



RV Industry Association Campground Industry Market Analysis



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1. Engagement Objective



Engagement Objective

To develop and execute a comprehensive campground inventory research project focused on tracking federal, state, and private campground inventory.

This report has for the first time quantified the scope and profile of the U.S. campground inventory. The research and study findings can play an important role in understanding and elevating the campground industry within the outdoor hospitality industry.



2. Industry Trends



Industry Trends

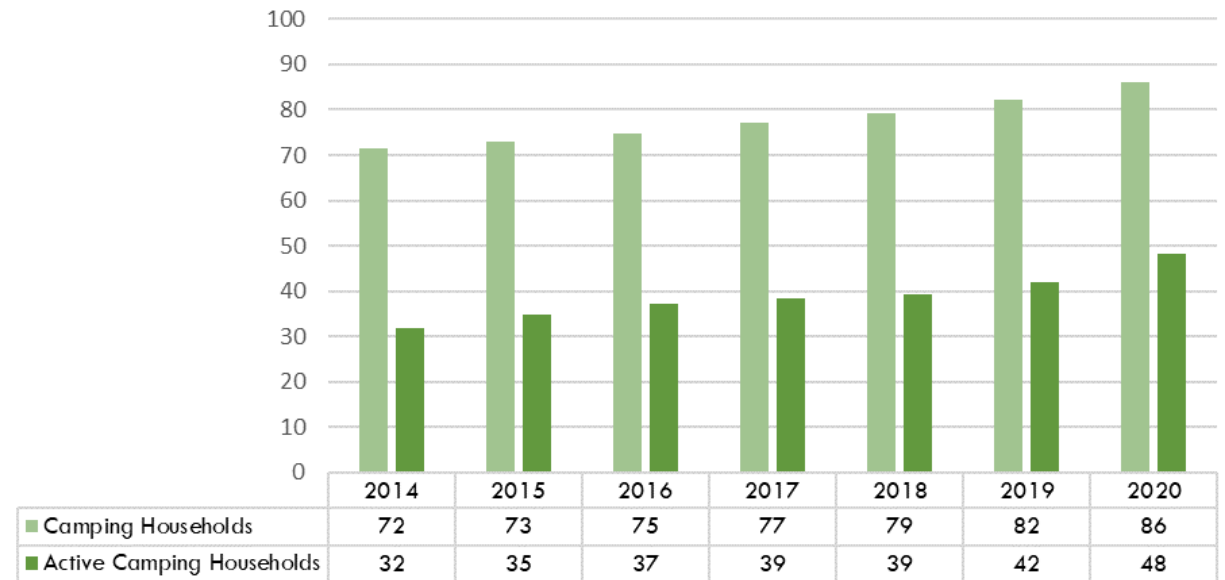
There are an increasing number of market demand indicators supporting the need for expansion and improvement of the nation's inventory of campgrounds and specifically RV campsites. The following pages provide data and analysis from multiple research sources. CHMGS presents data collected from the 2021 North American Camping Report sponsored by KOA, RV Industry Association Market Surveys, and IPSOS 2021 Go RVing Owner Demographic Profile. Combined, these sources provide insight to supply and demand indicators supporting additional campground development needs in the United States. The data clearly indicates that both the public and private campground sectors within the "Outdoor Hospitality" industry, need to continue to grow/expand and redevelop their supply of facilities to keep pace with consumer demand.



Industry Trends

- Longitudinal data provided within the 2021 North American Camping Report, sponsored by KOA, indicates that Camping Households have increased at a Compound Annual Growth Rate (CAGR) of three percent over the last seven years. The number of Active Camping Households has increased at a CAGR of 7.1 percent which is over twice that of the Camping Households. This means that the both the size and the depth of the camping demand is growing.
- Camping trips made by households have increased from 68.5 million in 2014 to 105.6 million over the last seven years. This equates to a CAGR of 7.5 percent over this period.
- This data would indicate that if the campground supply is presently at capacity, then supply would need to increase at a rate of seven percent per year to keep pace with current levels of demand growth.

Camping Demand (Millions) 2014 to 2020



Industry Trends

- The 2021 North American Camping Report, provides insight to the locations in which camping demand is occurring. The demand data reflects campers' interest in different types of camping experiences as well as settings.
- The data indicates that camping occurs in a variety of locations outside of a traditional campground setting. It also profiles the importance of both the public and the private sector in accommodating camping demand.
- The 2021 North American Camping Report also profiles preferred camping accommodations for 2020. The data indicates camping type preferences as follows:
 - Tent: 64%
 - RV: 25%
 - Cabins: 10%
 - Other: 1%

This data supports the need for a variety of campground site types.

DEMAND: Camper Nights by Location 2020	%
<i>Privately owned campgrounds</i>	23%
<i>National Park campgrounds</i>	21%
<i>State Park campgrounds</i>	22%
<i>National Forests</i>	3%
<i>Municipal campgrounds</i>	1%
<i>Back Country or Wilderness Areas</i>	6%
<i>Parking lots such as Walmart or roadside areas</i>	1%
<i>Dispersed/boondocking on public land</i>	5%
<i>Privately owned land such as your own, a friend or family members other than a campground</i>	10%
<i>Privately owned land that is part of a listing of private land owners (e.g., HipCamp, Harvest Host, etc.)</i>	8%
Total	100%
RVIA Campground Market Inventory Sample - Camper Night Demand	71%
Excluded from RVIA Campground Market Inventory Sample - Camper Night Demand	29%

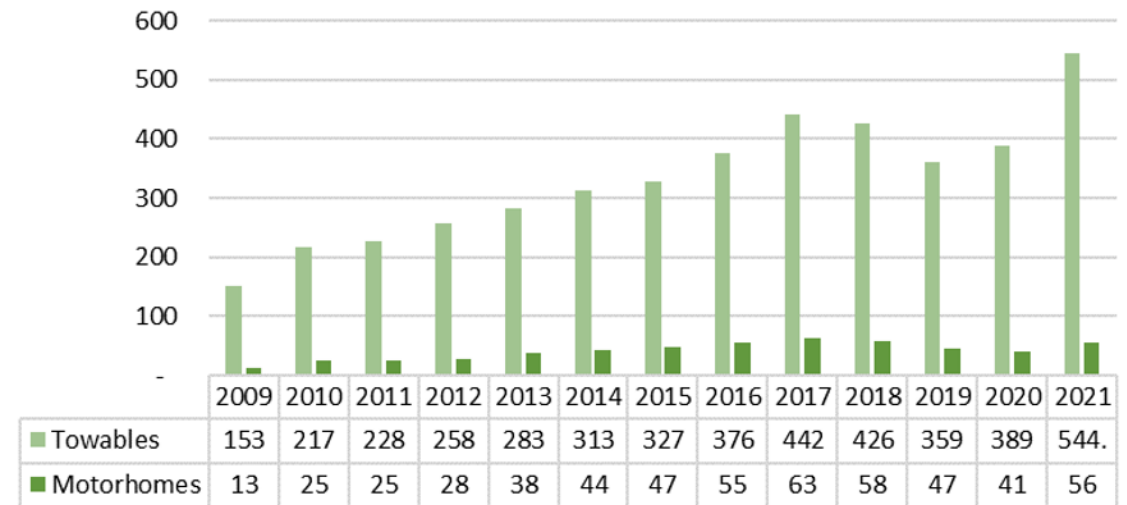
Source: 2021 North American Campground Report, sponsored by KOA



Industry Trends

- RV wholesale shipments have increased at a CAGR of 11.1 percent over the last thirteen years (i.e., 2009 to 2021). Over 90 percent of the shipments were in the Towable category with Conventional RV's representing approximately 78 percent of this supply and growing at a CAGR of 12.6 percent during this same period.
- The RV Industry Association reported that 600,200 units were shipped in 2021, which represents the highest level of shipments in history.
- The Go RVing 2021 RV Owner Demographic Profile report estimates there are approximately 11.2 million households that own RVs. This figure represents approximately 8.7 percent of total U.S. households. This percentage has increased from 7.4 percent of U.S. households in 2011.
- Simply stated, the historical growth rate of RV shipments, and increase in RV ownership and RV sharing all contribute to a need to understand if there is an adequate supply of campsites to accommodate RV campground demand.

RV Wholesale Shipments (Thousands) 2009 to 2021





3. Project Methodology



Project Methodology

CHM Government Services developed and executed the project methodology on behalf of the RV Industry Association. CHMGS is a national consulting firm focused on serving the research and analysis needs of public and non-profit entities who own, manage, or provides services in support of recreational and hospitality assets. For this engagement, CHMGS engaged two project partners (“CHMGS team”): SOM and Data Crunch. SOM was responsible for the private sector supply survey analysis and Data Crunch collaborated with CHMGS to aggregate and develop data dashboards for the findings. The Appendix provides additional information on these organizations.

CHMGS developed the project methodology based upon their understanding of the availability of campground supply data. Provided on the next page is an overview of the four project Tasks conducted by the CHMGS team. Following this graphic is a description of the project methodology.

Project Methodology: Task Elements

Task 1: Planning and Coordination

- Definition of Campground
- Identification of Campground Metrics

Task 2: Data Sourcing, Aggregation, Validation and Organization

- Private Sector Sampling Plan
- Public Sector Data Collection Strategy
- Extensive Data Cleaning

Task 3: Data Analysis

- 120+ Unique Data Sources (All Federal Agencies, 50 State Parks and Forests Systems, Multiple 3rd Party Sources)

Task 4: Inventory and Reporting

- Final Data Validation Prior to Report Issuance



Project Methodology: Task 1

Task 1: Planning and Coordination

Task 1 required the CHMGS and RV Industry Association to develop a “Campground” definition and identify campground supply metrics for evaluation.

Definition of Campground for Engagement Purposes

CHMGS and the RV Industry Association identified that the supply should comprise campgrounds where the largest percentage of camping demand is accommodated. Specifically, CHMGS focused on identifying the inventory of campgrounds and campsites at the locations where approximately 71 percent of camping demand occurred in 2020 (i.e., see page 9) and where supply data could be reliably gathered. CHMGS and the RV Industry Association identified the following as the campground definition for this engagement.

1. Demarcated parcel of land managed by an entity
2. Vehicle access (e.g., paved, dirt, gravel, etc. to facilitate access)
3. Defined site for an individual or family (e.g., tent, RV, yurt, cabin, etc.)
4. Basic infrastructure (e.g., potable water and vault toilet minimum standards)
5. May include a site fee
6. *Excludes: Backcountry, Hike-in, Boat-in Sites, Boondocking or Parking Lots, Privately Owned Sites that are part of listing of private landowners*

This campground definition corresponds closely with the NAICS Code (721211) for campgrounds: *“This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.”*



Project Methodology: Task 1 (Con't)

Task 1: Planning and Coordination

Campground Supply Metrics

CHMGS and the RV Industry Association identified the campground supply metrics for data analysis for the private and public Campground Market Study. The Appendix provides definitions of these metrics. The metrics selected and collected include:

1. Number of Sites
2. Type of Sites (e.g., Tent, RV, Cabin/Yurt, Horse, Group, etc.)
3. Length of Sites (e.g., ft.)
4. Design of Site (e.g., Pull-Through, Parallel)
5. Hookup Type (e.g., Electric, Water, Sewer, Cable)
6. Electrical Amperage
7. Other RV Services (e.g., RV Rental, Repair or Storage)
8. Toilet
9. Shower
10. Water Availability
11. Camper Store
12. Reservation



Project Methodology: Task 2

Task 2: Data Sourcing, Aggregation, Validation, and Organization:

CHMGS and the RV Industry Association agreed that the data gathering approach to Task 2 would differ for the public and private sector supply. The public data gathering would include all available data sources to create a “Universal” supply. The private sector data would be a “Sample” of the available campground supply. Information on approaches for each sector follows.

Public Agencies Inventory

1. **Federal Agencies:** National Park Service, U.S. Forest Service, U.S. Army Corps of Engineers, Bureau of Land Management, Bureau of Reclamation, U.S. Fish and Wildlife Service, Tennessee Valley Authority
2. **State Parks/Forests:** 50 State Park Systems and relevant State Forest systems
3. **Municipal Agencies:** City and Counties, Public Authorities and Utility providers

Public Agency Data Challenges

1. **Campsite Terminology:** Categories/definition of sites (e.g., primitive, walk in, hike in) not standardized. Therefore, CHMGS conducted significant data review and evaluation in order to determine the relevancy of including a campground/campsite.
2. **Campsite Attributes:** Attributes were grouped not sorted in databases. This required significant data cleaning and organization to feed the campground supply data base (e.g., type of site, amperage, design of site).
3. **Federal Data Standard:** There was no consistency in federal camping data terminology and/or data bases. In some cases, federal data sources did not match federal web pages information sources.
4. **State Park and Forest Data:** Different reservation reports for state parks and forests due to differing reservation system providers. No state park data standards within reservation systems.

Within the public sector, for Federal locations, (e.g., National Forest, U.S. Army Corps of Engineers, National Park Service) CHMGS considered campgrounds with different names as unique, even if they were in the same federal unit. For example, within National Forests and/or National Parks, there can be multiple campgrounds. Each campground within these units is a separate campground for purposes of this analysis.



Project Methodology: Task 2 (Con't)

Task 2: Data Sourcing, Aggregation, Validation, and Organization

Private Data Gathering

SOM, on behalf of CHMGS, was responsible for the private sector data sampling strategy. SOM identified a data sampling plan that included web data scraping, review and then validation of data available on private sector campground websites.

SOM/CHMGS identified that the best and most relevant sampling source should be the Dun & Bradstreet contact listing of 9,921 campgrounds classified under NAICS Code 721211: RV Parks and Campgrounds. The sample would be representative of the universal portfolio estimated to be 12,290 campgrounds in the U.S. The Appendix provides details on the sampling plan.

The sample size of 1,064 reflects the geographical distribution of campgrounds as well as size of campgrounds as reflected by # of employees. The sampling plan results in a 95 percent confidence level with a Margin of Error of +/- 3 percent for campgrounds having one of the attribute types. The average campground size has a Margin of Error of +/-6.6 percent. The Appendix provides additional information on the Margin of Error on other site attribute averages.



Project Methodology: Task 3 and 4

Task 3: Data Analysis

CHMGS reviewed all public data sets and removed data elements that did not align with the campground definition determined for this study (e.g., backcountry, some primitive and hike and boat in). CHMGS notes that in many cases public data sources did not include all attribute variables. CHMGS created data cross walks between the public (e.g., federal, state and municipal) data sources and the sought to standardize between public and private research findings. CHMGS's data partner, Data Crunch, then undertook further data cleaning/validation and analysis and used Tableau to aggregate data sources. The Appendix provides information on the public data source availability.

Task 4: Inventory and Reporting

CHMGS and its data partner Data Crunch developed Tableau dashboards for reporting the campground supply inventory. The Tableau dashboards identify the relevant metrics by the source (e.g., Public vs. Private) of the campground supply. The following section presents the research findings.



4. Research Findings

Private vs. Public Campgrounds Comparison

Private

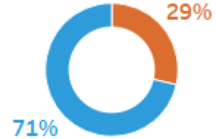
Public

Private sample = 1,064 campgrounds | Public is not sampled

Share of Total Campgrounds

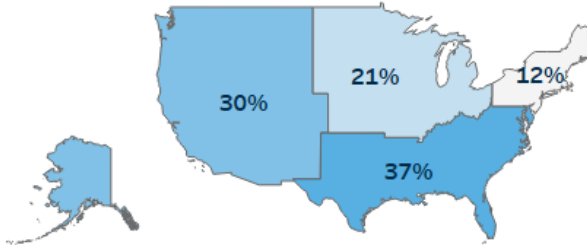


Share of Total Campsites



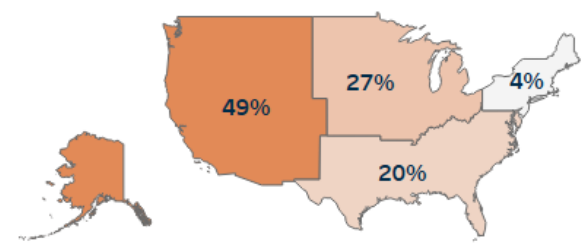
	Private	Public	Totals
Campgrounds	12,290	15,119	27,409
Campsites	1,520,000	607,014	2,127,014
RV sites	1,400,000	264,861	1,664,861
Avg. Campsites / Campground	124 sites	40 sites	78 sites
Median Campsite Length	60 ft.	45 ft.	53 ft.

Private Campgrounds by Region



West	30% (3,674)
Midwest	21% (2,605)
South	37% (4,577)
Northeast	12% (1,434)

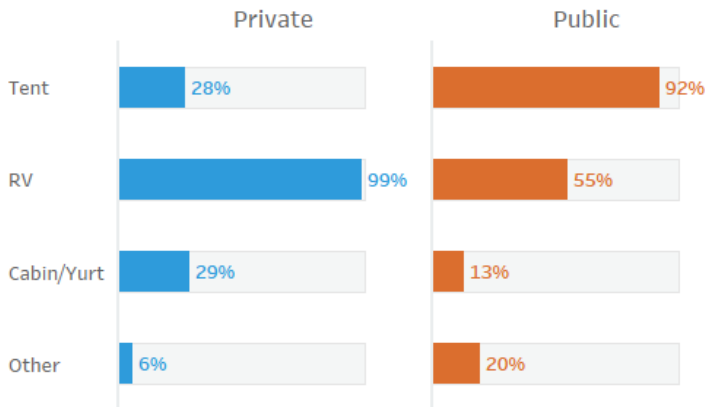
Public Campgrounds by Region



West	49% (7,415)
Midwest	27% (4,011)
South	20% (3,062)
Northeast	4% (631)

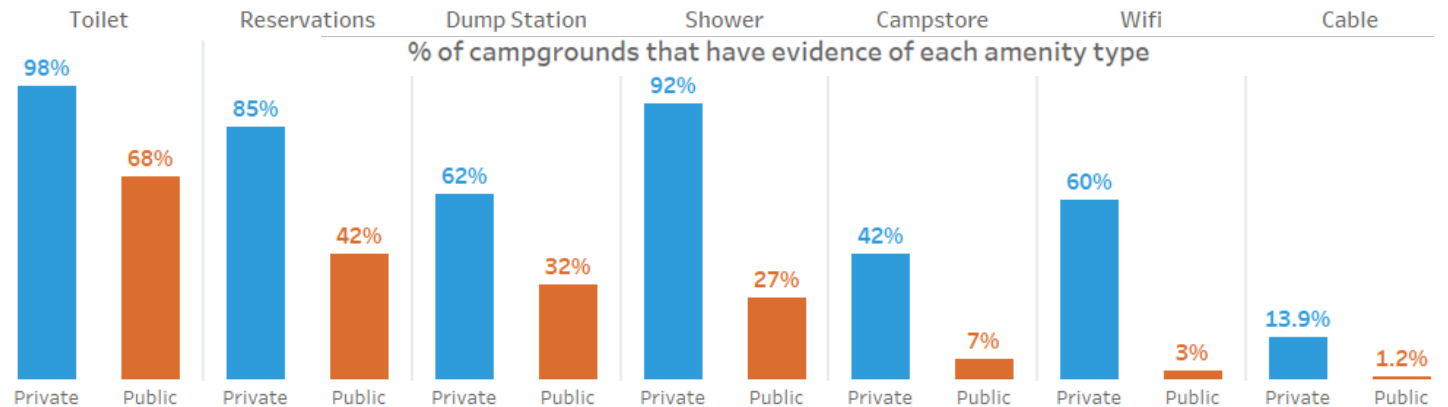
Supported Campsite Types

% of campgrounds that have evidence of each campsite type



Amenities

% of campgrounds



Private vs. Public RV Campgrounds Comparison

Private

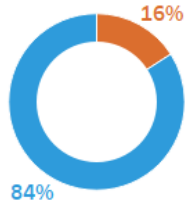
Public

Private sample = 1,064 campgrounds | Public is not sampled

Share of Total RV Campgrounds

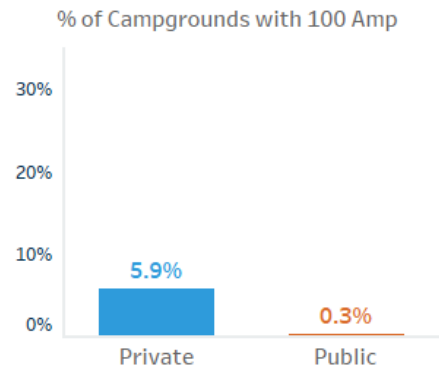
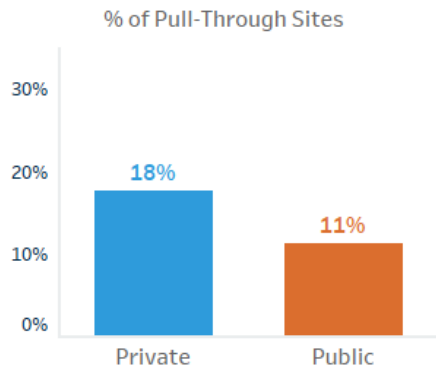


Share of Total RV Campsites



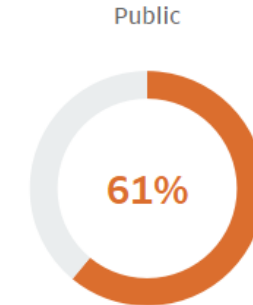
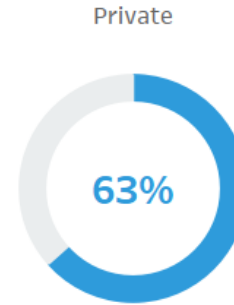
	Private	Public	Totals
Campgrounds with RV Sites	12,118	8,349	20,467
RV sites	1,400,000	264,861	1,664,861
Avg. Campsites / Campground	116 sites	32 sites	81 sites

RV Amenities



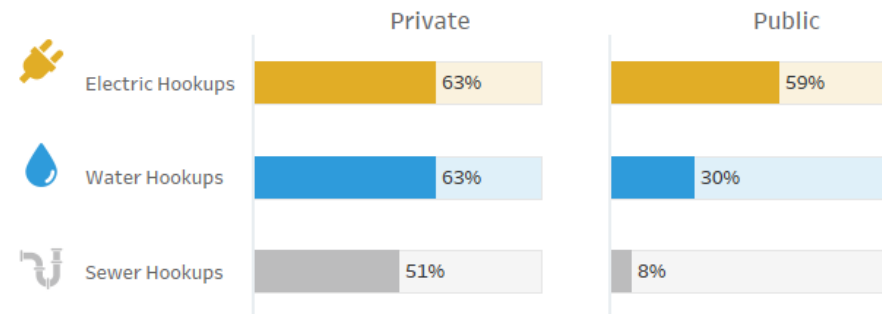
RV Hookups

% of RV campsites



Hookup Type Breakdown

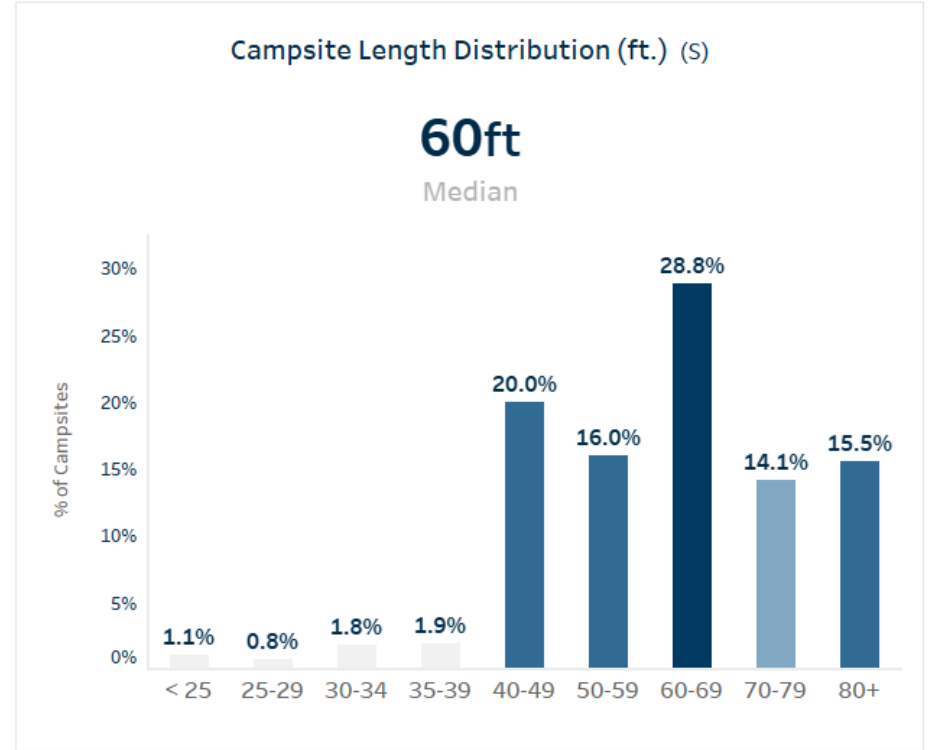
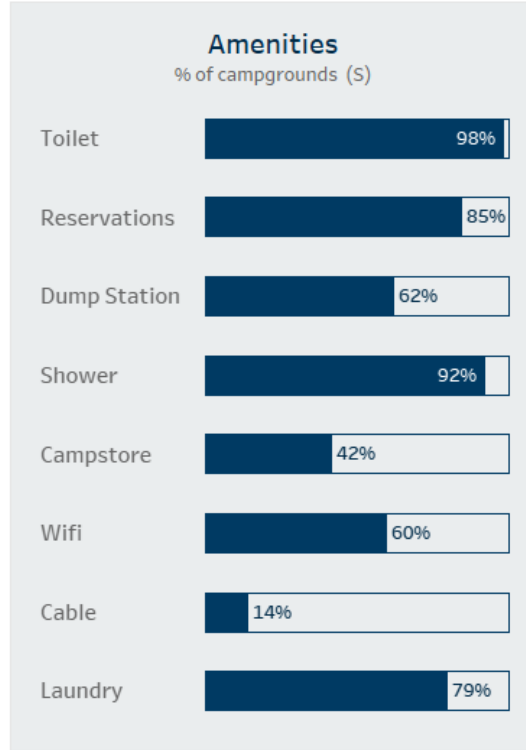
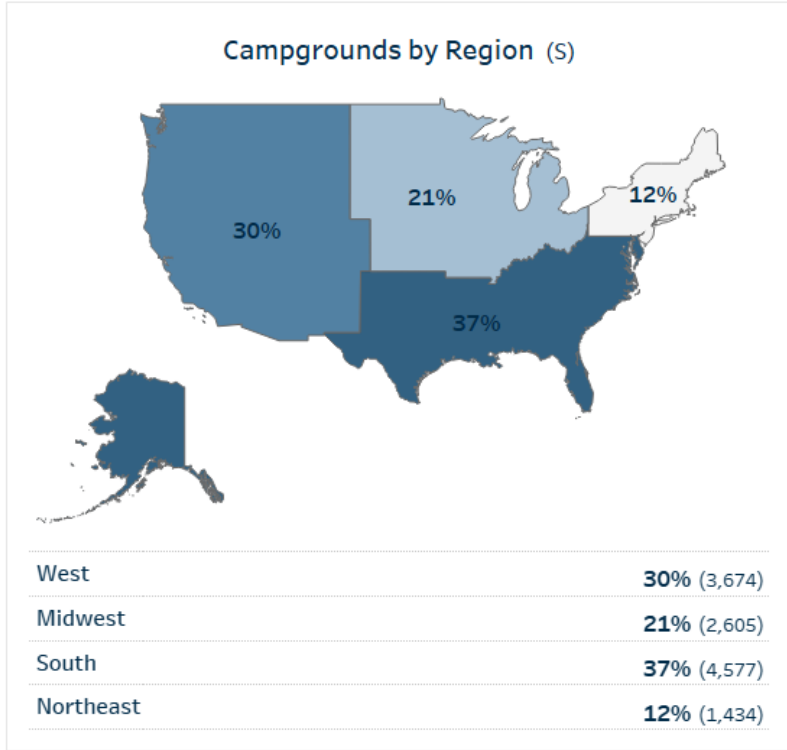
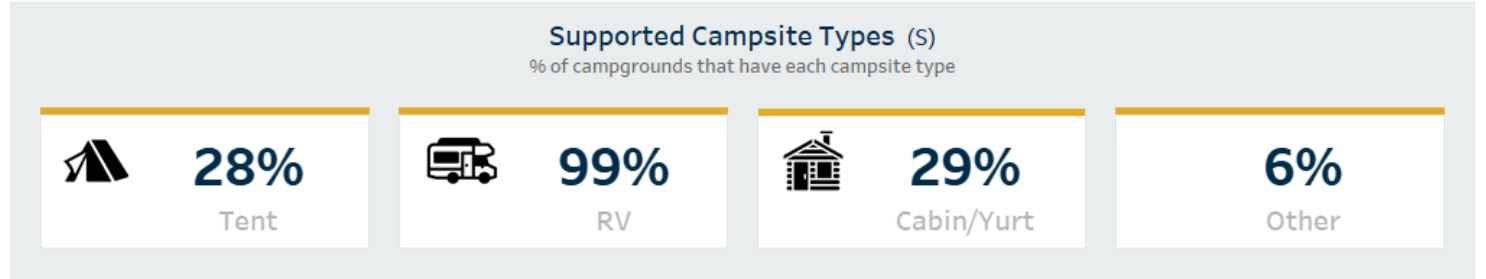
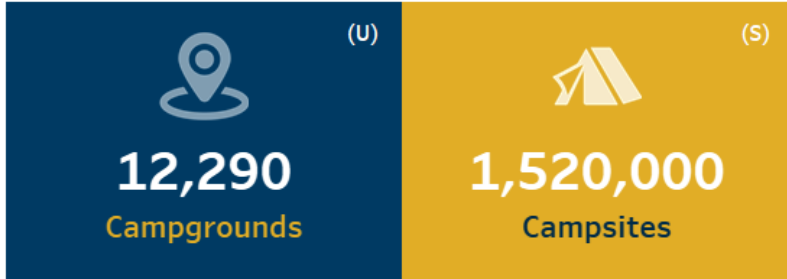
% of RV campsites



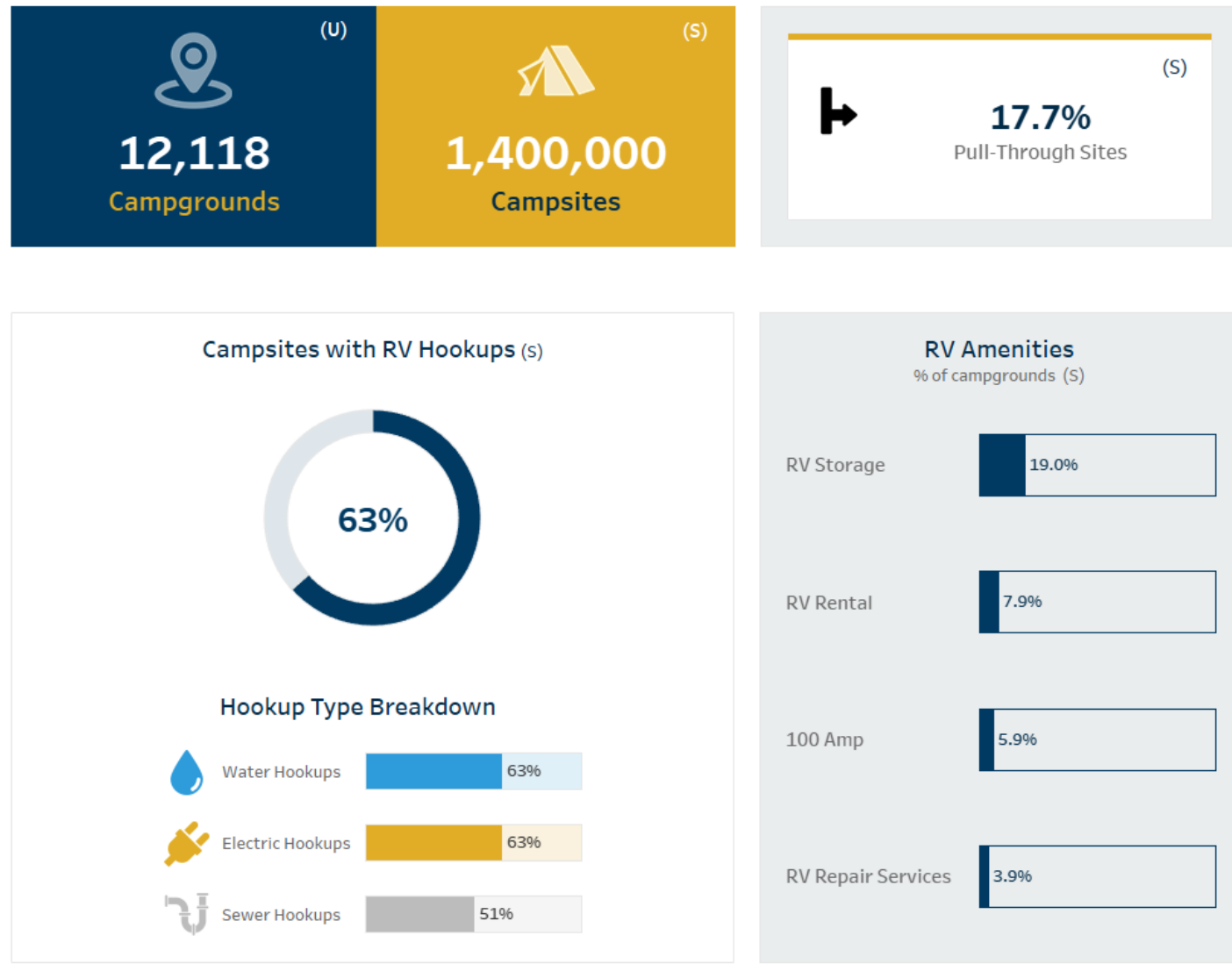
Municipal data not included in Public data for RV hookups.

Private Campgrounds Overview

(U) = Universe, (S) = Sample n = 1,064

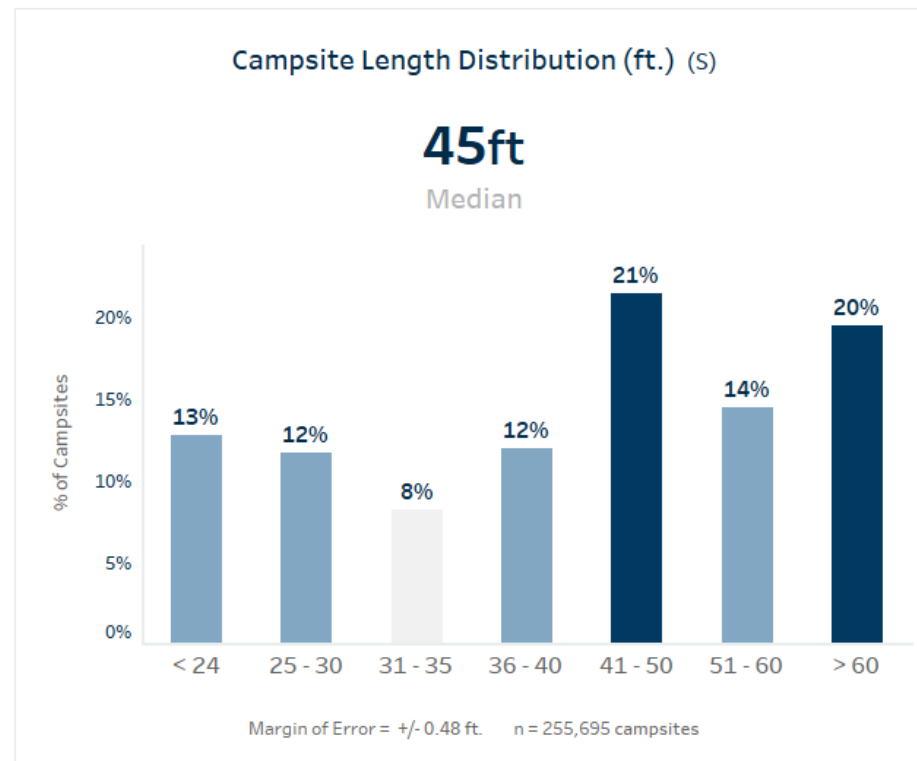
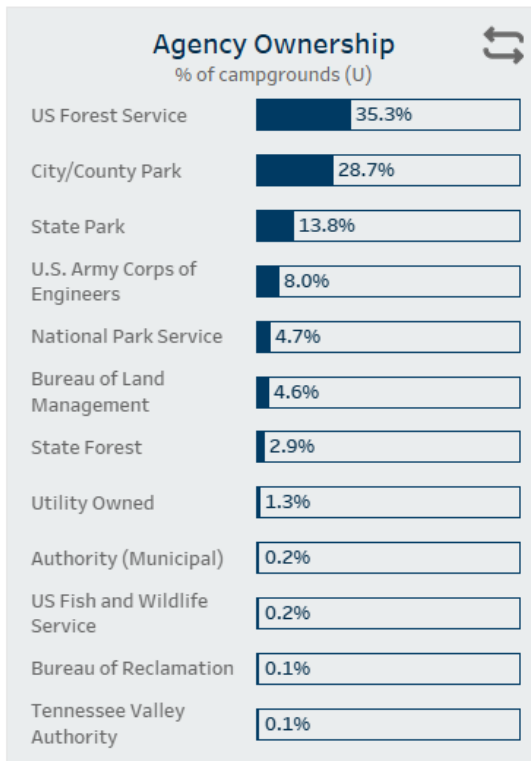
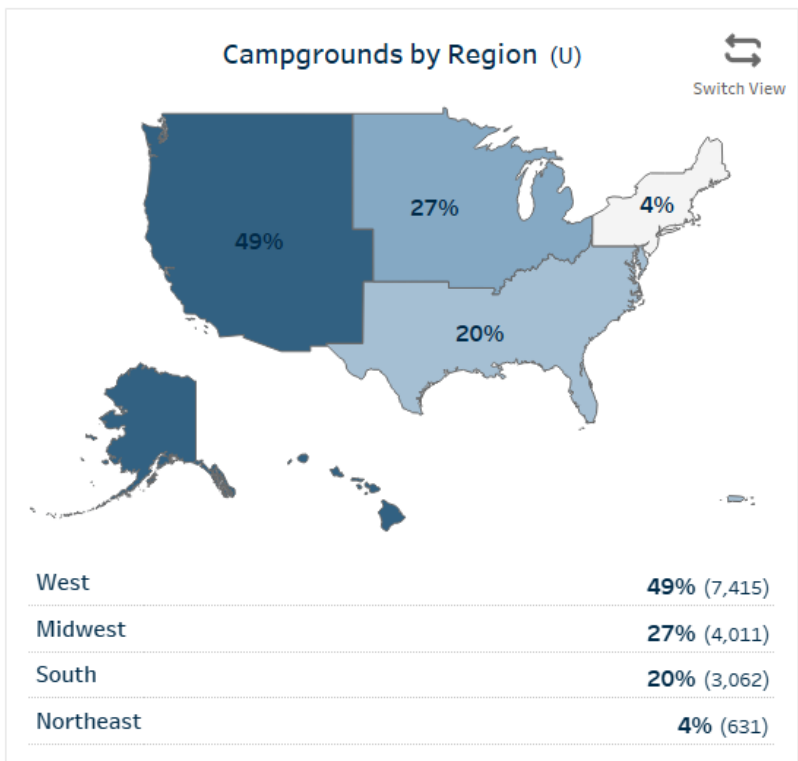
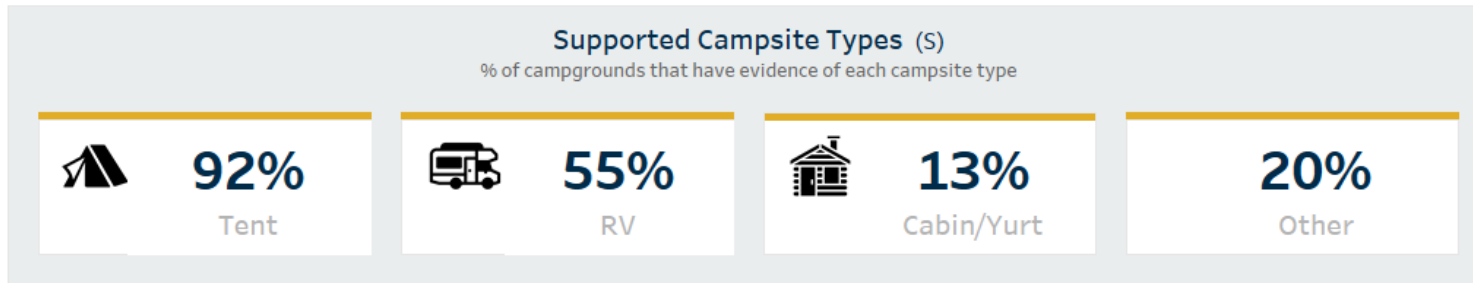
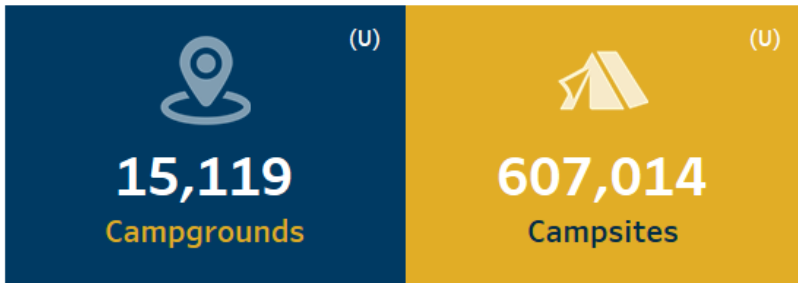


Private RV Campgrounds Analysis



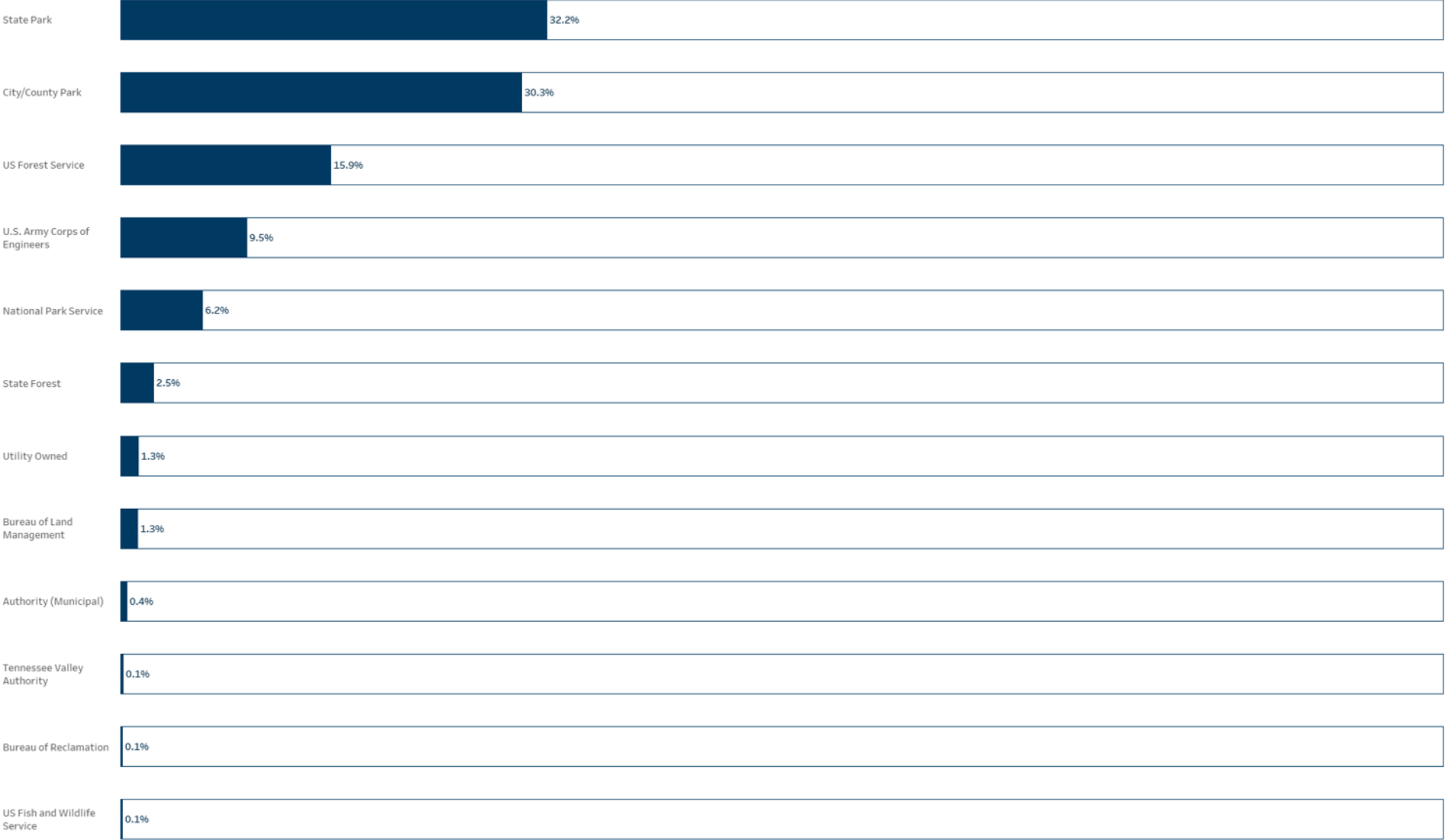
Public Campgrounds Overview

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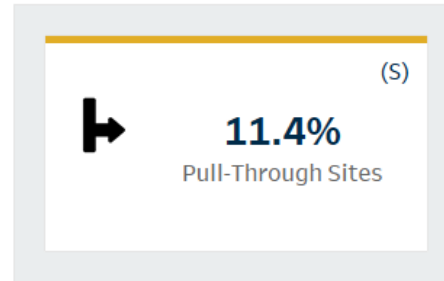
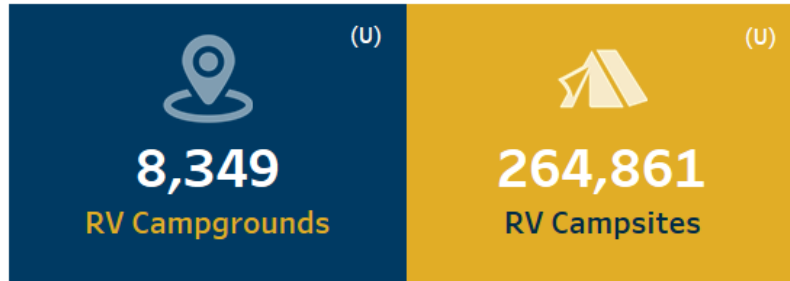
Public Campgrounds Overview

Agency Ownership % of campsites

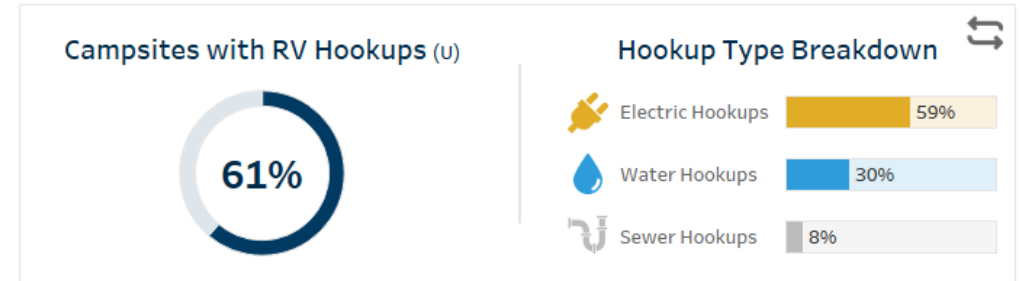


Public RV Campgrounds Overview

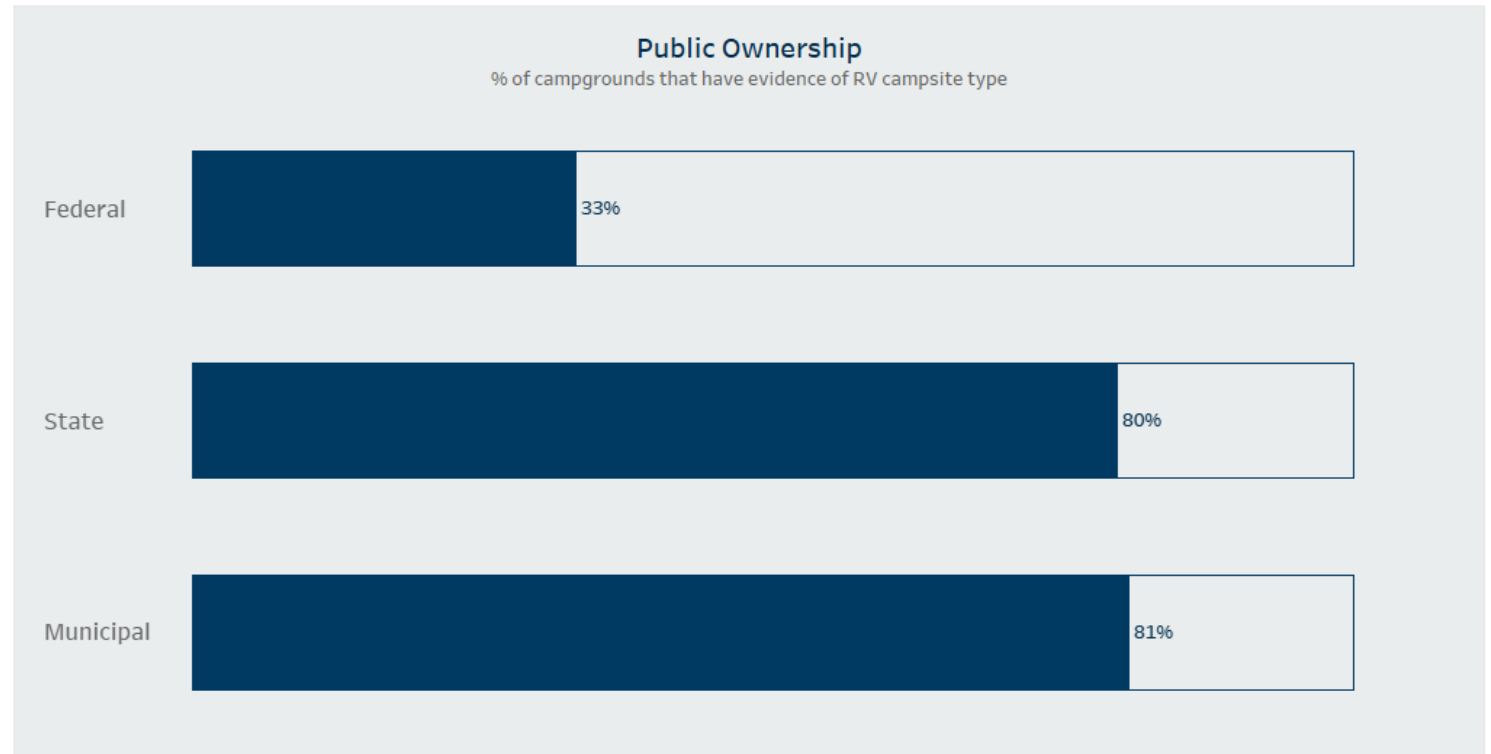
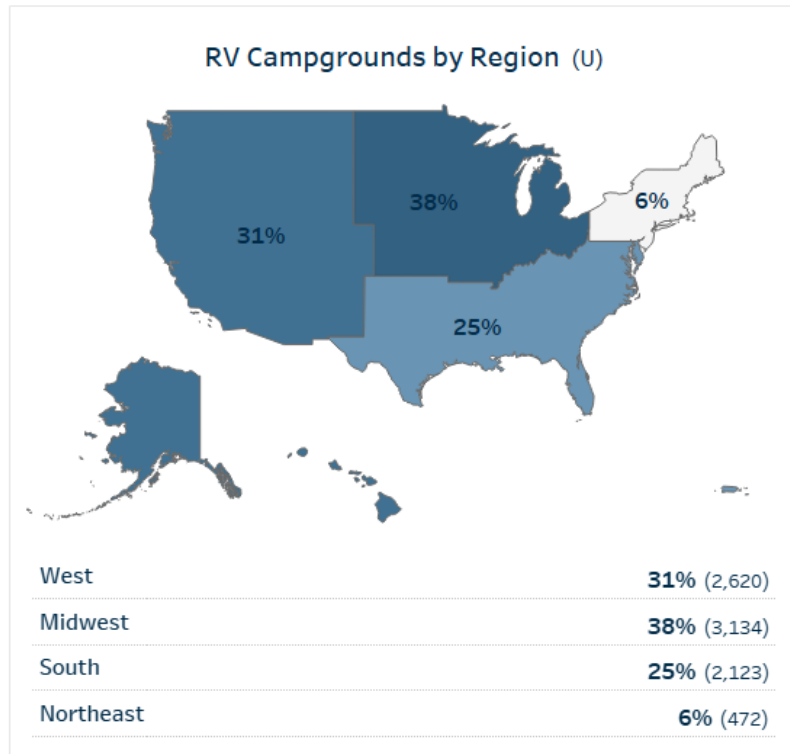
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n = 238,992 campsites

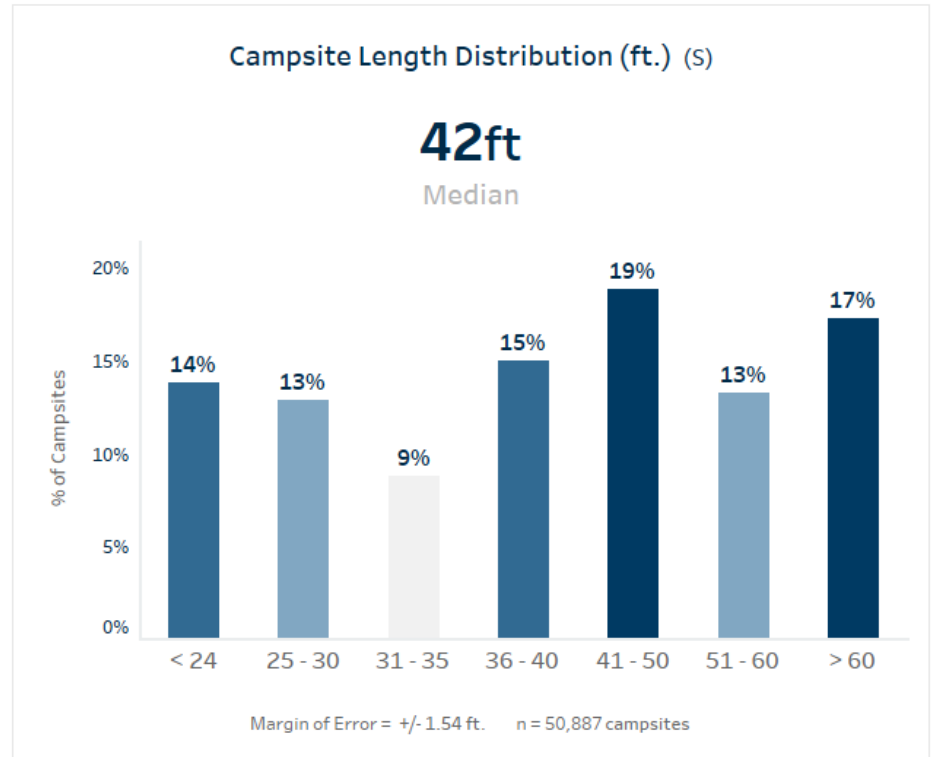
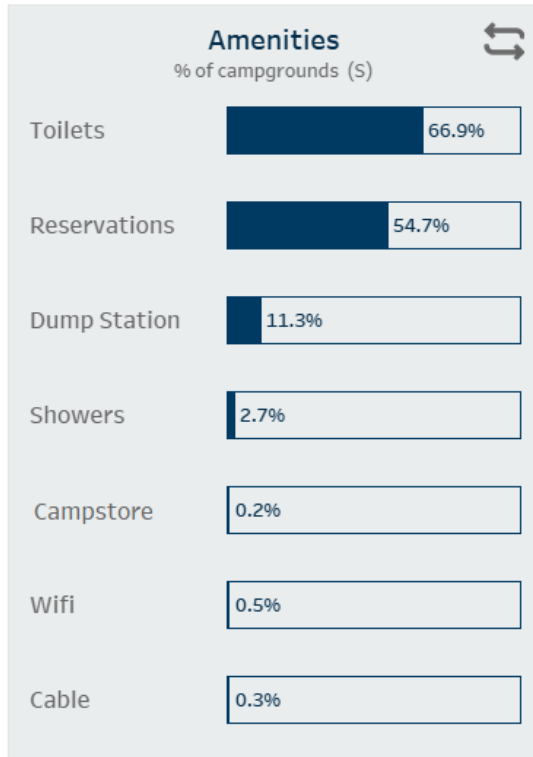
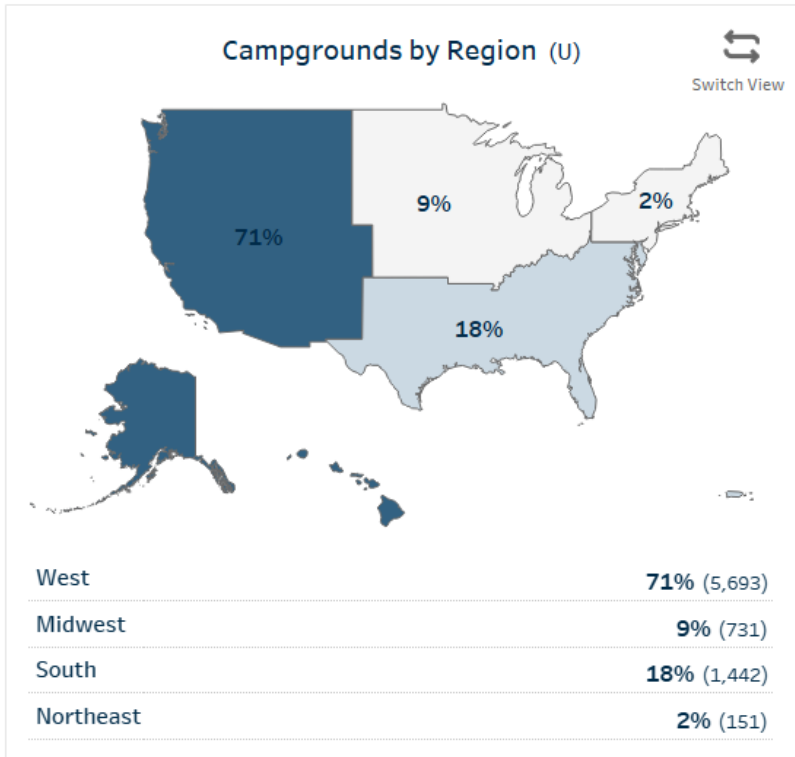
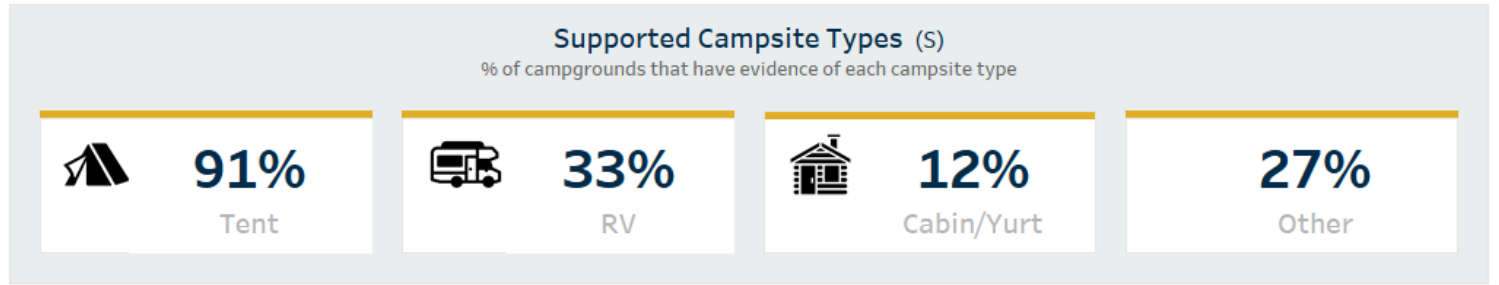
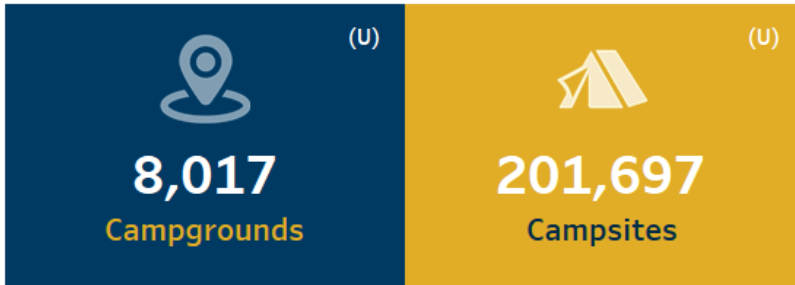


Municipal data not included for RV hookups.



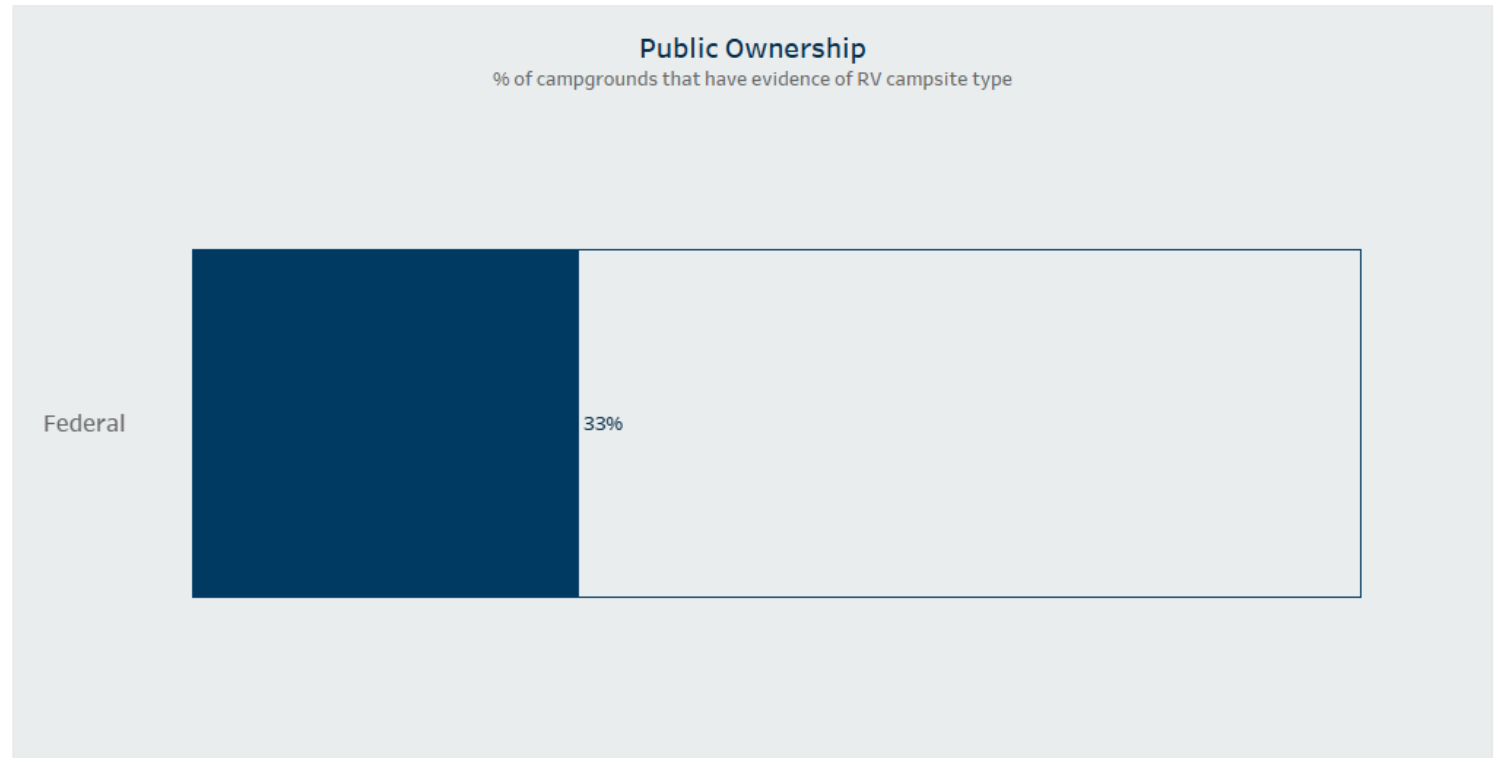
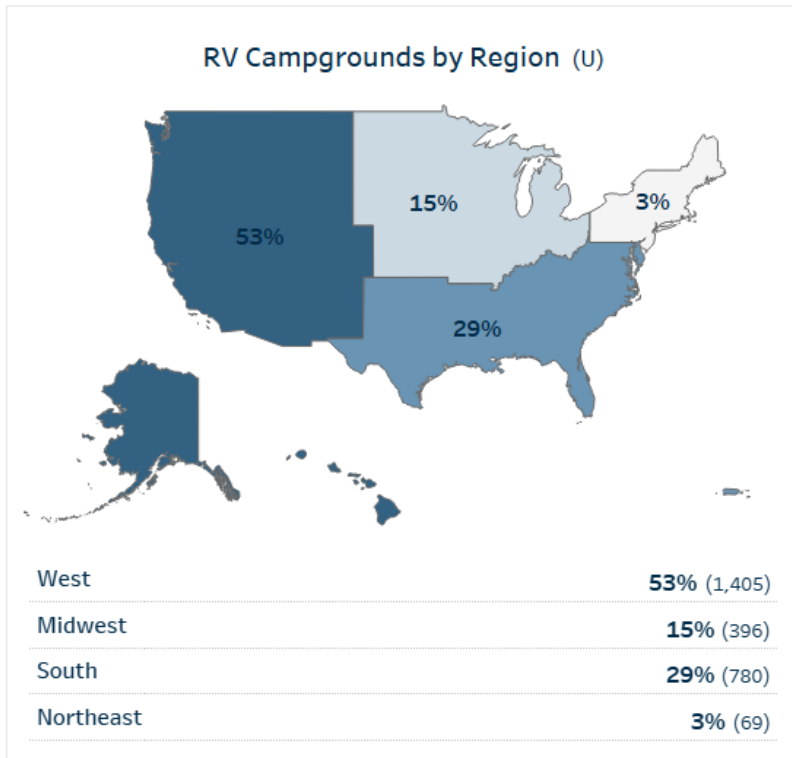
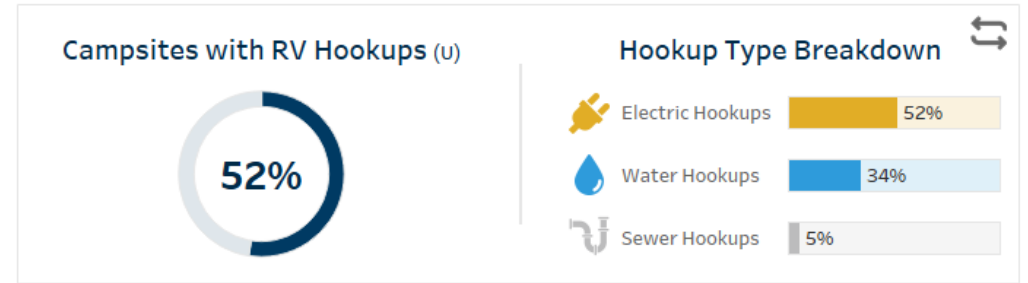
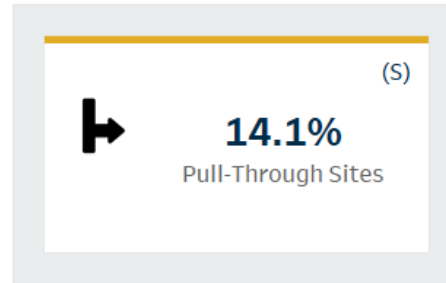
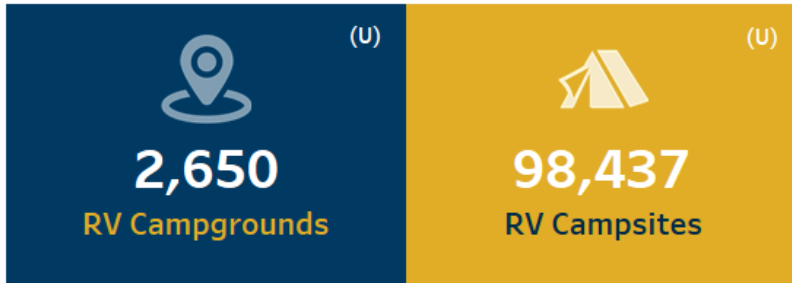
Federal Campgrounds Overview

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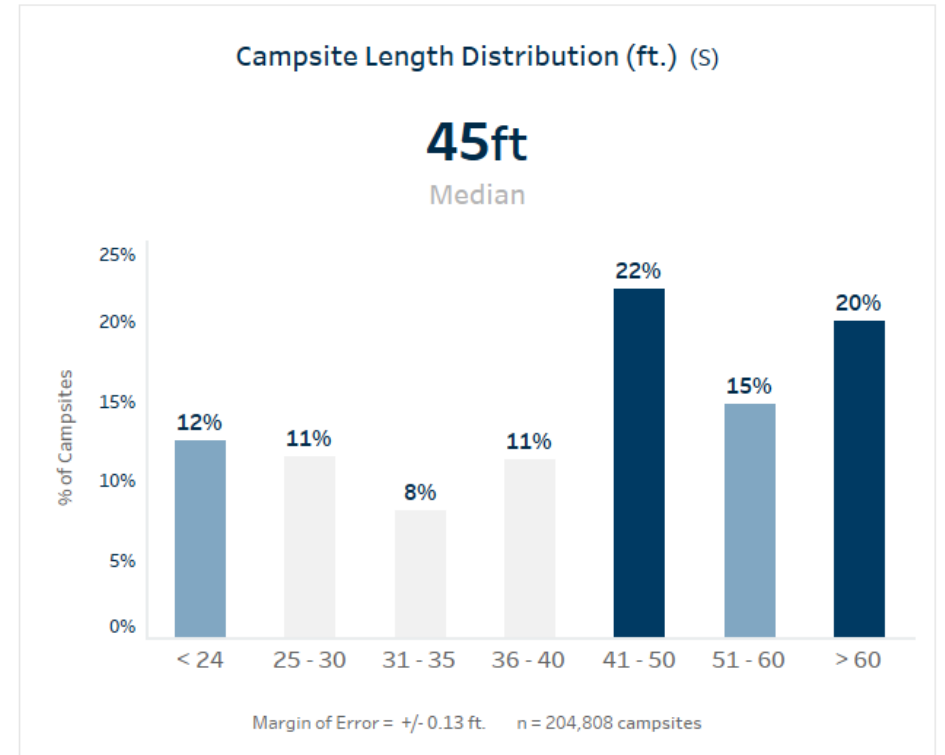
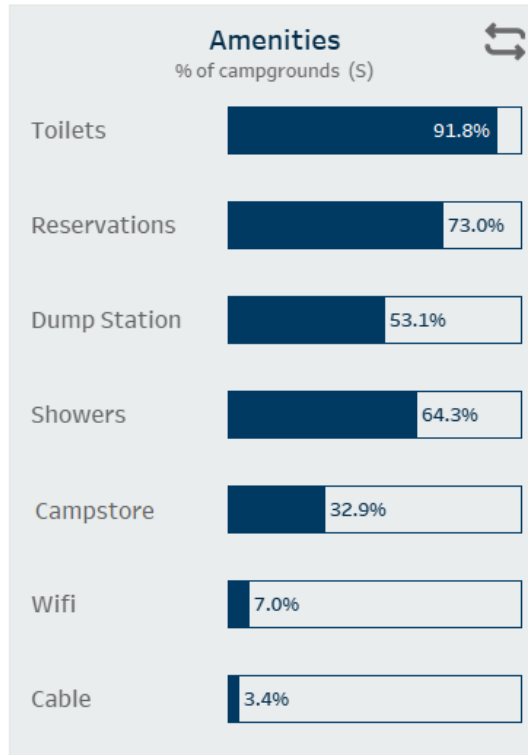
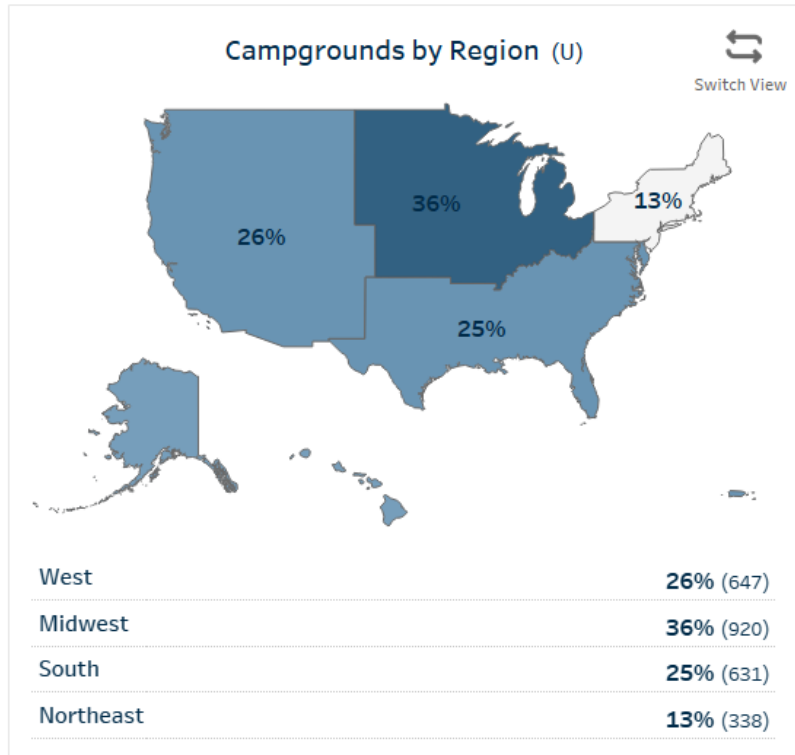
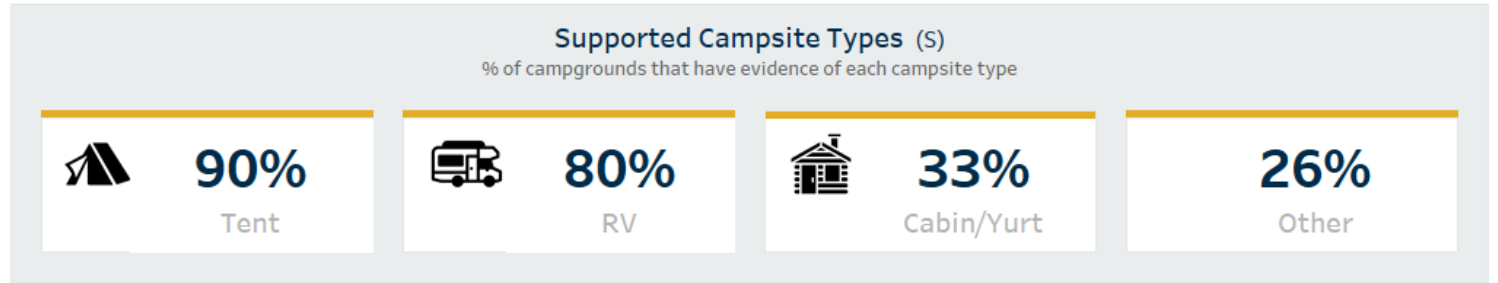
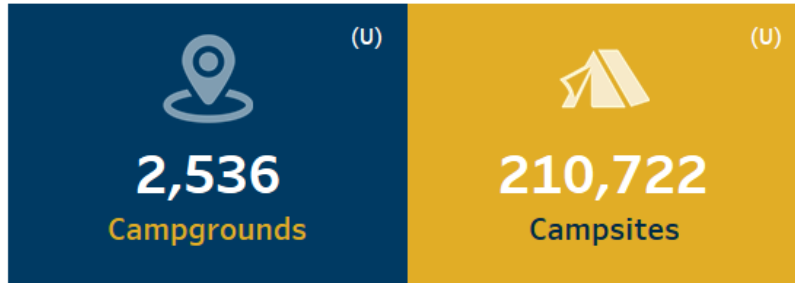
Federal RV Campgrounds Overview

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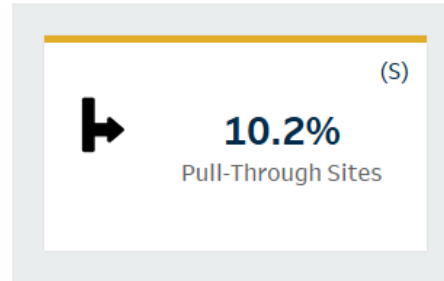
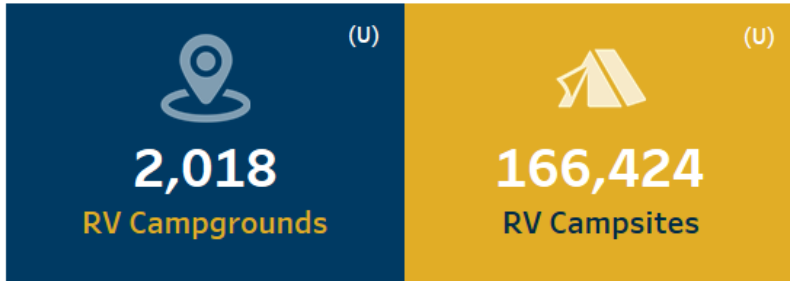
State Campgrounds Overview

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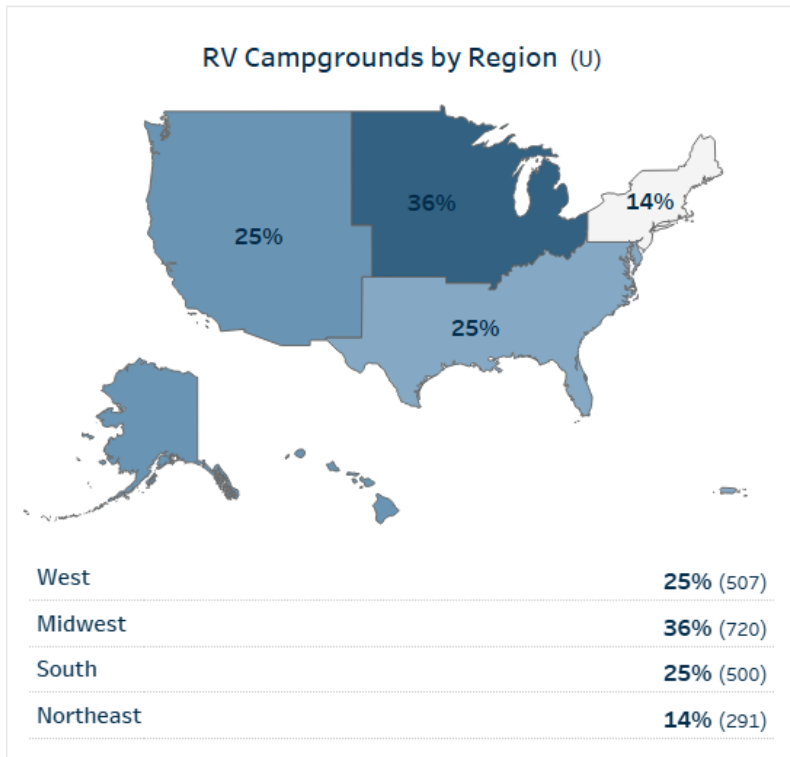
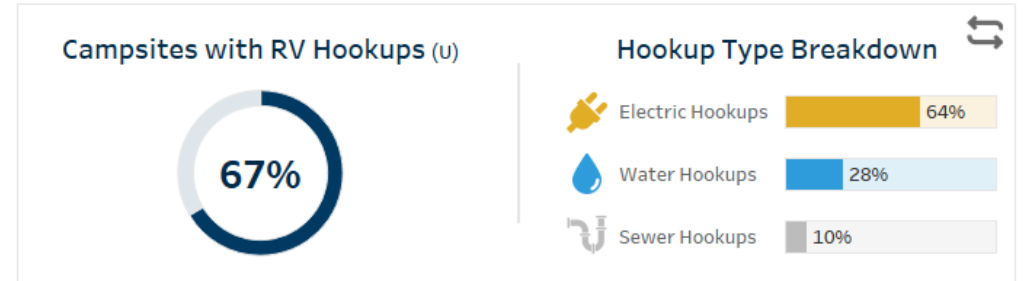


State RV Campgrounds Overview

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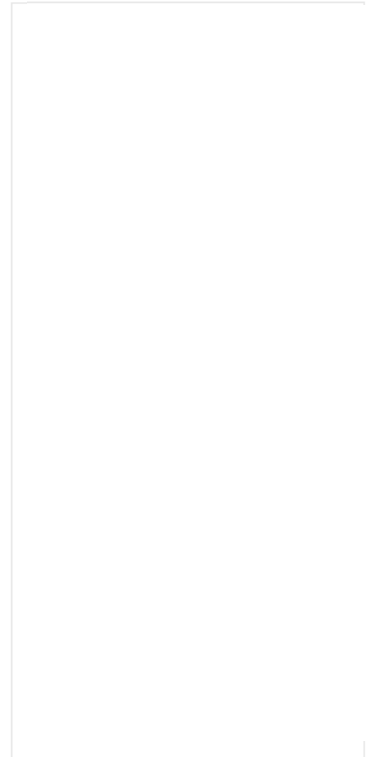
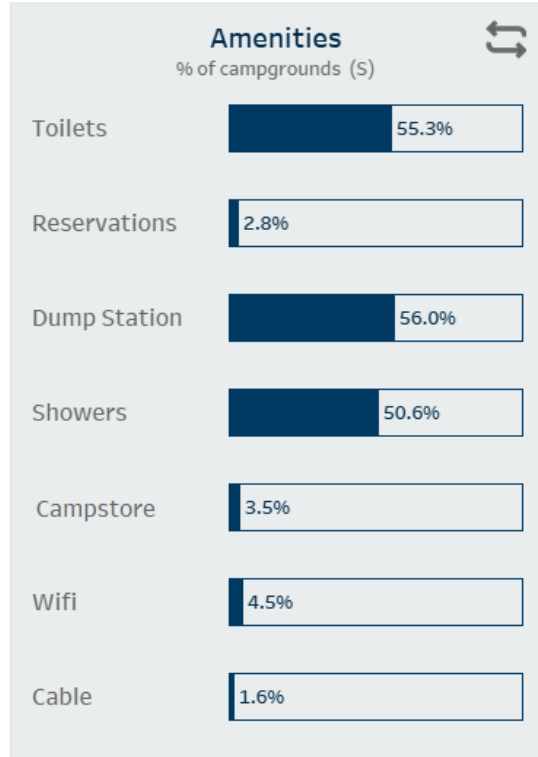
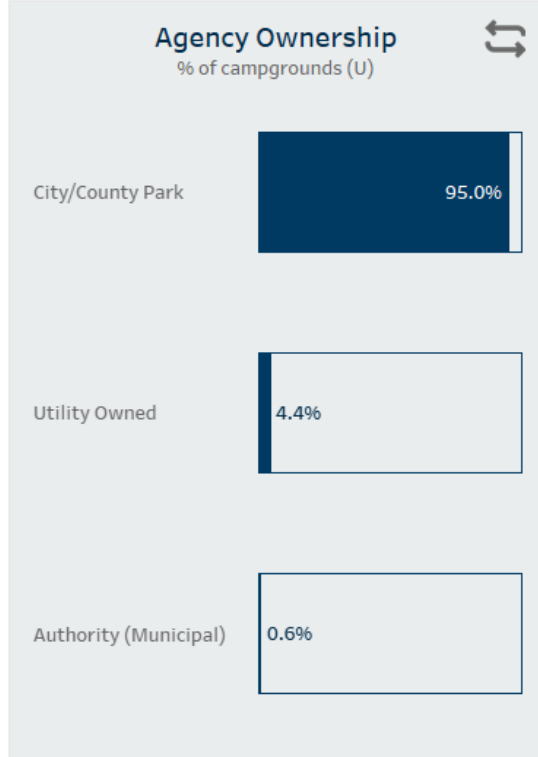
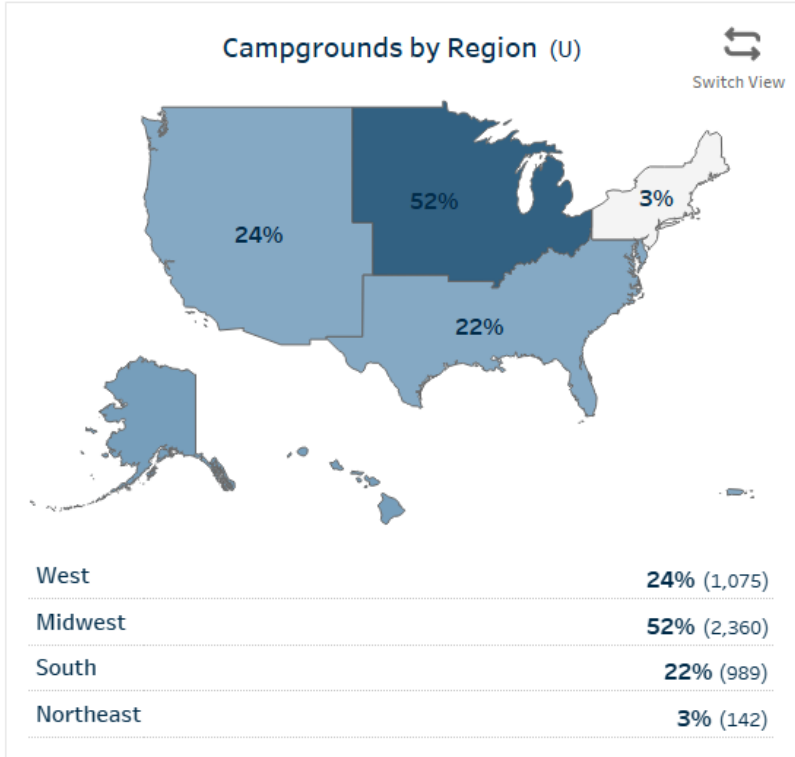
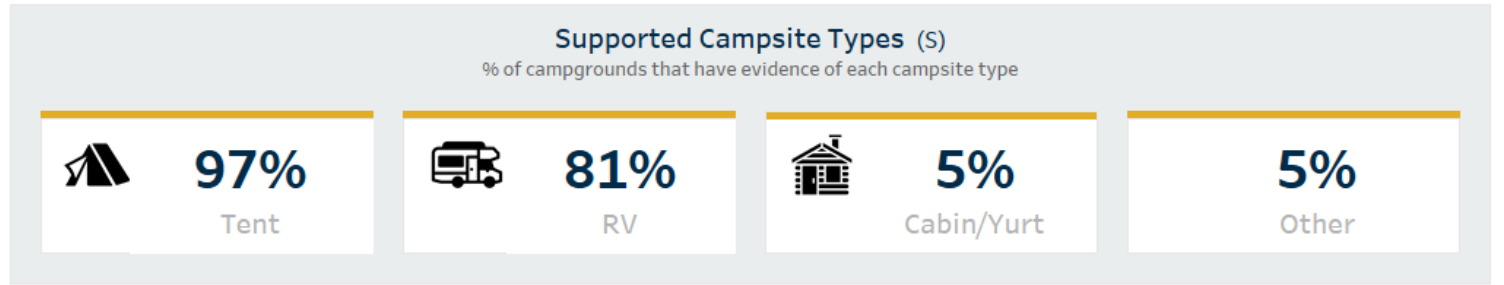
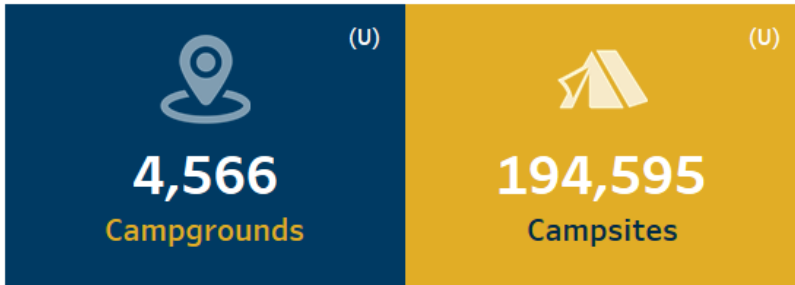


n = 166,424 campsites



Municipal Campgrounds Overview

(U) = Universe, (S) = Sample





5. Study Findings



Study Findings

FINDING 1: Campground Supply During Peak Season Nearing Full Capacity

Prior to this report, there was no comprehensive information on the aggregate U.S. private and public campground supply. It is now possible to estimate the current supply and demand position of the campground industry based upon the industry segments defined in this report.

CHMGS combined the supply data from this report, camper nights demand data from the 2021 North American Campground Report and other relevant data sources to develop an estimated peak and off-peak occupancy profile for the campground industry segments defined in this report. The chart on the following page provides assumptions behind this estimate. CHMGS notes this is a national occupancy estimate and regional occupancies are anticipated to vary.

- ***For the campground industry segments supply defined in this report, it is estimated that during Peak Season (i.e., June, July, August) the national public and private campground supply is exhibiting an estimated occupancy of 76 percent. On an annual basis, the supply and demand data indicates a national public and private campground estimated occupancy of 54 percent. Peak season occupancy rates indicators are characteristic of an industry at capacity. For comparison purposes (1), the national hotel industry, in 2019, the most recent year of normal hospitality operating conditions, achieved a peak season occupancy of approximately 70 percent and annually occupancy of 66 percent.***
- **FOOTNOTE (1)** CBRE Hotels, *Hotel Horizons, National Edition, Volume XIV-Issue 1, March-May Edition, Page 5*



Supply and Demand Analysis 2020	Peak Season (J,J,A) (2)	Annual (4)
Total Demand (1)	149,374,653	331,943,673
Supply (3)		
Public	55,845,288	143,862,318
Private	139,840,000	472,720,000
Total Supply	195,685,288	616,582,318
Campground Occupancy Estimates	76%	54%

Notes:

(1) Demand estimates developed through review of 2021 North American Camping Report for locations matching RVIA/CHMGS campground definition.

(2) Seasonality estimated by evaluating 2021 KOA Monthly Research November; Camping Households March through November 2021.

(3) Supply determined by RVIA/CHMGS Campground definition for inventory of sites. Days of operation developed through a review of ARVC 2020 Industry Trends & Insight Report on Private Sector Days Open and Public Data sources. Number of Sites from RVIA Study using "Average Sample" for private and "Actual" for public.

(4) Annual Supply represents an average number of sites available by day across the nation based upon four regions. This national occupancy profile does not reflect regional occupancies which may vary based upon regional supply and demand characteristics.



Study Findings

FINDING 2: Total Private Campsites Outnumber Total Public Campsites 2.5 to 1

The ratio of private to public campgrounds is .81:1.0; however, the ratio of private to public campsites is 2.50:1.0. The number of public campsites is significantly less than private campsites. Therefore, the number of public campsites would have to grow by approximately 250 percent to equate to the number of private campsites. The ratio is even greater when comparing number of available RV campsites between the private and public, which is 5.29: 1.0.

- *The finding indicates that the public sector is not a supply competitor to the private sector. Instead, it is likely a demand generator (e.g., public settings attracting demand) for the private sector. This is evident in the inventory of private sector campgrounds in gateway communities surrounding state and national parks, forests and recreation areas.*



Study Findings

FINDING 3: Geographical Distribution of Campground Supply Shows Public Campgrounds Prevalent in the West; Private Campgrounds More Equally Dispersed

Geographically, the distribution of public and private campgrounds varies significantly. In the Northeast, the number of private campgrounds is 2.3 greater than public. In the South, the number of private campgrounds is 1.5 times greater than public. It reverses in the West, where the number of public campgrounds is 2.0 times greater than the private. The Midwest is where the ratio is closest, with the private to public campground ratio being 1.0:1.5.

- *The finding indicates that future campground development strategies should recognize regional supply and demand indicators. The research from this study, at a macro level, provides important data to support future investments in campgrounds by both the private and public sector.*



Study Findings

FINDING 4: RV Hook Ups Lacking at Public Campgrounds

The 2021 North American Camping Report indicates that full service (e.g., W/S/E) hookups are one of the top ten amenities sought by campers (29%) making campground selections. The research indicates that approximately 63 percent of private campgrounds provided evidence of having water and electric hookups and 51 percent had sewer hookups. This compared to 59 percent providing evidence of an electric hookup and 30% a water hookup within a public campground. Only 8% of public campgrounds have sewer hookups. The largest supplier of RV hookups campsites within the public sector is state parks. Most hookups in state park campgrounds are electric only.

- *The finding indicates that as entities contemplate redevelopment and/or expansion of campsites to accommodate RVs, integrating hook ups that meet current and future (e.g., EV) RV needs should be a priority of the campground industry.*

FINDING 5: Disparity in Private and Public Campsites Amenities

The 2021 North American Camping Report identifies pull-through sites as one of the top ten amenities sought by campers (25%) making campground selections. The research indicates a potential undersupply of RV pull-through sites within both the private (17%) and public (11.4%) sector. The research indicates that approximately 62 percent of private and 32 percent of public campgrounds have dump stations. The prevalence of WIFI in private sector campgrounds is approximately 60 percent but is significantly less in public campgrounds (2.8%).

- *The finding indicates that investments in improving the camping experience through increasing campsite amenities should also be a priority of the campground industry.*

Study Findings

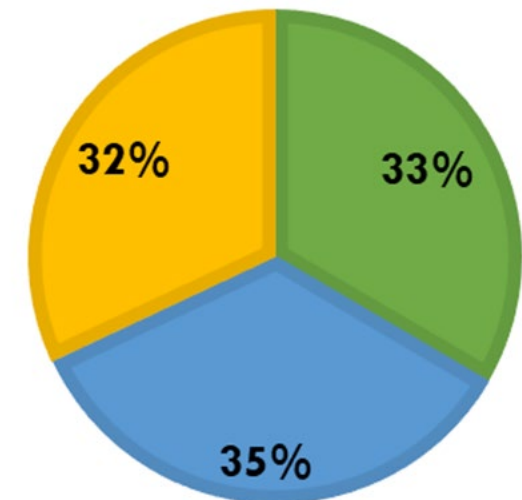
FINDING 6: Public Campsite Supply

For the campground supply defined in this analysis, the 50-state parks and forests have the largest inventory of campsites. Overall, the distribution of campsites between the three categories of public agencies is close to equally distributed. However, under the category of RV campsites, the 50 state parks and forests have the largest RV campsite inventory outpacing the federal agencies at a ratio of 1.7:1.

- *The finding indicates that it will likely be more impactful to focus on RV site expansion at the State vs. Federal level. Federal agencies would need to almost double their inventory of RV sites to begin to match that which is available within states.*

Public Campsite Inventory

■ Federal ■ State ■ Municipal





Study Findings

FINDING 7: Public Sector Tent Campsites Provide Entry Level Camping Experience

The 2021 North American Camping report indicates that tent camping is the preferred camping accommodation for 64 percent of campers as well as providing the entry-level camping experience for many campers. Public campgrounds provide the greatest inventory of tent camping with ninety-two (92%) percent of public campgrounds having evidence of tent camping compared to 28 percent in the private sector.

- *The finding indicates that the public sector is and can continue to be a provider of tent sites within the campground industry. Tent camping provides an important inventory in which to entice and introduce new campers to the campground industry.*



Study Findings

FINDING 8: Federal Campground Supply

Federal agency campgrounds represent 53 percent of the public campground supply, 33 percent of the public campsite inventory and average 25 campsites per campground. The smaller campsite size is driven by the large number of U.S. Forest Service campgrounds that have fewer campsites (i.e., approximately 18) within a campground. The agency with the greatest average number of campsites within a campground is the Tennessee Valley Authority (TVA) at an average of 73 sites, followed by the NPS at 52 and USACE at 48.

The U.S. Forest Service, followed by the U.S. Army Corps of Engineers, provides the greatest total number of campsites within the Federal Sector. However, the U.S. Army Corps of Engineers provides the greatest total inventory of RV sites within the federal space, followed by the U.S. Forest Service. The U.S. Army Corps of Engineer's total RV site inventory is approximately 43 percent larger than the U.S. Forest Service.

- ***The finding indicates that a focus on expanding federal sector campsites vs. campgrounds may yield campsite supply additions in a more efficient manner. Additionally, since RV development requires infrastructure, a focus on those federal agencies with largest existing RV inventory (i.e., U.S. Army Corps of Engineers) would likely yield greater development opportunities. Expansion strategies should consider public/private partnerships which leverage public sector funds and private sector operational expertise and funding.***



Study Findings

FINDING 9: State Campground Supply

State parks and forests represent 17 percent of the public campground supply, 35 percent of the public campsite inventory, and average 83 campsites per campground. Excluding state forests results in an average of 94 campsites per campground, the largest campsite size of all the public agencies. State parks and forests also have the largest percentage of RV sites and hookups (i.e., 67%) within the Public Sector.

- *The finding indicates that if State parks and forests have the greatest percentage of RV sites and hookups, expanding RV sites will likely be more feasible at the state level where the existing infrastructure may provide for easier campground expansion.*

FINDING 10: Municipal Campground Supply

Municipal agencies (e.g., City, County, Public Authorities, and Utility providers) combined represent approximately 30 percent of the public campground inventory, 35 percent of the public campsite inventory and average 43 sites per campground. Municipal Park and recreation agencies typically manage these campgrounds. However, these agencies may not possess campground management or development expertise. This provides the campground industry opportunities for public/private partnerships.

- *The finding indicates an opportunity for the RV and campground industry to consider engaging with municipal agencies on their public campgrounds. As the private sector works to expand private sector campgrounds in local communities, opportunities may exist in those communities to assist municipal agencies in improving their campground offering through concession or management contracts with the private sector. This strategy is currently employed within the federal camping sector. Employing this strategy within the municipal sector would provide business opportunities for the private sector as well as result in an improved understanding of the campground industry by the municipal sector.*



5. Appendix

Appendix: Company Profiles



CHM Government Services (“CHMGS”) is a boutique consulting firm comprised of seasoned professionals dedicated to advising clients on their hospitality and recreation real estate portfolios. Our Mission Statement identifies our advisory objectives.

Mission Statement: *To partner with entities who are responsible for visitor-based facilities and services to develop and implement sustainable strategies to operate, maintain, and improve these hospitality and recreation assets and programs.*

CHMGS provides market, financial, investment, and strategic research and analysis so our clients can focus on what they do best: stewarding and enhancing assets and places. www.chmgov.com



SOM, Inc. is a Canadian Market Research and Analytics firm, based in Quebec City, Canada. SOM products focus on measuring and evaluating customer satisfaction and experiences toward building a loyal customer base. They do this through their understanding and experience using social media, conducting geolocated surveys, and recruit unique participant profiles. They also critique and objectively measure emotional intensity generated by marketing content through telephone interviews, surveys, focus groups, and/or digital analysis and interpretation. <https://www.som.ca/en>



Data Crunch is a highly focused and competent business data aggregator, analyst, and visualization firm. They secure large scale disparate data, aggregate such data in a way that simplifies informed decision making. Data Crunch uses Tableau and other dashboard interfaces to simplify data analysis, that takes the anxiety of relying on huge data sets to make management decision. <https://datacrunchcorp.com>

Appendix: Definition of Terms

1. **Number of Sites:** A count of the number of campsites. CHMGS included HOST sites in the campsite counts. CHMGS excluded from site counts the following:
 - Back Country, Hike In, Bike In, Boat In, Primitive Campgrounds that do not have water or toilet facilities.
2. **Type of Sites**
 - Tent: Site designated for Tents.
 - RV: Site designated to accommodate RVs. Could also accommodate a Tent.
 - Cabin: Site name includes Cabin as a unit. Counted multiple bedroom cabins as single cabins.
 - Yurt: Site name includes Yurt as a unit.
 - Other: This site type included site types such as Horse Camps, Group Camps, Shelters, Look Out towers, Lean To, etc.
3. **Length of Sites (e.g., ft.):** This attributed reflects a listing of the length of a site.
4. **Design of Site (e.g., pull-through, parallel):** This site attributes reflect the method of site access. Since pull-through sites are most desired, this was the measured metric most focused on for Private. Where available, public sector data was queried for other site designs.
5. **Hook-Up Type (e.g., Electric, Water, Sewer, Cable):** This site attribute reflects if there is the existence of one of these hook-up types at a campsite.
6. **Amperage/100 Amp:** This site attribute reflects the number of sites that have an 20/30/50 amperage outlet.
7. **Other RV Services (e.g., RV Rental, Repair, or Storage):** This attribute was only evaluated for private campgrounds. This reflects the existence of this type of service within the campground.
8. **Toilet:** This campground attribute reflects the existence of a toilet type. This could include a comfort station with shower, Vault or CXT Toilet, etc.
9. **Shower:** This campground attribute reflects the existence of a shower. This could include a shower with either hot or cold water.
10. **Water Availability:** This campground attributes reflects the existence of a potable water source within a campground. The water source could be within the restroom and/or a separate drinking spout.
11. **Camper Store:** This campground attribute reflects the existence of a retail store managed by either public agency and/or a concession within and/or within proximity of the campground.
12. **Reservation:** This campground attribute reflects the existence of either an online and/or telephone reservation system.

Appendix: Private Sector Sampling Plan

CHMGS reviewed multiple data sources to determine the universe/population of private campgrounds for the development of the private sector campground sample. Below are the sources:

- Dun & Bradstreet: NAICS Code 721211, RV Parks and Campgrounds: 9,921. See definition below.
- All Stays Campground App: 12,290
- Campground Reviews: 13,883
- RV Industry Association Economic Impact Survey Private Campground: 12,793 (Dupes Removed)

An average of all these sources equates to 12,221, which closely matches the All Stays Number. CHMGS used the All Stays Campground Number of 12,290 as the campground universe/population figure.

NAICS Code 721211 – RV (Recreational Vehicle) Parks and Campgrounds: This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

CHMGS' project partner SOM was responsible for developing the sampling plan for review and approval by the RV Industry Association. The sampling frame was the D&B contact list which contains, 9,921 campgrounds classified under NAICS code 721211 - RV Parks & Campgrounds and included geography and number of employees. The sampling plan follows on the next page.

Appendix: Private Sector Research Methodology

SOM gathered the information using the following web scraping methodology.

1. Thorough review of each campground's website, including all relevant menus, maps, and sections.
2. For any missing information, use of alternative information sources referencing the campground (Allstays, Campendium, etc.).
3. If no information was found after these two steps, SOM assumed the amenity was not offered (for example, no mention of laundry facilities or RV rental = no laundry facility or no RV rental services).



Appendix: Public Sector Data Sources

- 1. National Park Service:** *AIS Report, NPS.gov Structured Data Set, RV Pads.* CHMGS reviewed the AIS report and noted many campgrounds within this report had notation of a campground but no campsites. For those campgrounds that had no campsites, CHMGS reviewed the NPS website (i.e., www.nps.gov) and populated the AIS Report with the data. CHMGS did not validate the NPS provided campsite numbers within the AIS Report. CHMGS notes that in several cases, the campsite numbers included in the AIS report did not match those on the NPS website.
- 2. U.S. Forest Service:** *FS_Public_DRS Features and FS Public_DRS Core_Inventory.* CHMGS combined these files to identify both campsite elements, campsite numbers, and campground facilities (e.g., toilets). Sites identified with a status of “Existing” were used while those as “Disposed, Erroneous or Planned” are not.
- 3. Bureau of Land Management:** *BLM- FAMS_ Camping-Units-2021.*
- 4. Bureau of Reclamation:** Recreation Information Database.
- 5. U.S. Fish and Wildlife Service:** *NWRS Campgrounds.* CHMGS refined this data file by a website review of each campground to identify if it was Primitive or not based upon availability of potable water and toilets.
- 6. U.S. Army Corps of Engineers:** *USACE Camping Facilities Updated 27 Aug 21.* This data does not include outgrant areas and CHMGS removed Category E sites but left Primitive sites.
- 7. Tennessee Valley Authority:** CHMGS contacted Recreation Resource Management (“RRM”) the concessioner who manages the campgrounds and campground reservation system for the Tennessee Valley Authority. RRM provided the listing of campsites and CHMGS reviewed websites to validate campground attributes.
- 8. Recreation Information Data Base:** *Campsite attributes and amenities 20210701.* CHMGS used this file to identify site attributes that were not in each respective federal data base.

Appendix: Public Sector Data Sources (Con't)

9. **State Park Systems:** CHMGS received data from each of the 50 state park systems. The state either provided information from their reservation system provider and/or CHMGS created the data from the states website or a combination of both (e.g., Alaska, Hawaii, Nevada).
10. **State Forest Systems:** CHMGS identified those states which had a State Forest system with sites that met the campground definition for this engagement. For those states which had sites, CHMGS either received reservation system data for the respective state, collected data from the states website, or scraped data from the states website. (e.g., Florida State Forests).
11. **Municipal (City, County, Utility, Authority):** CHMGS used data from U.S. Campgrounds (www.uscampground.info). CHMGS also scraped the websites of Campendium and Campground Reviews for these categories. CHMGS ensured no duplication occurred. Note, data from this source does not include # of campsite attributes but does include evidence of the campsite attribute.





6. Assumptions & Limiting Conditions

Assumptions & Limiting Conditions

CHMGS (“we”) was retained by the RV Industry Association to conduct the referenced analysis.

Client has provided us information relevant to the Services and any reasonable assistance as may be required to properly perform the Services. Client represents and warrants to us that all such information is accurate and complete in all material respects. The overall definition and scope of the work performed, and its adequacy in addressing Client’s needs, is Client’s responsibility. Client acknowledges that we did not perform any management functions or make any management decisions in connection with the Services. Client is also responsible for the implementation of actions identified in the course of this engagement and results achieved from using any Services or Deliverables.

To the best of our knowledge and belief, the statements of fact contained in this report, upon which the analysis and conclusion(s) expressed are based, are true and correct. In the preparation of this analysis and the report, we have relied on information, estimates, and opinions furnished to us by third-party sources (“Source Information”). We make no warranty or representation as to the accuracy of the Source Information or any information set forth in our report that is based, in whole or in part, on the Source Information.

Our analyses are based on estimates, assumptions, and statistical analyses developed in connection with the contract to provide these services. Some estimates and assumptions, however, inevitably will not materialize, and unanticipated events and circumstances will occur; therefore, actual findings and results achieved during the period covered by the accompanying analyses may vary from the estimates and assumptions contained herein.

The analysis contained herein is based on a point-in-time of the market. We take no responsibility for any events, conditions or circumstances that may affect the subject facilities/inventories that take place subsequent to the delivery of this report but recognize that certain events may occur between that time and delivery of our report. The estimates and underlying analyses presented herein are time sensitive, as changing market conditions inevitably will require that this analysis be updated on a recurring basis. We believe that the observations and recommendations expressed in this report will remain valid for a period of one year beyond the issue date of this report. After that date, the information contained herein is likely not reliable and must be updated to remain valid.



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