



GLAMPING
SHOW AMERICAS

Glamping Show Americas

2023 Glamping Report

10.3.2023



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.



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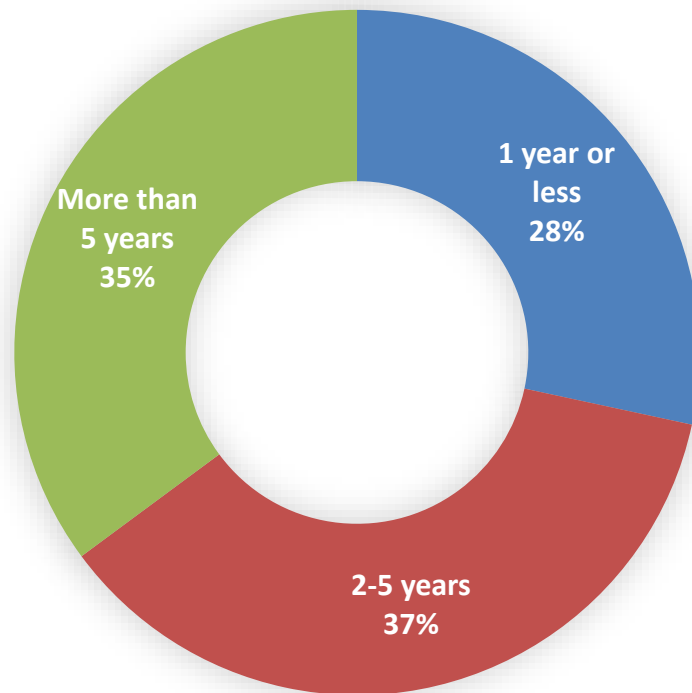


Glamping is now solidly placed in the habits and mindset of leisure travelers, allowing guests who want more comforts to still experience the outdoors.

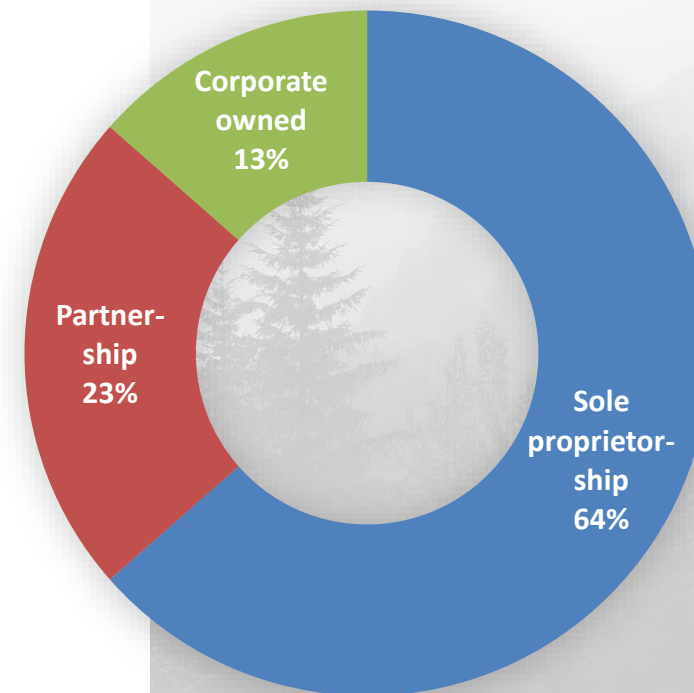
Current Operators

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?

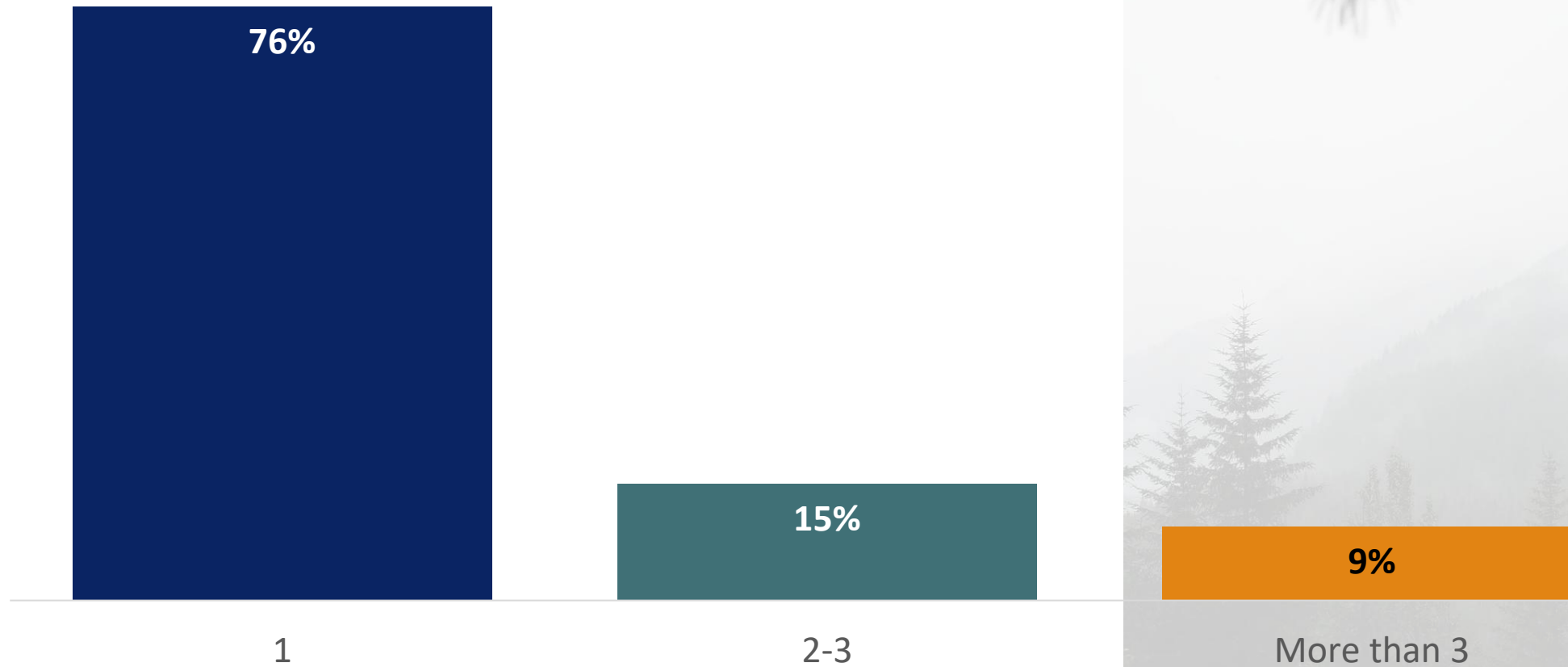
Years of Operation



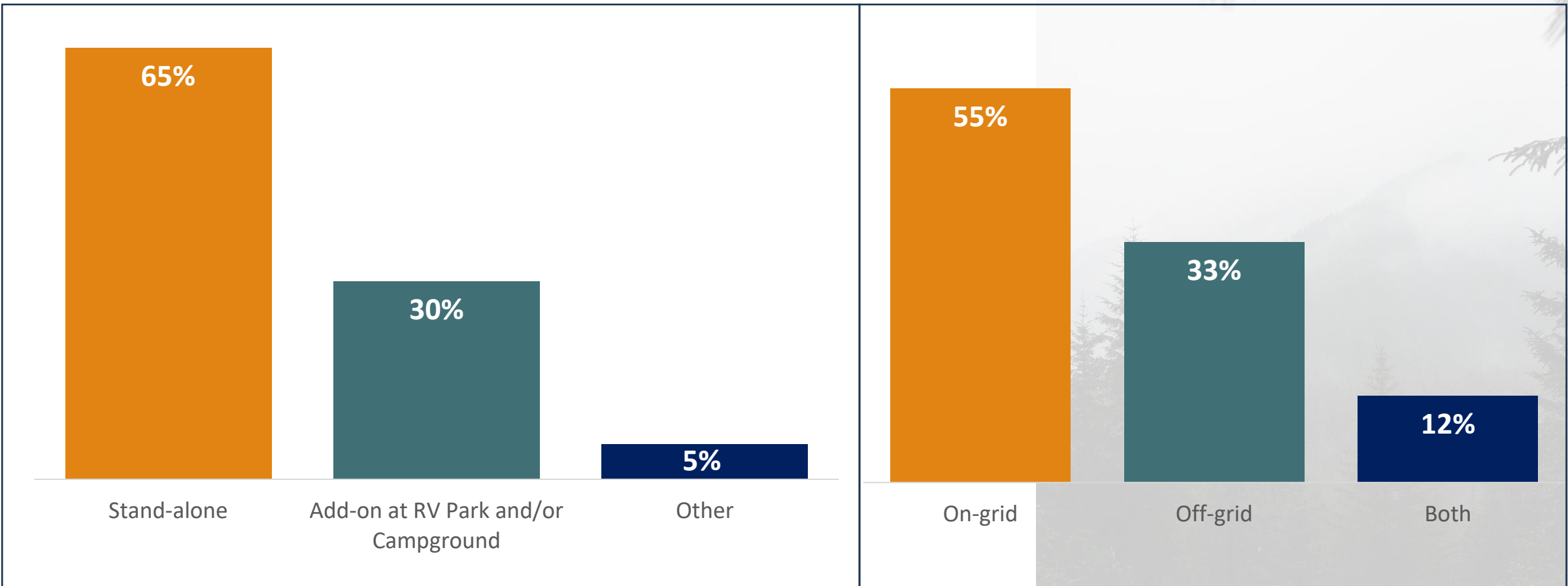
Ownership Structure



How many glamping locations do you have?



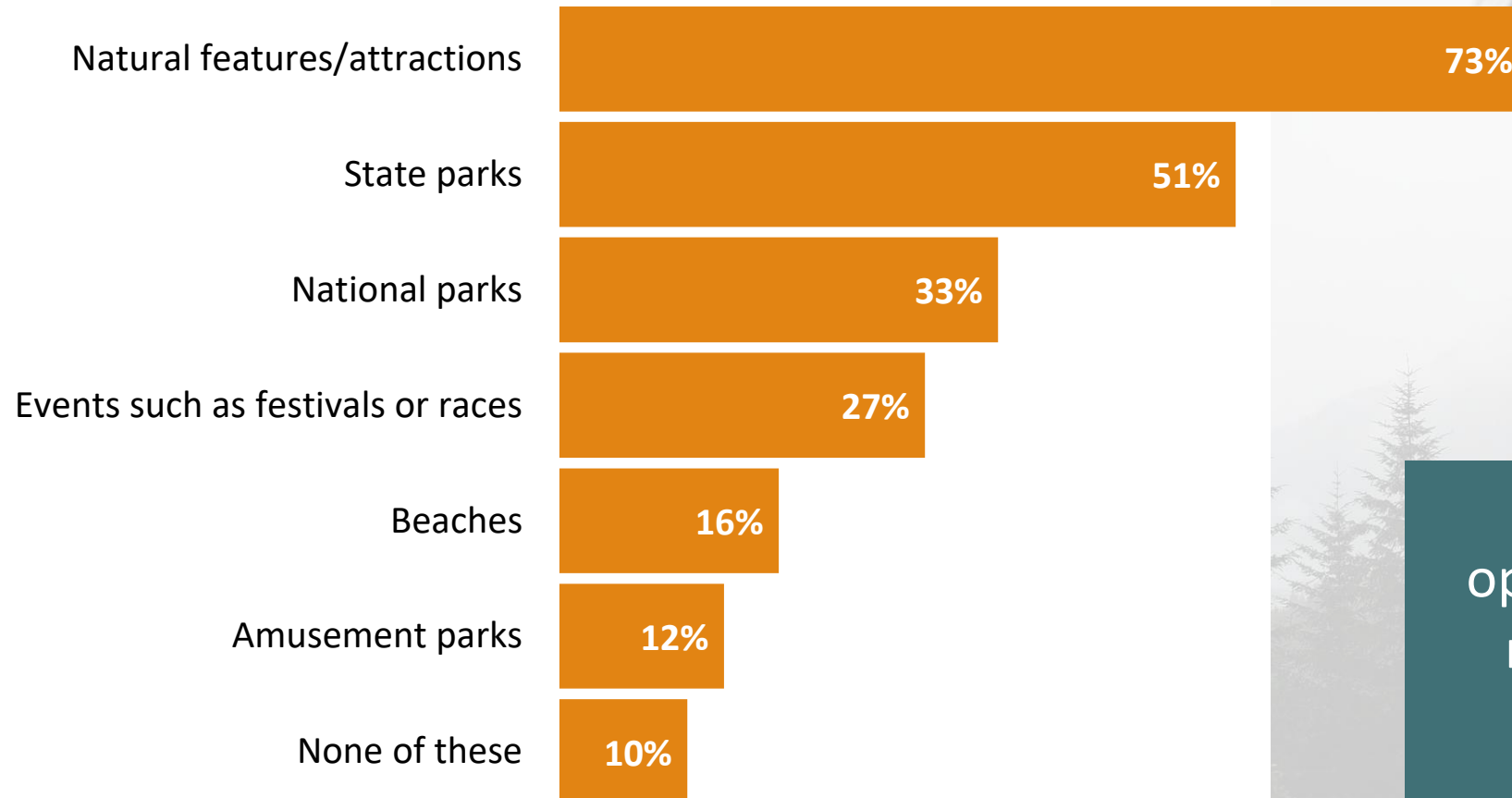
What type of property or properties do you currently own or operate?



In which of the following regions do you currently operate glamping locations? // Which region of the US do you currently operate glamping locations?

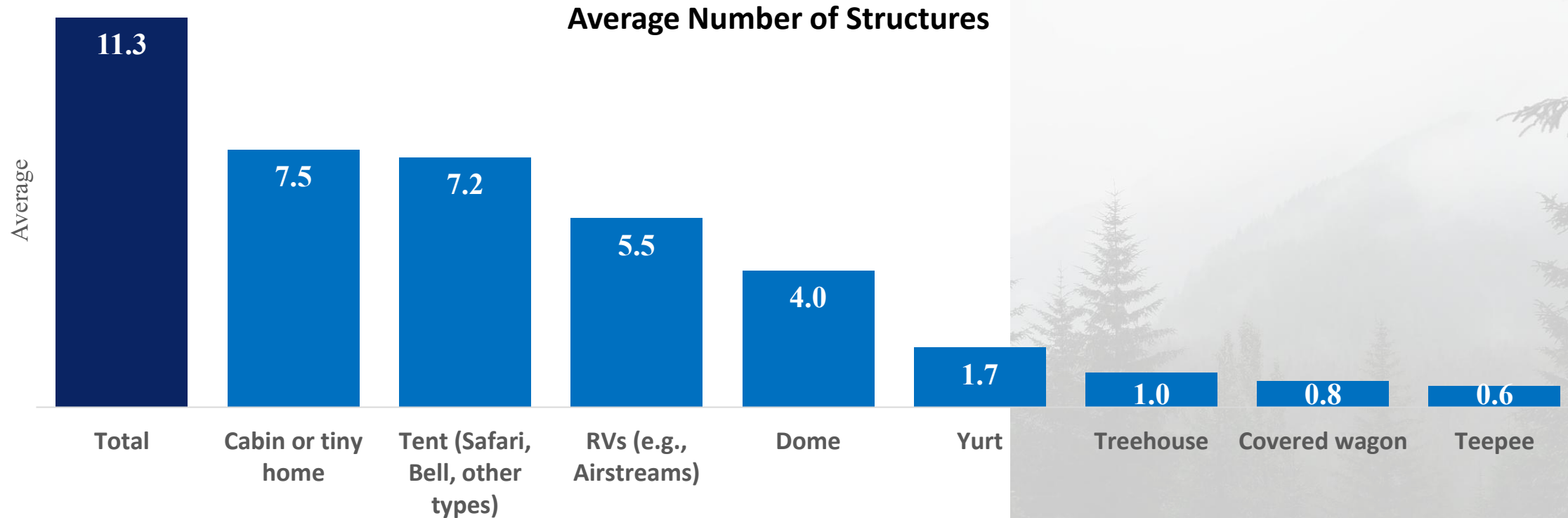
Countries	%
US	79%
Northeast Region	12%
Midwest Region	19%
South Region	31%
West Region	38%
Canada	8%
Caribbean	1%
Mexico	6%
Central America	4%
South America	3%

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

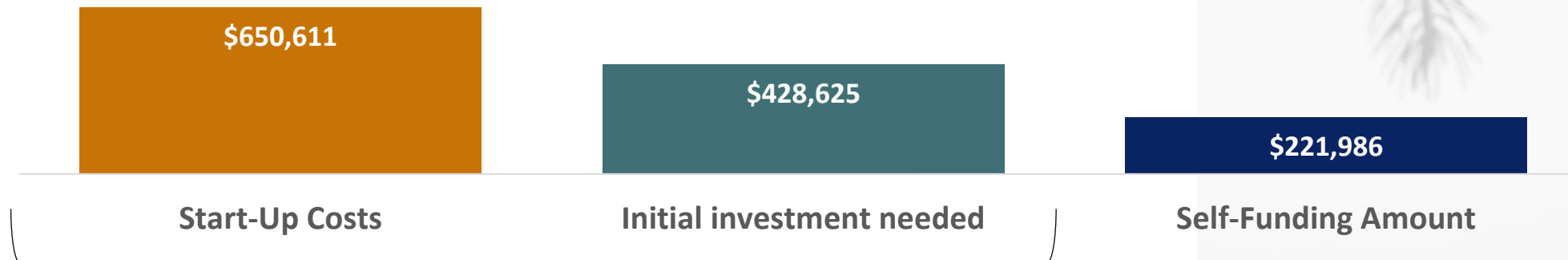


Three-fourths of operators are located near some type of natural feature or attraction.

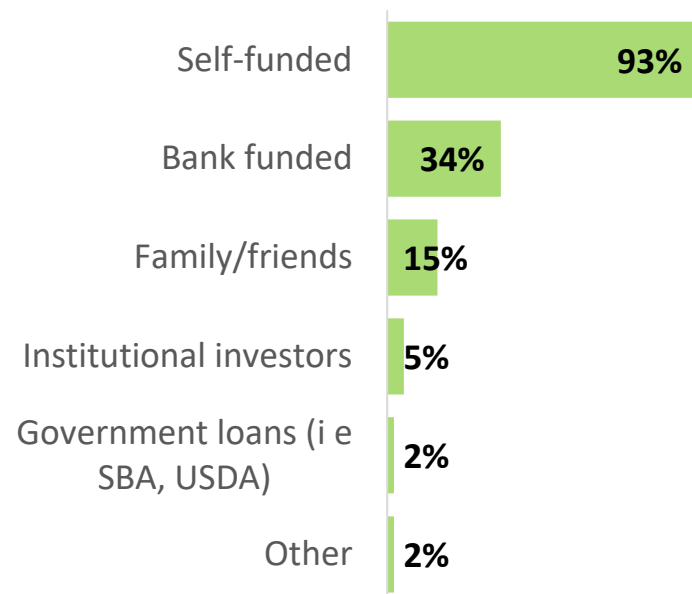
How many, if any, of each of the following structures are part of your property or properties?



Start-up Costs

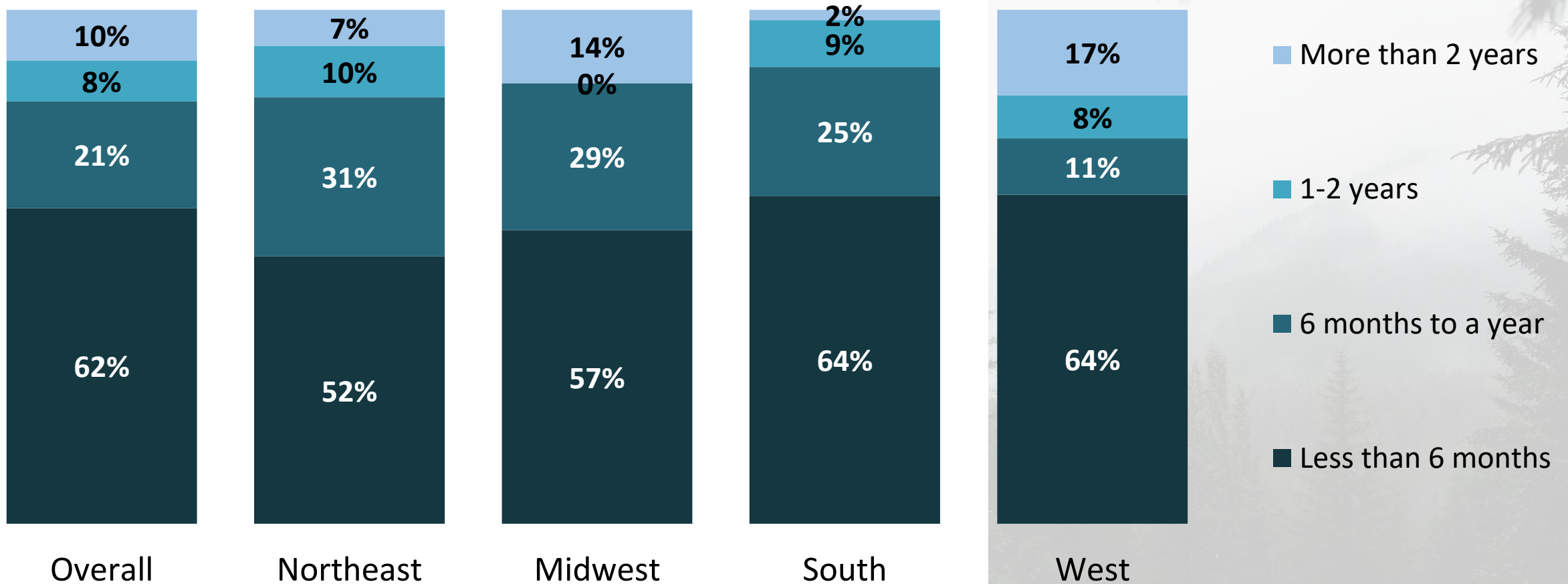


Type of Funding Used

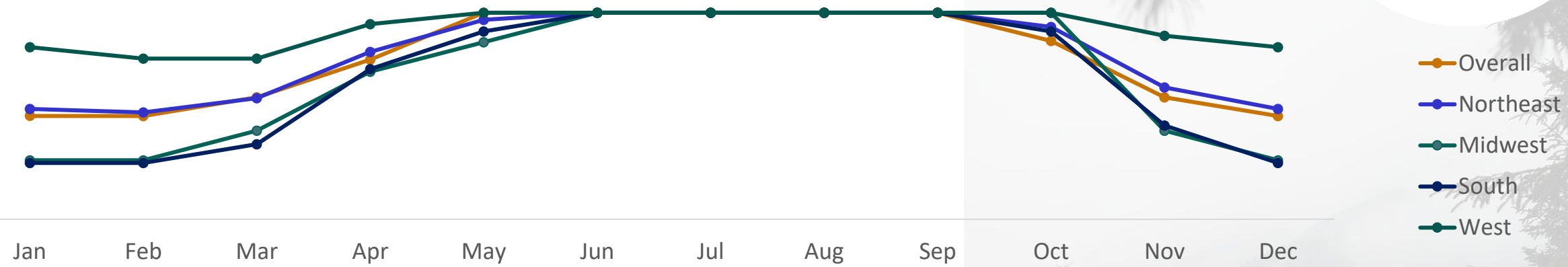


**Investment
Needed for Future
Growth:
\$1.1 million**

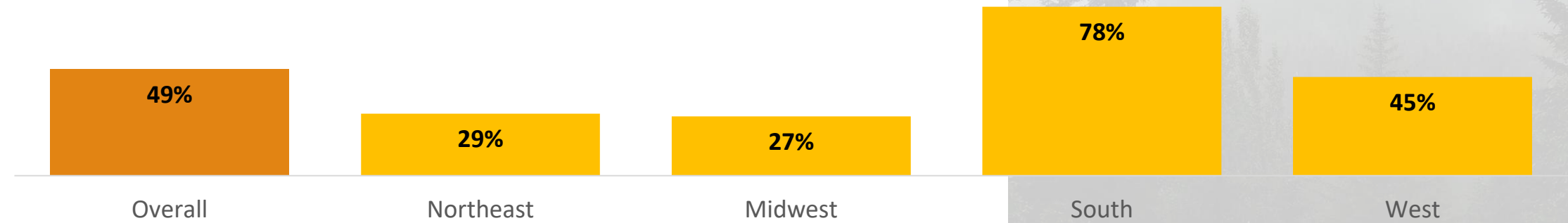
Looking back at when you first started, how did the permitting process take from the time you initiated it to completion?



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

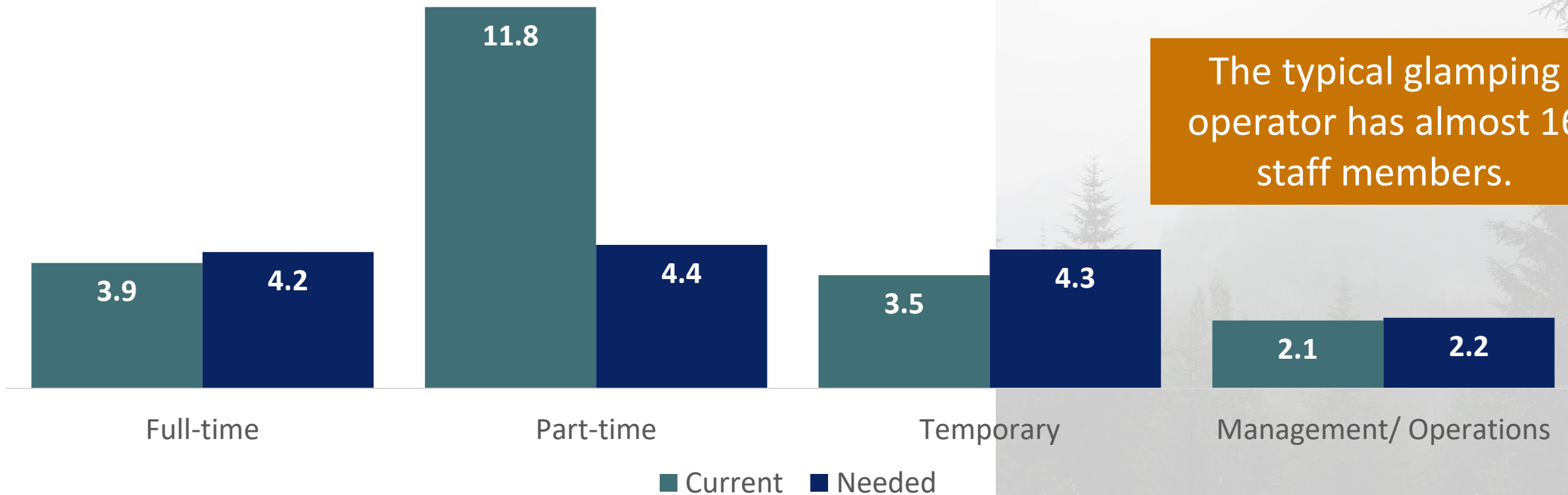


Open All Year



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

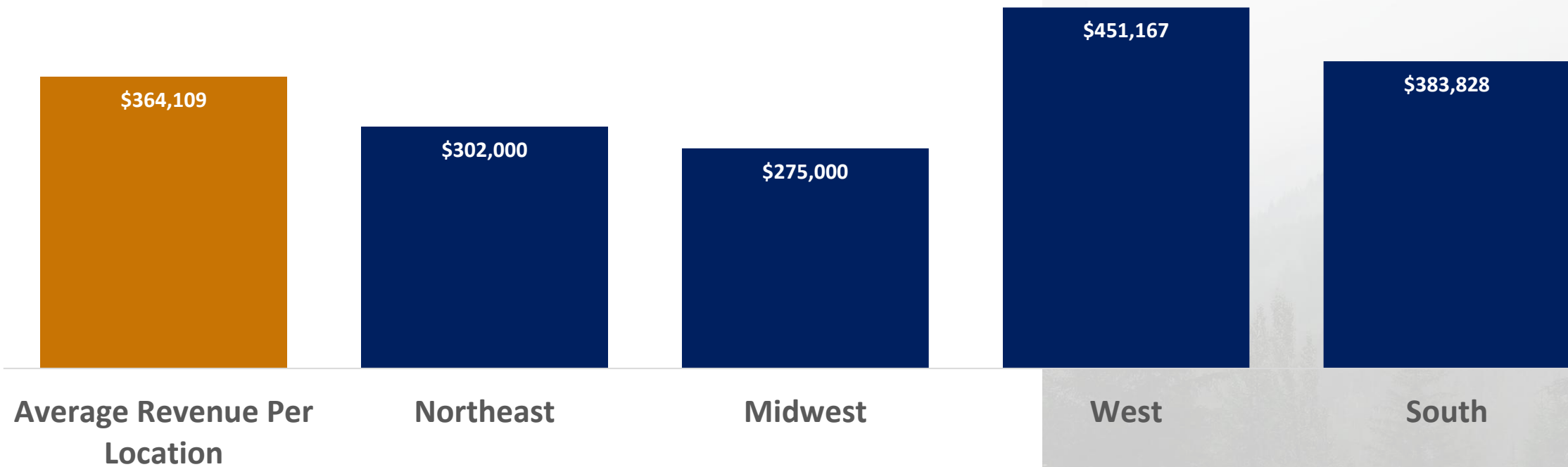
Average Number of Staff



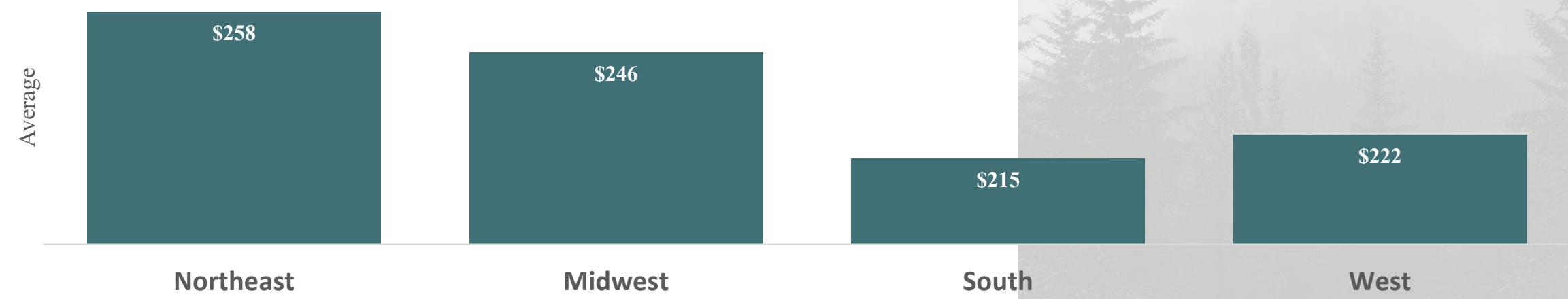
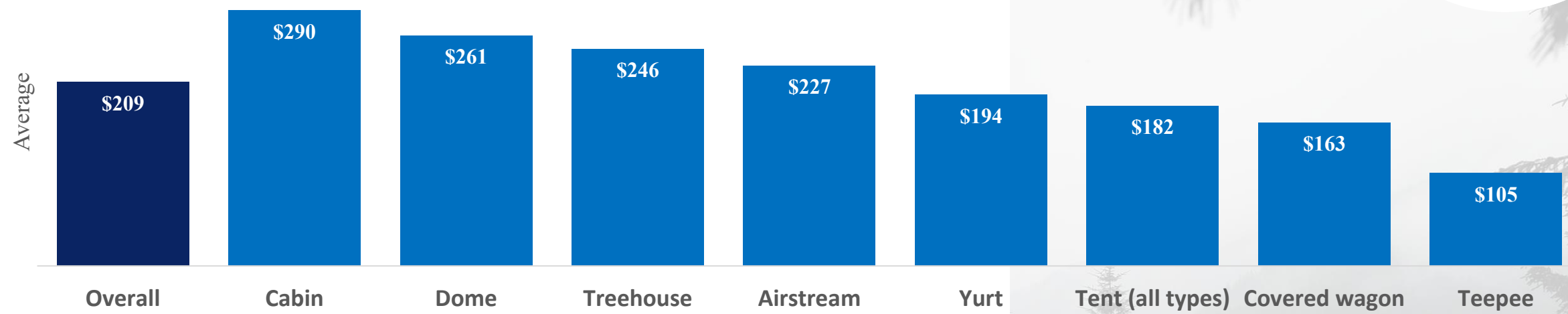
The typical glamping operator has almost 16 staff members.

Overall, what has been your estimated annual gross revenue?

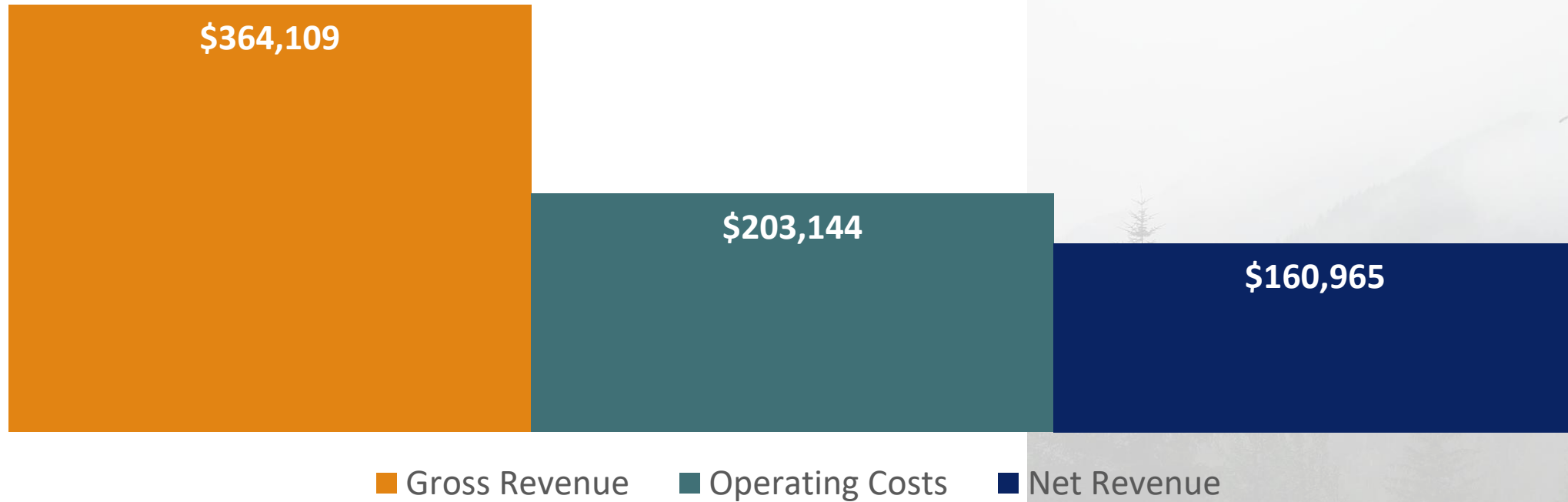
Gross Revenue



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

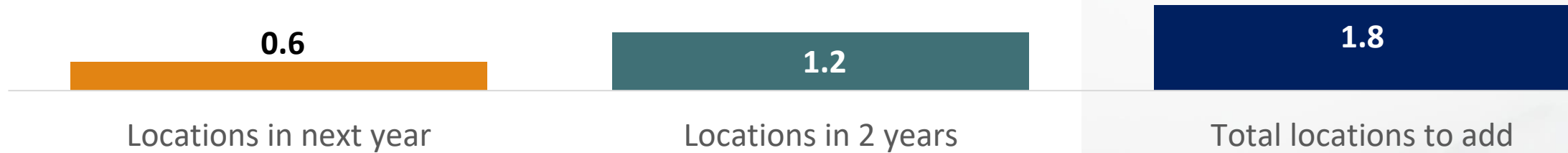


And what are your annual operational costs?

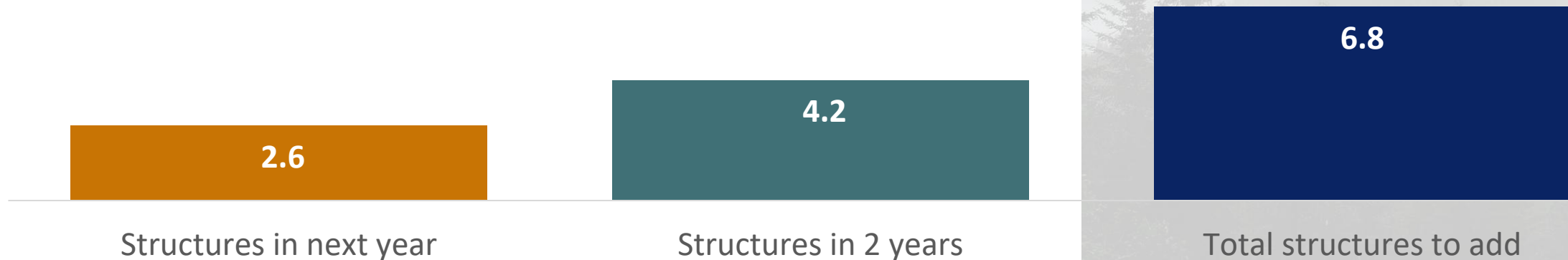


How many of the following do you plan to add in the next year? Next 2 years?

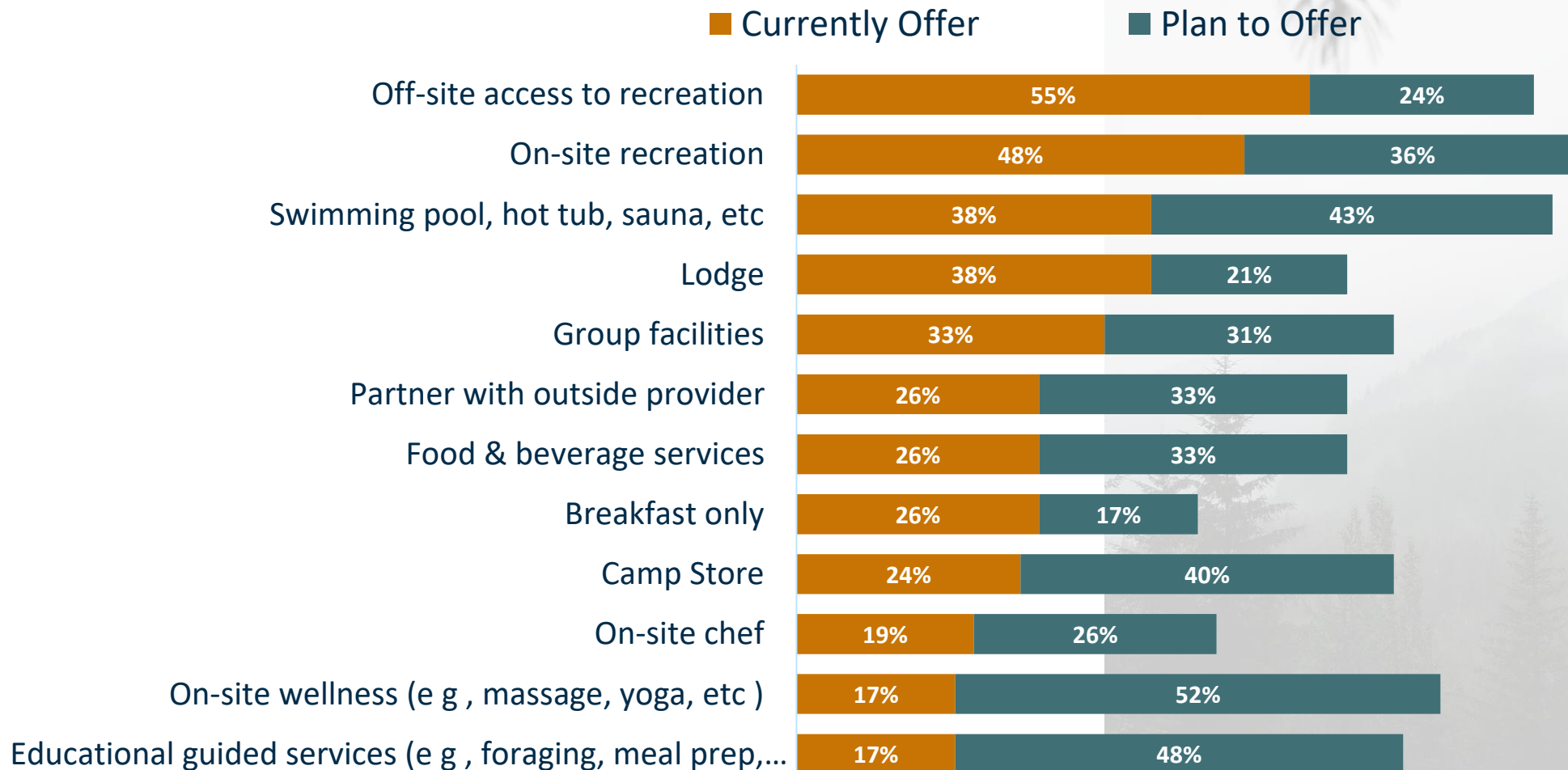
Growth in Locations



Additional Structures

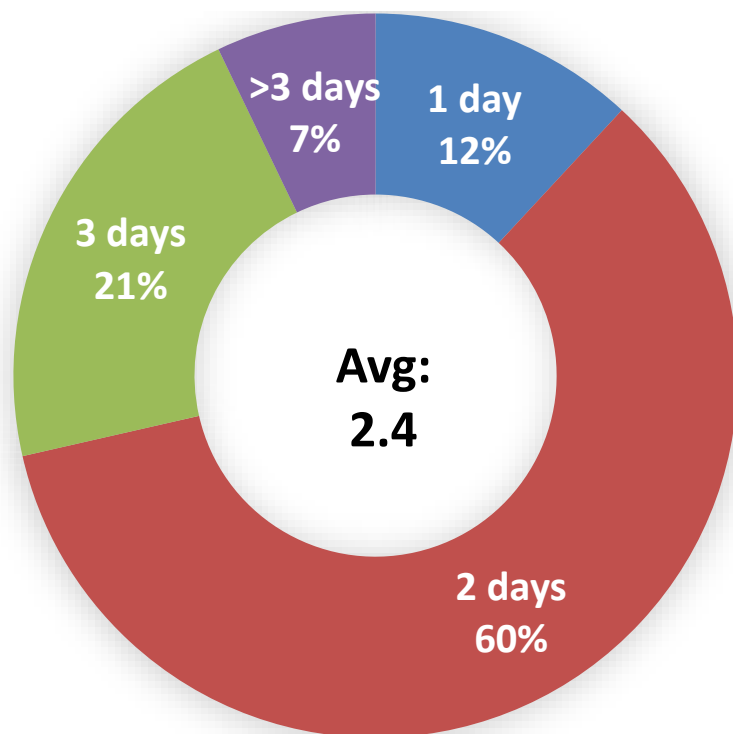


Which of the following services and amenities do you currently offer, plan to offer (or expand), and which are needed (but don't currently have plans for)?

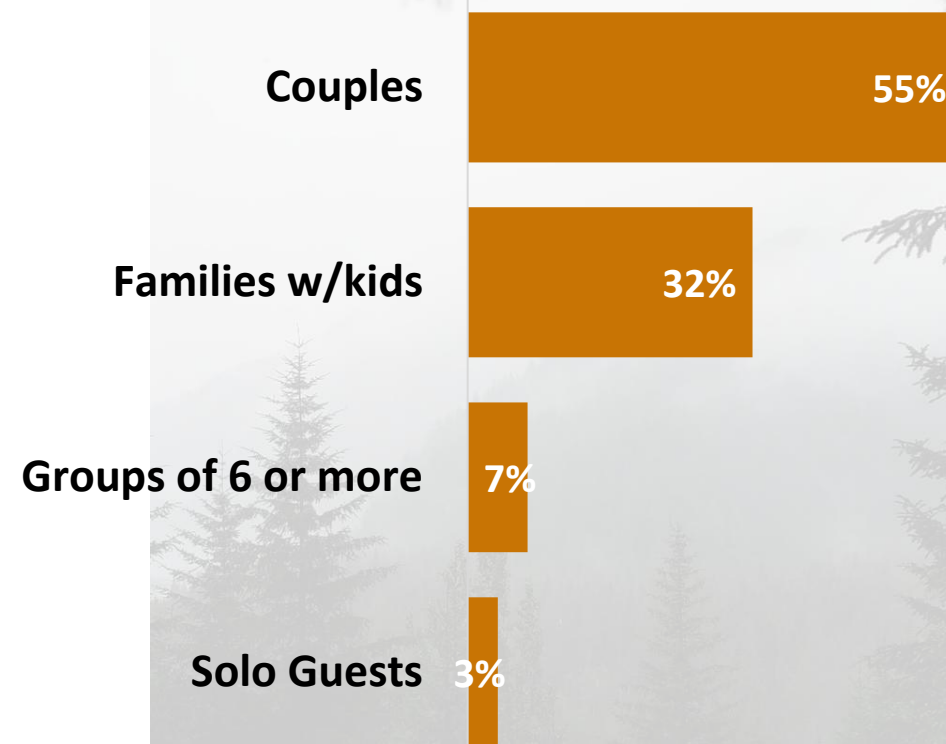


What is the average length of stay at your location(s)? // What is the current mix of guests you attract at your location(s)?

Length of Stay

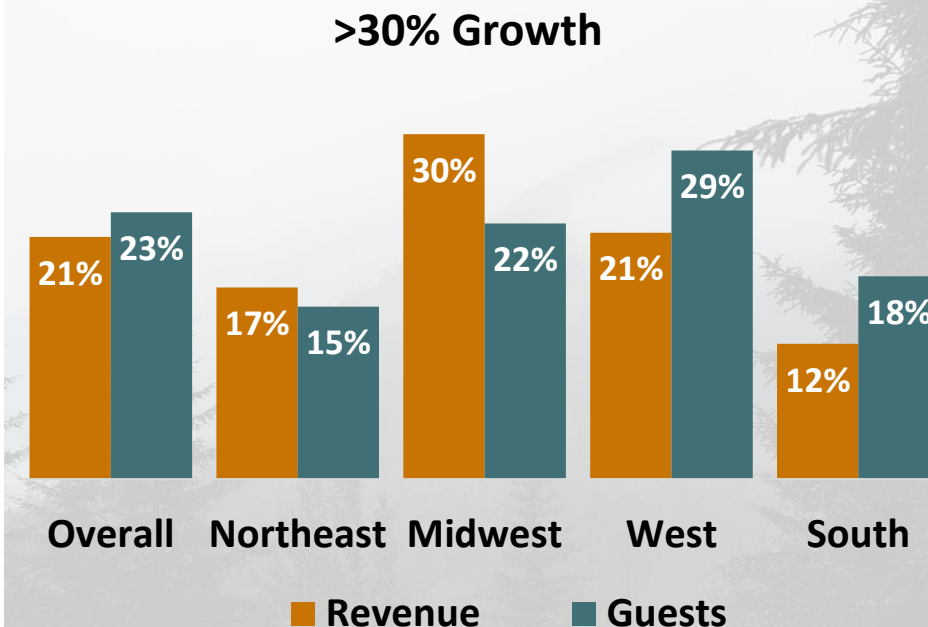
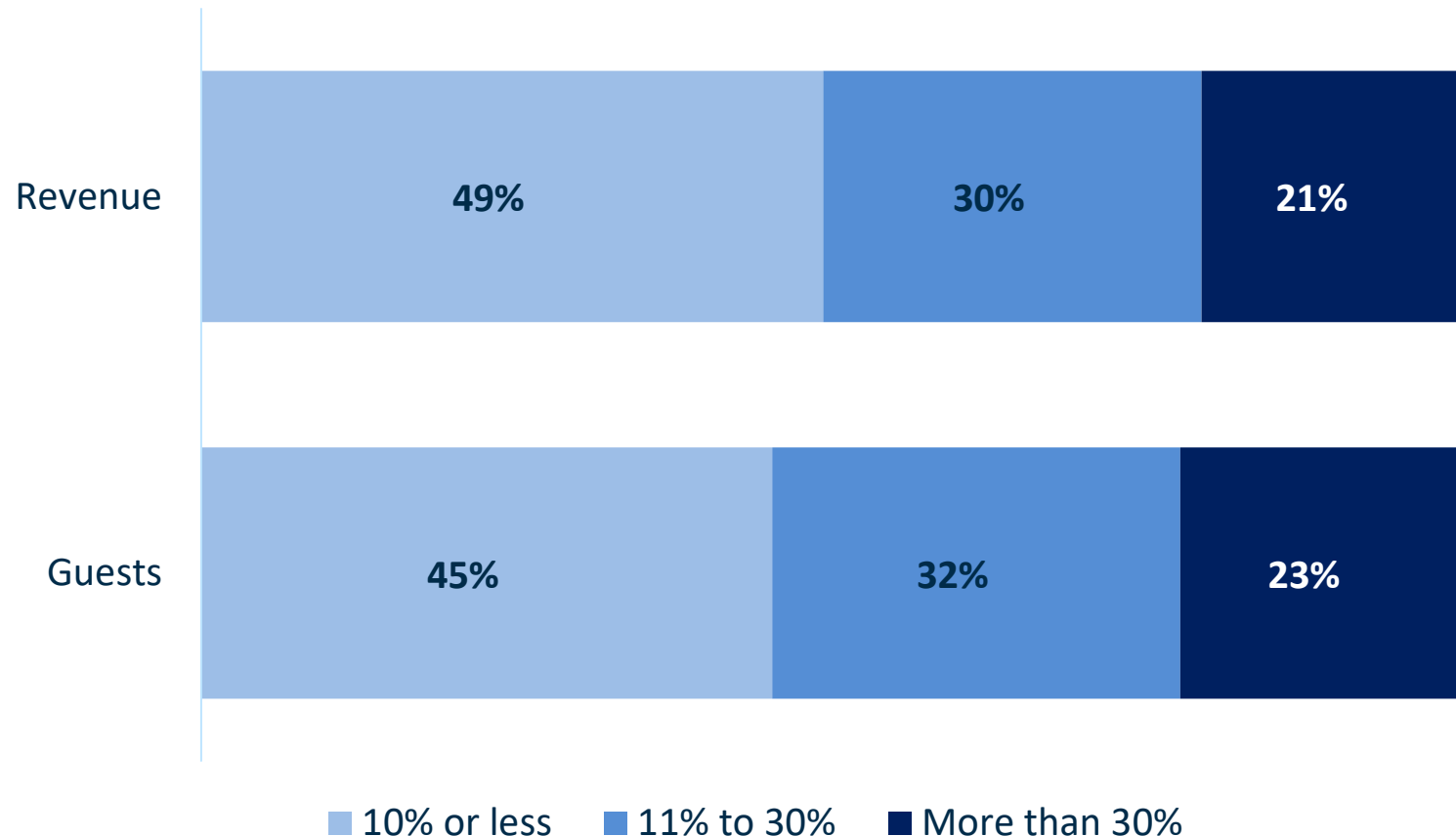


Guest Group Types

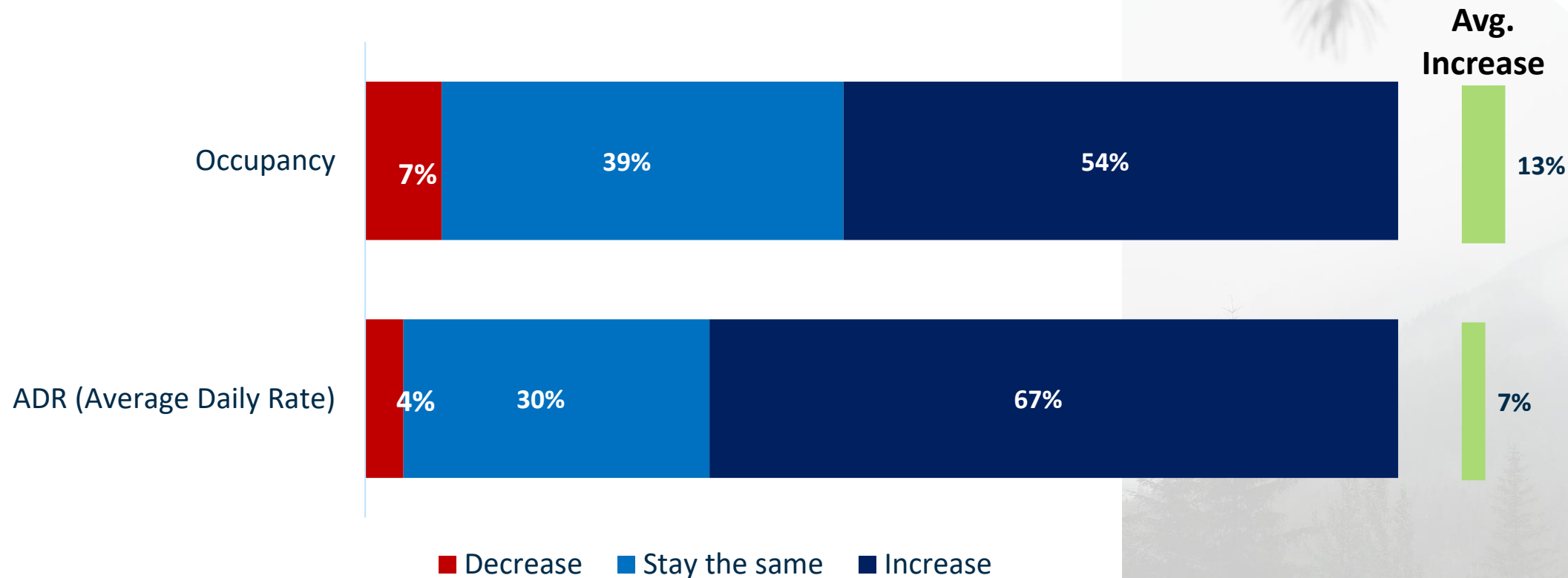


62% of the locations say that they allow pets on-site.

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

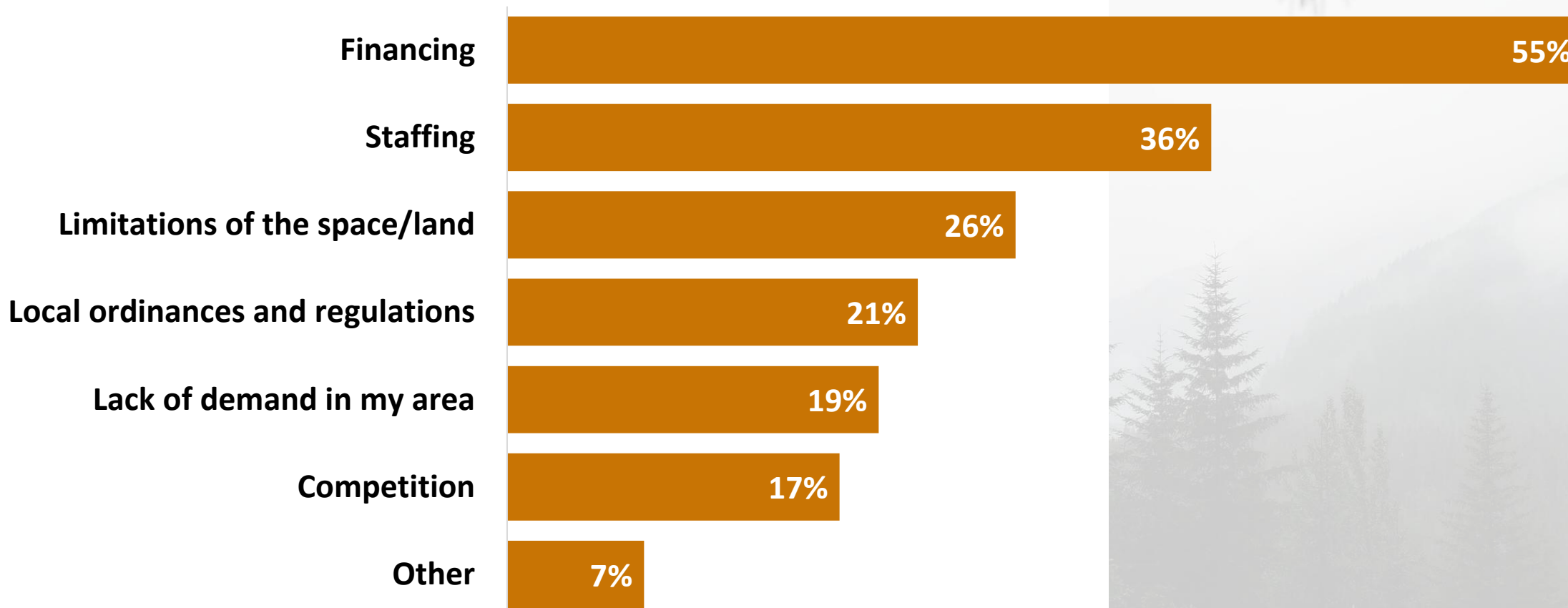


And for the upcoming year, compared to last year, do you anticipate that your occupancy and ADR (Average Daily Rate) will:



All things considered, what for you are the primary barriers to future growth?

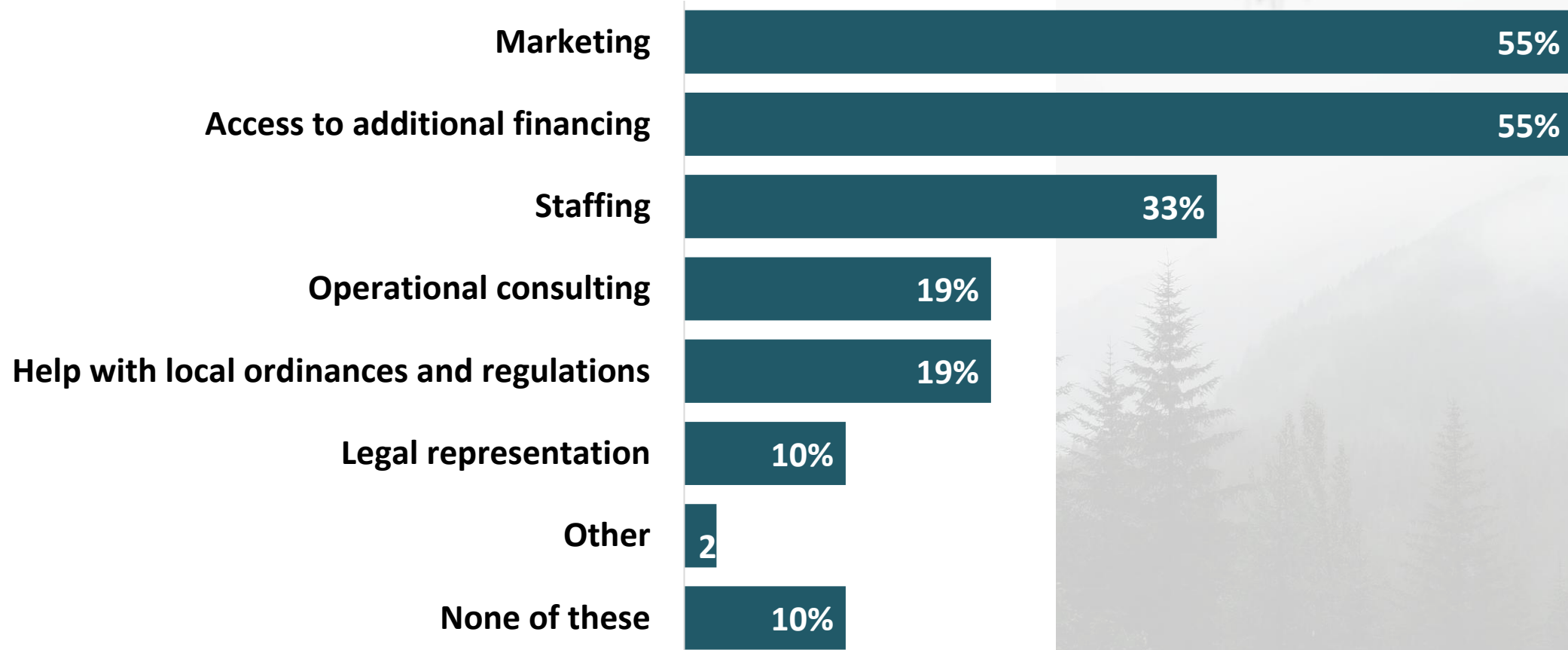
Barriers



What resources, if any, could you use to help you grow and expand?

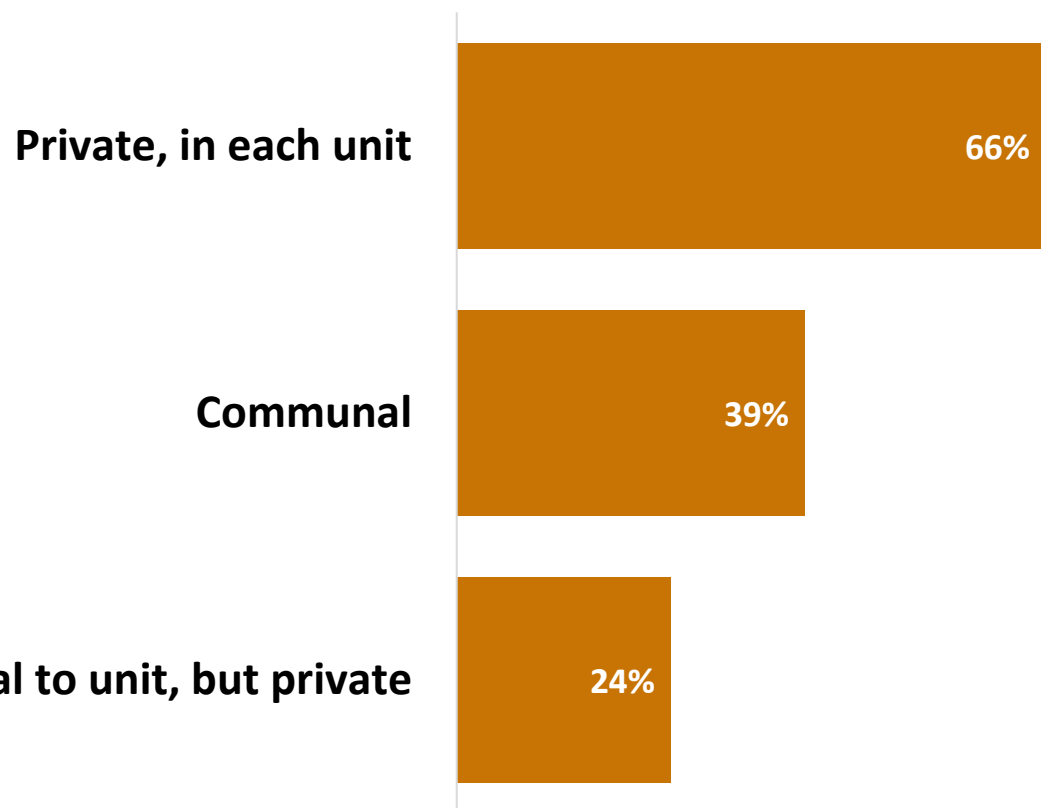


Resources Needed

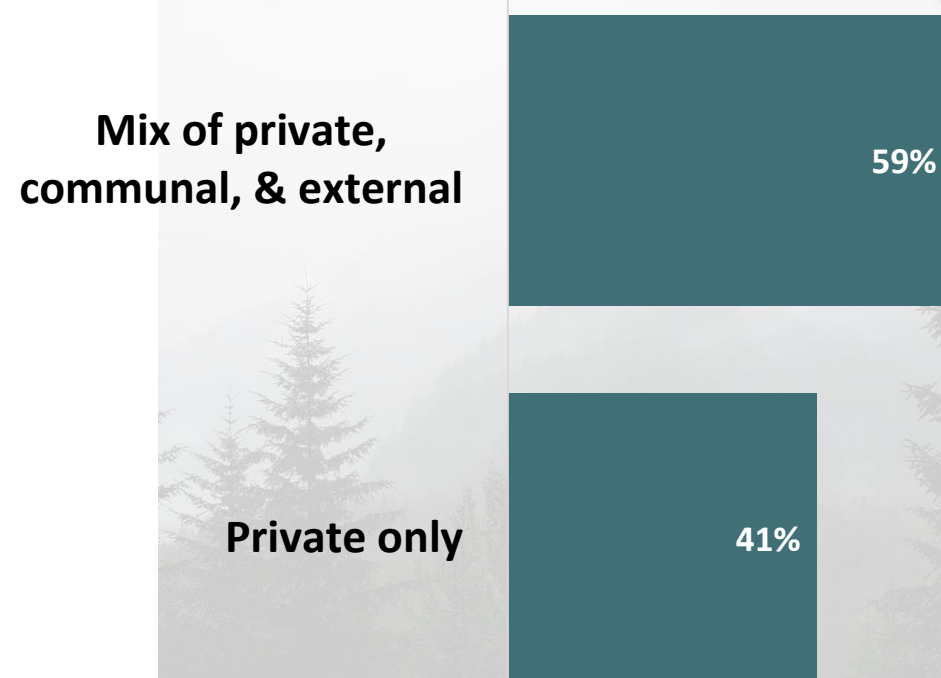


What is the current configuration of bathrooms at your property or properties? Are they . . . ?

Location of Bathroom



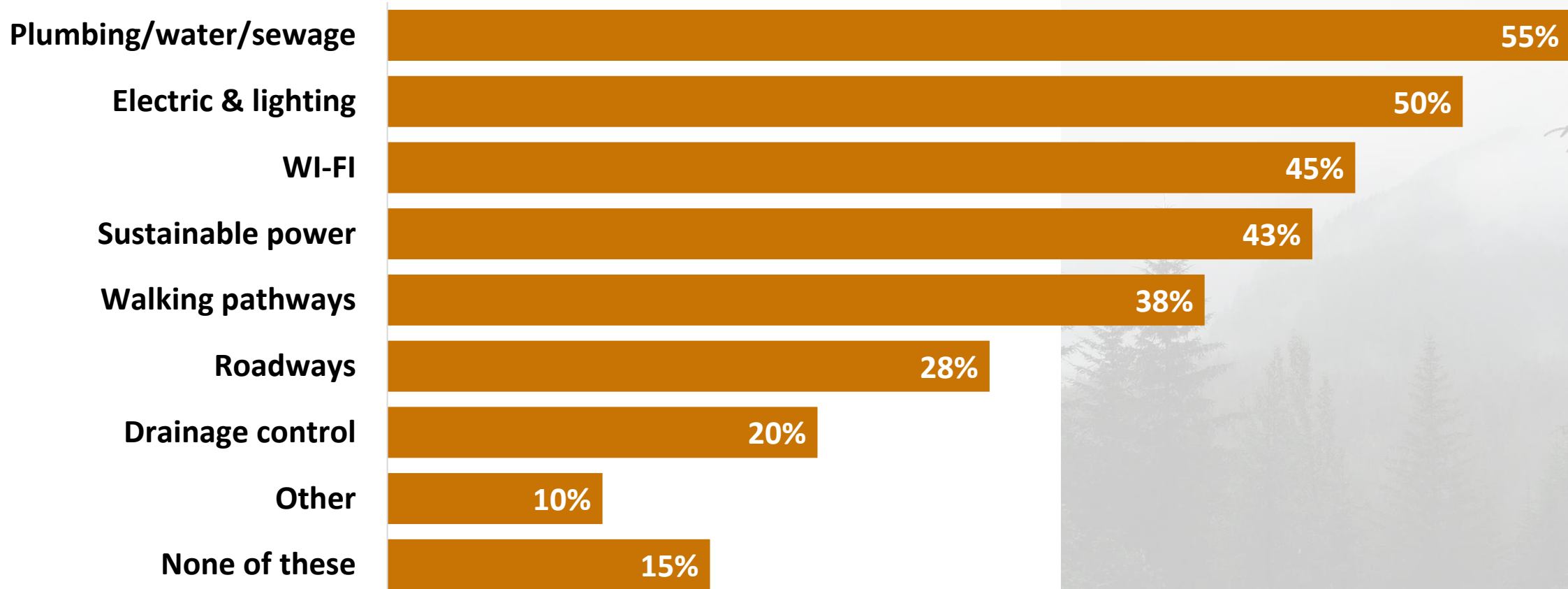
% of Providers Using a Mix vs. Private Only



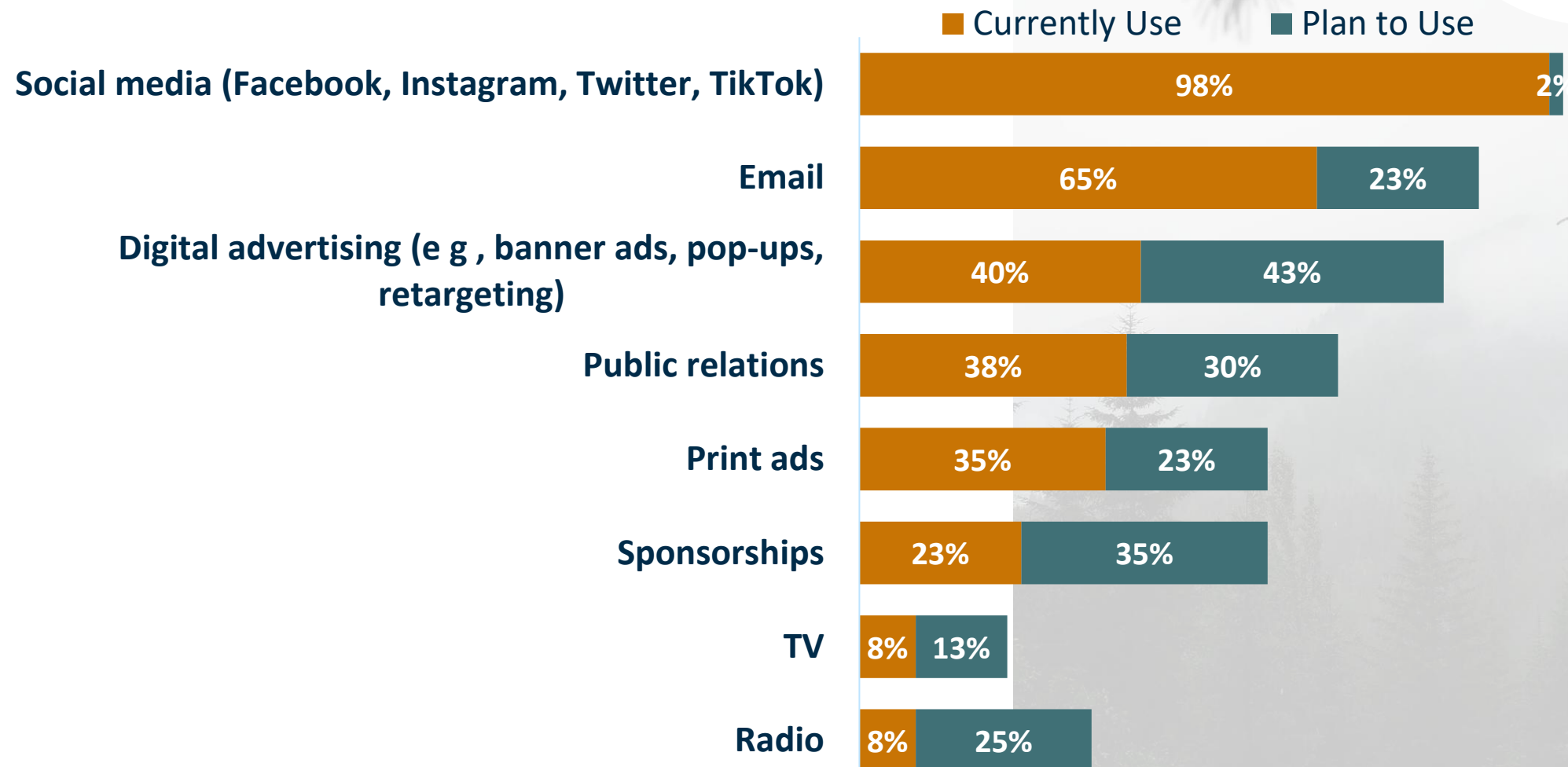
29% of the operators surveyed say they charge extra for private bathrooms, with the typical increase in cost of 13%.

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

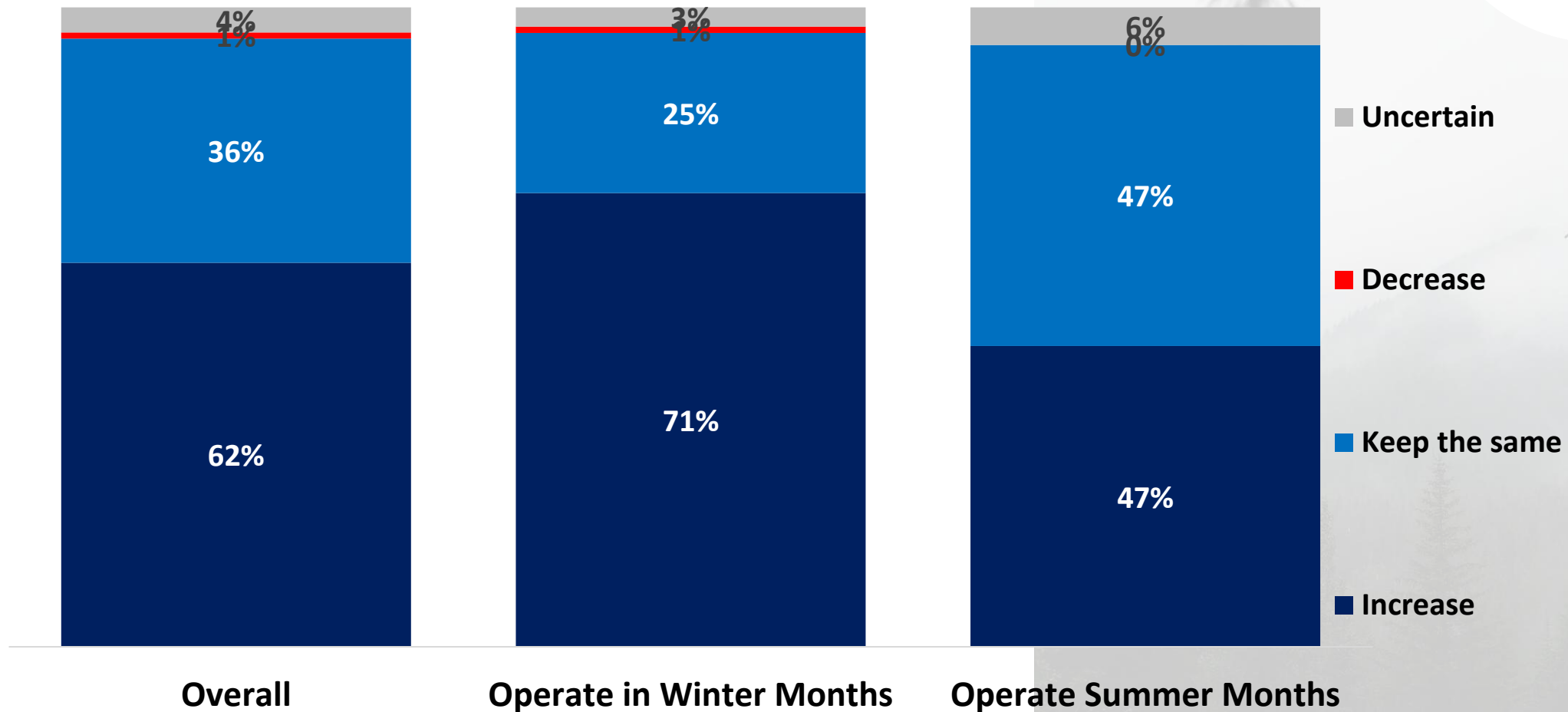
Infrastructure Needed



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

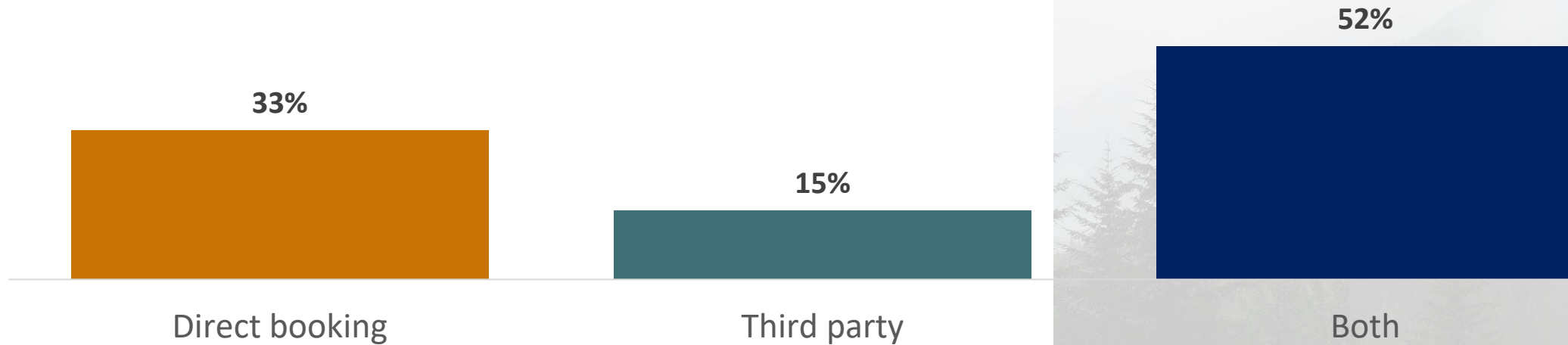


And looking ahead in the next year, do you plan to increase, keep constant, or increase your marketing budget?



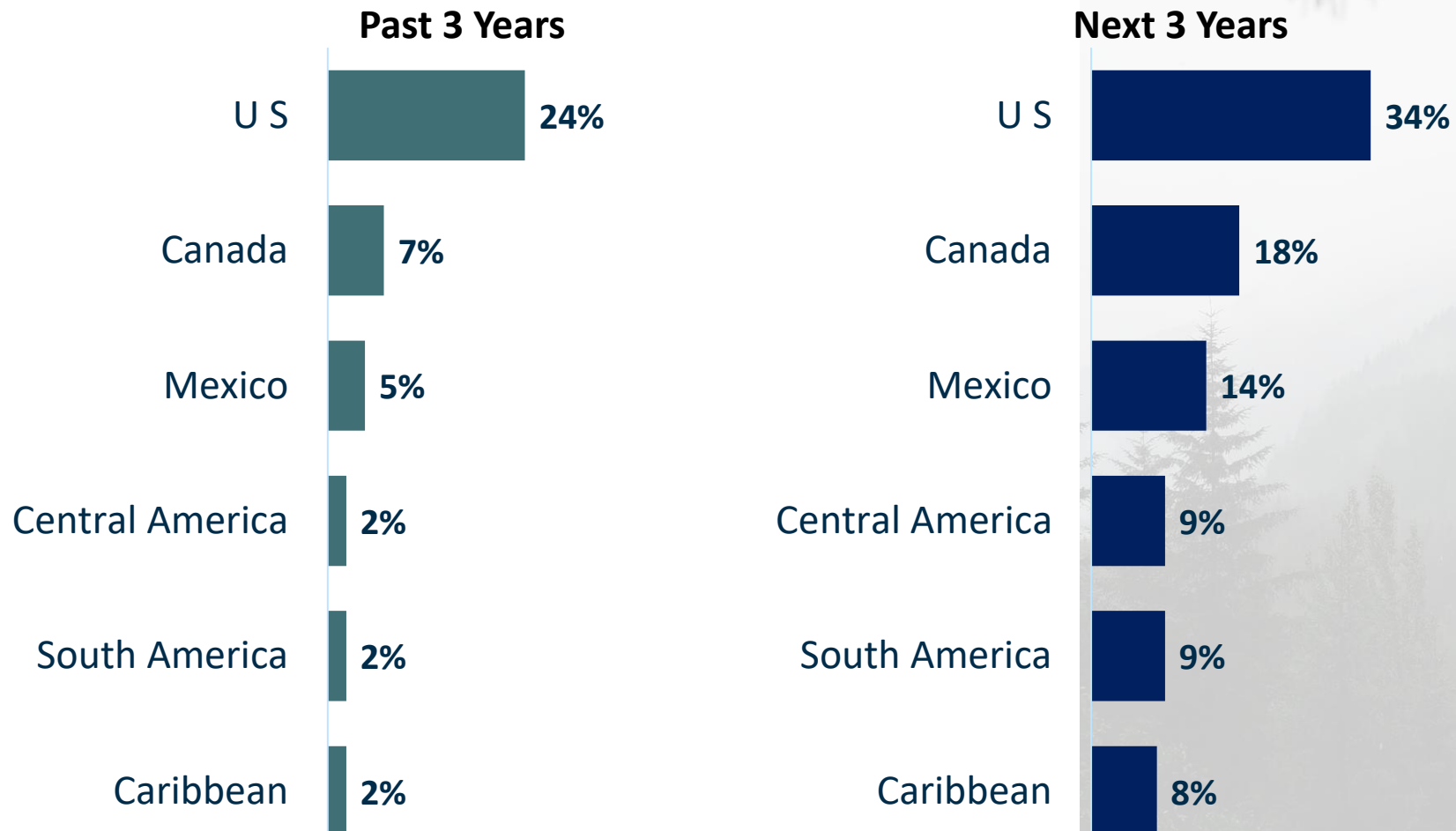
What current method do you use for booking and reservations?

Method(s) of Booking

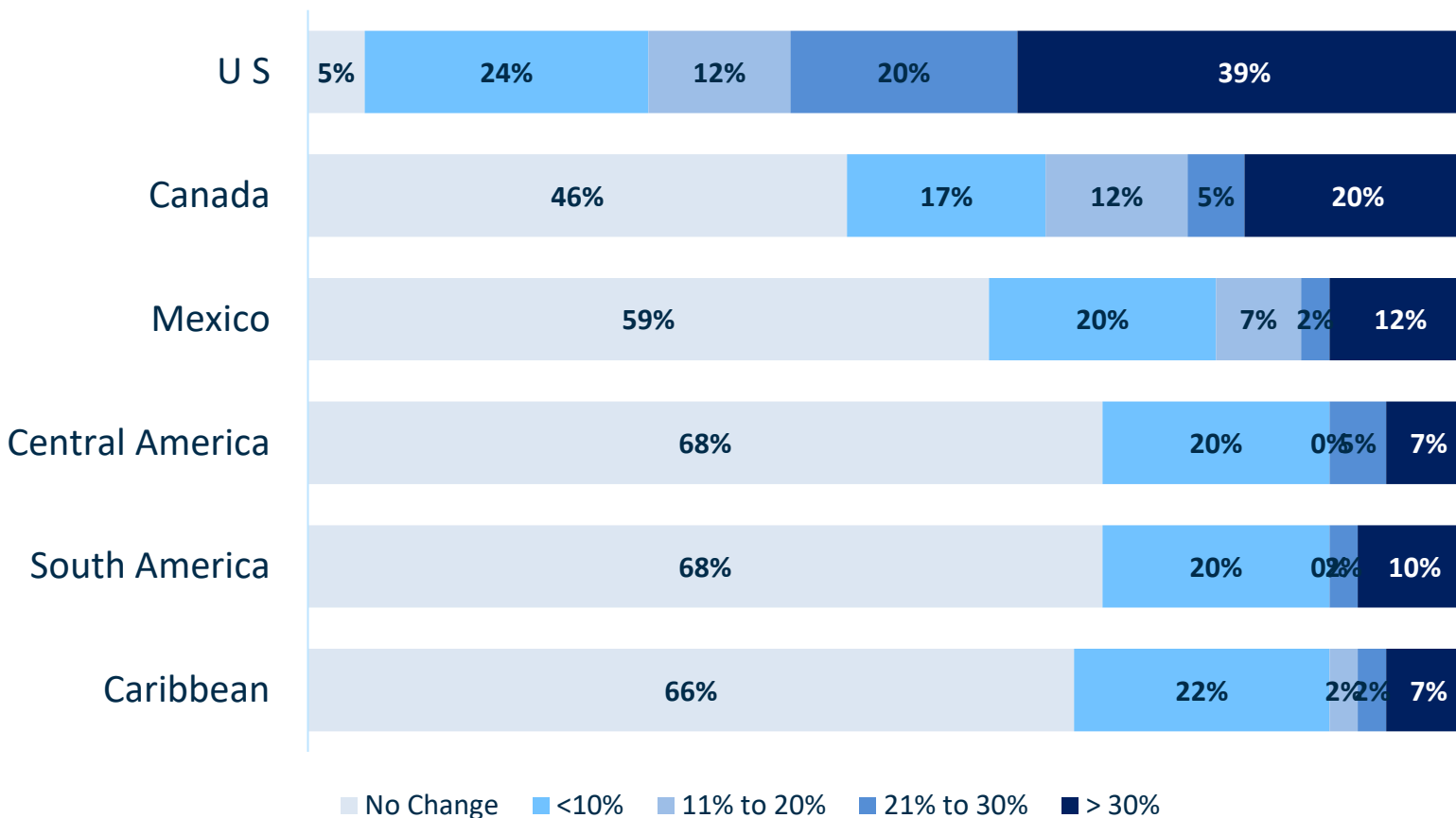


Suppliers: Growth Estimates

What has been your annual revenue growth in the Americas over the past 3 years? // What is your projected growth in the Americas for the next 3 years in each of the following regions?



Projected Growth by Region



And projected growth looks strong in the U.S. market in the coming years (though not as strong as the past 3), with Canada looking like a prospective growth market.

Summary

Key Takeaways

- As demand for outdoor experiences expands, and guests are seeking new and unique experiences, combined with optimism among current operators, growth should continue to be robust in the coming years.
- Guests who experience glamping have elevated expectations for the services and amenities, thus demand for an elevated experience will be necessary to compete.
- Access to financing, staffing, and infrastructure development are the primary barriers to growth.

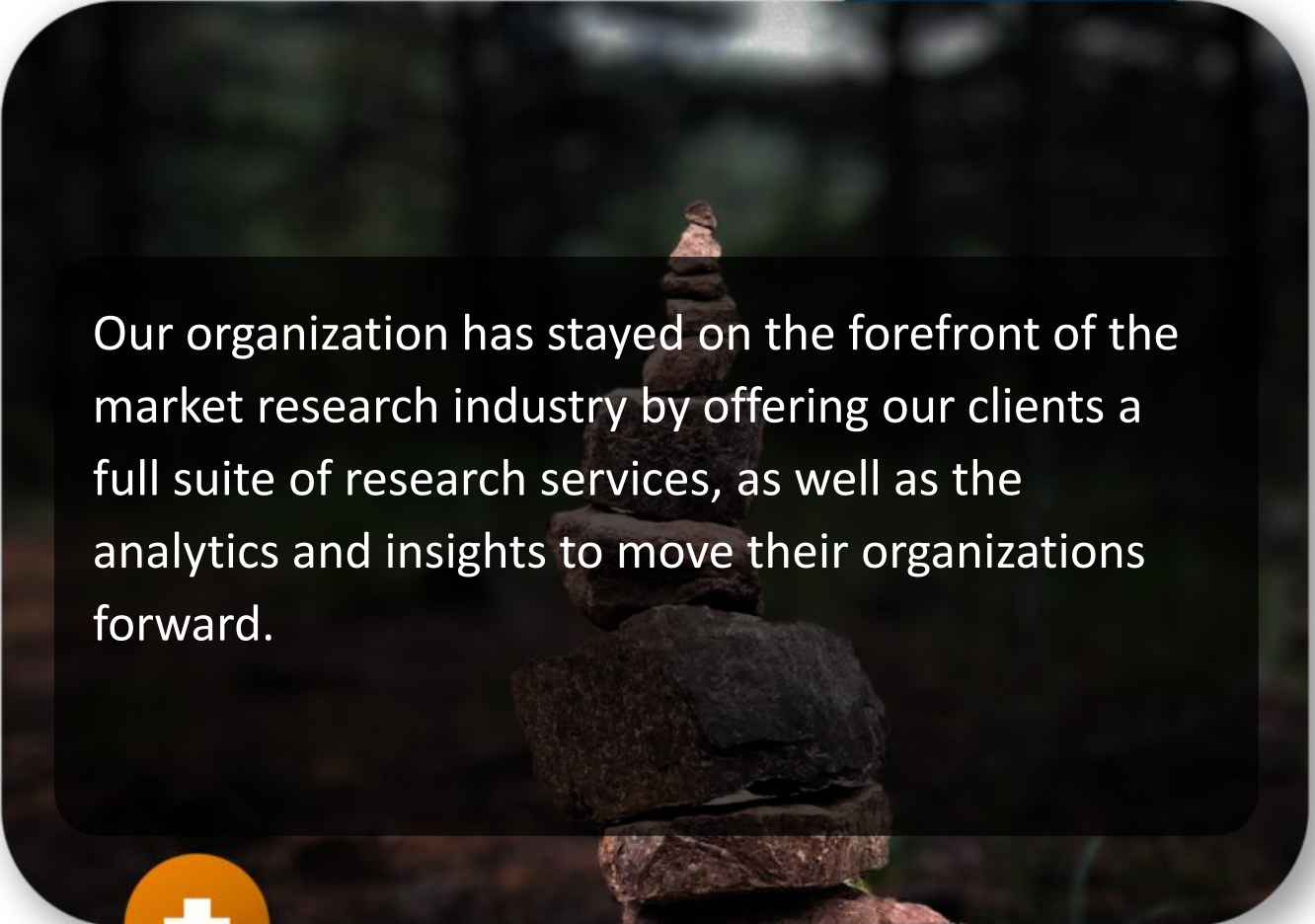


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