



GLAMPING
SHOW AMERICAS

Glamping Show Americas

2023 Glamping Report

October, 2023



Background & Methodology

- Objectives:
 - Identify the current state of glamping among glamping operators, prospects, and suppliers.
 - Evaluate the level of potential growth and expansion across operators and suppliers.
- Method of data collection & timing
 - All surveys were completed online using the Glamping Americas contact list with n=488 (MoE +/-4.3%) surveys completed in July of 2023.
- Results are representative of the subset of respondents, and are intended to provide a snapshot of their views.

Introduction

- Glamping was on a growth pattern over the past few years, but COVID ramped up participation as well as growth in the number of operators.
- Glamping offers the non-camping leisure traveler the opportunity to have an outdoors experience without some of the discomforts and intimidating factors associated with camping.
- In the mindset of the guest, glamping continues to evolve from simply providing more comfortable and/or unique accommodations, to higher expectations of services and amenities.

GLAMPING
SHOWAMERICAS

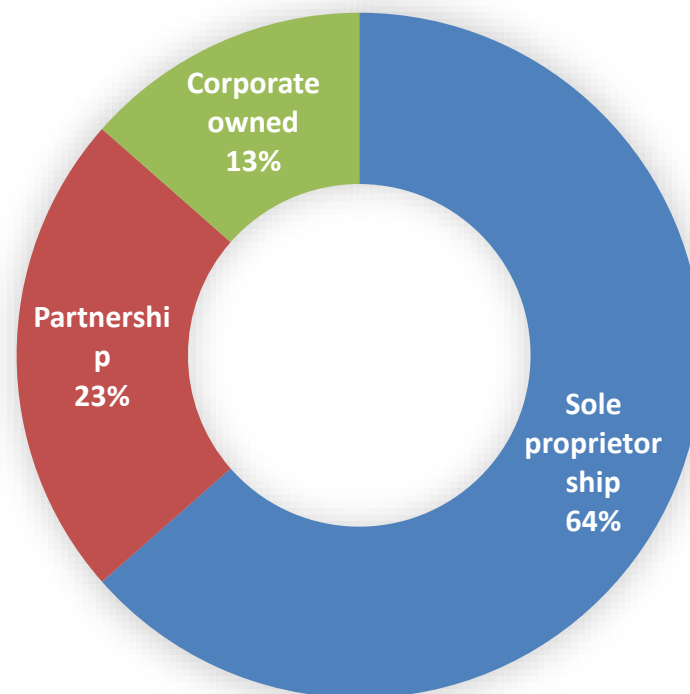
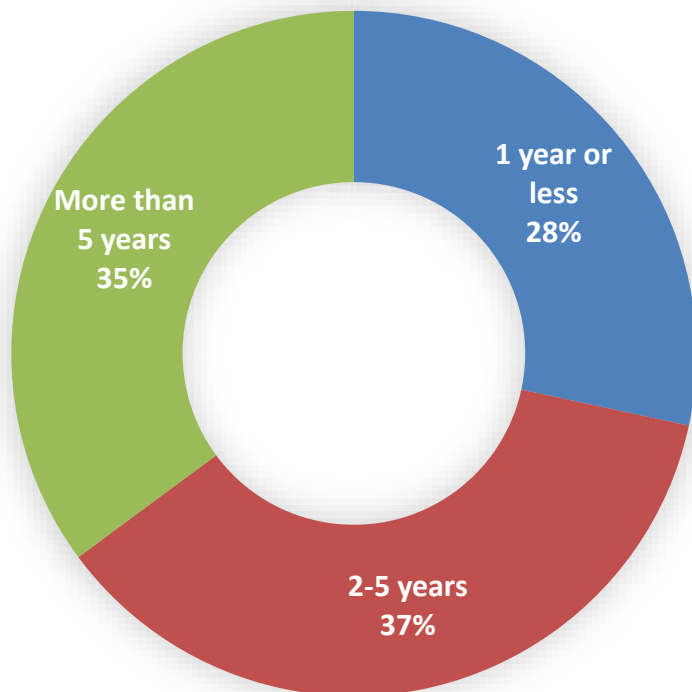
Glamping is now solidly placed in the habits and mindset of leisure travelers, allowing guests who want more comforts to still experience the outdoors.

Current Operators

Years of Operation & Ownership Structure

How many years have you been in operation, or have you been providing glamping accommodations and services?

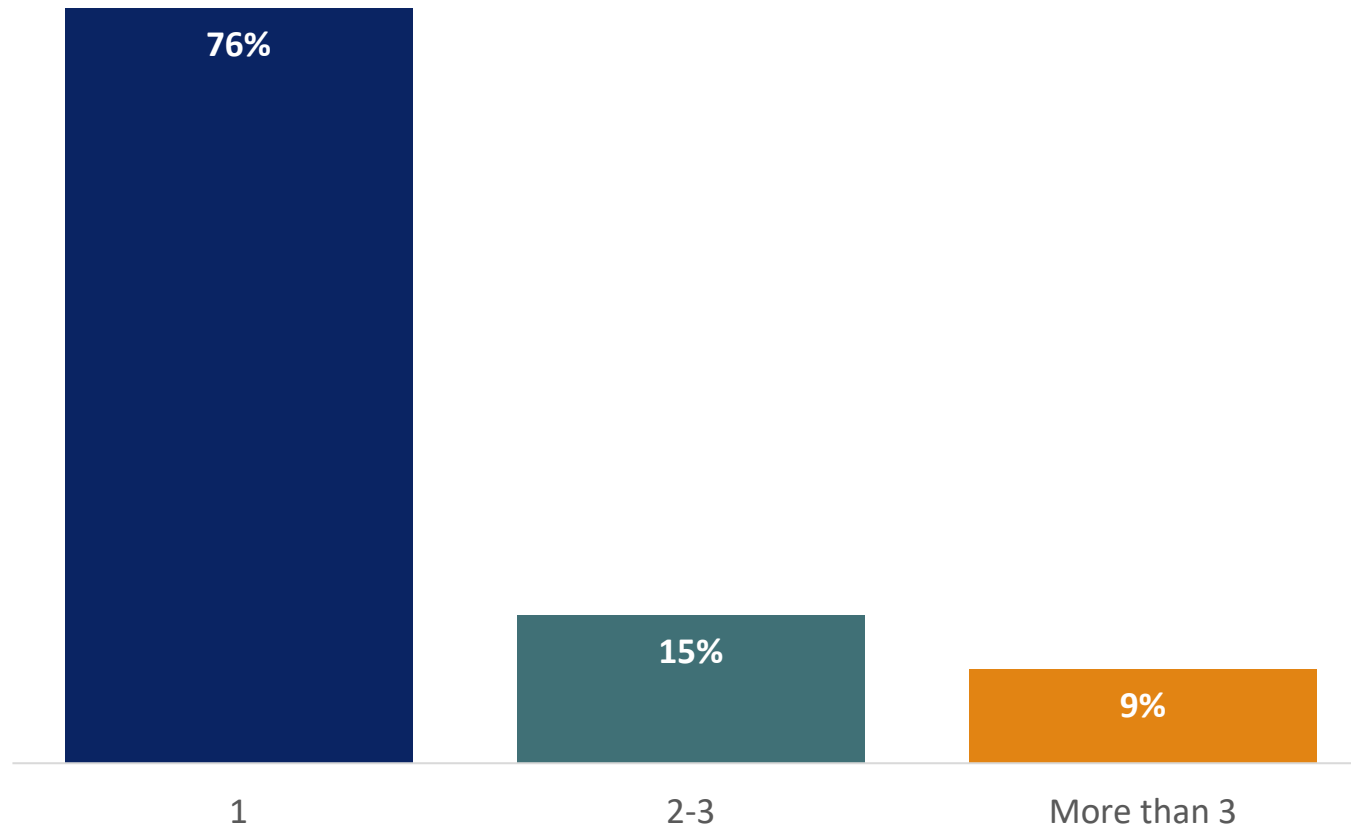
What type of ownership/ownership structure do you have?



The tenure of glamping providers is relatively evenly dispersed, with about a third (35%) having been operating for more than five years, a similar proportion in the two to five year range, and about 3-in-10 (28%) open for a year or less.

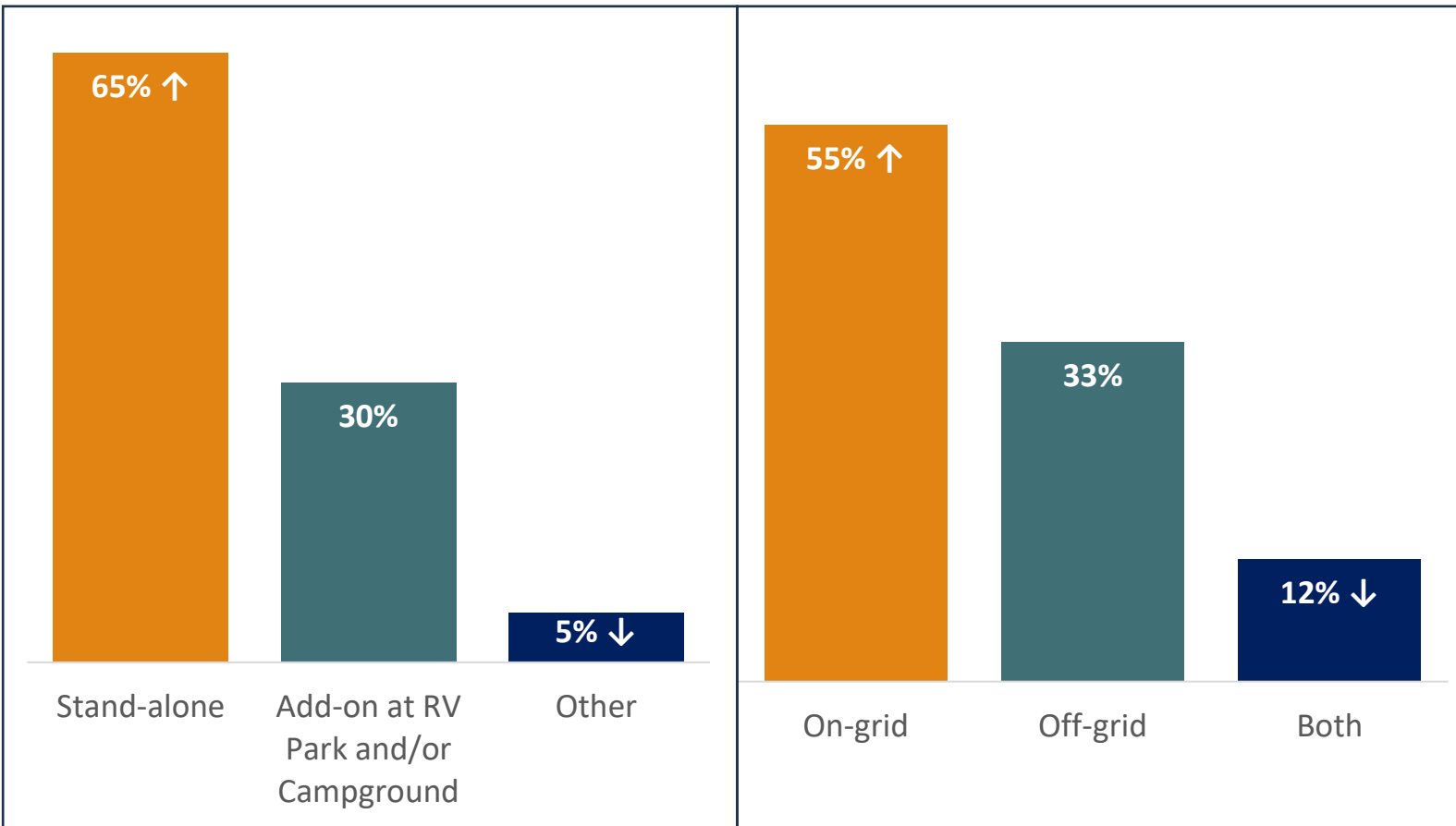
The ownership structure leans toward a sole proprietorship and secondarily, partnerships; corporate owned properties less common.

How many glamping locations do you have?



Most of the glamping providers surveyed are owning and/or operating a single property while about one-fourth (24%) owning two or more locations.

What type of property or properties do you currently own or operate?



Almost two-thirds of all glamping providers surveyed are stand-alone properties, with the remainder falling into the “add-on” category.

Additionally, a majority of all the properties surveyed are on-grid, though a third are off-grid.

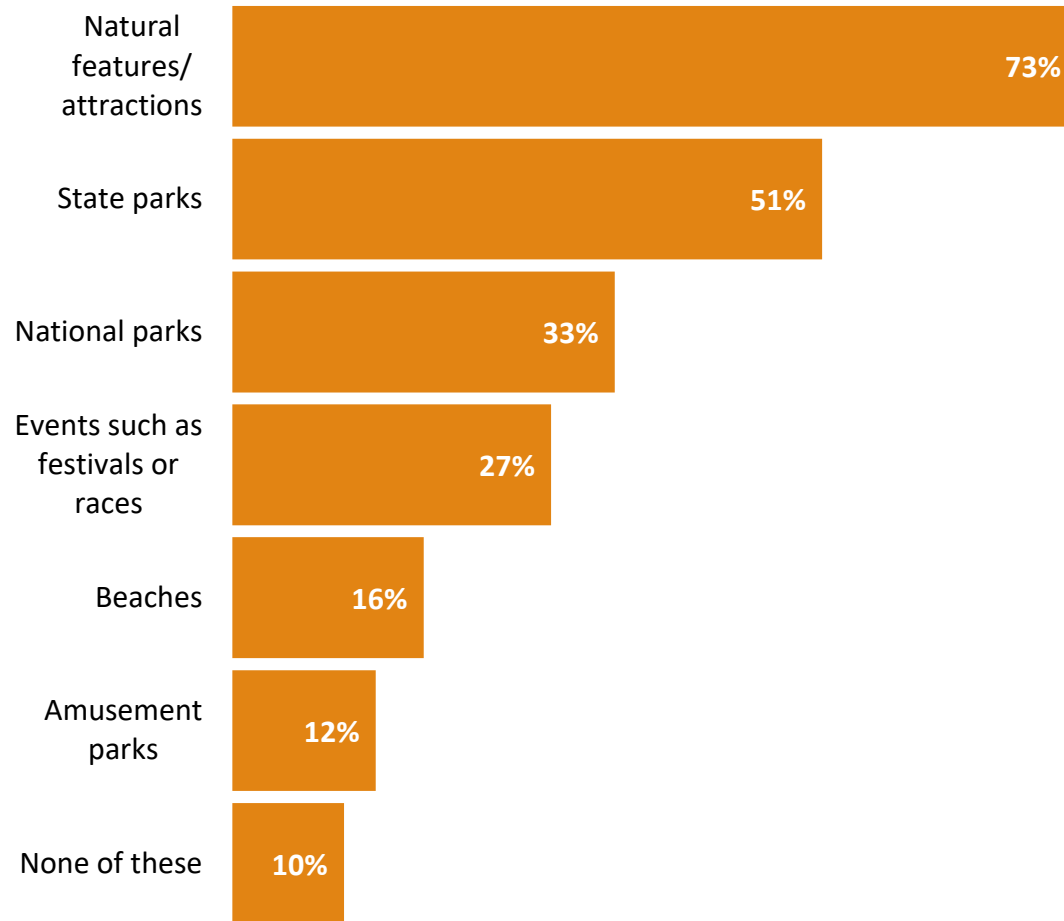
In which of the following regions/regions of the U.S. do you currently operate glamping locations?

Countries	%
U S	79%
Northeast Region	12%
Midwest Region	19%
South Region	31%
West Region	38%
Canada	8%
Caribbean	1%
Mexico	6%
Central America	4%
South America	3%

Most operators responding to the survey are U.S.-based, though roughly 1-in-5 are outside the U.S. (or both).

Within the U.S., the western states have the highest level of representation, with the northeast having the fewest.

Are any of your properties near major destinations and if so, which ones?

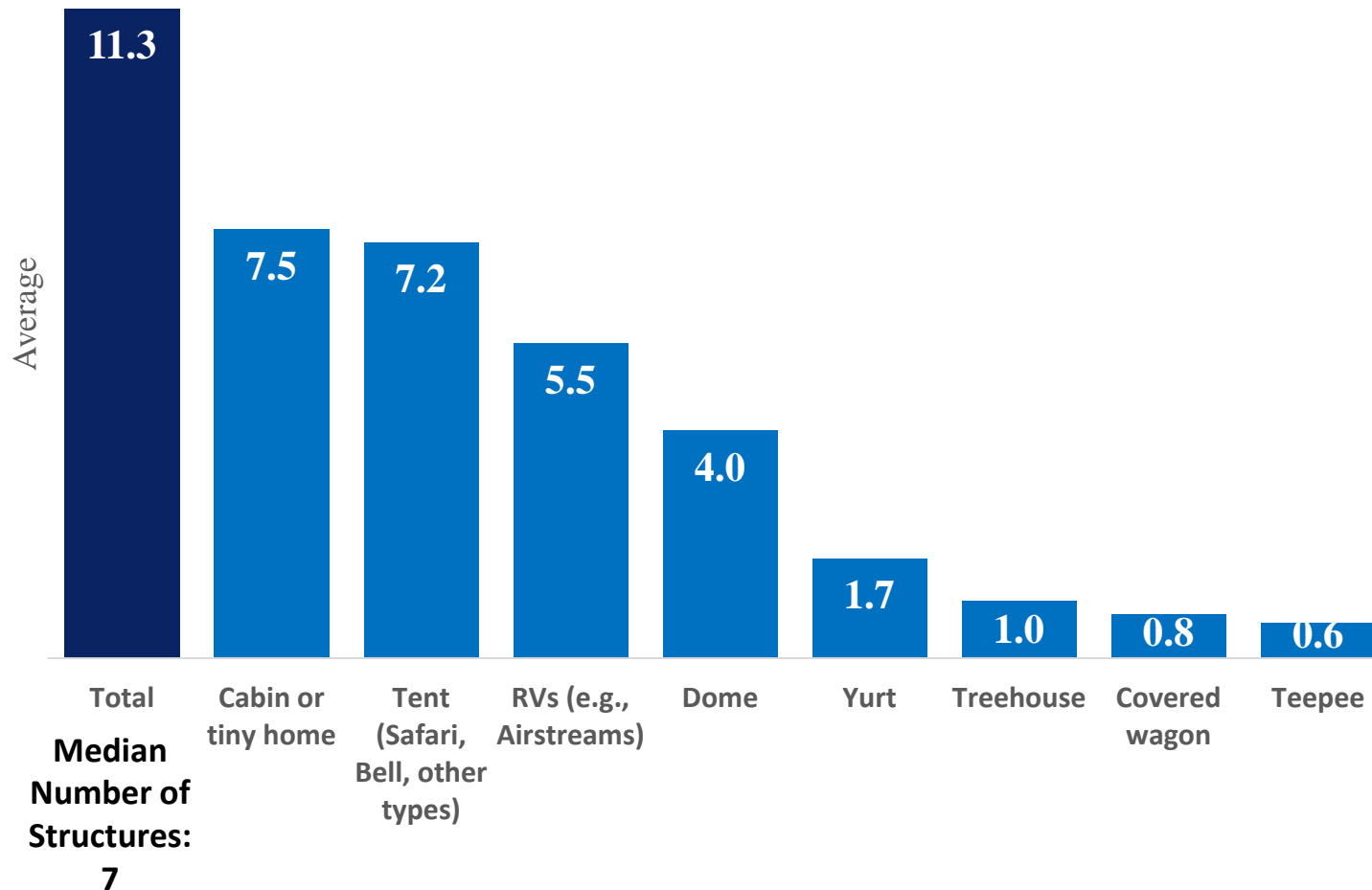


Overall, 90% of the operators surveyed are located close to a visitor attraction.

Three-fourths of all operators are located near some type of natural feature or attraction and notably, half are in the areas surrounding state parks (another third are in proximity to national parks).

How many, if any, of each of the following structures are part of your property or properties?

Average Number of Structures

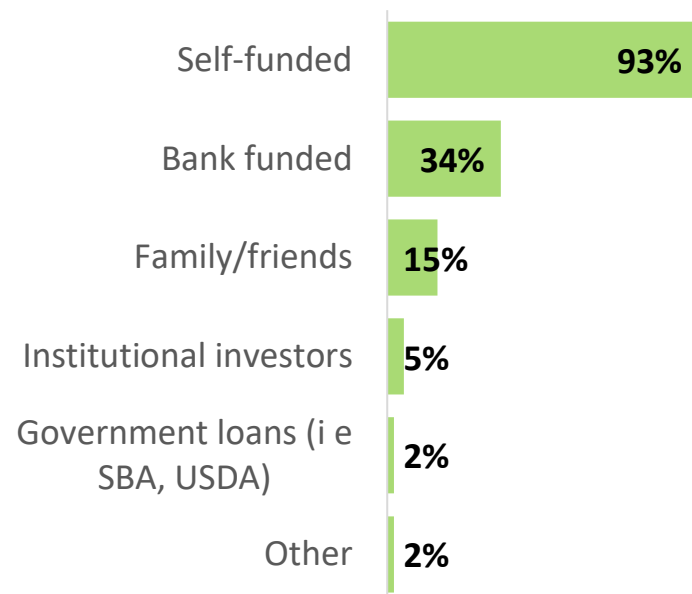


The average glamping provider includes about 11 structures. Cabins/ tiny homes and some type of tent are the most commonly mentioned types of structures included on the properties surveyed.

What was your initial cost to launch your business?



Type of Funding Used

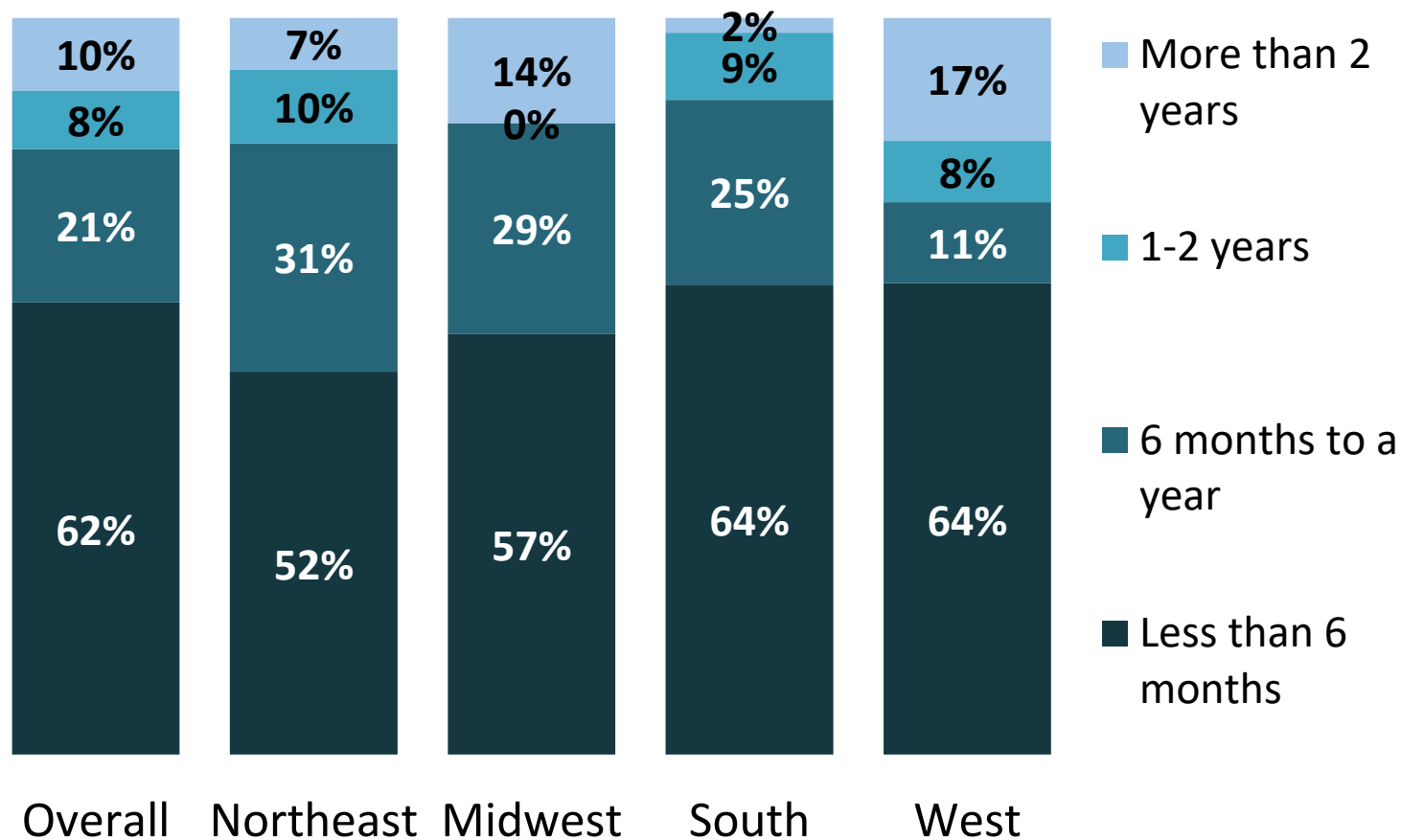


The start-up costs on average are estimated at around \$650,000.

It is notable that nearly all of the providers surveyed (93%) used self-funding to start their glamping business with one-third using bank funding.

**Investment
Needed for Future
Growth:
\$1.1 million**

Looking back at when you first started, how did the permitting process take from the time you initiated it to completion?

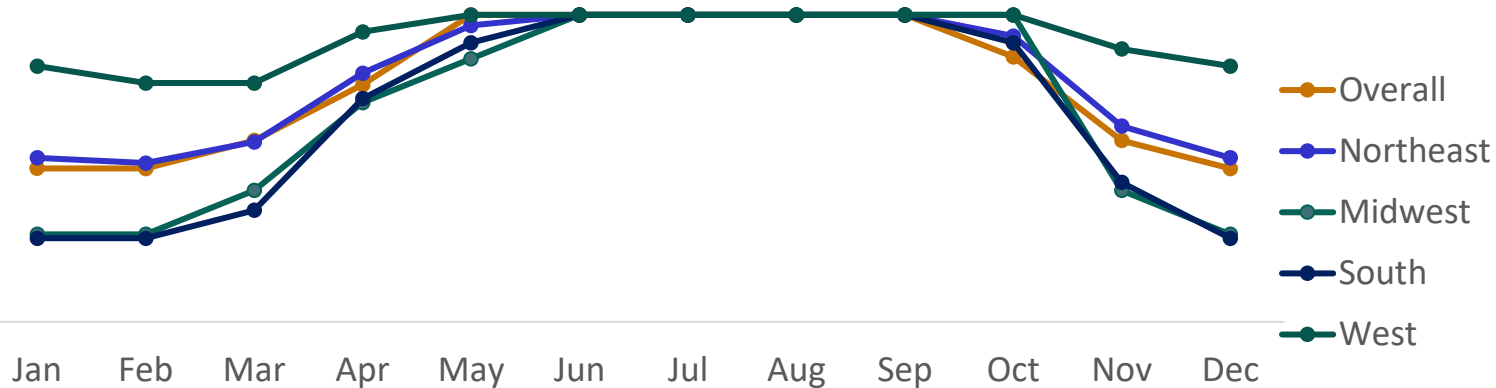


Considering the permitting process, the largest bloc of respondents (61%) say it was under six months, with over 80% stating it was a year or less.

Operators in the Northeast report the longest permitting process while those in the West report the shortest.

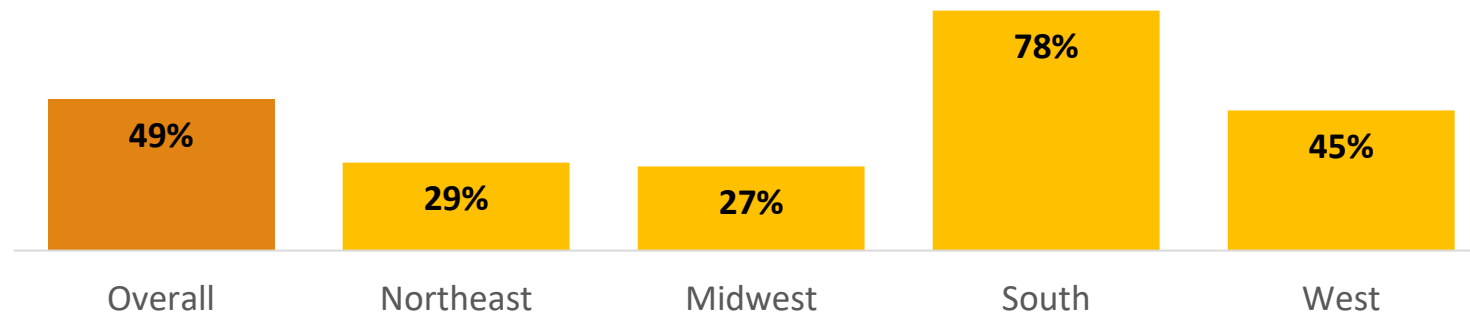
Which months do you currently operate your glamping location(s)?

Months of Operation by Region



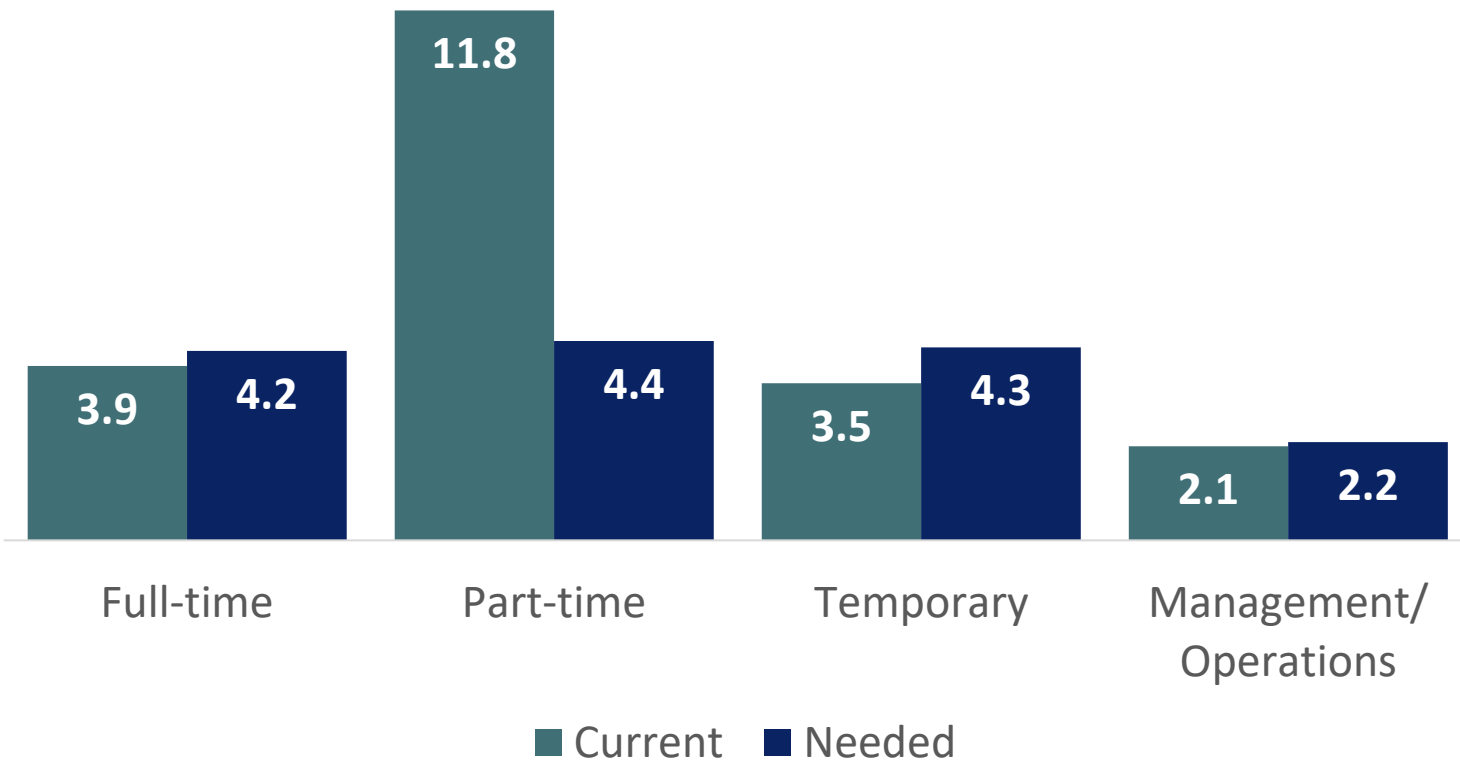
Half of the operators surveyed are offering guests the all year experience, with those located in the southern states most likely to operate all 12 months while the Northeast and Midwest operators are least likely.

% of Operators Who are Open All Year



What is your current level of staffing? // Next, what is the number of needed staff in each of the following categories?

Average Number of Staff

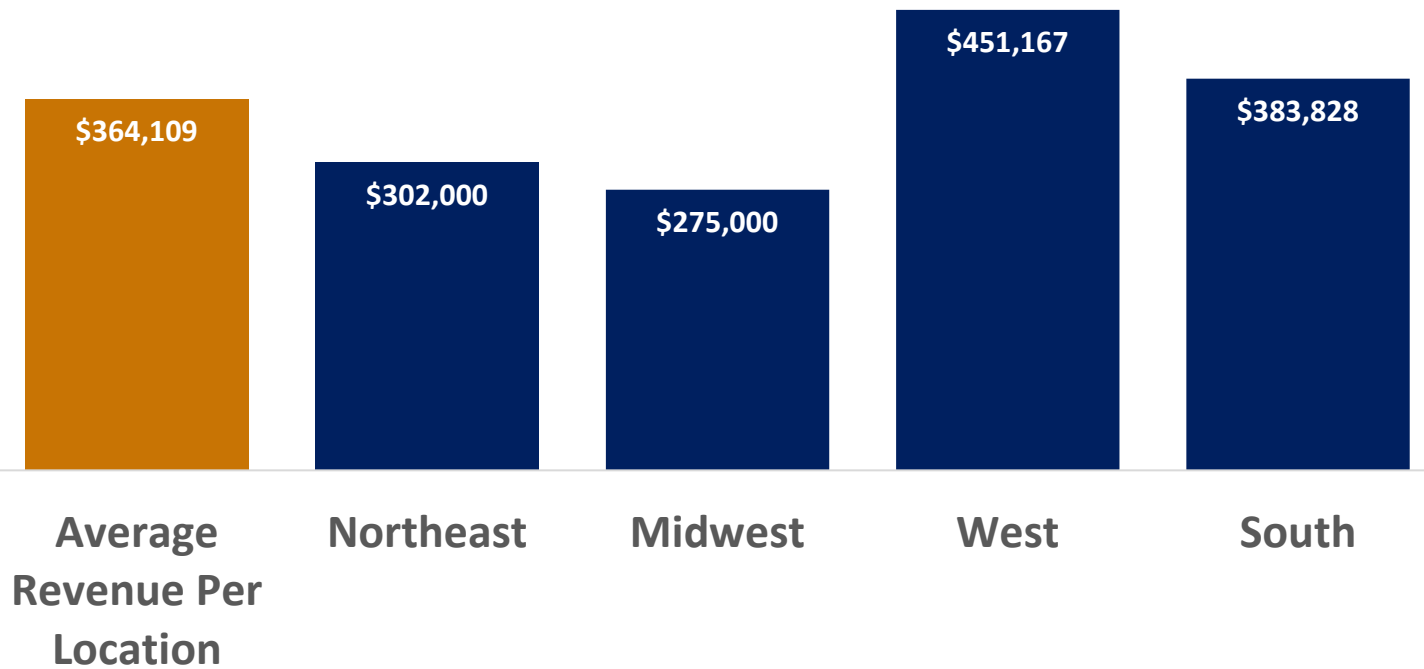


The typical glamping operator who responded to the survey has almost 16 staff members, with part-time workers comprising the bulk of employment. Indeed, the average respondent is employing only four full-time workers and a similar number of temp employees; each location has an average of two people in management.

There is a large gap, however, in the level of staffing that is desired, including an average of over 10 additional staff, whether it's doubling full-timers or temp workers. The results point to a reliance on part-time workers, with the needed staffing below the need for full-time workers.

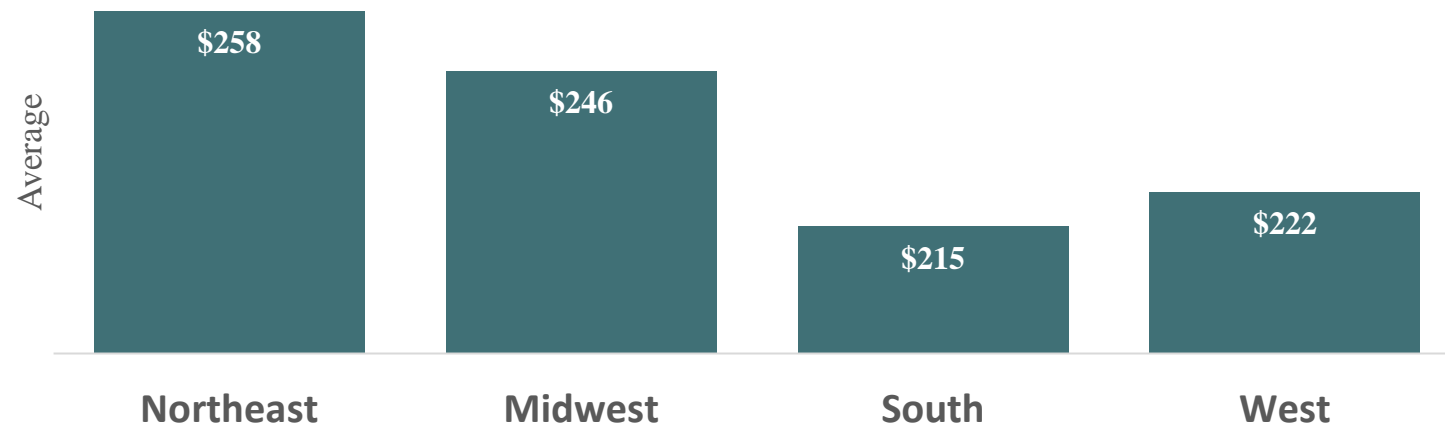
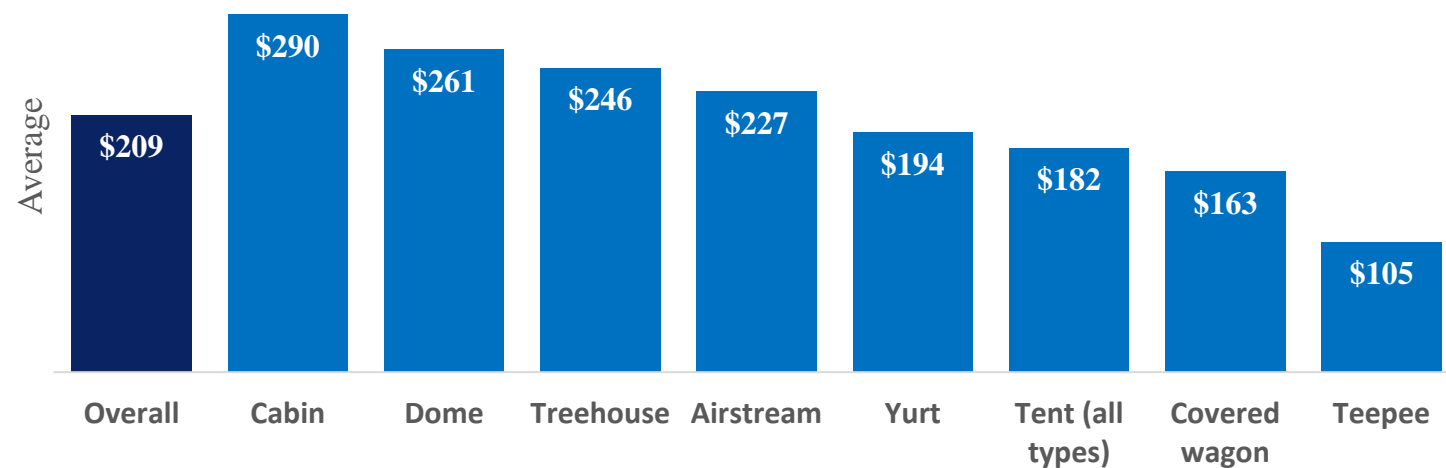
Overall, what has been your estimated annual gross revenue?

Gross Revenue



Respondents reported an average of \$364,109 in annual gross revenue. There are, however, large differences between operators in the Northeast and Midwest and those in the West and South.

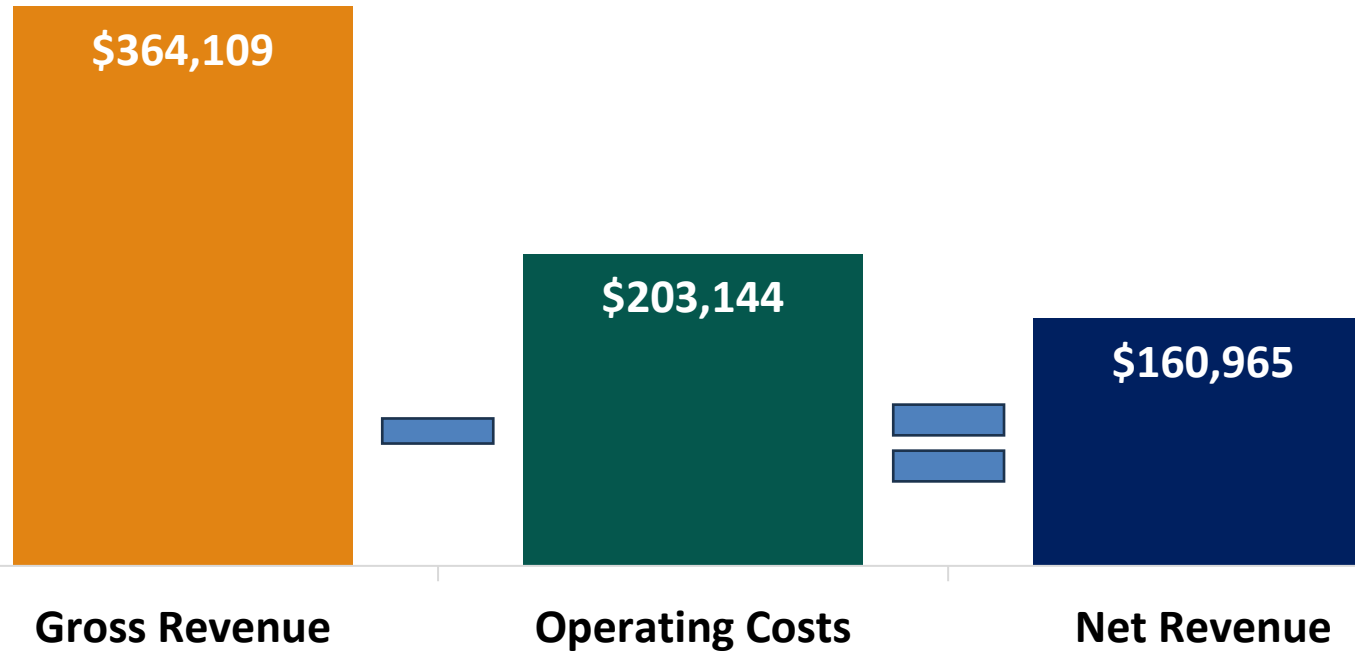
What is the average daily rate (ADR) for each of the following?



Across all operators, the ADR stands at just over \$200 per night, with cabins or tiny homes generating the most income and teepees the least.

Operators in the Northeast, even though they have lower overall revenue, charge the highest ADR which can be attributed to the typical operator in the Northeast or Midwest having fewer structures on average.

And what are your annual operational costs?



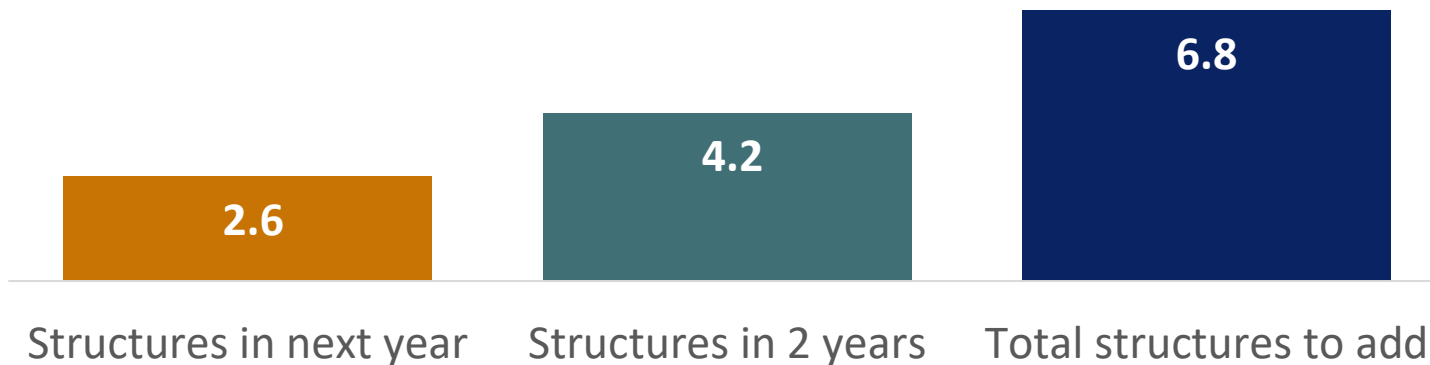
When taking into consideration the reported operating costs, the typical glamping operator reports about \$160,000 in net annual revenue.

How many of the following do you plan to add in the next year? Next 2 years?

Growth in Locations



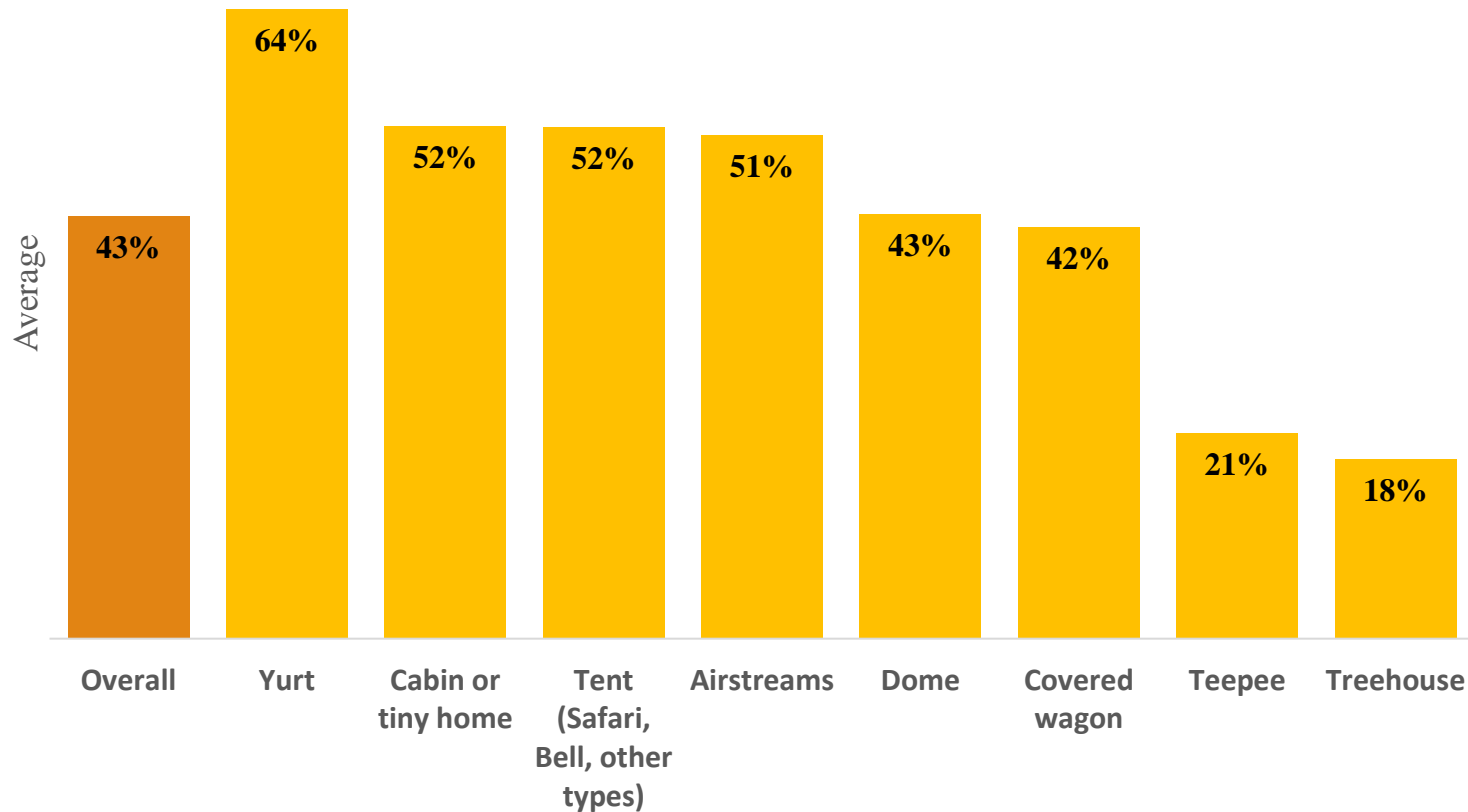
Additional Structures



On average, most current operators have plans to add an additional property or location in the coming year. The look further ahead is elevated, and over the course of the next two years, operators are seeking to add two additional locations.

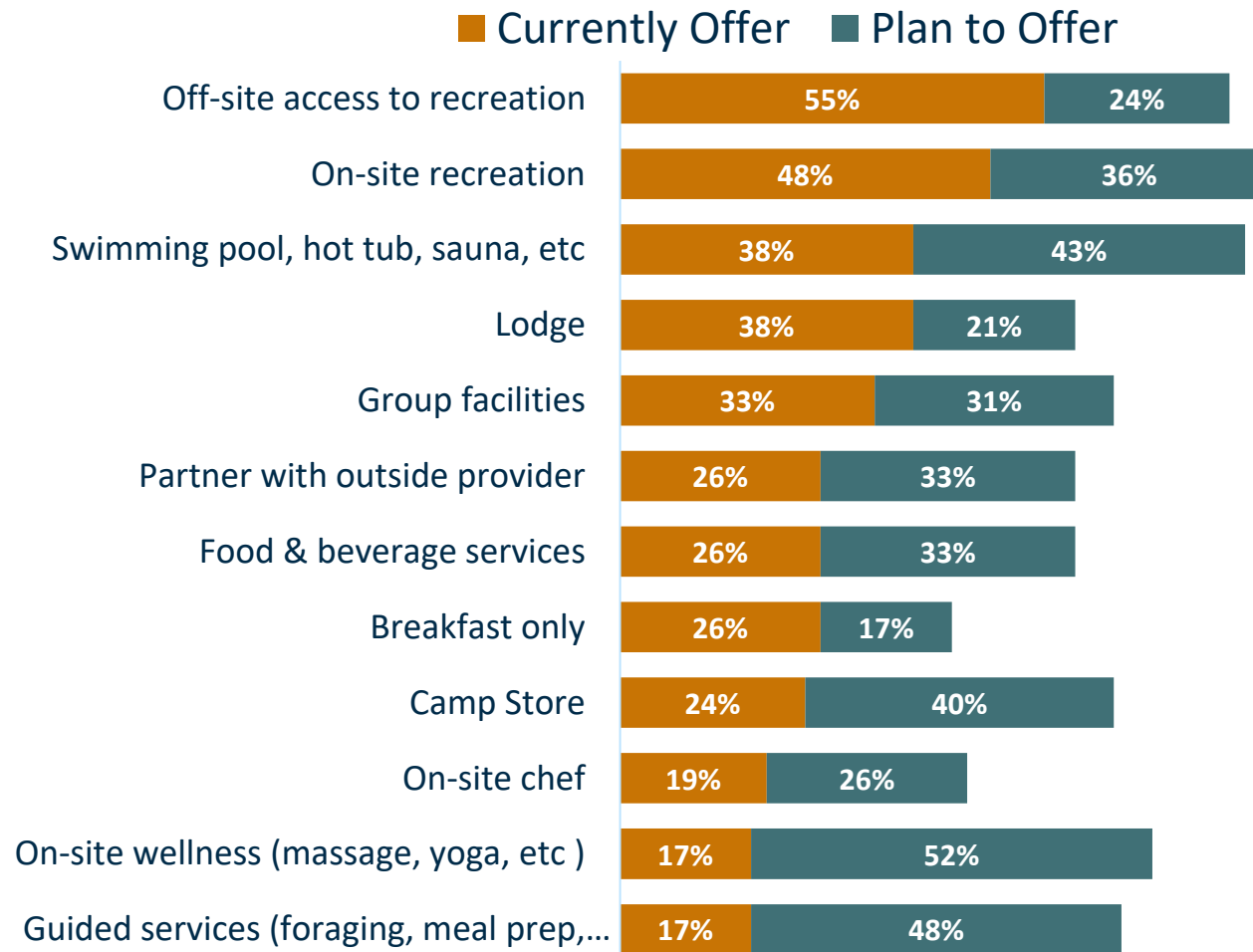
The addition of structures suggests that again, the average operator plans to add about three additional structures this year, and between six and seven over the next two years.

What is your average occupancy for each of the following?



The overall occupancy across all structure types is about 43%, with yurts generating the highest usage and teepees and treehouses the lowest occupancy.

Which of the following services and amenities do you currently offer and plan to offer (or expand)?

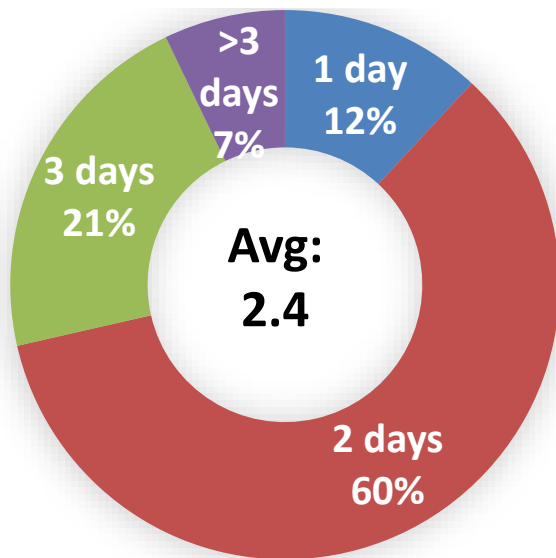


A majority of locations offer access to off-site recreation and close to half have on-site activities. Fewer are offering add-on services such as educational guided services, wellness, and on-site chef.

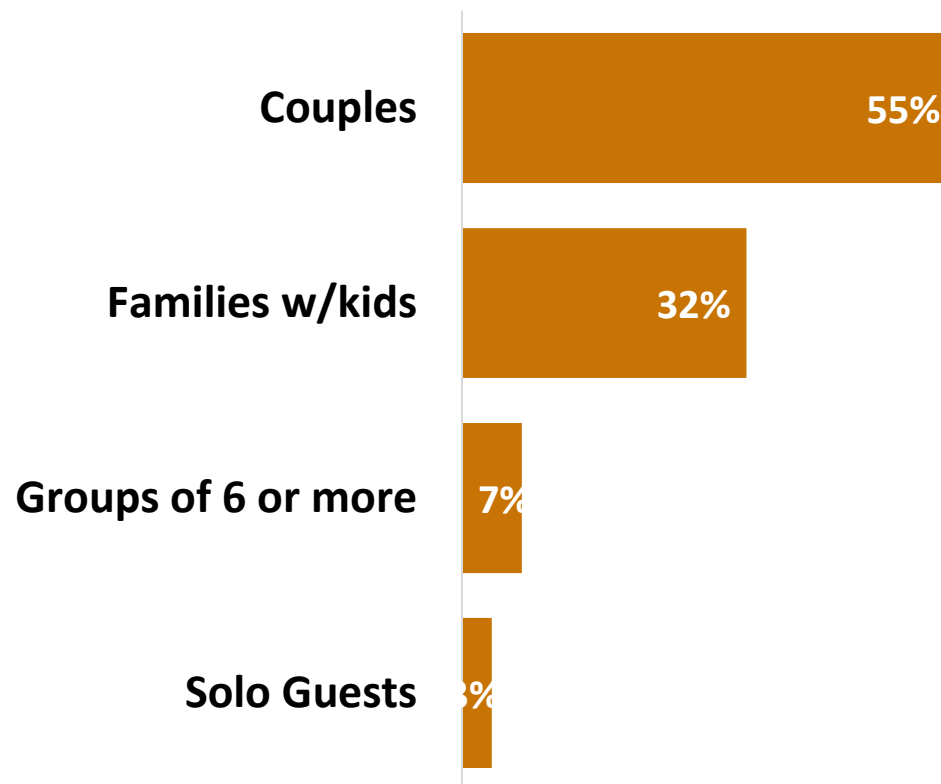
However, even though these less common services don't currently exist on-site, about half of the locations plan to add wellness and educational guided services. Swimming pools/hot tubs/saunas are common add-ons, as well as a camp store.

What is the average length of stay at your location(s)? // What is the current mix of guests you attract at your location(s)?

Length of Stay



Guest Group Types

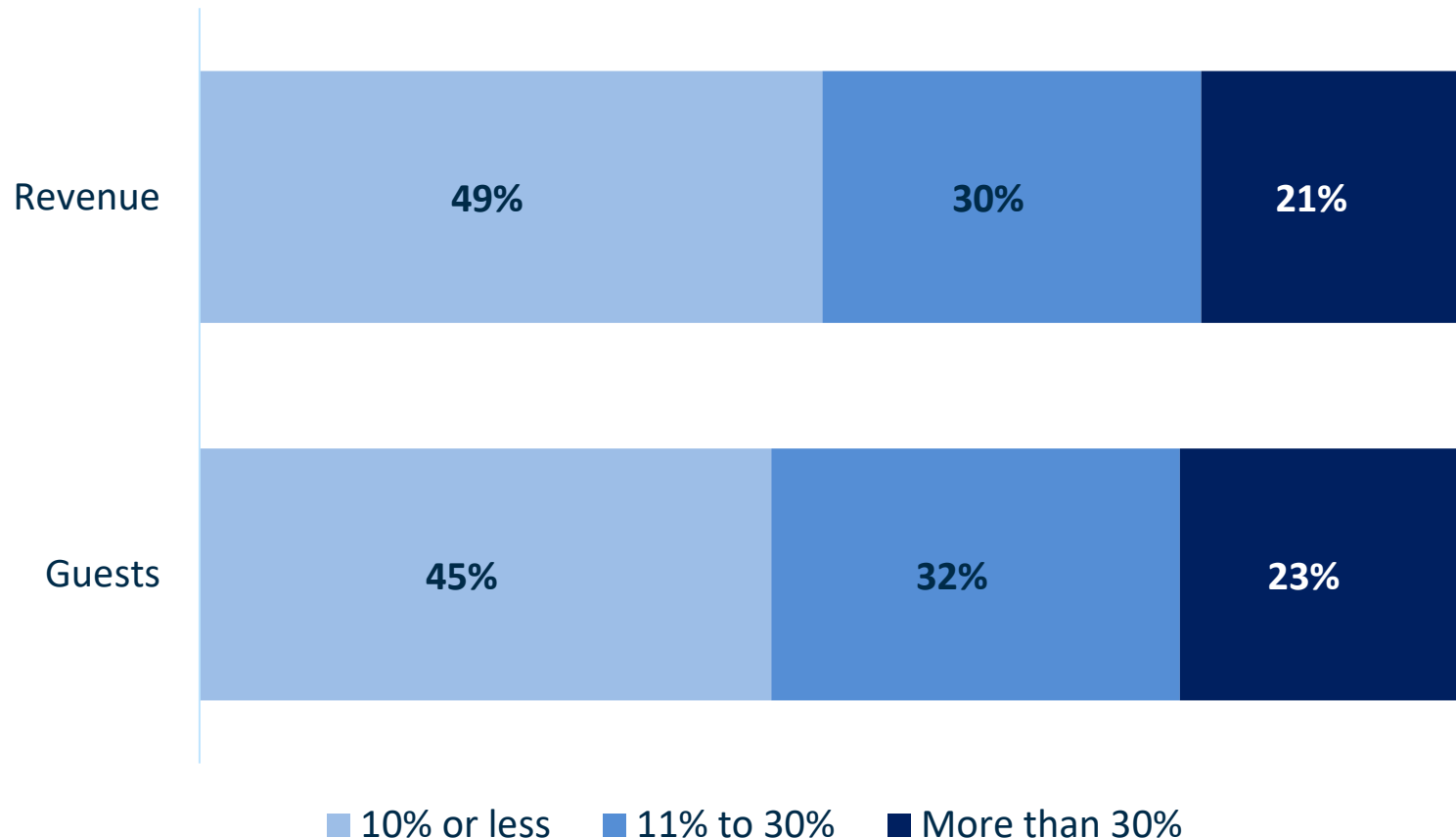


The most common length of stay is for two days, suggesting many weekenders are glamping. Indeed, just over one-fourth of all guests stay for three or more days.

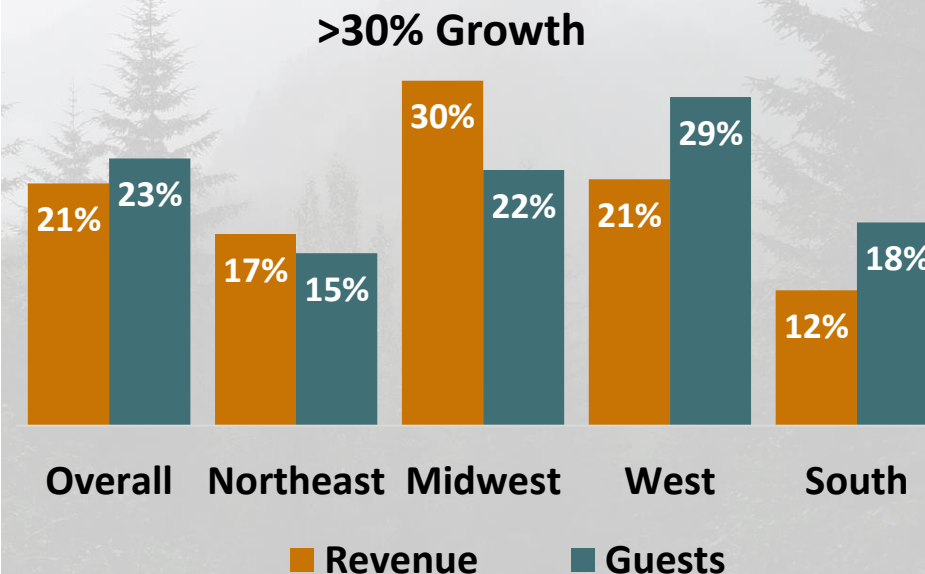
Couples form the most common type of guest stay, followed by families with kids. Solo guest make up only a small percentage of guests.

62% of the locations say that they allow pets on-site.

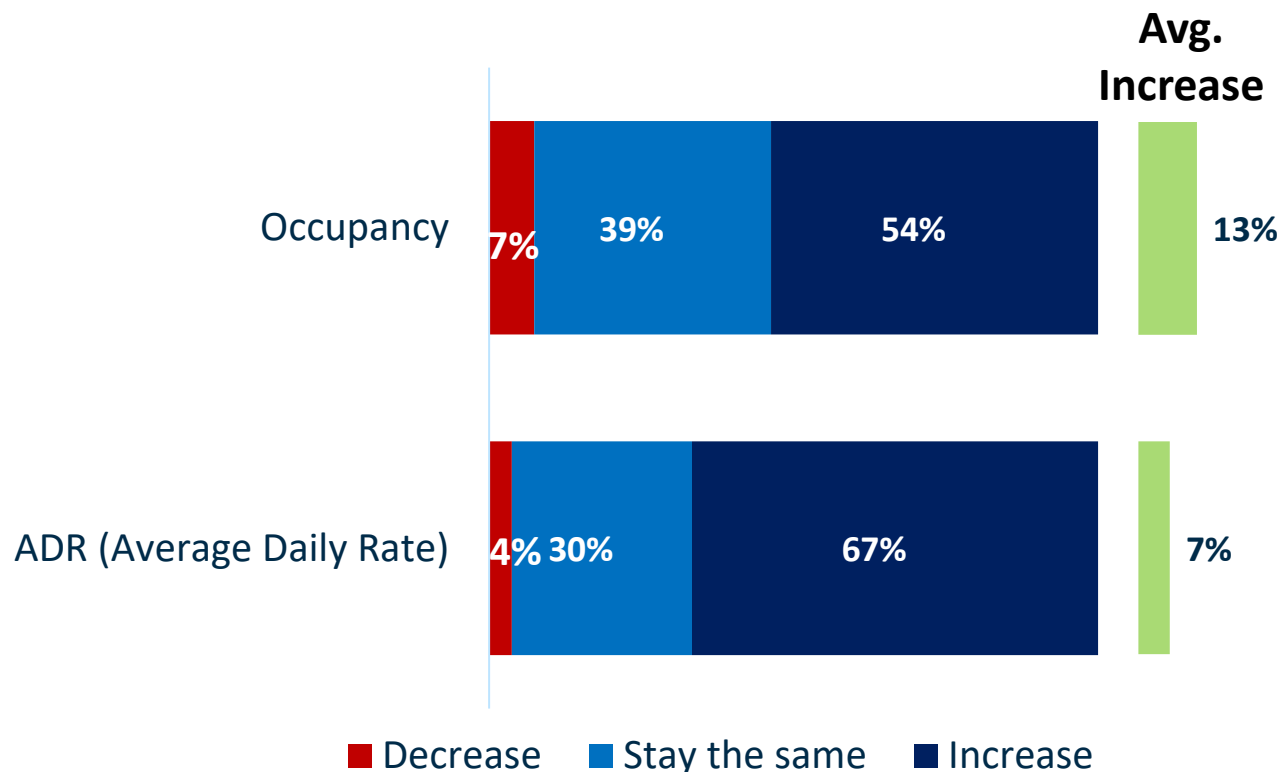
Thinking about the past 3 years (if you have been in operation for less than 1 year, base your estimates on the past 1 or 2 years), what has been the estimated rate of growth for . . . ?



Looking ahead, operators are reporting relatively robust growth, whether it's revenue, guests, or additional sites. More than half have seen growth greater than 10% over the past three years, with single location operators having the most aggressive growth.

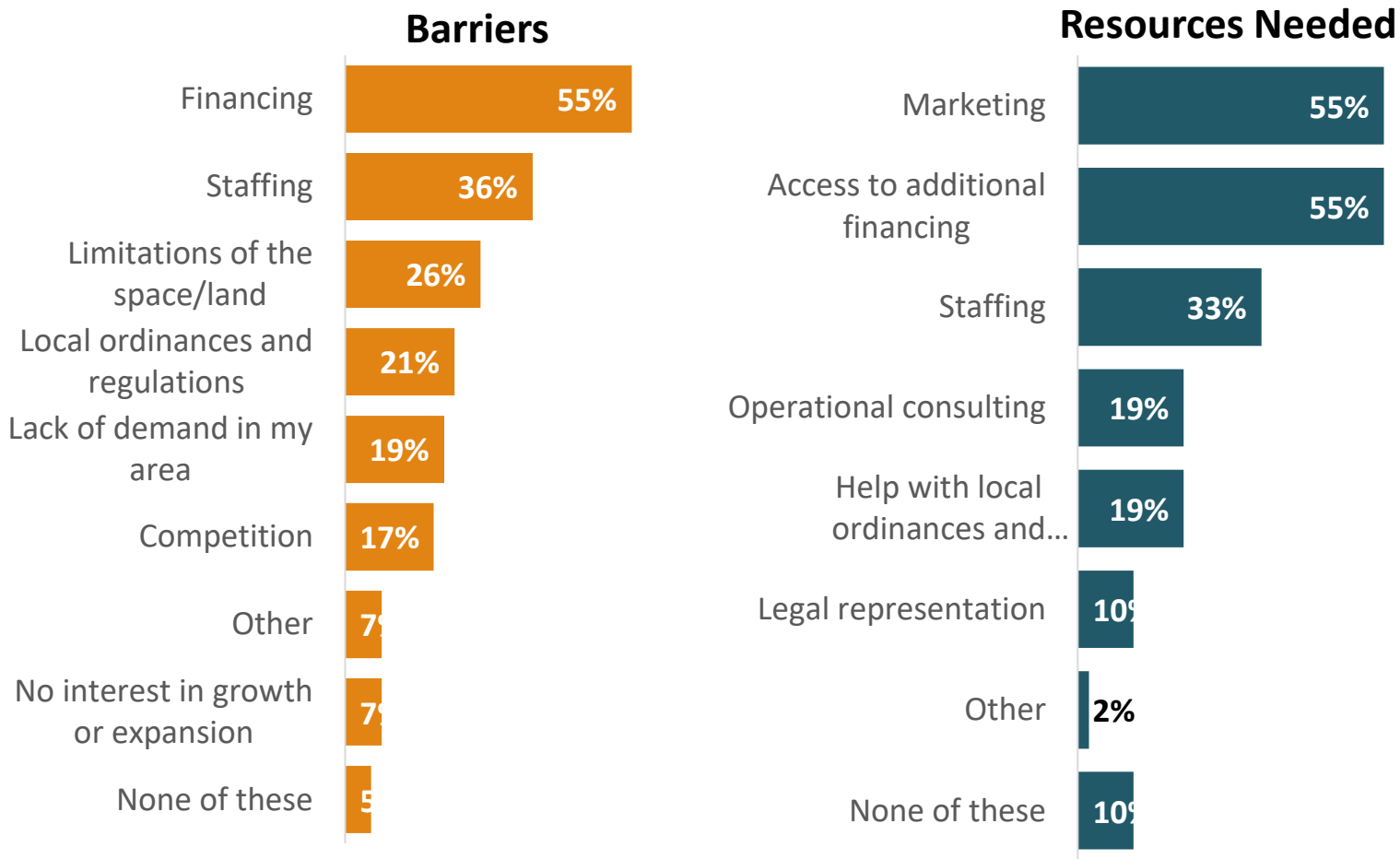


And for the upcoming year, compared to last year, do you anticipate that your occupancy and ADR (Average Daily Rate) will:



Once again looking ahead, more than half of operators (54%) anticipate increasing occupancy and two-thirds will increase their ADR.

All things considered, what for you are the primary barriers to future growth? // What resources, if any, could you use to help you grow and expand?

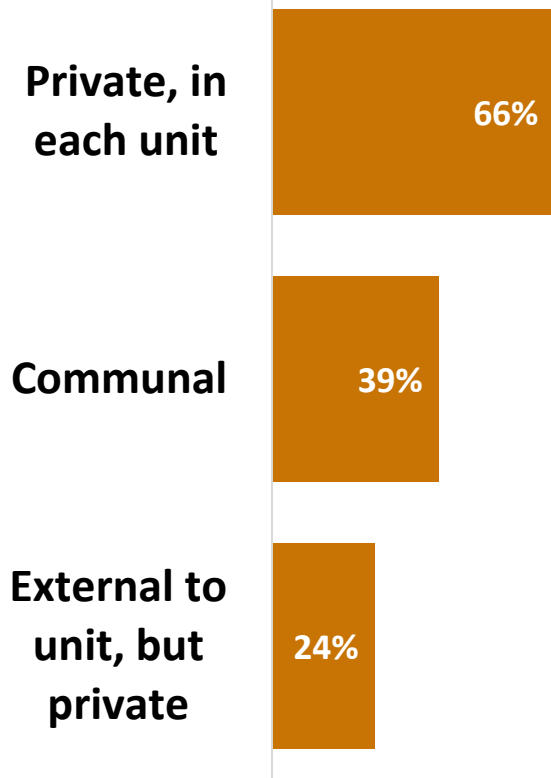


When asked to list the barriers to growth and development, financing is the issue, followed by staffing. Lack of demand and competition are much less likely to be barriers.

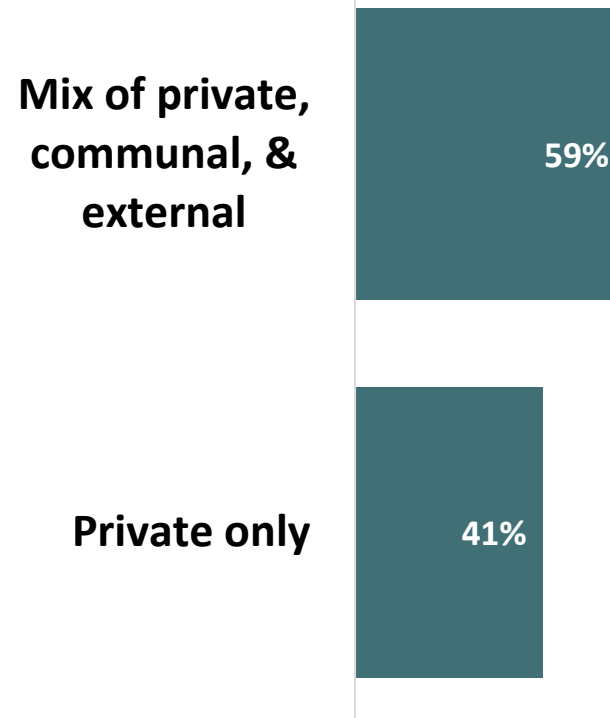
The resources needed to overcome these barriers are most likely to include marketing and access to financing. Again, staffing resources would also help to boost growth.

What is the current configuration of bathrooms at your property or properties? // How much extra, if any, do you charge for private in-suite bathrooms?

Location of Bathroom



% of Providers Using a Mix vs. Private Only



Two-thirds of the locations offer private bathrooms in each unit, while the remainder have communal bathrooms, external but private facilities, or all of these options.

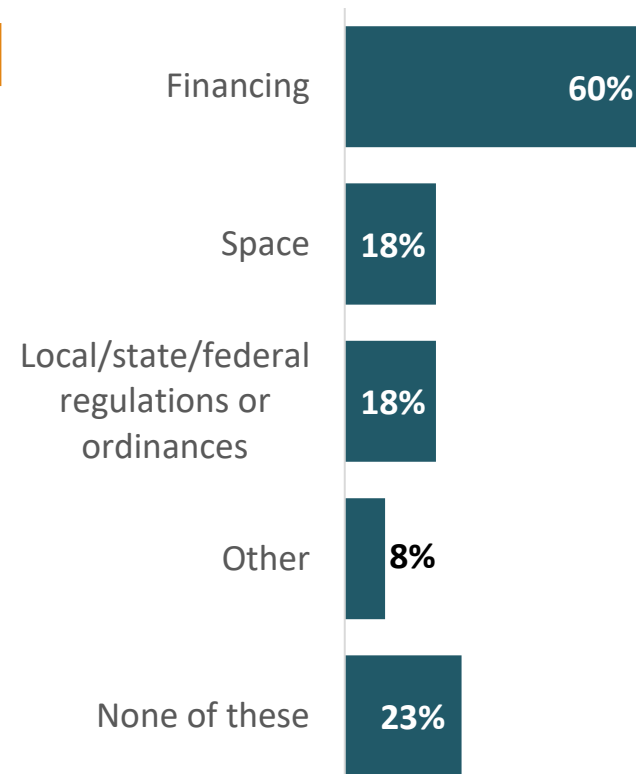
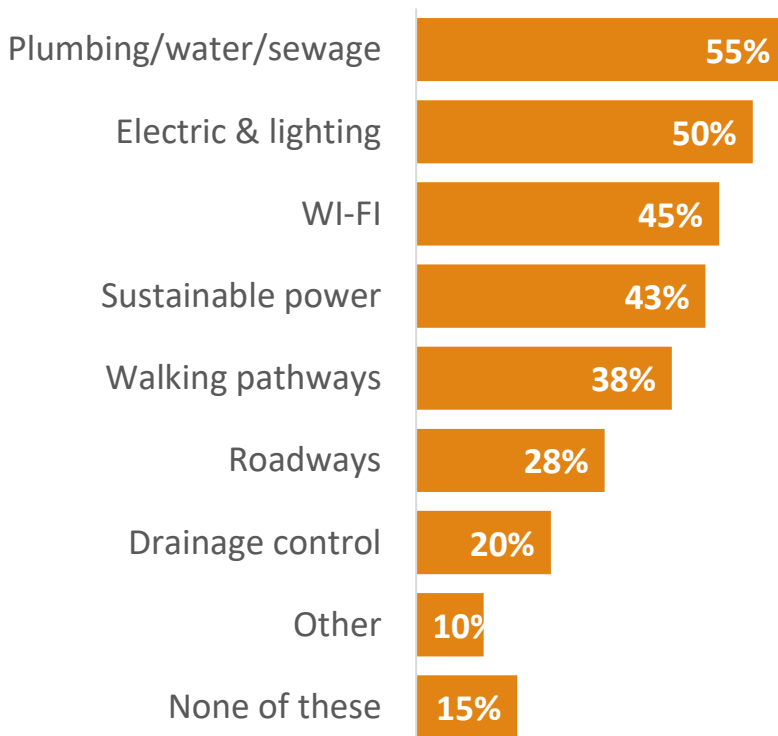
When asked what amount extra is charged for private in unit bathrooms, most (71%) say they do not charge any additional fee and among the 29% who do, the increase is approximately 13%.

29% of the operators surveyed say they charge extra for private bathrooms, with the typical increase in cost of 13%.

What types of infrastructure development and enhancement are needed, if any, at your property or properties? // What are your primary barriers to infrastructure development and enhancement?

Infrastructure Needed

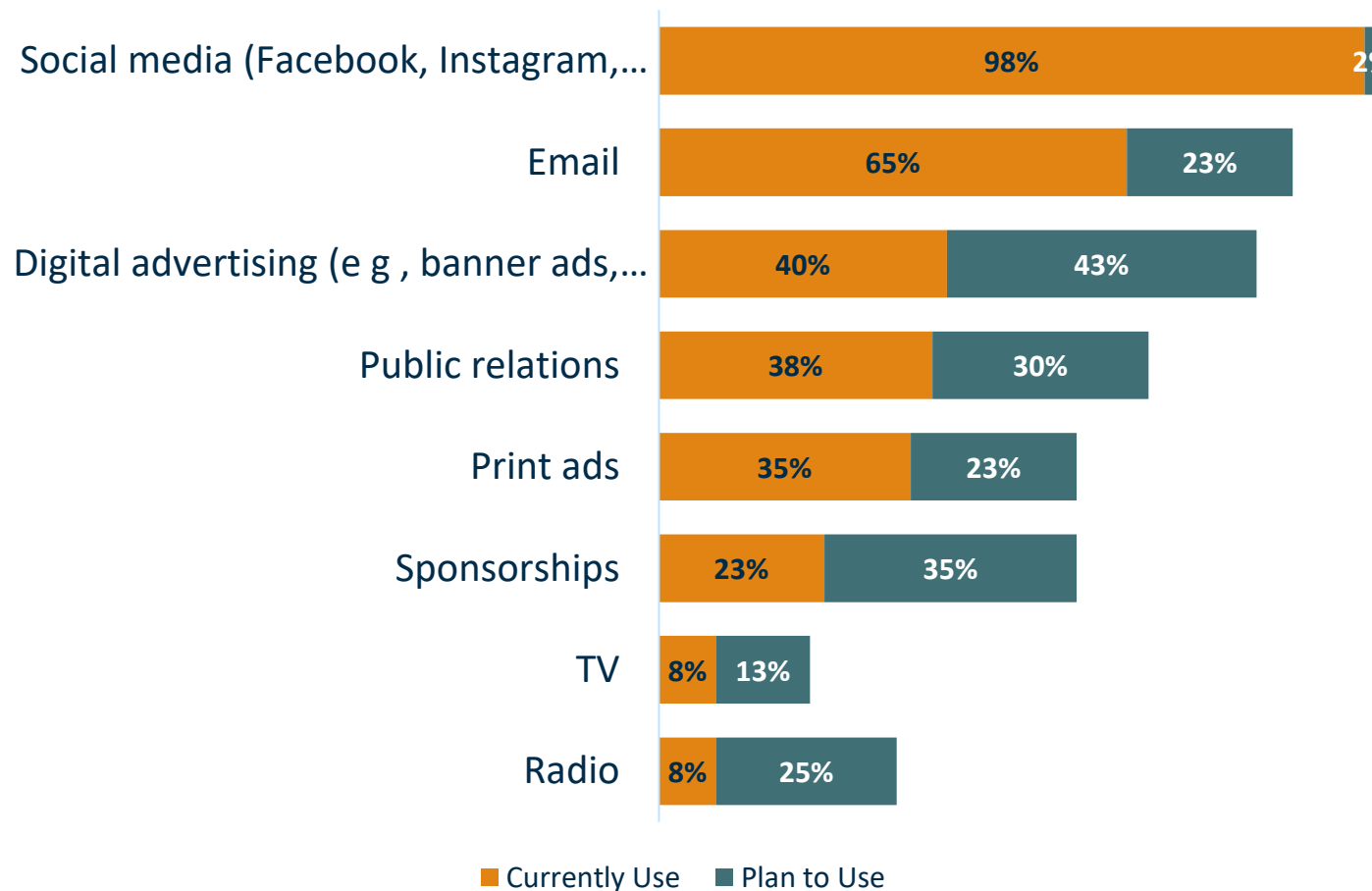
Barriers to Infrastructure Development



A majority of operators note that improvements to their plumbing/water/sewage systems are needed, followed by upgrades or enhancements to the electric and lighting. It is also worth noting that many (43%) are looking into sustainable power.

The greatest barrier, once again, is access to financing.

Which of the following marketing channels, if any, are you using? Which do you plan to use in the coming months?

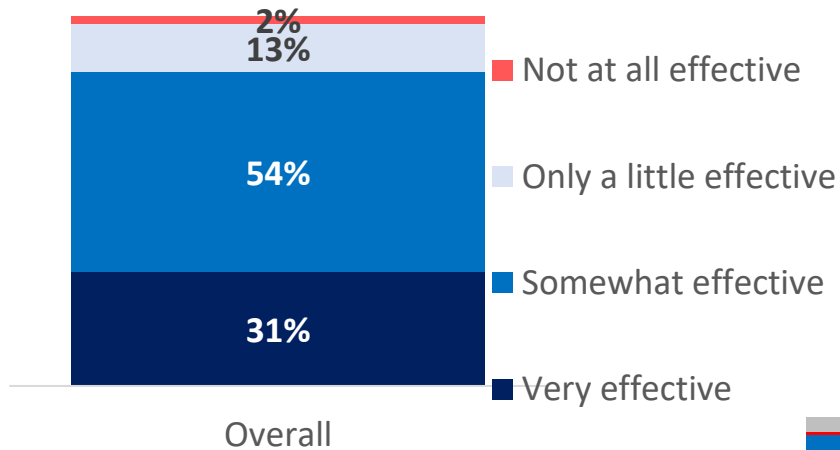


Social media is widely used, with all operators using or planning to use at some point.

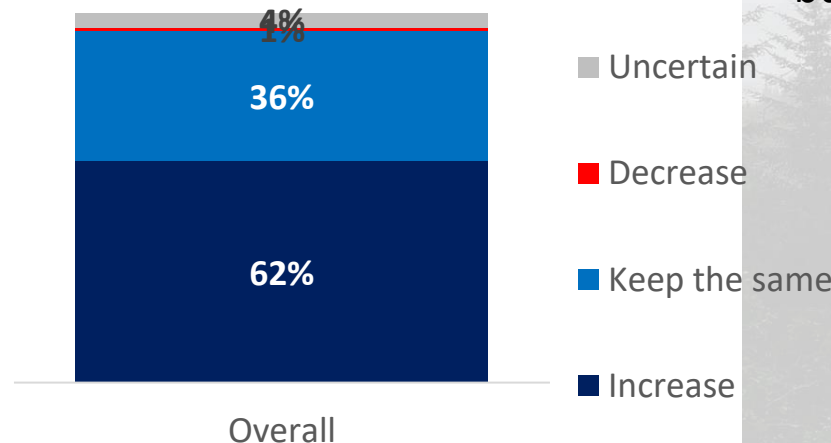
Almost two-thirds use email, while digital is identified as the channel that is in the works for the coming months.

How effective have your marketing efforts been so far? And looking ahead in the next year, do you plan to increase, keep constant, or increase your marketing budget?

Marketing Effectiveness



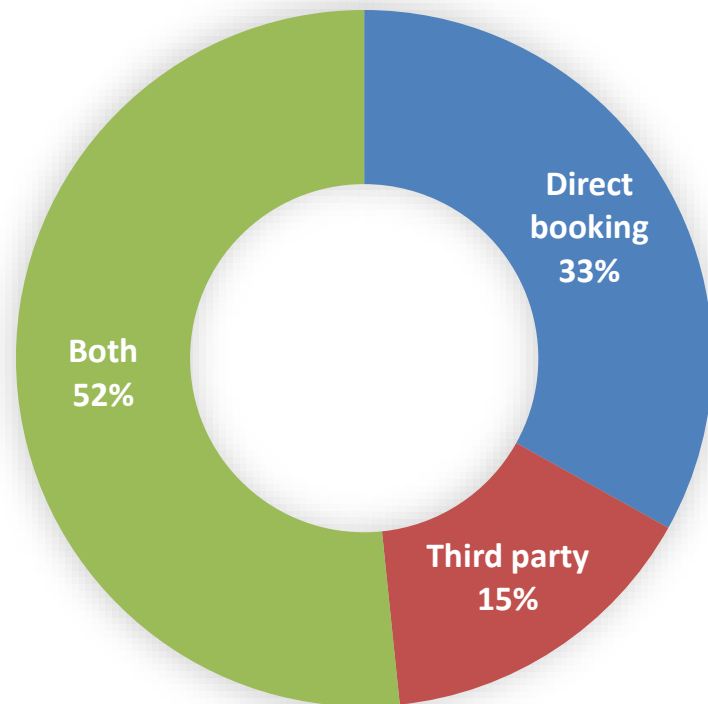
Planned Changes to Marketing Budget



Most operators feel that their marketing efforts are at least moderately effective, but only about a third say these efforts have been highly effective.

Nearly all operators plan to increase or at least keep constant their marketing budgets.

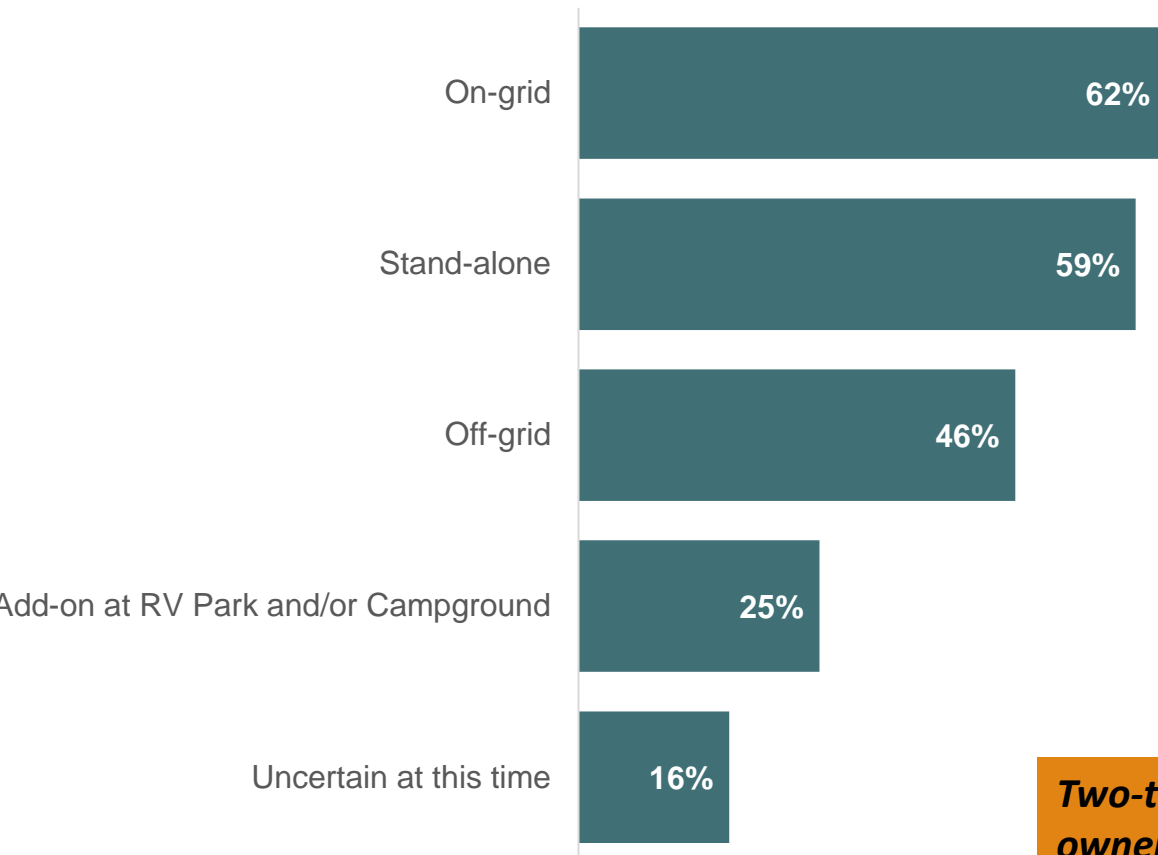
What current method do you use for booking and reservations?



A majority of operators are using both direct and third parties for booking reservations, with 85% using direct booking either on its own (33%) or in combination with third parties (52%).

Prospective Operators

What type of property or properties are you considering?



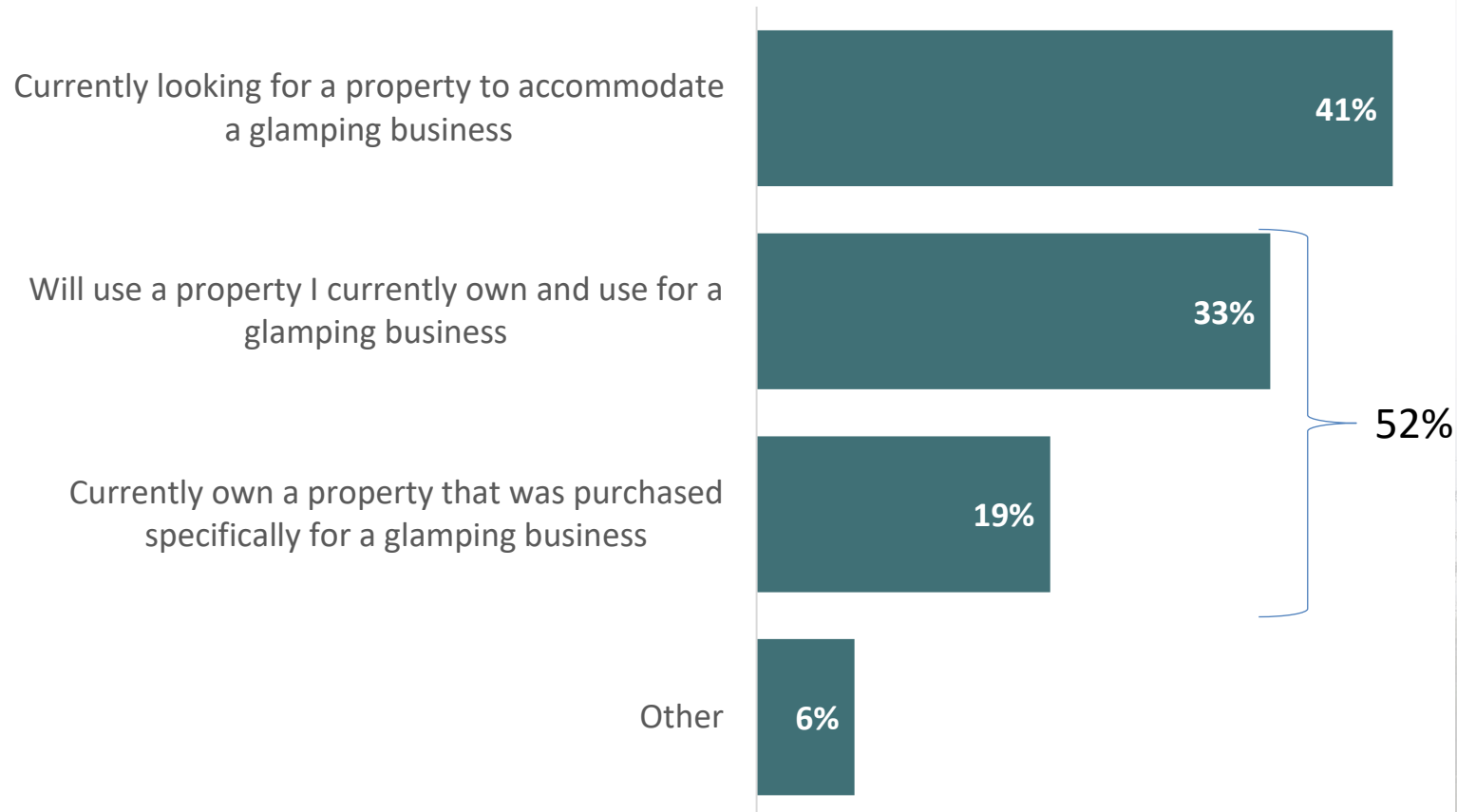
Two-thirds of prospective owners are planning to operate their businesses all year (compared to 49% of current operators).

Prospective operators are most likely to seek an on-grid property, and in total, 35% of prospects state that they are planning to have both on- and off-grid properties.

Among those who exclusively choose on- or off-grid, 71% choose on-grid. Still, off-grid properties (46%) form a relatively large bloc of prospective properties under consideration.

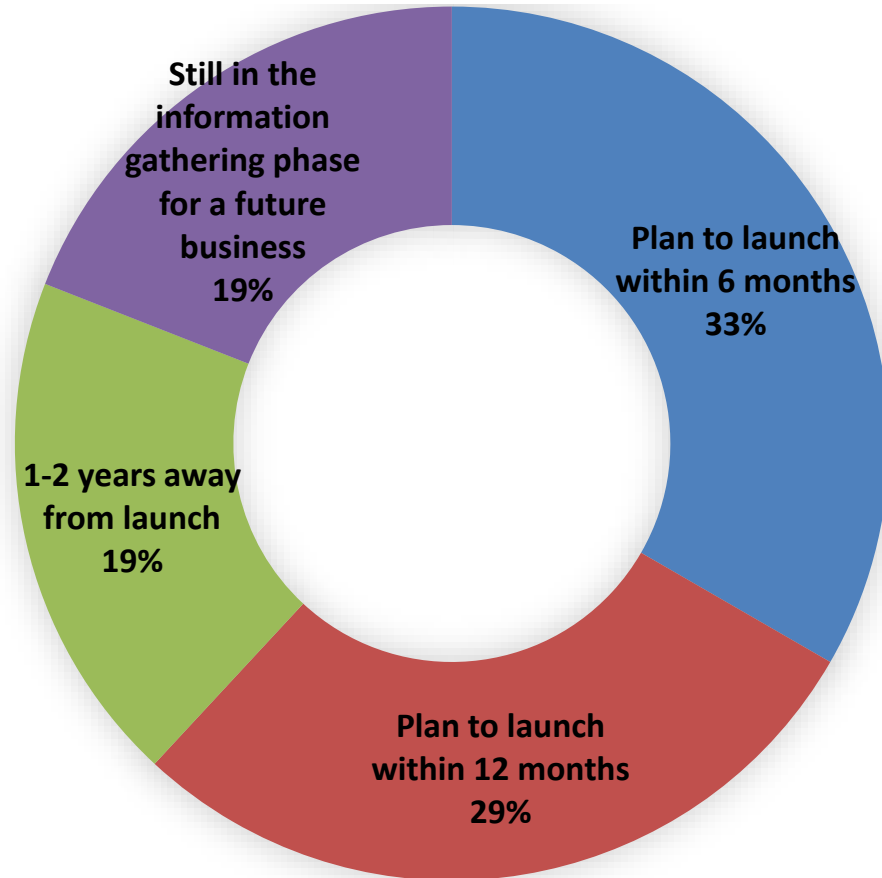
Additionally, about 6-in-10 prospects will operate stand-alone properties, versus 25% who will be part of an add-on (and the remainder uncertain).

Which of the following best describes the type of property you plan to use for your glamping business?



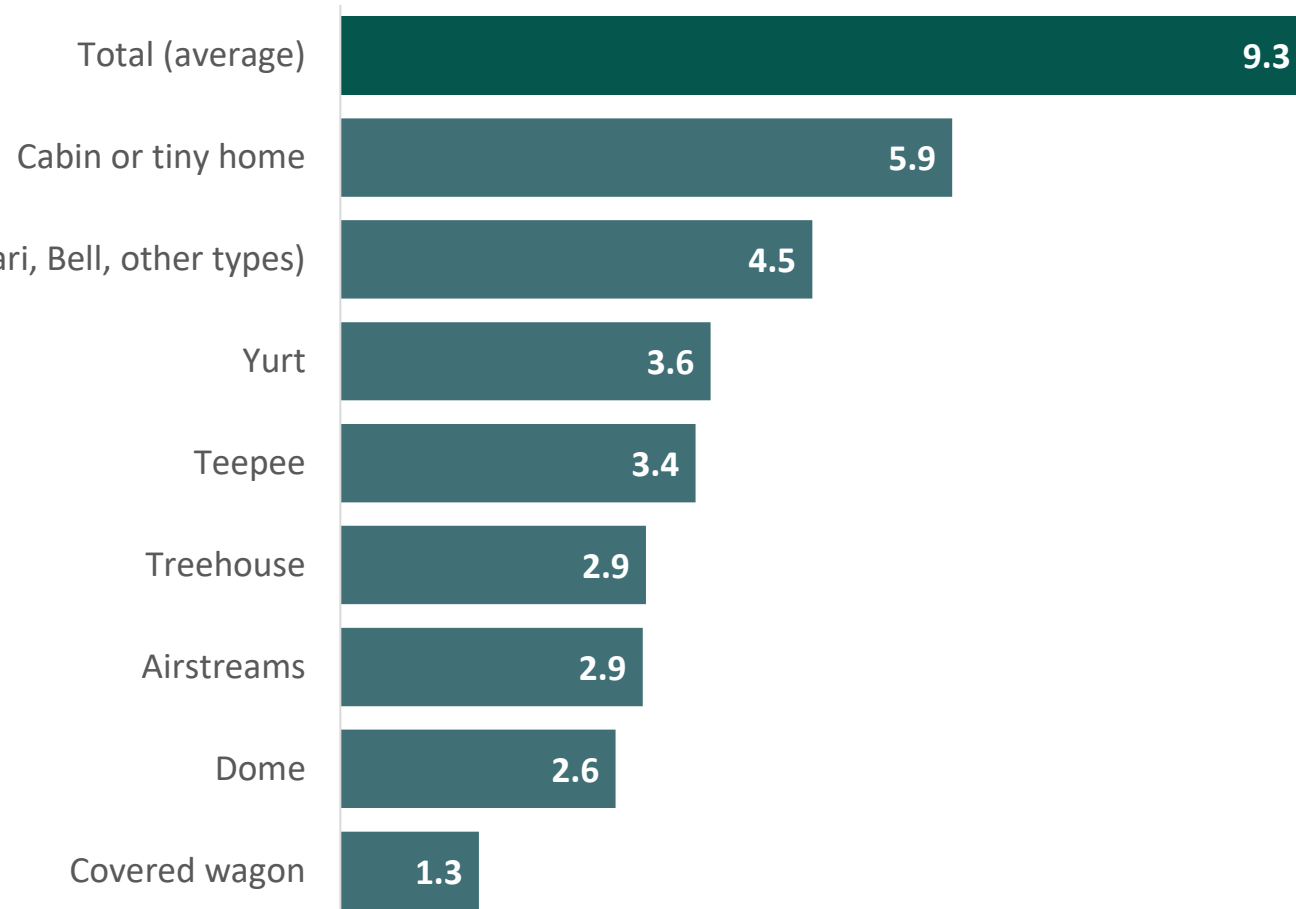
A majority of prospects plan to use properties they currently own (52%), whether the property they already owned (33%), or one that they purchased specifically for the purpose of a glamping business (19%).

At what stage are you in the planning process for your glamping operation?



When asked where they are in the overall planning process, 62% of all prospects indicate that they are about a year or less from launch. The remainder are evenly split between those who are still more than a year out (19%) and those who are still gathering information (19%).

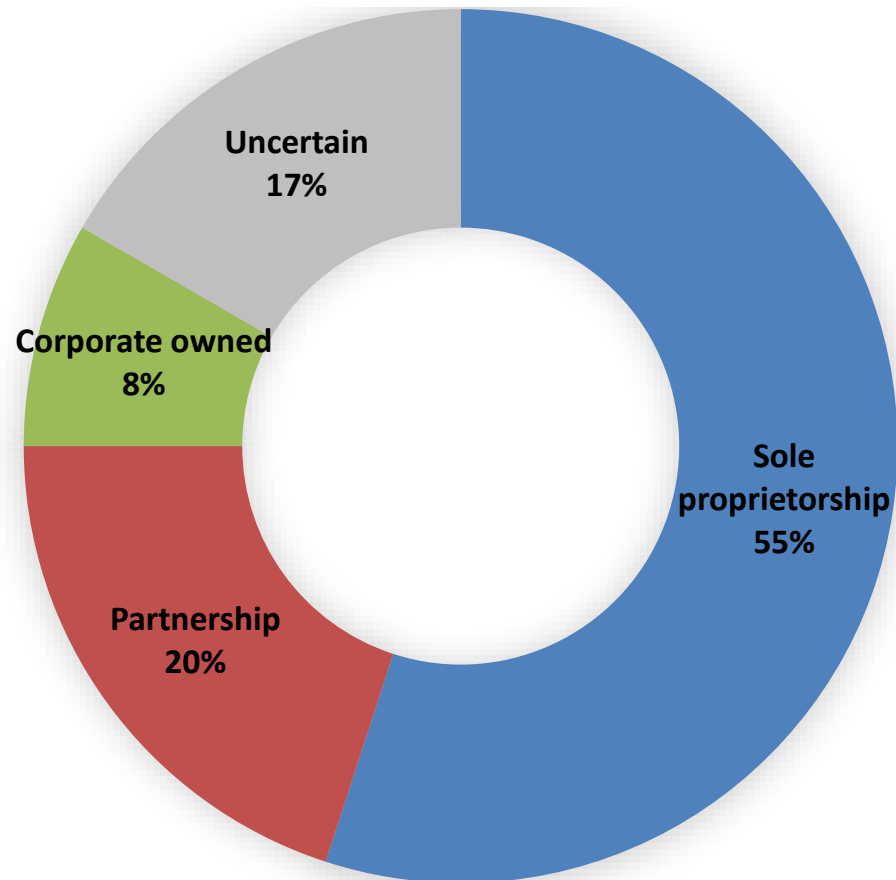
How many, if any, of each of the following structures are you planning to include?



The average prospect is planning to include about nine structures for their start-up, a figure slightly below the set of current operators (11). The smallest planned development is about three new structures and the largest planning on 30.

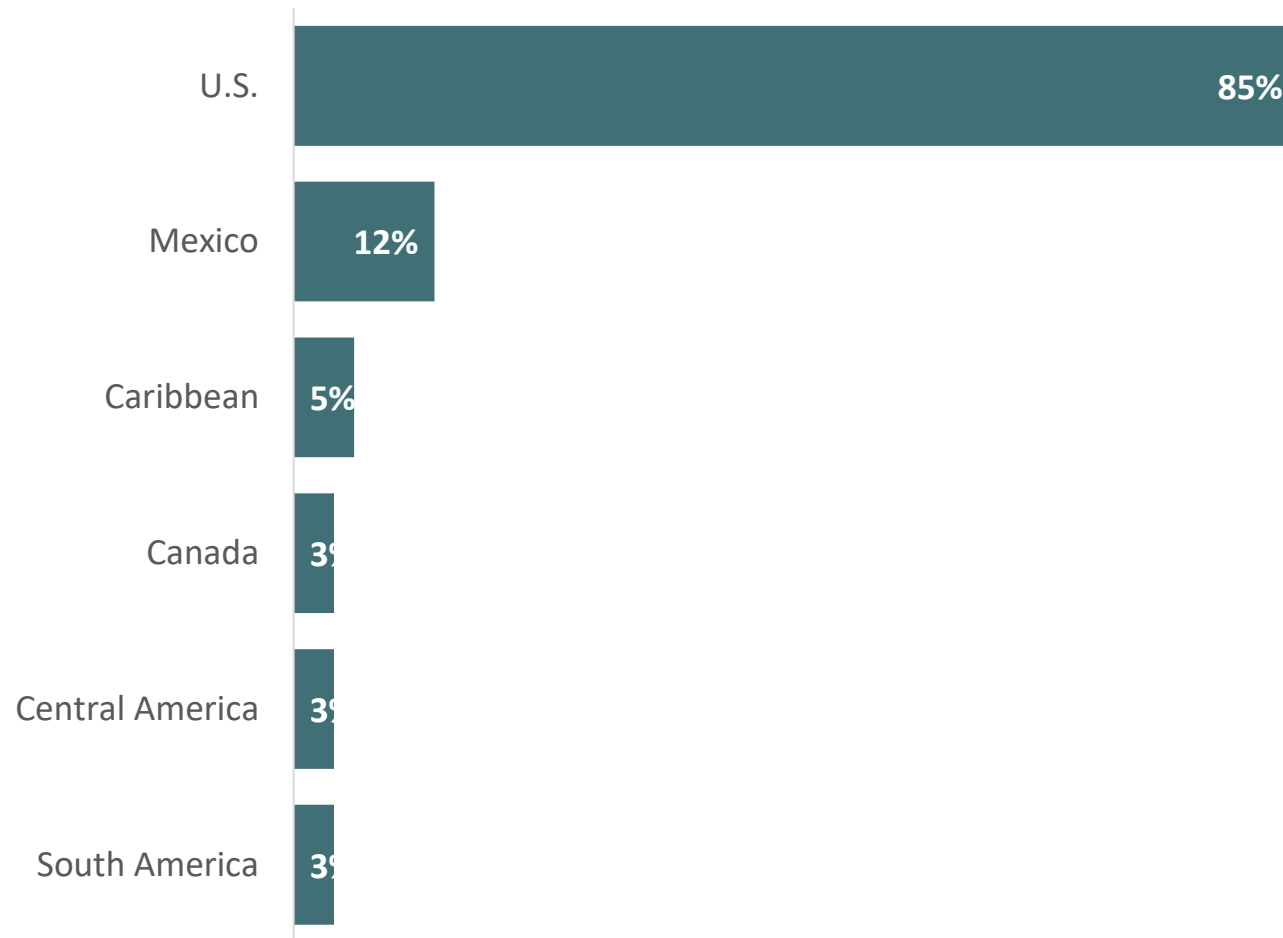
Looking ahead to the number and types of structures, similar to existing operators, cabins or tiny homes are the most popular type of structure followed by tents.

What type of ownership/ownership structure will you have?



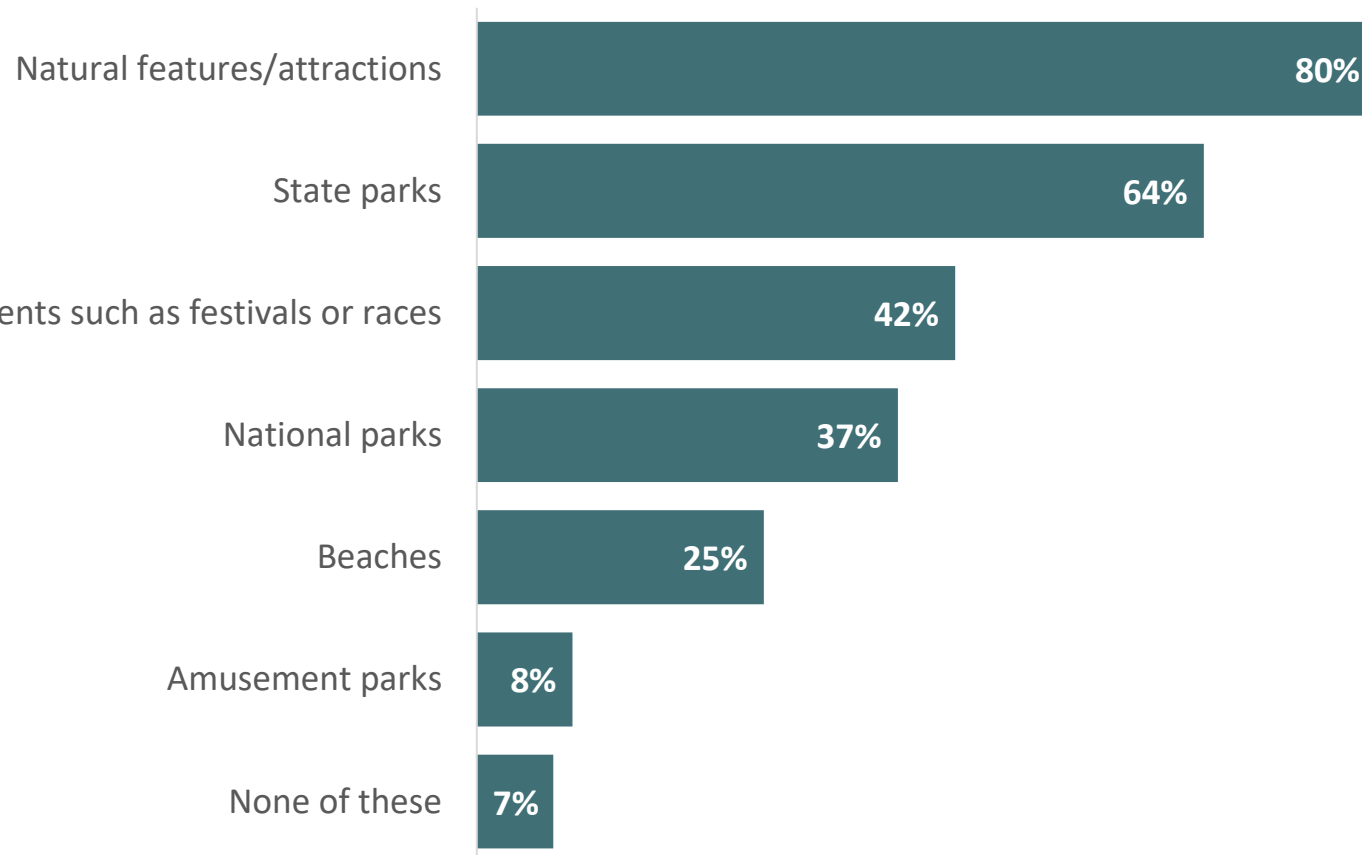
A majority of new developments are planning to be sole proprietorships, while 1-in-5 are planned partnerships. Fewer than 1-in-10 plan to be corporate owned.

In which of the following regions do you plan to operate glamping locations?



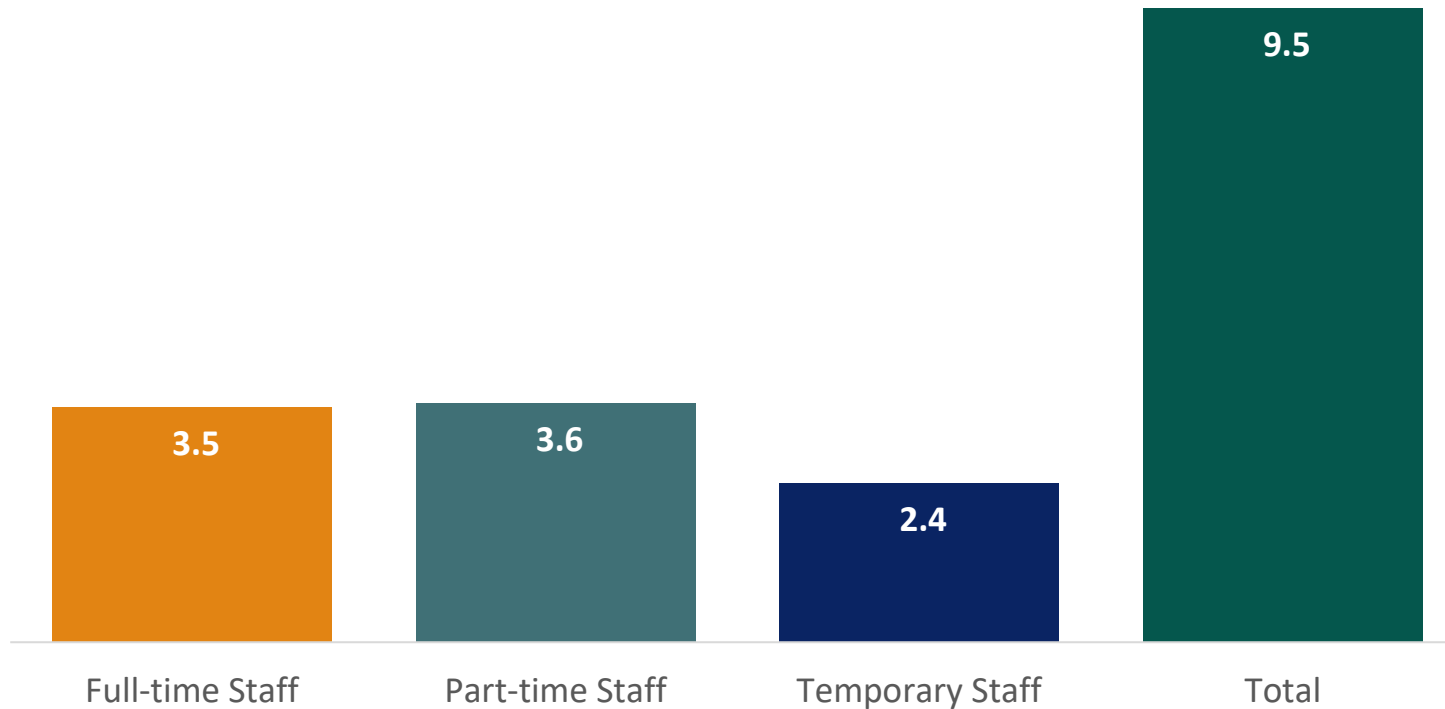
Most prospects plan to open in the U.S., with plans for other countries much lower at this point in the process, yet 15% (including 12% in Mexico) are planning to operate in other countries.

Are any of your planned or existing properties near major destinations and if so, which ones?



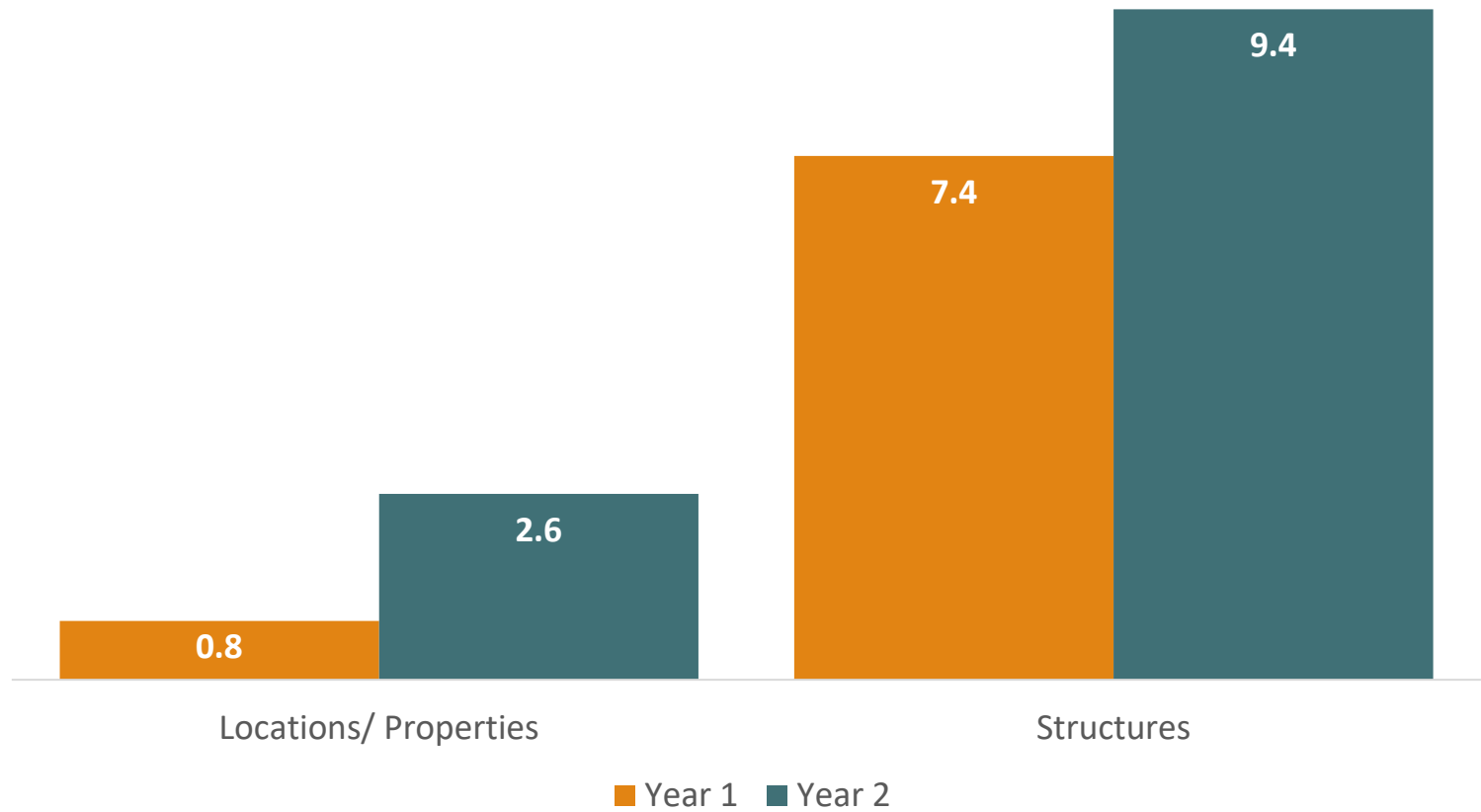
The locations being sought by prospects are most likely to be in proximity to natural features and attractions (similar to existing properties), with almost two-thirds in the areas surrounding state parks.

What is your planned level of staffing?



The average new operator is planning to employ an equal number of full- and part-time staff, with the total staffing alignment to include almost 10 staff.

How many locations are you planning to open in year one? Year two? // And how many structures are you planning to include in year one? Year two?

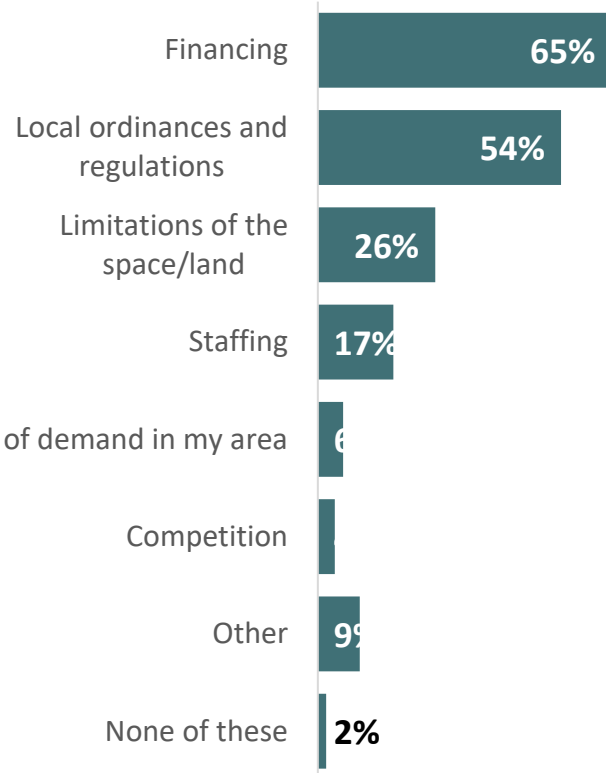


Most of the prospects are planning to start slowly, opening a single property in year one, but on average, there are somewhat more aggressive plans to open multiple properties by year two of operation. Overall, 74% of prospects are planning a single property in year one.

Similarly, the average start-up plans to have seven structures in year one and nine by year two.

All things considered, what do you see as the primary barriers? // What resources, if any, could you use to help you grow and expand?

Barriers



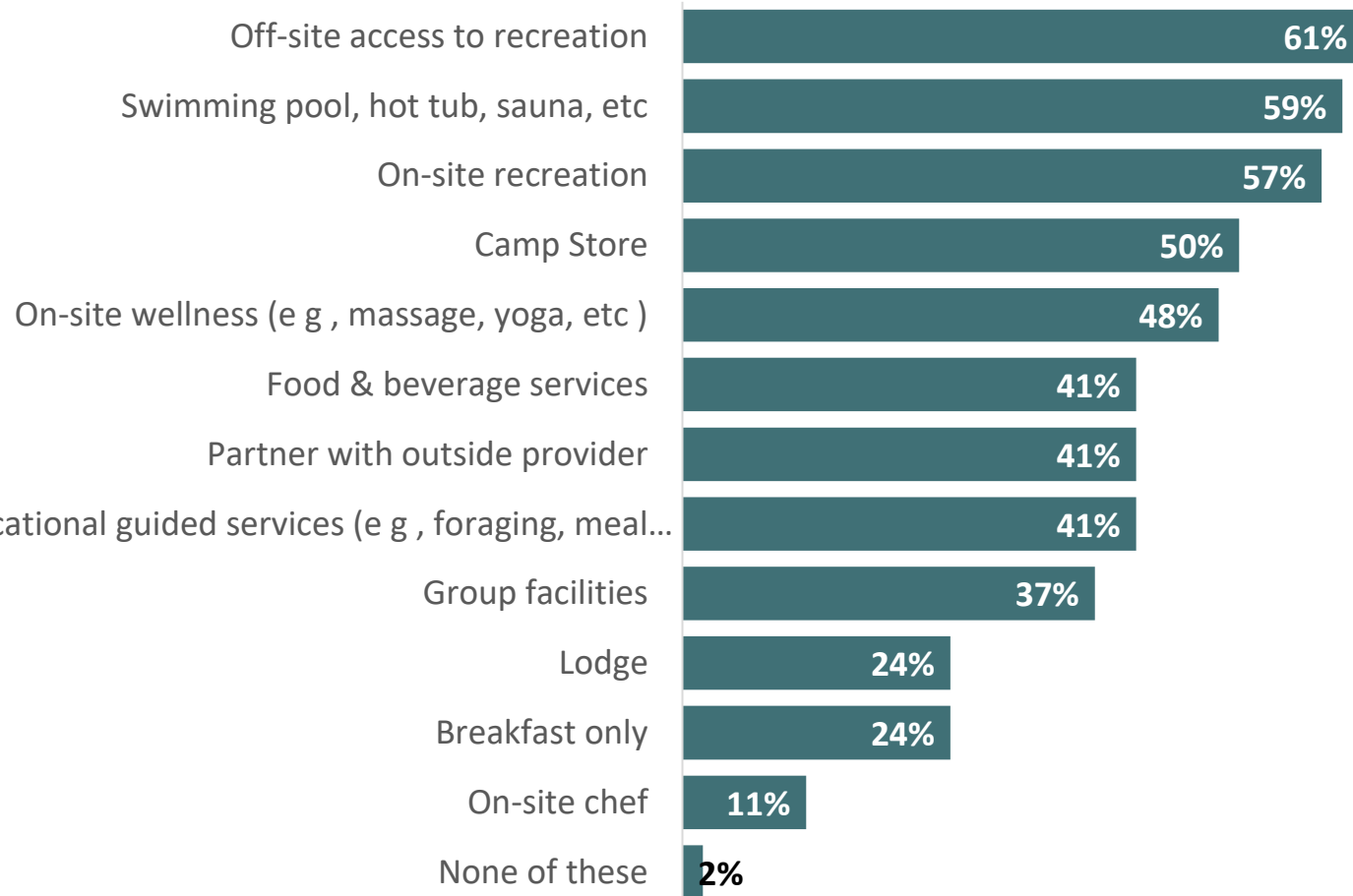
Needed Resources



Similar to the results of the current operators, financing their venture represents the greatest single barrier. However, a majority (54%) suggest that the challenges of navigating local ordinances and regulations is also a key barrier to their plans.

The resources need to overcome these barriers include, not surprisingly, access to financing, help navigating local ordinances, and marketing support.

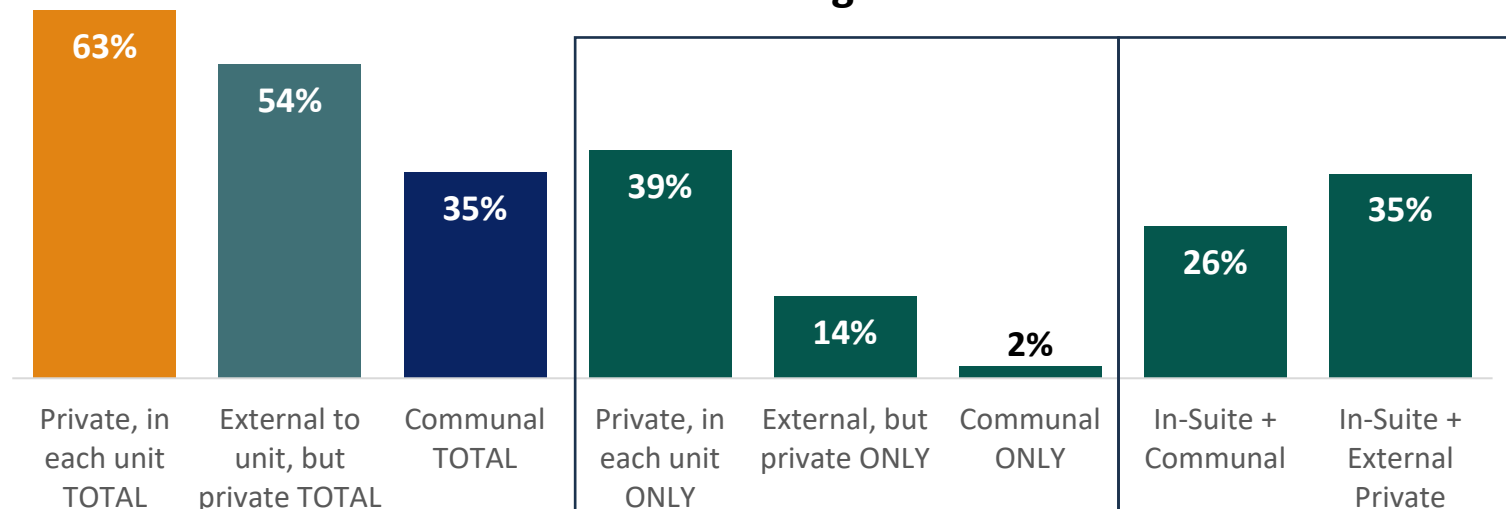
Which of the following services and amenities do you plan to offer?



Prospects are nearly equally likely to offer off-site access to recreation, pool/hot tub/sauna, or on-site recreation activities. Half are planning a camp store and on-site wellness (note: current providers are less likely to offer these amenities, but have plans to offer in the near future).

What type of configuration of bathrooms at your property or properties are you planning to offer? How much extra, if at any, do you plan to charge for private in-suite bathrooms?

Bathroom Configuration

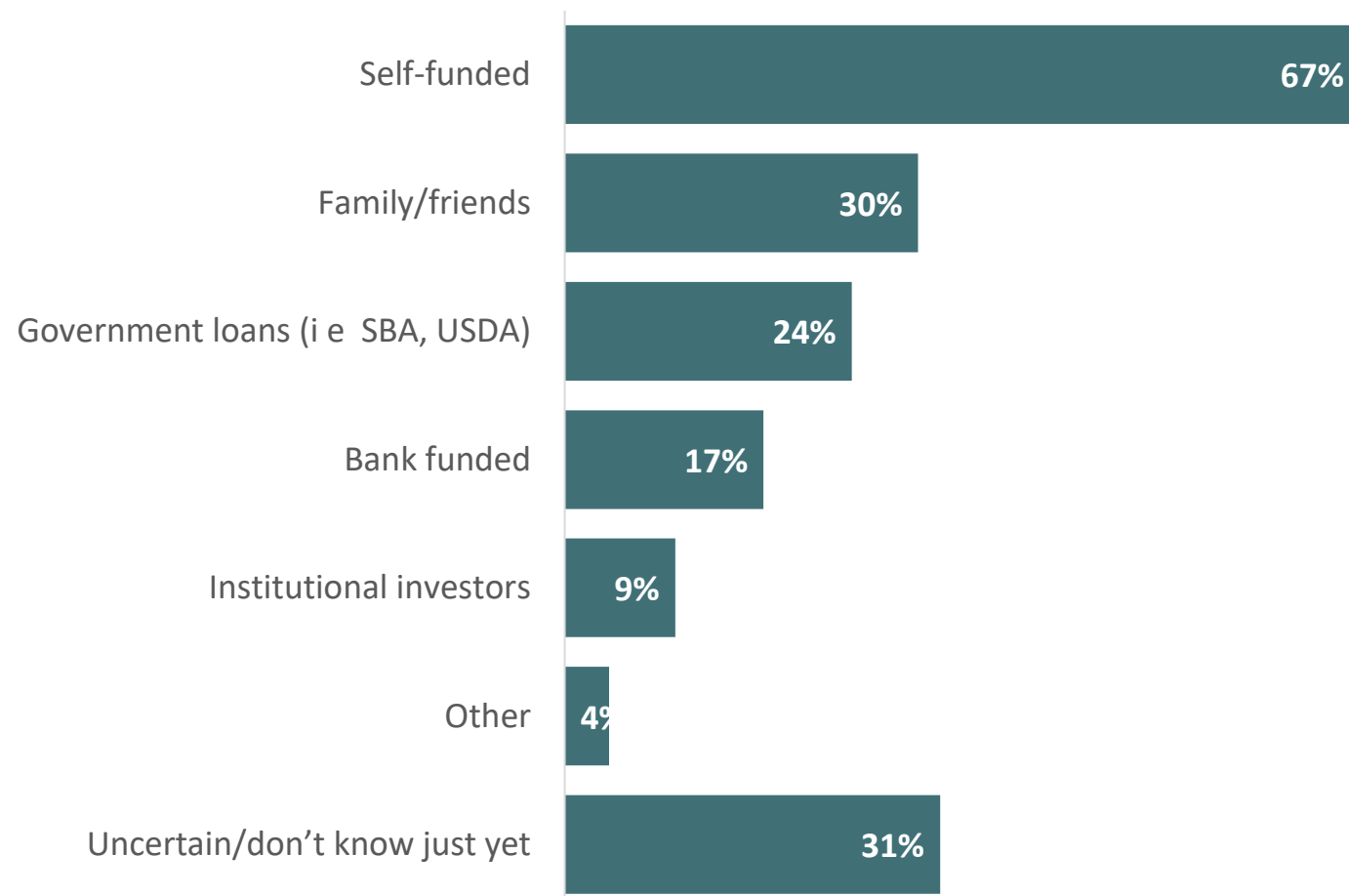


Additional Charge for In-Suite Bathroom: 17%

A majority of the prospects are planning to include private bathrooms in each structure, and/or private but external to the structure. One-third are planning communal bath houses, but few plan to use communal facilities as a stand-alone option.

About 4-in-10 prospects are planning private bathrooms in each structure only, and most are planning to charge an additional fee for having this private bathroom option (about 17% more on average, compared to 13% more among current operators).

What type of financing will you use to fund your business?

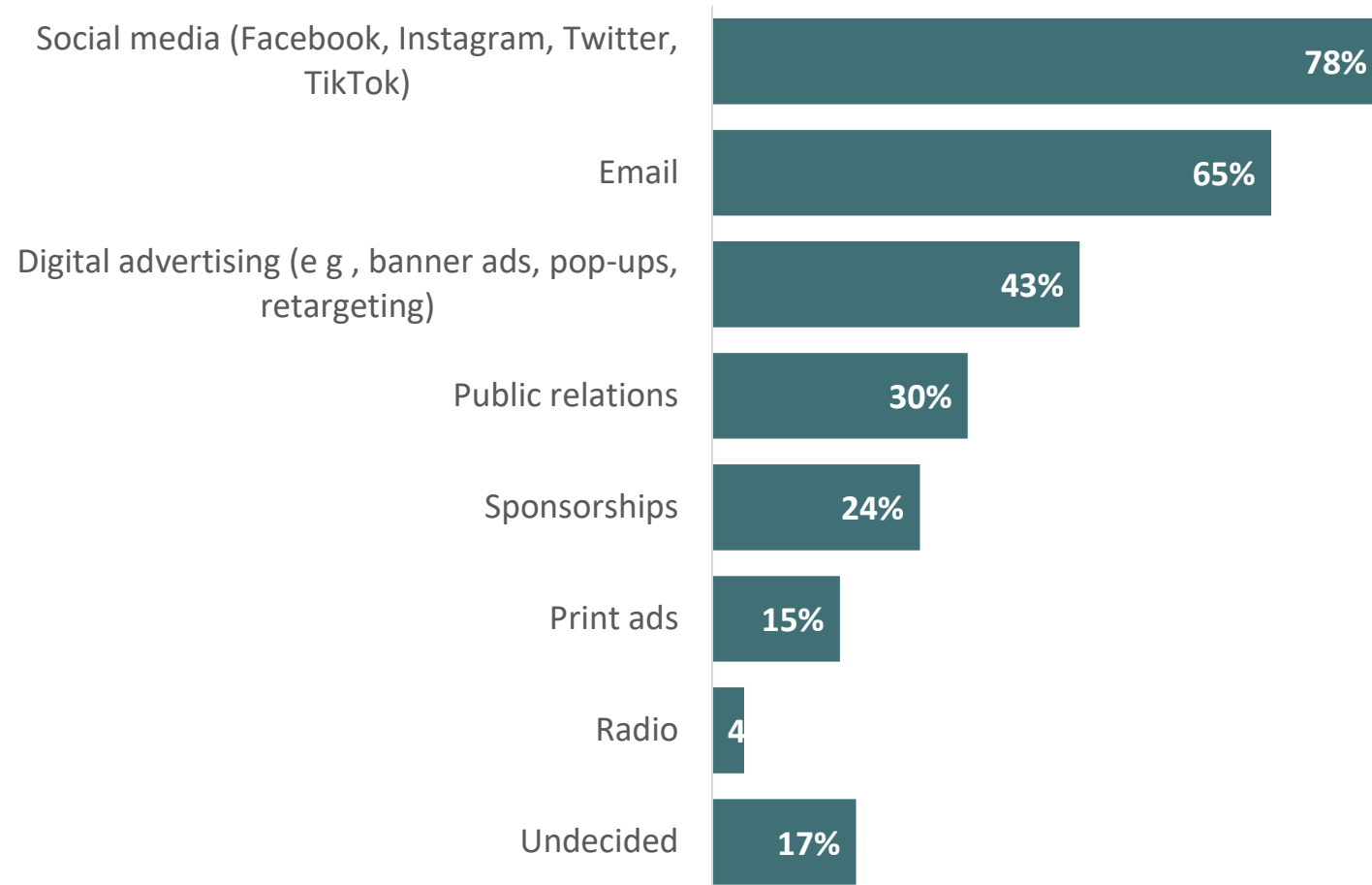


Two-thirds of prospects plan to be self-funded in their ventures, while others are planning to use family/friends to help out, and one-fourth are seeking government loans.

Within the two-thirds who are self-funding, most are using multiple financing options; about 3-in-10 are uncertain of their financing options.

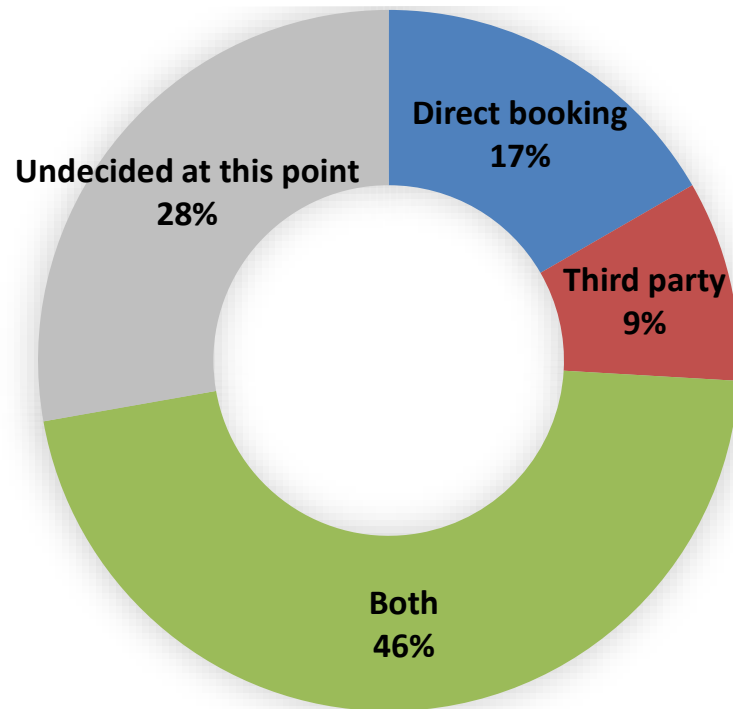
It is worth noting that 17% plan to use bank funding, a rate half what the set of current operators used (33%).

Which of the following marketing channels, if any, are you planning to use?



More than three-fourths of prospects say that they plan to use social media for marketing (compared to nearly all current operators), and two-thirds plan to use email.

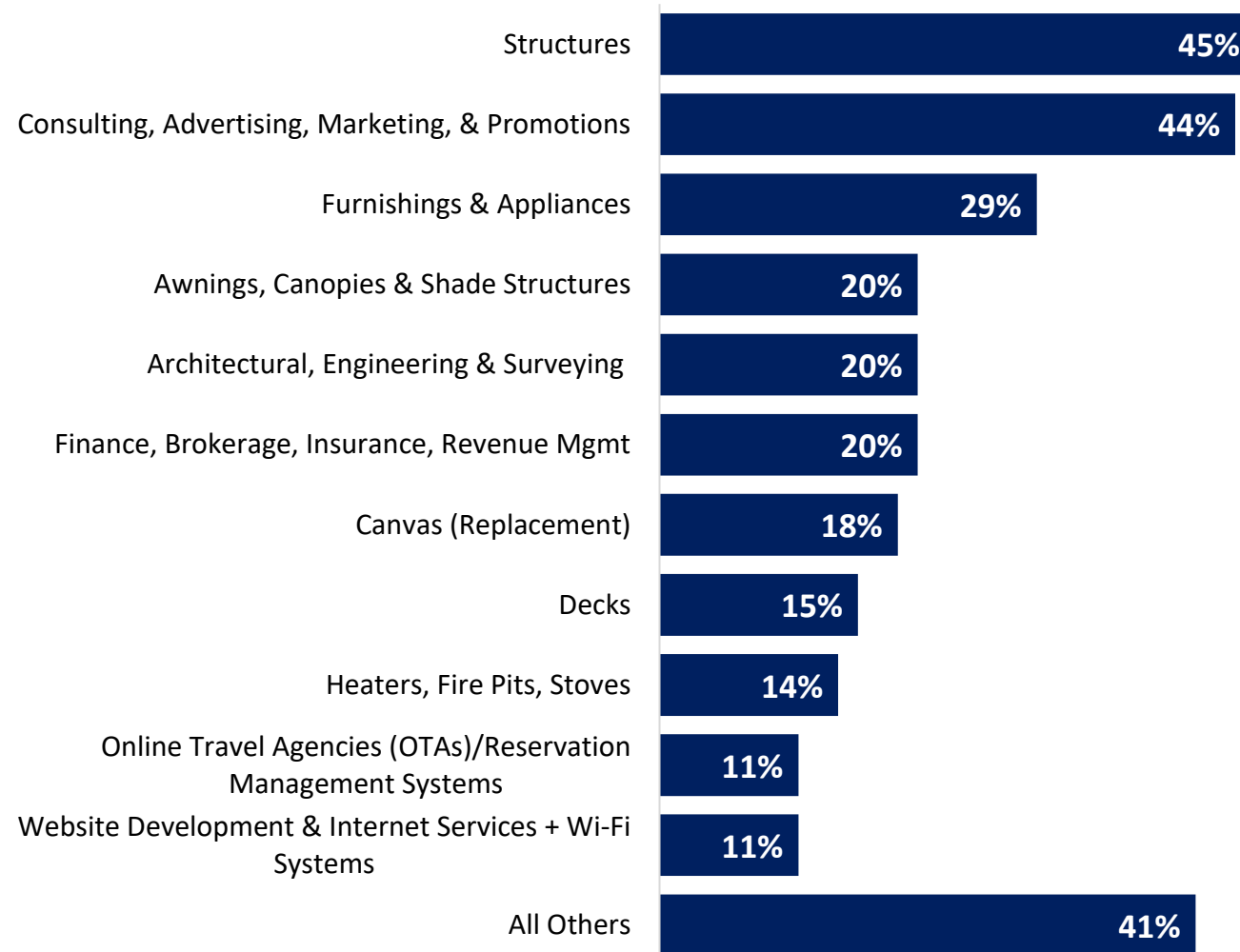
What method do you plan to use for booking and reservations?



When asked how they plan to handle booking reservations, nearly half of prospects are likely to use both direct and third parties. Overall, 63% of prospects plan to use direct booking only (17%) or in combination with third parties (46%). Almost 3-in-10 remain undecided at this stage in the planning process.

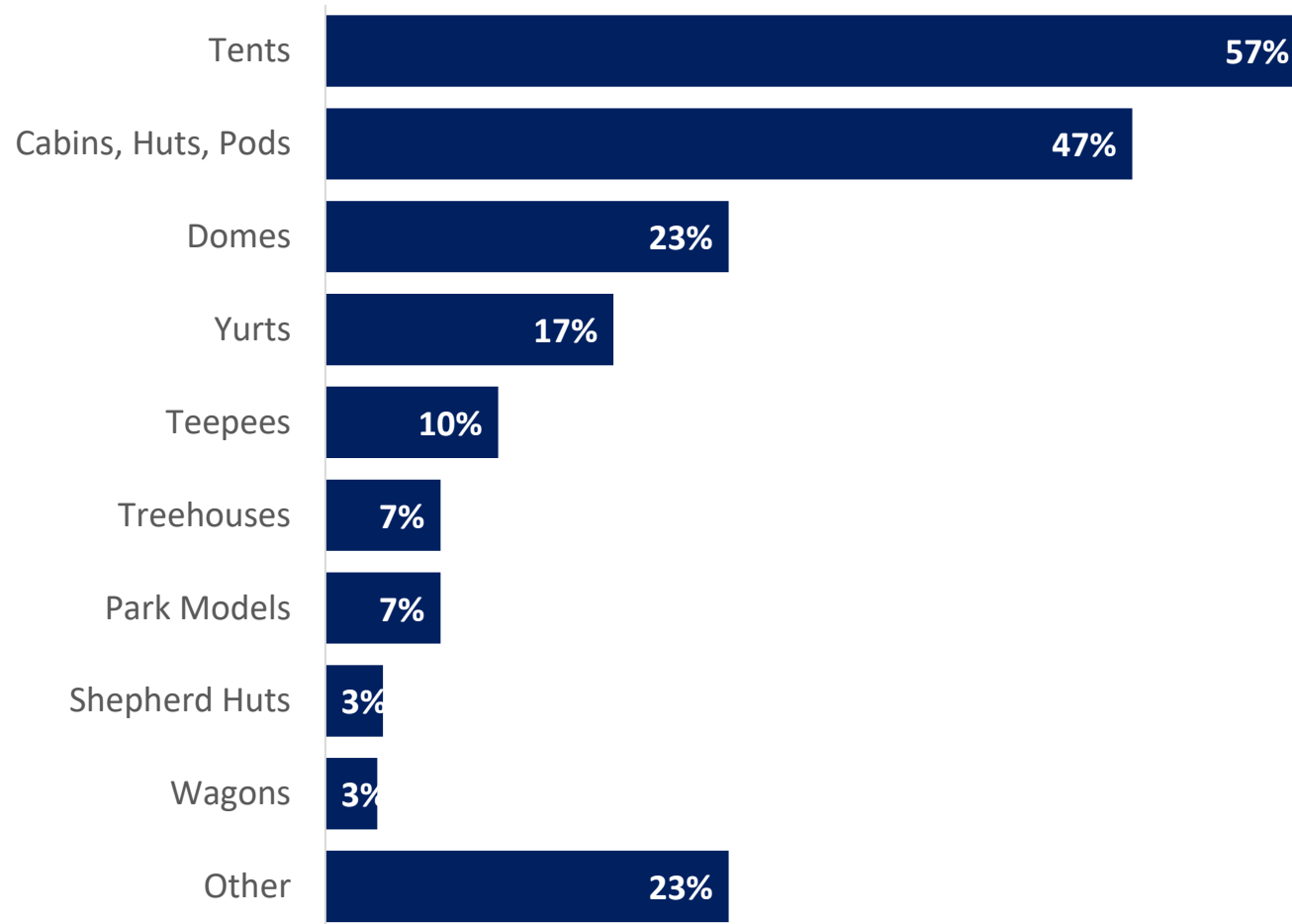
Suppliers

Which of the following products and/or services do you provide to glamping providers?



Among the set of suppliers who were surveyed, a nearly equal proportion of providers who make and provide structures and those in the consulting categories (including marketing and advertising) are the most commonly mentioned.

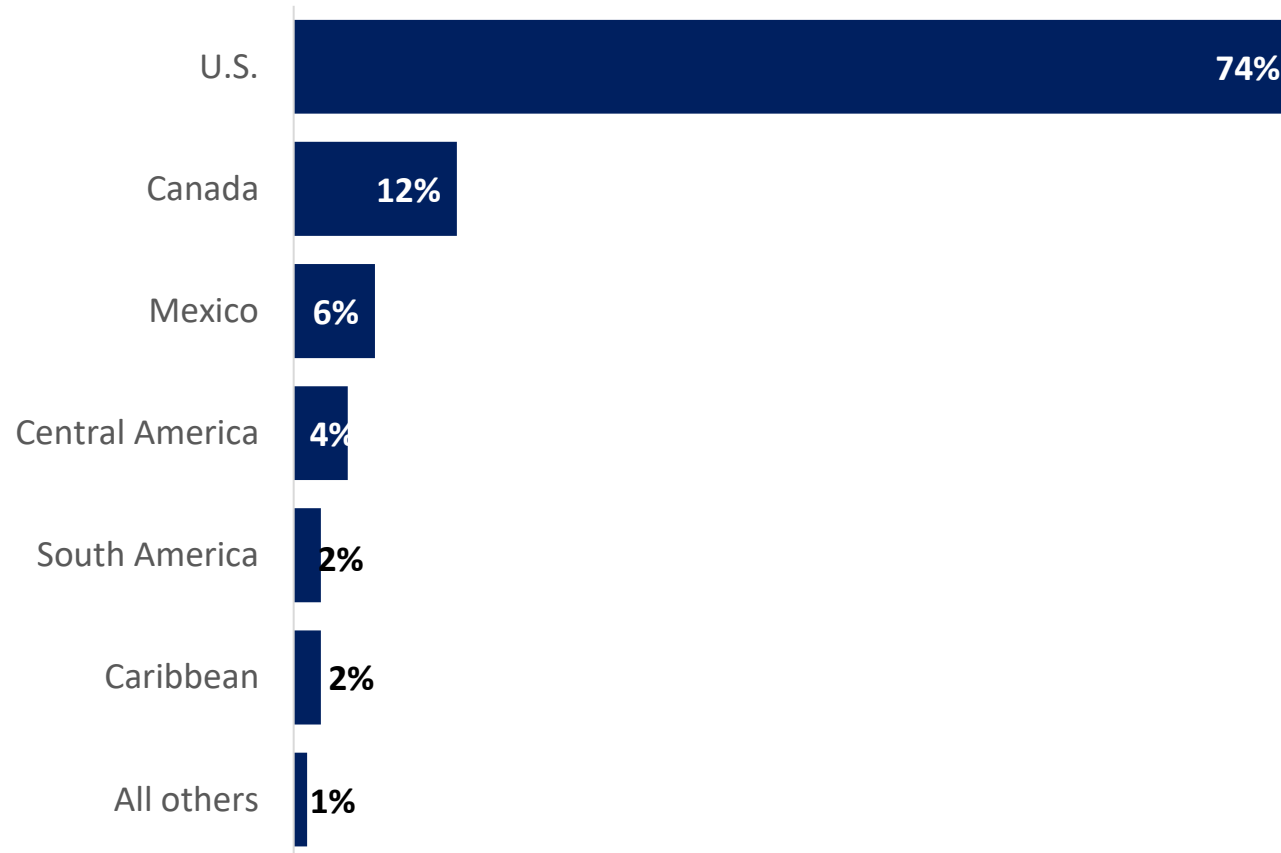
What type of structures do you manufacture or sell?



Among the suppliers who responded to the survey and identified themselves as providing structures, tents are the most commonly manufactured structure, followed by cabins.

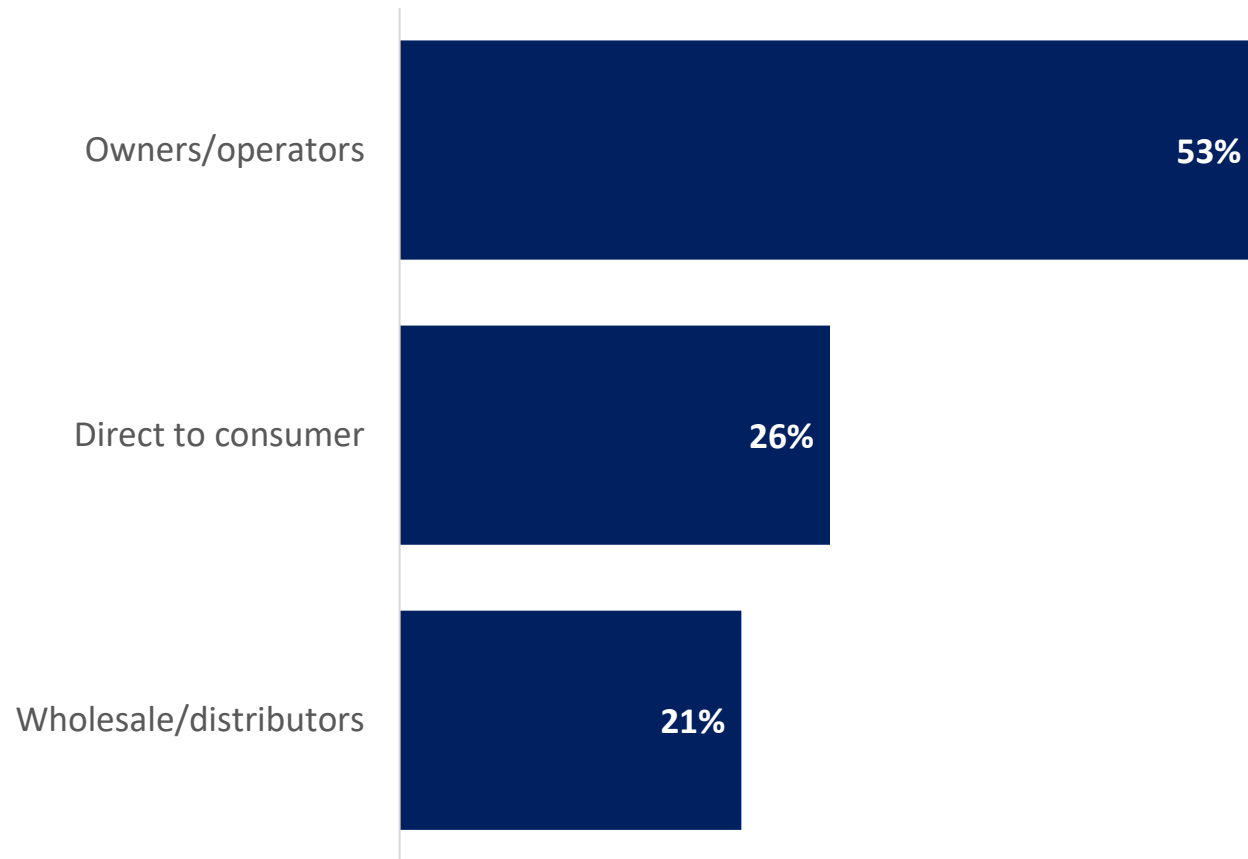
This result is in slight contrast to the results of the current operator results who are more likely to say that they have cabins and small houses on their properties.

What percentage of your business in the Americas is accounted for by each of the following regions:



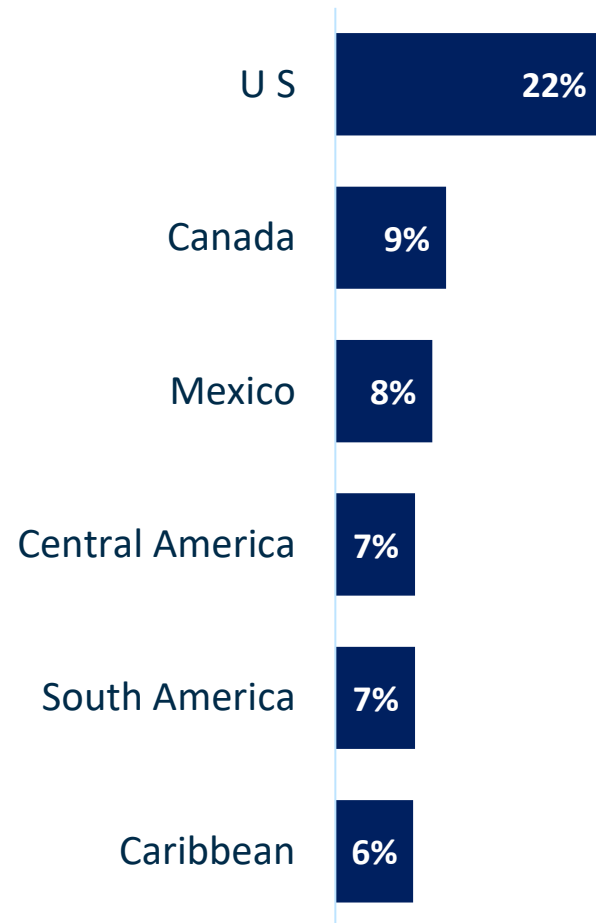
And among the supplier respondents, three-fourths of their business is currently accounted for by the U.S. market.

What percentage of your business in the Americas – both shipments and revenue – can be attributed to the following:



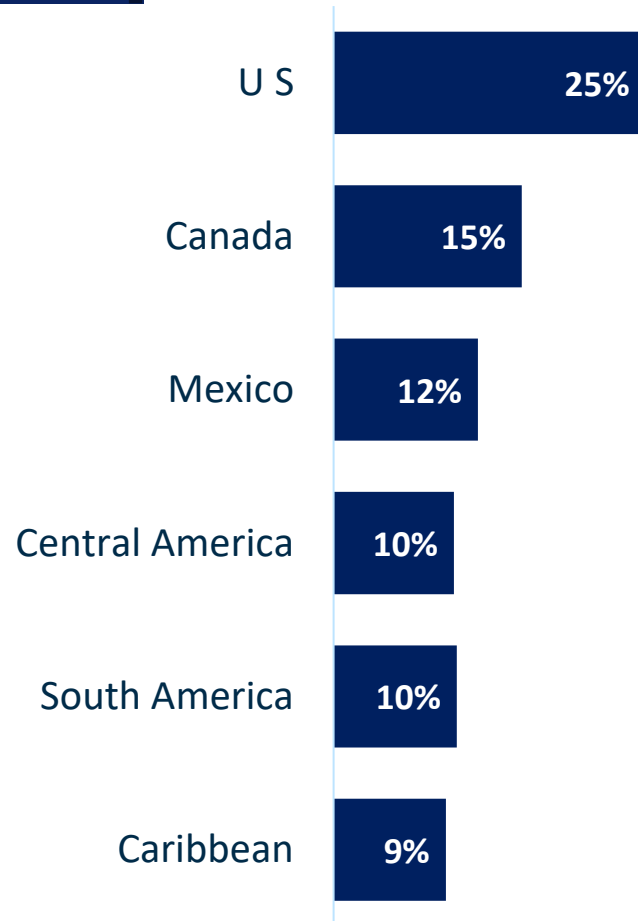
When asked to attribute the percentage of their business in the U.S. market, a majority is direct to owners/operators, one-fourth direct to consumer, and the remainder (21%) wholesale.

What has been your annual revenue growth in the Americas over the past 3 years for:



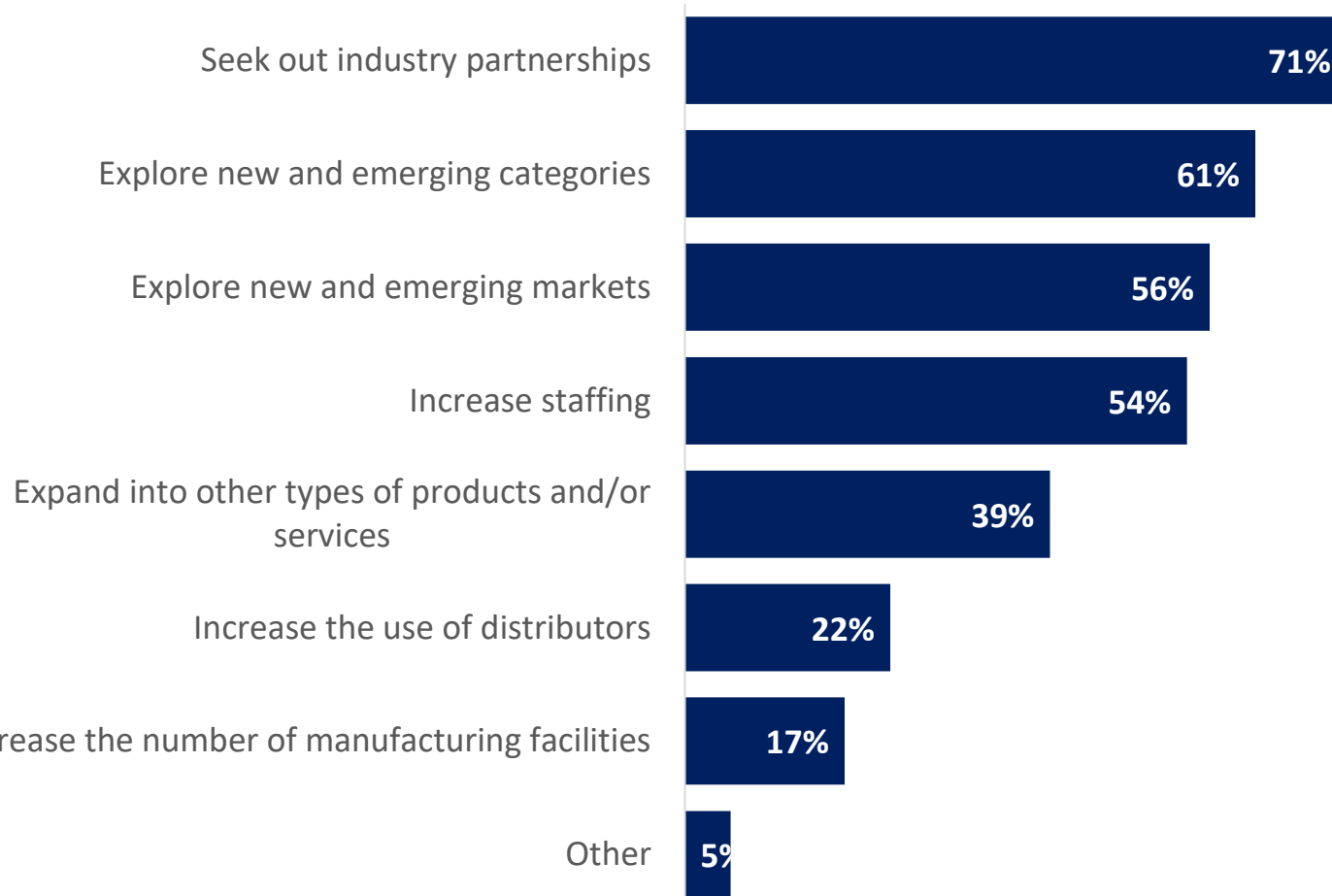
Revenue growth in the U.S. market has been aggressive over the past three years, including close to half of suppliers stating that their growth has increased by more than 20% over that time frame.

What is your projected growth in the Americas for the next 3 years in each of the following regions?



Respondents are projecting strong growth in the U.S. market in the upcoming 3 years.

What type of growth and expansion are you considering over the next 3 years?



Partnerships are the area of growth suppliers are most interested in pursuing, as well as an exploration of new and emerging categories and/or markets. More than half plan to increase staffing.



Contact Information

207.409.0929

sbahr@cairnconsultinggroup.com

www.cairnconsultinggroup.com

Our organization has stayed on the forefront of the market research industry by offering our clients a full suite of research services, as well as the analytics and insights to move their organizations forward.

In particular, our work on the North American Camping Report has been nationally recognized, being cited in such notable media outlets as The New York Times, Chicago Tribune, LA Times, NBC News, Fox Business News, USA Today and CBS News. This work has been recognized by PR Week in the “Best in Analytics” category for both 2017 and 2018 and a Sabre Award for “Best Post Campaign Analysis” in 2018 and 2019.

