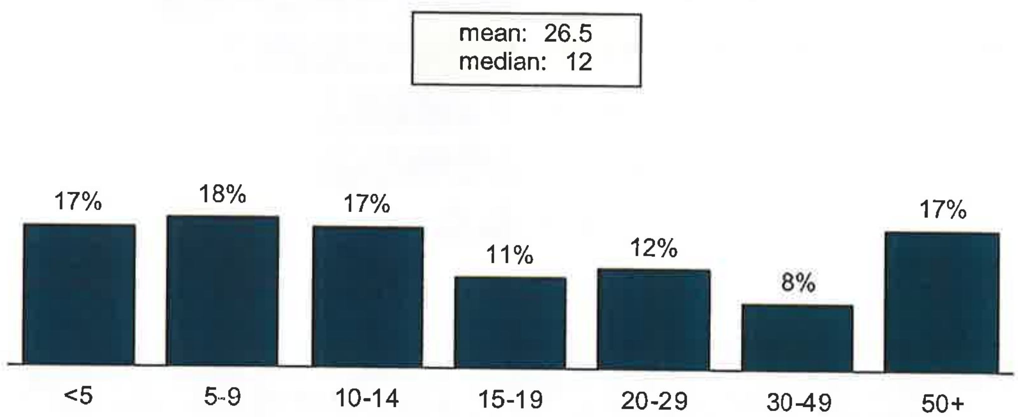
Among those whose park/campground added sites/units in the past five years, the typical (median) respondent indicated their park/campground added 12. The average report was more than double that at 26.5, influenced by a handful of parks/campgrounds adding large quantities of sites/units.

While parks/campgrounds in the Midwest reported a slightly higher median number of sites/units added in the past five years than other regions, a handful in the South reported having added large numbers of sites/units, driving up that region's average.

Number of Sites/Units Added

Approximately how many sites/units were added in the past five years?

base (unweighted): 230 qualified respondents whose park/campground added sites/units in the past five years answering (fill-in answers)



Number of Sites/Units Added	REGION			
	Northeast	Midwest	South	West
50 or more	9%	18%	25%	6%
30 - 49	5%	14%	6%	6%
20 - 29	19%	16%	8%	6%
15 - 19	9%	10%	12%	12%
10 - 14	11%	14%	19%	21%
5 - 9	26%	14%	14%	26%
less than 5	21%	14%	15%	22%
mean	18.2	26.7	35.7	14.4
median	10	18	15	10

=10% - 14% =15% - 19% =20%+

FINDINGS: Recent and Future Improvements and Additions

Nearly half of respondents (46%) indicated their park owner plans to expand in the next 12 months—44% plan to add additional sites/units to the existing park/campground and 5% plan to open a new park/campground (both of those proportions include the 3% who plan to do both—add sites/units to the existing park and open up a new one).

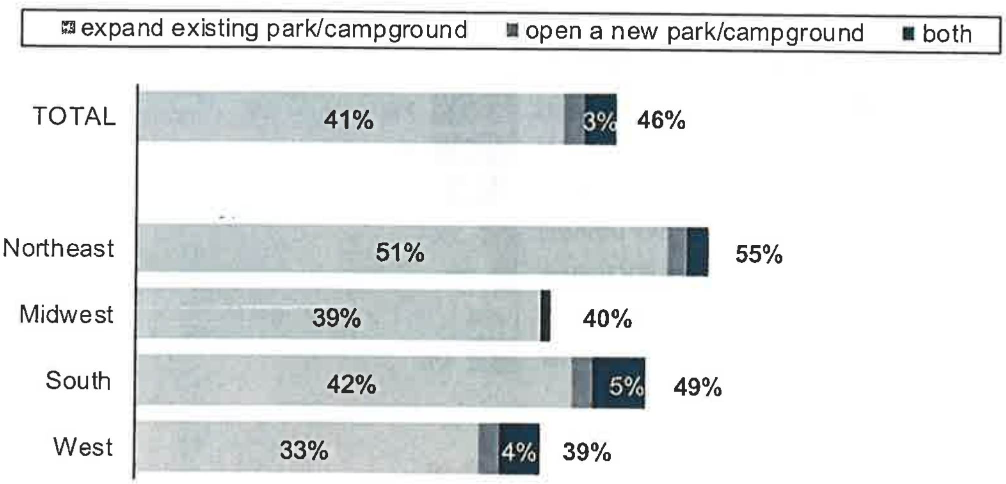
Among those whose park plans to expand the *existing* park/campground in the next 12 months, the median number of sites/units they plan to add is 12.

Among the few reported parks whose owner plans to open a *new* park/campground in the next 12 months, the median number of sites/units planned for the new park is 100 (results based on fewer than 30 respondents).

Expansion Plans

Does the park owner plan to expand this existing park/campground (adding additional sites/units) and/or open a new park/campground in the next 12 months?

base (unweighted): 614 qualified respondents; those in each segment



percentages <3% charted but numbers not displayed

Number of Sites/Units Planning to Add to Existing Park/Campground

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

base (unweighted): 171 qualified respondents whose park owner has plans to expand the existing park/campground in the next 12 months; those in each segment (fill-in answers)

Number of Sites/Units Planning to Add to Existing Park/Campground in Next 12 Months	TOTAL	REGION			
		Northeast	Midwest	South	West*
median	12	10	15	15	12

*based on fewer than 30 responses and considered statistically unstable

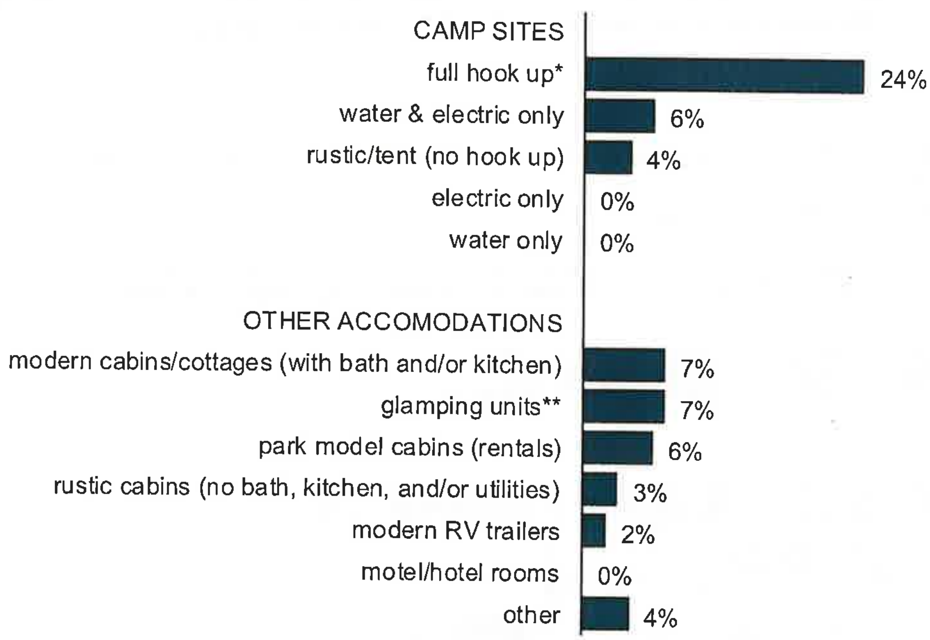
FINDINGS: Recent and Future Improvements and Additions

Full hook up camping sites are the most common type of site/accommodation that parks/campgrounds plan to add in the next 12 months, claimed by 24%. No other individual type was selected by more than 7%.

Sites/Accommodations Planning to Add

What types of camp sites and other accommodations does this park/campground plan on adding in the next 12 months?

base (unweighted): 614 qualified respondents; those in each segment



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

FINDINGS: Rates

Respondents were asked to report their park/campground's average main season rate plans (mid-week, weekend, holiday/special, and weekly rates) for each type of site/accommodation they offer. Median reports are tabled below and on page 27. Results based on fewer than 30 (unweighted) respondents are noted via grey text; results based on fewer than 10 are suppressed.

Mid-Week and Weekend Rate Per Night (Main Season)

During your main season(s), what are your average rate plans at this park/campground?

base (unweighted): qualified respondents with this site/accommodation at their park/campground answering; those in each segment (fill-in answers)

MEDIAN Summary: Mid-Week Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$45**	$50	$45	$44	$46	$45	$47	$54	$39	$45	$48	$52
water & electric only	**$40**	$45	$40	$35	$38	$40	$38	$45	$32	$39	$40	$50
rustic/tent	**$26**	$35	$25	$23	$27	$25	$30	$30	$21	$25	$30	$35
electric only	**$32**		$30		$35	$32				$31	$35	
water only	**$30**	$33			$30	$30				$30		
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$125**	$139	$133	$99	$125	$120	$134	$145	$100	$120	$117	$159
rustic cabins	**$67**	$72	$60	$58	$69	$65	$75	$73	$59	$55	$70	$75
park model cabins	**$135**	$157	$146	$108	$135	$128	$140	$148		$123	$126	$155
modern RV trailers	**$100**	$123	$100	$91		$95	$114			$90	$100	$155
glamping units	**$119**	$109	$93			$123				$120	$99	
motel/hotel rooms	**$89**				$119	$86						

MEDIAN Summary: Weekend Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$46**	$52	$45	$43	$47	$45	$50	$60	$38	$45	$50	$53
water & electric only	**$40**	$46	$40	$35	$37	$40	$41	$50	$34	$39	$42	$50
rustic/tent	**$27**	$35	$25	$24	$28	$25	$30	$37	$20	$25	$30	$36
electric only	**$32**		$30		$38	$32				$32	$38	
water only	**$30**					$30				$30		
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$129**	$143	$150	$95	$129	$124	$138	$163	$121	$120	$120	$169
rustic cabins	**$68**	$75	$64	$56	$59	$65	$78	$78	$55	$55	$75	$82
park model cabins	**$140**	$161	$164	$110	$139	$139	$145	$150		$140	$138	$172
modern RV trailers	**$107**	$126	$111	$100		$102	$119			$96	$110	$169
glamping units	**$120**	$107	$124			$125				$123	$102	
motel/hotel rooms	**$89**					$90						

grey shading denotes results based on fewer than 30 (unweighted) respondents; results based on fewer than 10 are suppressed

FINDINGS: Rates (cont.)

Holiday/Special and Weekly Rate Per Night (Main Season)

During your main season(s), what are your average rate plans at this park/campground?

base (unweighted): qualified respondents with this site/accommodation at their park/campground answering; those in each segment (fill-in answers)

MEDIAN Summary: Holiday/Special Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$47**	$55	$47	$45	$47	$45	$50	$65	$39	$45	$50	$56
water & electric only	**$42**	$48	$42	$35	$38	$41	$44	$56	$34	$39	$45	$55
rustic/tent	**$30**	$38	$28	$28	$25	$30	$32	$42	$22	$25	$35	$40
electric only	**$36**		$36		$41	$37				$36	$40	
water only	**$30**					$30				$30		
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$133**	$144	$155	$95	$142	$125	$144	$173	$135	$125	$125	$180
rustic cabins	**$70**	$80	$70	$60	$55	$69	$74	$83	$60	$61	$80	$85
park model cabins	**$145**	$165	$162	$110	$137	$140	$146	$164		$140	$140	$170
modern RV trailers	**$117**	$144	$114	$115		$113	$134			$99	$120	$175
glamping units	**$132**	$116	$116			$126				$121	$139	
motel/hotel rooms	**$90**					$87						

MEDIAN Summary: Weekly Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$259**	$310	$252	$228	$280	$252	$274	$347	$227	$244	$283	$300
water & electric only	**$240**	$270	$240	$211	$225	$240	$248	$293	$206	$233	$252	$281
rustic/tent	**$170**	$203	$173	$105	$172	$162	$199		$112	$166	$178	$220
electric only	**$210**		$214			$210				$220	$218	
water only	**$190**					$191						
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$720**	$784	$816	$538	$810	$700	$803	$974	$843	$598	$701	$855
rustic cabins	**$358**	$400	$350		$321	$350	$542			$312	$450	$420
park model cabins	**$697**	$863	$854	$520	$786	$695	$821			$597	$750	$854
modern RV trailers	**$518**	$729	$492	$515		$497	$521			$518	$489	$980
glamping units	**$637**	$378				$657						
motel/hotel rooms	**$517**					$495						

grey shading denotes results based on fewer than 30 (unweighted) respondents; results based on fewer than 10 are suppressed

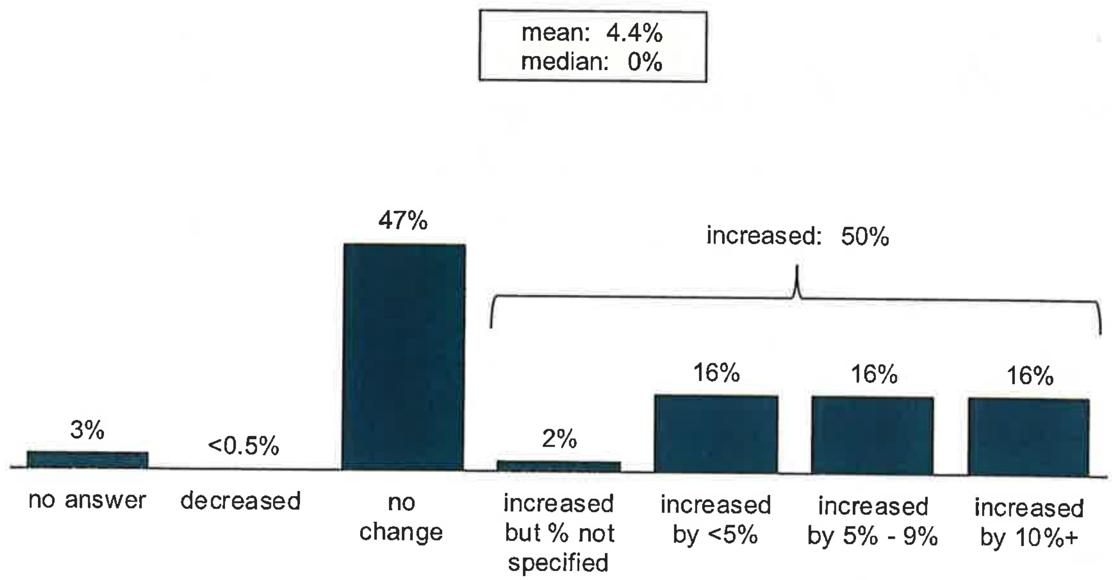
FINDINGS: Rates

Half of reported parks/campgrounds (50%) increased their 2019 main season nightly/weekly rates compared with 2018. The other half (47%) reported no change (3% did not answer the question).

Change in Nightly/Weekly Rates

Compared with 2018, how have this park/campground's 2019 main season nightly/weekly rates changed?

base (unweighted): 614 qualified respondents; those in each segment



Change in Nightly/ Weekly Rates	REGION				OPERATIONAL STRUCTURE		
	Northeast	Midwest	South	West	ind./ mem	corp.-owned	fran-chised
mean	3.1%	3.8%	5.4%	4.7%	4.1%	6.0%	13.3%
median	2%	0%	0%	4%	0%	4%	3%

FINDINGS: Rates

A majority of respondents (89%) indicated their park/campground offers monthly or seasonal rates for at least one site/unit type. Median reports are tabled below (among those offering rate plans for each). Results based on fewer than 30 (unweighted) respondents are noted via grey text; results based on fewer than 10 are suppressed.

Monthly and Seasonal Rate (Main Season)

During your main season(s), what are your average monthly and/or seasonal rates at this park/campground?

base (unweighted): qualified respondents with this site/accommodation at their park/campground answering; those in each segment (fill-in answers)

MEDIAN Summary: Monthly Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$575**	$753	$601	$500	$609	$552	$603	$677	$500	$525	$600	$781
water & electric only	**$600**	$750	$548	$350	$450	$600	$547		$450	$543	$636	$770
rustic/tent	**$400**		$400			$400					$540	
electric only	**$445**											
water only												
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$1,290**			$1,200		$1,200				$1,000		
rustic cabins	**$705**											
park model cabins	**$1,044**			$900		$913					$1,381	
modern RV trailers	**$802**					$726						
glamping units												
motel/hotel rooms												

MEDIAN Summary: Seasonal Rate		REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	TOTAL	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
CAMP SITES												
full hook up	**$575**	$835	$600	$500	$656	$550	$653	$680	$485	$525	$600	$792
water & electric only	**$641**	$888	$608		$450	$609	$942		$450	$881	$572	$1,156
rustic/tent	**$368**					$359						
electric only												
water only												
OTHER ACCOMMODATIONS												
modern cabins or cottages	**$1,330**					$1,200						
rustic cabins												
park model cabins	**$1,040**			$850		$1,030						
modern RV trailers	**$788**											
glamping units												
motel/hotel rooms												

grey shading denotes results based on fewer than 30 (unweighted) respondents; results based on fewer than 10 are suppressed

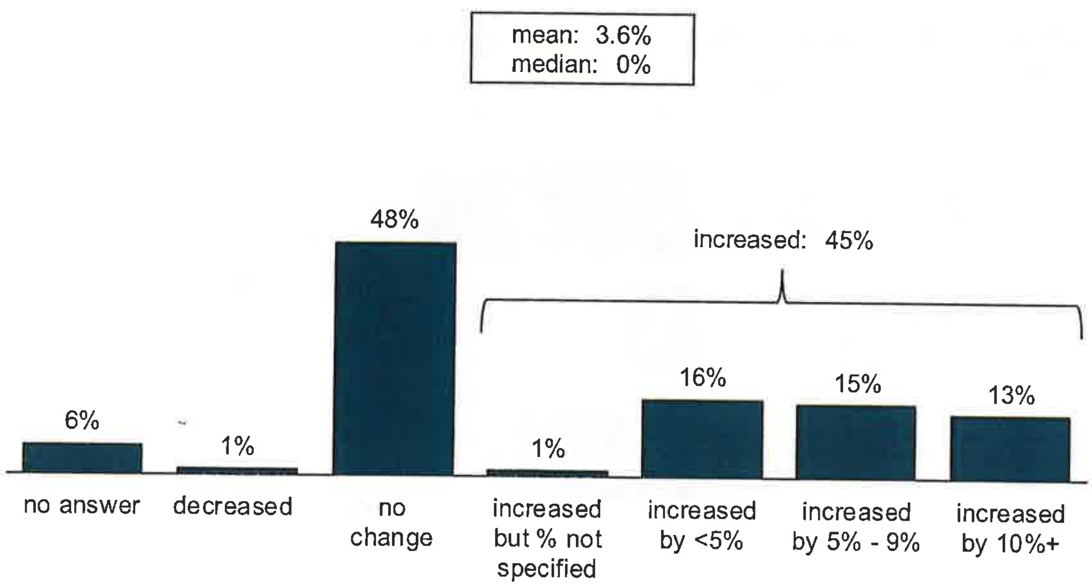
FINDINGS: Rates

Among parks/campgrounds offering monthly/seasonal rates, nearly half (45%) increased their 2019 main season monthly/seasonal rates compared with 2018. The other half (48%) reported no change (6% did not answer the question).

Change in Monthly/Seasonal Rates

Compared with 2018, how have this park/campground's 2019 main season monthly and/or seasonal rates changed, on average?

base (unweighted): 546 qualified respondents whose park/campground has monthly and/or seasonal rates; those in each segment



Change in Monthly/ Seasonal Rates	REGION				OPERATIONAL STRUCTURE		
	Northeast	Midwest	South	West	ind./ mem	corp.- owned	fran- chised
mean	3.3%	3.0%	4.1%	3.8%	3.4%	4.7%	4.9%
median	2%	0%	0%	0%	0%	3%	3%

FINDINGS: Rates

Among those whose park/campground offers monthly and/or seasonal rates, two-thirds (66%) monitor electric usage for these sites via individual site meters, including 53% where the *park* pays the utility company and 13% where the *guest* pays the utility company.

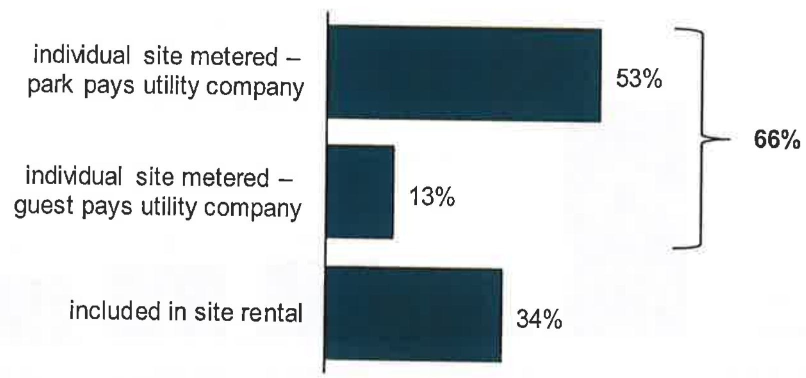
A third (34%) include electric usage in the monthly/seasonal site rental.

Small parks (those with fewer than 50 sites/units) are more likely than others to include electric usage costs in the monthly/seasonal site rental.

Method of Monitoring Electric Usage on Monthly/Seasonal Sites

How is electric usage monitored at your park/campground's monthly and/or seasonal sites?

base (unweighted): 546 qualified respondents whose park/campground has monthly and/or seasonal rates; those in each segment



Method of Monitoring Electric Usage on Monthly/Seasonal Sites	# OF SITES/UNITS			
	<50	50-99	100-199	200+
individual site metered: park pays utility company	42%	51%	59%	58%
individual site metered: guest pays utility company	6%	12%	14%	18%
included in site rental	52%	35%	25%	24%

=10% - 29% =30% - 49% =50%+

FINDINGS: Occupancy

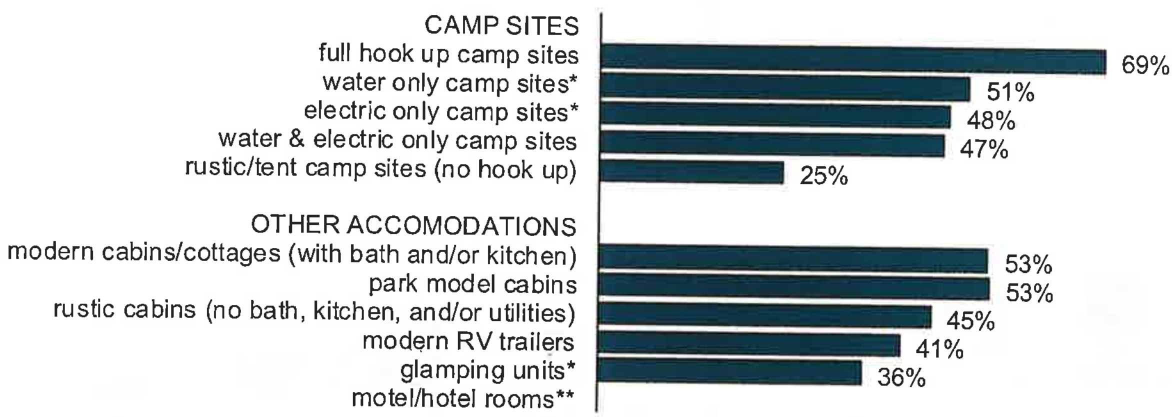
Parks/campgrounds with full hook up camp sites reported an average occupancy rate of 69% for these sites during the past 12 months. The occupancy rate for rustic/tent camp sites was the lowest at 25%.

The typical (median) park/campground reported that their 2019 main season occupancy is up 2% compared with 2018.

Occupancy Rate: Mean Summary

In your months of operation (including main and shoulder seasons) during the past 12 months, what was the total number of potential nights and the total number of nights sold for each type of site/unit at this park/campground?

base (unweighted): qualified respondents with each site/accommodation at their park/campground answering both potential nights and nights sold (fill-in answers)

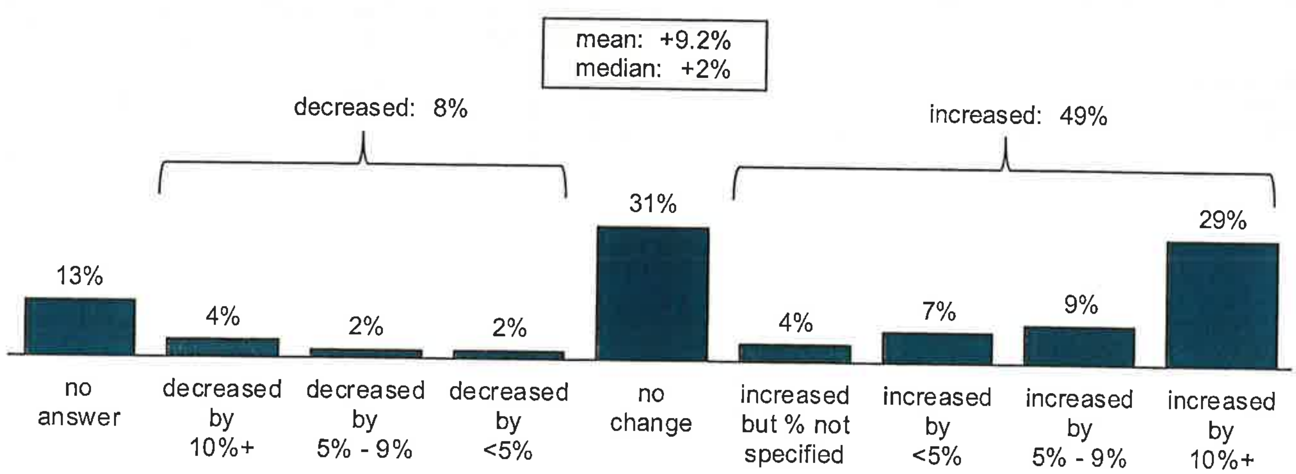


**based on fewer than 30 responses and considered statistically unstable*
***based on fewer than 10 respondents (suppressed)*

Change in Occupancy

Compared with 2018, how has this park/campground's 2019 main season occupancy changed?

base (unweighted): 614 qualified respondents (fill-in answers)



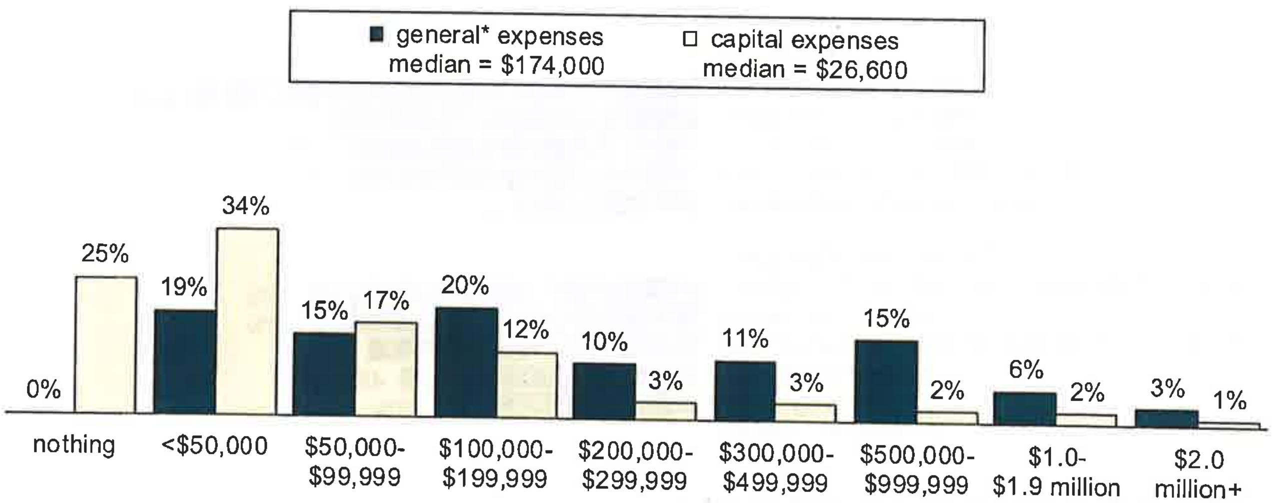
FINDINGS: Financials

The typical (median) respondent indicated their park/campground had $174,000 in general expenses and $26,600 in capital expenses in the past 12 months. Median reports were much higher among respondents in the Northeast and West than in the Midwest and South. And, not surprisingly, median reports correlate positively with park/campground size (by number of units/sites).

Expenses

What were this park/campground's total expenses in the past 12 months?

base (unweighted): 215 qualified respondents answering; those in each segment (fill-in answers)



Expenses: MEDIAN Summary	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
general expenses*	$201,000	$123,000	$150,000	$199,000	$47,000	$142,000	$211,000	$793,000
capital expenses	$42,500	$20,200	$20,000	$50,400	$13,800	$20,000	$49,200	$111,700
TOTAL expenses	$296	$168	$266	$291	$60	$162	$351	$1,055

*all expenses other than capital expenses

FINDINGS: Financials

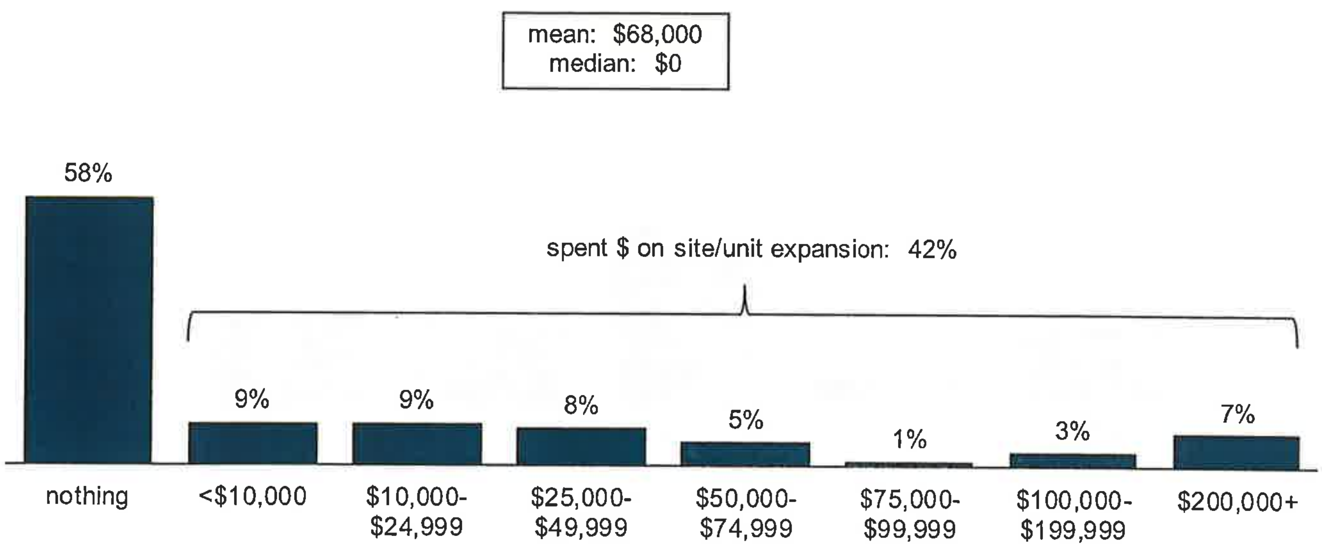
Two in five respondents (42%) indicated their park/campground spent money on site/unit expansion in the past 12 months (among those answering this question). The median report was zero, due to more than half reporting their park/campground spent nothing, while the average report was $68,000.

The Northeast is the only region in which more than half of parks/campgrounds spent money on site/unit expansion in the past 12 months—therefore, all other regions reported a median of $0 spent. Average reports vary substantially by region and size of park, with those in the West and those at the largest parks (200 or more sites/units) reporting the most spent on site/unit expansion.

Amount Spent on Site/Unit Expansion

Approximately how much money was spent on site/unit expansion at this park/campground in the past 12 months?

base (unweighted): 357 qualified respondents answering; those in each segment (fill-in answers)



Amount Spent on Site/Unit Expansion	REGION				# OF SITES/UNITS			
	Northeast	Midwest	South	West	<50	50-99	100-199	200+
spent $ on site/unit expansion	57%	34%	46%	35%	35%	45%	40%	49%
mean	$36,500	$33,400	$89,900	$105,900	$9,700	$30,500	$95,000	$170,500
median	$3,000	$0	$0	$0	$0	$0	$0	$0

FINDINGS: Financials

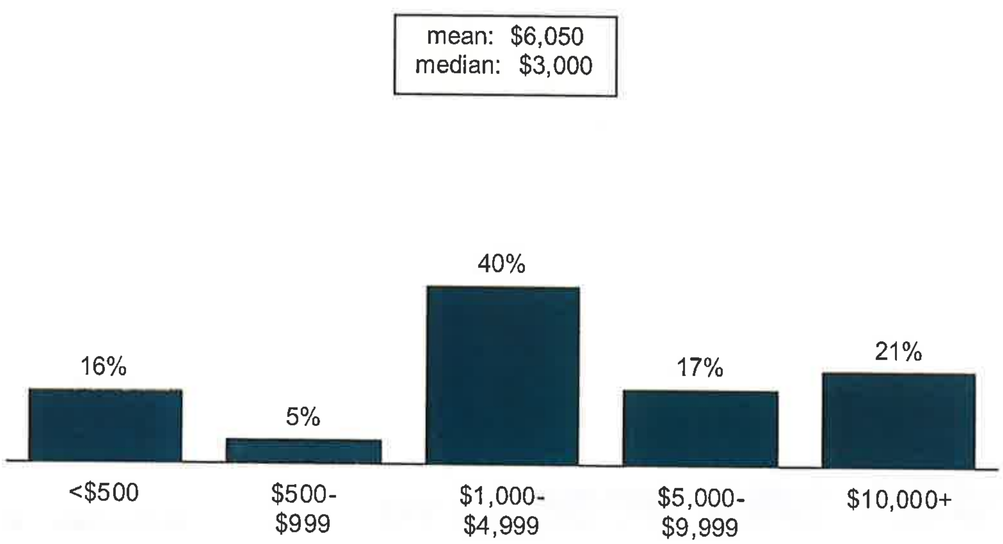
Among those whose park/campground spent money on site/unit expansion in the past 12 months, the median amount spent per new site was $3,000. The average report was twice that amount, influenced by a handful reporting large amounts spent per site.

It is important to note that this question did not ask respondents to report costs for the various types of new sites added. And, costs no doubt vary by type site (full hook up versus rustic campsites, for example).

Average Cost Per New Site

What was this park/campground's average cost per new site in the past 12 months?

base (unweighted): 105 qualified respondents whose park/campground spent money on site/unit expansion in the past 12 months answering (fill-in answers)



FINDINGS: Financials

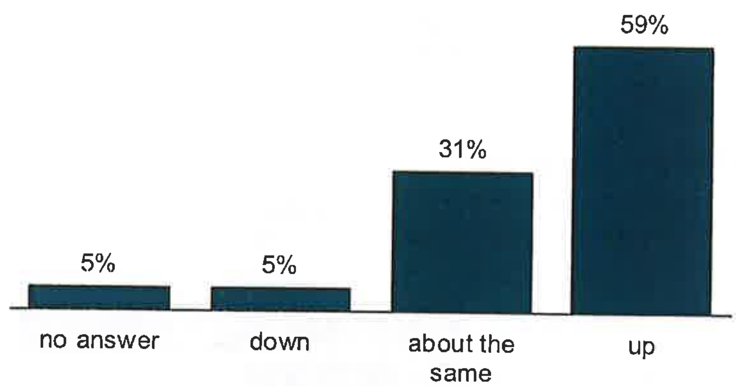
Three in five respondents (59%) anticipate their park/campground's profits to be up in 2019 compared with 2018; another 31% feel their profits will be about the same. Very few (5%) expect to see a decrease.

Those at individual/independently owned small businesses or membership/member-owned parks, and those at smaller parks (fewer than 50 sites/units) are slightly less likely than their counterparts to anticipate their profits to be up in 2019 compared with 2018.

Expected Change in Profits

Compared with 2018, do you anticipate this park/campground's 2019 profits to be up, down, or about the same?

base (unweighted): 614 qualified respondents; those in each segment



Expencted Change in Profits	REGION				OPERATIONAL STRUCTURE			# OF SITES/UNITS			
	North-east	Mid-west	South	West	ind./mem	corp.-owned	fran-chised	<50	50-99	100-199	200+
up	57%	65%	58%	57%	56%	70%	75%	45%	63%	62%	65%
about the same	32%	25%	31%	35%	33%	21%	19%	42%	31%	26%	27%
down	5%	5%	5%	5%	6%	5%	2%	10%	3%	5%	2%
no answer	5%	6%	6%	3%	5%	4%	5%	3%	4%	6%	6%

=10% - 39% =40% - 59% =60%+

FINDINGS: Financials

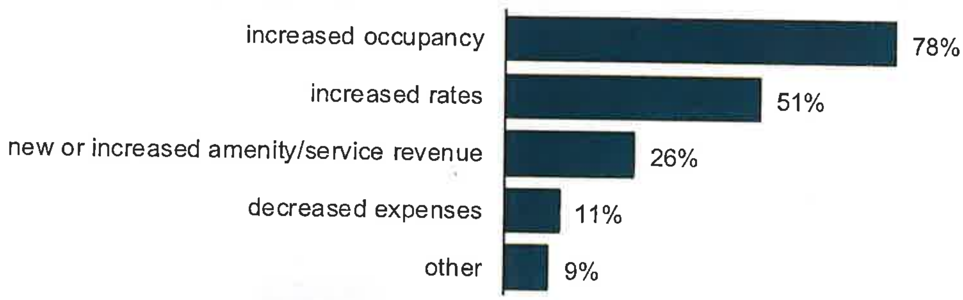
The most common reason for anticipated changes in 2019 profits (up or down) is due to occupancy changes.

Half of those anticipating an increase in 2019 profits feel it will be due to increased rates. A third of those anticipating a decrease in 2019 profits feel it will be due to environmental reasons, including the weather.

Reasons for Anticipated Profit Increase

Why do you anticipate this park/campground's 2019 profits to be up this year?

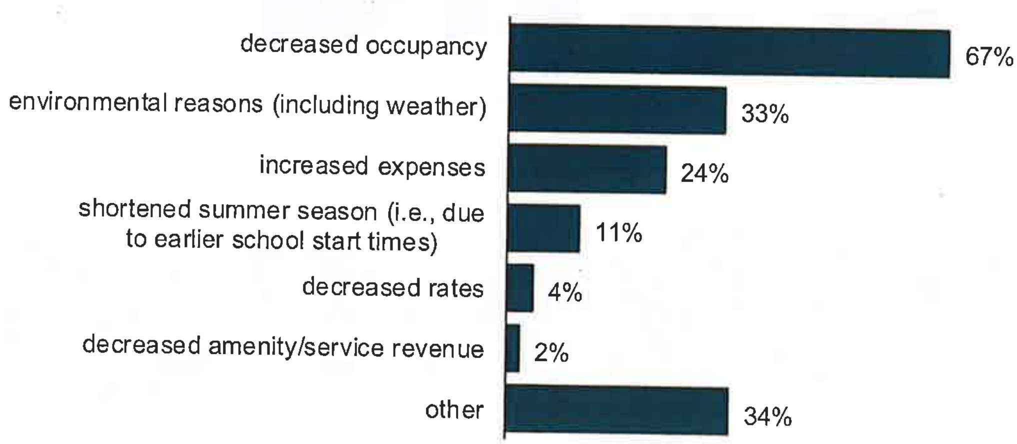
base (unweighted): 371 qualified respondents who anticipate their park/campground's 2019 profits to be up (multiple answers)



Reasons for Anticipated Profit Decrease

Why do you anticipate this park/campground's 2019 profits to be down this year?

base (unweighted): 33 qualified respondents who anticipate their park/campground's 2019 profits to be down (multiple answers)



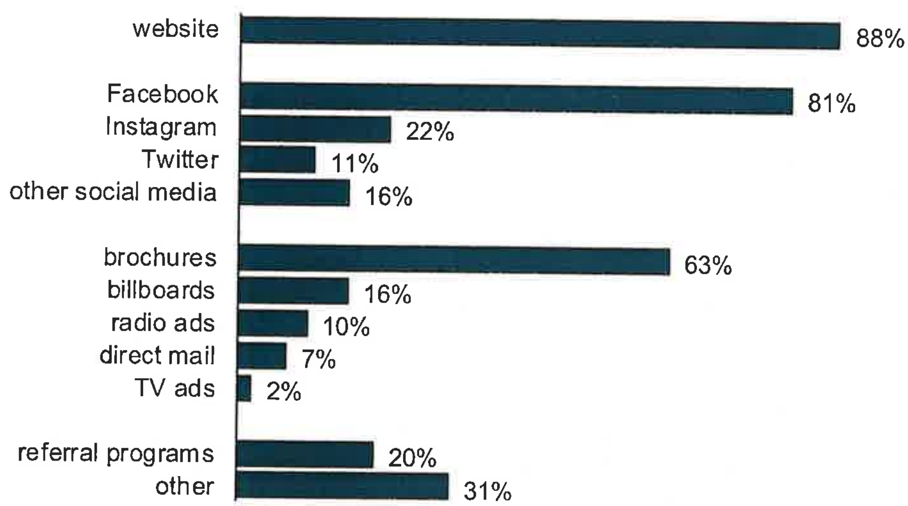
FINDINGS: Marketing

Websites, Facebook, and brochures are among the most common marketing channels used by reported parks/campgrounds. A handful of the listed marketing channels are more likely used among large parks/campgrounds than small ones.

Marketing Channels Used

What marketing channels does your park/campground currently use?

base (unweighted): 614 qualified respondents; those in each segment (multiple answers)



Marketing Channels Used	# OF SITES/UNITS			
	<50	50-99	100-199	200+
website	89%	89%	87%	90%
Facebook	73%	78%	87%	89%
Instagram	15%	19%	21%	36%
Twitter	9%	11%	10%	15%
other social media	16%	12%	16%	24%
brochures	46%	56%	74%	80%
billboards	12%	13%	20%	22%
radio ads	9%	6%	11%	15%
direct mail	2%	5%	9%	17%
TV ads	0%	0%	2%	9%
referral programs	18%	15%	21%	28%
other	31%	34%	29%	32%

=20% - 39% =40% - 59% =60% - 79% =80%+

SURVEY DETAILS

Purpose

The National Association of RV Parks and Campgrounds (ARVC) represents the interests and needs of private RV parks and campgrounds. ARVC provides its members with access to continuing education, networking, business and marketing tools, member-only benefits and discounts, and advocacy. In addition, it conducts a biennial 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. The findings cited in this report are based on an updated State of the Industry survey sponsored by ARVC in 2019.

Method

The survey sample of 6,587 represented the following two populations:

- 2,685 **members** of ARVC located in the United States at unique parks/campgrounds (one record per park/campground), excluding Supplier Council and Associate members
- 3,902 emailable **non-members** in the ARVC database who are located in the United States at unique parks/campgrounds (one record per park/campground)

The sample was stratified by sample segment (ARVC 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	
ARVC members	2,685	41%	2,685	419	16%	277	41%
non-members	3,902	59%	3,902	261	7%	403	59%
TOTAL	**6,587**	**100%**	**6,587**	**680**	**10%**	**680**	**100%**

The survey was designed jointly by ARVC 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 ARVC.

On September 11, 2019, ARVC contacted all sample members (with the exception of 62 ARVC members without an email address on file) via an email in the name of ARVC's president/CEO, 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 Trends and Insights Report a full month before results becoming available to others.

In an additional effort to increase survey participation, Readex mailed print letters on September 13 to all 2,685 ARVC members. The letters were sent on ARVC letterhead, signed by ARVC's president/CEO, requesting participation by accessing the secure survey website (unique survey links and passwords were included in the letter).

ARVC sent reminder emails on September 16, 19, and 30 to those with deliverable email addresses who had not yet responded (prior to each reminder deployment, Readex provided ARVC with the list of non-respondents).

SURVEY DETAILS (continued)

Response

The survey was closed for tabulation on October 2, 2019, with 680 total responses—a 10% response rate. Results are based on the 614 respondents who indicated in the first few survey questions they have owned, managed, operated, or have had detailed knowledge about a park/campground for at least one year ("qualified" respondents). The other 66 respondents who did not meet this profile were thanked for their interest in the study and were terminated from the survey.

As with any research, the results should be interpreted with the potential of non-response bias in mind. It is unknown how those who responded to the survey may be different from those who did not respond. In general, the higher the response rate, the lower the probability of estimation errors due to non-response and thus, the more stable the results.

The margin of error (maximum sampling error for percentages at the 95% confidence level) based on all 614 qualified responses is ±3.7 percentage points.

This report was prepared by Readex in accordance with accepted research standards and practices. Percentages may not add to 100 for single answer questions due to rounding and/or non-response.

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.