



City Council Study Session Agenda
February 12, 2024 - 5:30 PM
City Council Chambers, City Hall, 3rd Floor,
1528 Third Avenue, Rock Island, IL

[Click Here to Watch Live](#)

- 1. Call to Order**
- 2. Roll Call**
- 3. Public Comment**
- 4. Presentations**
 - a. Campground Feasibility Study Presentation - Campground Consulting Group
 - b. Rock Island Public Library 2023 Annual Report Presentation
- 5. Adjourn**
 - a.

Motion:	Motion whether or not to adjourn.
VV	Voice vote is needed.

This agenda may be obtained in accessible formats by qualified persons with a disability by making appropriate arrangements from 8:00 am to 5:00 pm, Monday through Friday, by contacting the City Clerk's Office at (309) 732-2010 or visiting in person at: 1528 Third Avenue, Rock Island, IL 61201.

Feasibility Report

Subject Property:
Sunset RV Park & Marina
(working title)



December 1, 2023

Prepared for:
John Gripp, CPRP, Director of Parks & Recreation
Luke VanLandegen, Municipal Services Superintendent
City of Rock Island
4303 24th Street
Rock Island, Illinois 61201

Submitted By:
Jayne Cohen, President
Sharon Weber, Senior Lead Consultant
David Cohen, Senior Consultant

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Attachments – Separate Documents

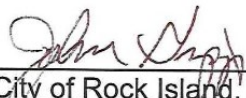
- 1. Glossary**
- 2. 2024 Good Sam Rating Guidelines**
- 3. NFPA 1194 National Standard for RV Parks & Campgrounds 2021 Edition**
- 4. Americans With Disabilities RV Site Design**
- 5. Financial Model**
- 6. Guideline for Outdoor Developed Areas**

GENERAL LIMITING CONDITIONS

Every reasonable effort has been made to ensure that the data contained in this report reflects the most accurate and timely information possible, and it is believed to be reliable. In addition to site visits, industry information and research data, this report is based on estimates, assumptions and other information developed by CAMPGROUND CONSULTING GROUP LLC and from independent research efforts, previous studies, general knowledge of the industries, and consultations with the client and their representatives. No responsibility is assumed for inaccuracies in reporting by the Client, its agent and representatives, or any other data source used in preparing or presenting this report.

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Client Signature:  Date: 11-15-23
The City of Rock Island, IL
John Gripp, Director of Parks & Recreation
Public Works Department

December 1, 2023

John Gripp, CPRP Director of Parks & Recreation
Luke VanLandegen, Municipal Services Superintendent
City of Rock Island
4303 24th Street
Rock Island, Illinois 61201

Electronic Copy via Emails to gripp.john@rigov.org, vanlandegen.luke@rigov.org

Feasibility Study for a new RV park development in Rock Island, Illinois

Dear John & Luke:

Thank you for engaging our services to provide insight, counsel, and recommendations regarding the potential development of a new RV park/campground in Rock Island, Illinois.

A Feasibility Study provides a preliminary risk assessment and market analysis for a proposed RV park development in a specific location. The result of this study provides guidance and knowledge for future decision-making in the development of an RV park in the proposed location. This study is the basis for determining if further analysis, efforts, and planning are warranted.

This study has been prepared for John Gripp, CPRP, Director of Parks & Recreation and Luke VanLandegen, Municipal Services Superintendent of the City of Rock Island. The location identified for development is Sunset Park at Sunset Road between 18th and 31st Avenues in Rock Island, Illinois.

This letter, the SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) and the report conclusion serve as an executive summary of our findings and recommendations.

Industry Highlights^{1 2 3 4 5 6 7 8}

- Camping is now a formidable part of leisure travel and has experienced a marked increase with over 58 million households camping in 2022. The growth in camping since 2020 is not only attributed to the influx of new campers but also the number of campers who are camping more frequently throughout the year.

¹ 2021-2023 North American Camping Reports sponsored by Kampgrounds of America, Inc.

² The Dyrft 2023 Camping Report

³ TERRAMOR NORTH AMERICAN GLAMPING REPORT — 2022 sponsored by Kampgrounds of America, Inc

⁴ KOA Monthly Reports January – August 2023

⁵ rvia.org

⁶ USA Travel 2023

⁷ SSI Retail Registrations RV Business September 8, 2023

⁸ KOA Monthly Reports October 2023

- Two-thirds of all U.S. residents participate in some type of leisure travel. One out of every three leisure trips (32%) included camping or glamping in 2022.
- About half of campers (51%) have already booked at least one trip for 2024.
- Ninety-two million or 69% of U.S. households identify as campers.
- Fifteen million households went RVing in 2022 and 11.2 million households own RVs with over 2.1 million new RV renters in 2022.
- RV vacations and RV travel are far less expensive when compared to other types of vacation and travel. Even when the economy worsens most continue to camp and choose camping over other types of travel.
- The industry showed resilience through the pandemic in 2020/2021. Persevered economic uncertainty in 2022 with record inflation and high gas prices and in 2023 remains steady.
- Historically campgrounds and RV parks have shown resiliency through economic hardship and during difficult time periods.
- Most campers will not replace a camping trip with another type of trip during times of economic uncertainty, and more than half of all campers are already looking forward to 2024 and booking their camping trips.
- Travelers have determined that an RV vacation and any outdoor type of vacation is safer than other forms of travel. RV parks and campgrounds are considered essential businesses.
- Campgrounds and RV Parks report record occupancies since 2019. Campers report difficulties with booking reservations, especially during peak periods and weekends. The demand for modern RV sites, tent sites and rental accommodations has never been greater.
- About 10 million households experienced glamping in 2022, up nearly 3 million households since 2020.
- Online RV rental companies have introduced millions of people to RVing and camping.
- While there has been a significant decline in RV shipments from manufacturers in 2023, the Recreational Vehicle Industry Association (RVIA) reports wholesale RV shipments of an all-time high of 600,240 in 2021 surpassing the previous record year in 2017 of 504,600 shipments by 19%. 2022 RV shipments ended the year with 493,268 units, a decrease of 17.8% when compared to 2021 but

still the third best year on record. The latest RVIA forecast (9/2023) projects between 363,700 and 375,700 new units to be shipped in 2024, an increase of 22-24% above earlier projections.

- Retail RV sales set a record in 2020 with 523,098 new RV units sold. 2021 U.S. RV retail sales finished with 570,771 registrations, up 9% over 2020. 2022 retail registrations declined by 22.15% ending with 447,718 retail registrations. Year to year 2023 data shows a 16.8% decrease through September 2023 with 316,127 retail registrations. Retail sales are outpacing wholesale shipments, a strong indication that the industry continues to work through an excess of field inventory on dealer lots.
- There is little supporting data for used unit sales. However, the National RV Dealers Association (RVDA) estimates used RV unit sales, from all sources not just dealers, at 1.5 used units sold per new unit retailed. Approximately 672,000 used units were sold in 2022 and just over 357,000 to date in 2023.

Key Findings Sunset RV Park & Marina

- The extremely large population of the surrounding local and regional markets supports recreation, entertainment businesses, and activities including RV parks and campgrounds. There are approximately 8.4 million households within 200 miles of the City of Rock Island with almost 612,000 households owning RVs.
- The property is directly off Illinois Hwy 92 which intersects Interstate 280 about a mile from the entrance to the property.
- There are 27 parks on the comparative chart. Over half (15) of these parks are owned by cities, counties, or the Corps of Engineers. These parks have maximum stays of 14 days and only have water and electric hookups. The remaining 12 parks are owned by private businesses which have monthly and seasonal stay options. Within 74 miles of the property there are 3,424 campsites and 128 rental units.
- The proposed RV park development will include sites with sewer hookups. Full hookup sites (FHU) are typically the most desirable and highest occupied sites at RV parks. FHU sites will attract extended stay guests desiring monthly and seasonal sites. There are no campgrounds directly on the Mississippi River offering full hookups or long-term stays within 50 miles of the property.
- The developer is the City of Rock Island. John Gripp, CPRP, Director of Parks & Recreation and Luke VanLandegen, Municipal Services Superintendent have oversight on this project. The existing Sunset Park, Sunset Marina, two golf courses, a water park, and 22 other recreational parks are popular with the residents of the City of Rock Island.

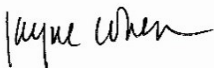
- John Gripp has been employed by the City of Rock Island since 1999 and has directed the parks and recreation programs for the City of Rock Island since 2016. This includes recreation programs and classes, fitness, aquatic, and sports programs. Other positions held by John include Aquatics Director, Superintendent of Recreations, and Assistant Director. Luke maintains 850+ acres spread among 27 different sites within the City of Rock Island. Together, given each of their expertise and level of experience, they are qualified to oversee the RV park development and operations.
- There are more RVs on the road today than ever before. There is strong demand for quality campsites across the United States. Advanced reservations have become challenging for same day or last-minute reservations. More people are working remotely. Virtual and home schooling while camping is a growing trend. Additionally, demand continues for extended-stay RV sites for snowbirds, temporary housing and retirement as more people live full time in their RVs.

Industry analysts maintain the fundamentals of the millennial and baby boomer interest in outdoor recreation and RVing experiences are strong. Significant obstacles to the continued growth of the RV and camping industry are not expected even within the landscape of a volatile economy and ongoing life with COVID-19.

In considering the factors presented above and throughout this report, the development of a new RV park and campground in the City of Rock Island, using the guidelines of the business model described in this report, has an *average development risk and a strong probability of growth and success over time. (Average development risk is generally associated with new business start-ups.)*

The opportunity to work with you is appreciated. We hope this report meets your needs and expectations. We look forward to assisting you as you move forward with this exciting project.

Sincerely,



Jayne Cohen
Principal
Campground Consulting Group LLC

Feasibility Study Methodology and Memorandum

The objective of a feasibility study is to provide the client with an in-depth analysis of the opportunity to develop an RV park on a specific site with specific goals as to quality, size, amenities, and facilities. The outcome of this work is expert recommendations on the business, construction, and financial models leading to the development of an RV park.

The feasibility study report includes an in-depth review of the RV and camping industries, a market and competitive analysis, business model analysis, operational recommendations including service standards and personnel requirements, construction cost estimates, a detailed five-year operating pro forma, and additional development considerations such as zoning and permitting with a high-level review of local and state regulations. Additionally, the feasibility study report includes the information and level of detail normally required by financial institutions and/or investors for financing the RV park development.

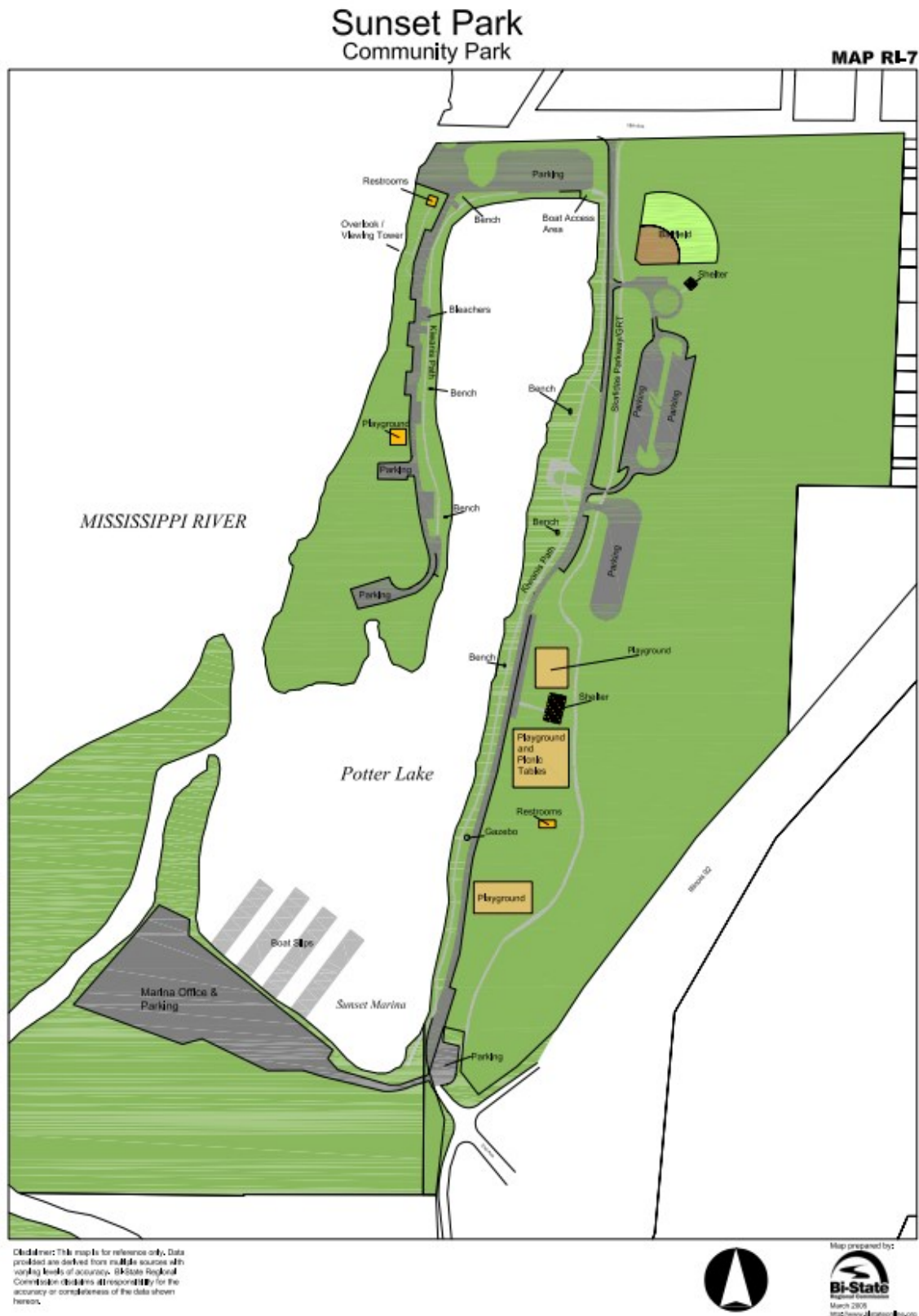
This report has been prepared with information gathered during the site visit, extensive in-office research, and information provided to the consultants by John Gripp and Luke VanLandegen. The study report describes the findings, recommendations, conclusions, and next steps relevant to developing a new RV park at the specified location.

Overview of Client and Description of Project

The clients for this study are John Gripp, Director of Parks & Recreation and Luke VanLandegen, Municipal Services Superintendent of the City of Rock Island. Rock Island Parks & Recreation offers a wide variety of activities and programs for all ages and includes over 850 acres of parks and green space at 22 city parks plus Sunset Park, two golf courses, a water park, and Sunset Marina. They want to create an RV park at the existing Sunset Park which is adjacent to Sunset Marina.

John and Luke engaged Campground Consulting Group LLC to conduct a feasibility study to determine the viability of developing an RV park at the existing Sunset Park next to Sunset Marina. The study began with an introductory phone call on June 2nd and the property site visit and comparative park visits occurred Tuesday June 20th through Thursday, June 22, 2023.

The map of the property below shows the Mississippi River on the west side of the property. Lake Potter is in the middle of the property with the marina on the south end of the lake and along the Skafidas Peninsula between the river and Lake Potter. The dark gray lines and areas are parking lots and existing roads. The light gray line is the 1.4-mile recreation trail. Existing playgrounds, pavilions, and bathrooms are shown in tan. The baseball diamond is now an open field. Part of the green area along Illinois 92 on the east side contains the 26-acre backwater pond. The google earth picture below the map shows this area best. Additionally, there is an overlook along the Mississippi River and a gazebo on the western shore of Lake Potter both are marked on the map.





The proposed development of the campground will be at Sunset Park, which is adjacent to the Sunset Marina including the Skafidas Peninsula, but not Pettifer Island. The area is 250 acres of treed land along the Mississippi River with Lake Potter, a 50-acre protected lake which has access to the river and two boat ramps. There is a \$75,000 grant to upgrade these boat ramps. Another boat ramp has direct access to the Mississippi River and is on the Skafidas Peninsula. The marina (also including a boat ramp) is at the south end of Lake Potter.

Existing within the city park are bathrooms, picnic areas and two pavilions, an overlook tower on the Mississippi River, playground equipment, sand volleyball, and a walk/jog trail with resting benches. Much of this is in good shape except the bathrooms which

need updating and do not have showers. The property is at the trailhead of a 65-mile Quad Cities bike path within the Riverway Trails System. This trail system also connects to the American Discovery Trail which traverses the United States from the Atlantic to Pacific Oceans. The two picnic pavilions are rented for private gatherings from April 1 to October 31 each year.

A second 26-acre backwater lake is ideal for eventual canoe and kayak use and rentals. Cleanup of the shoreline along this lake is planned by the city. Above the marina bathrooms and laundry is an apartment that might be used in the future for a manager or staff housing. This building needs updating. Another large administrative building has potential space for clubhouse activities. Finally, electric, city water, and a 4" sewer line is available.

Campground and marina operations are very compatible. The opportunity to merge marina and campground management and staff as well as sharing amenities would be financially beneficial to both operations. The facilities and most amenities boaters look for in a marina and RVers look for in a campground are identical.

Consultants recognize that a separate marina study was conducted by Edgewater Resources LLC, Madison, Wisconsin completed on February 5, 2023. John and Luke have indicated that the marina and campground should look like one operation and where feasible operations should be combined. It is necessary to explore the opportunities to share rather than duplicate facilities, amenities and services between the marina and the campground.

Based on this separate feasibility study a recommendation has been made to update the marina. The report suggests the marina needs to become compliant with the Americans with Disabilities Act (ADA), implement safety measures to prevent Electric Shock Drowning (ESD), and to be brought up to current electric codes. Much of the marina infrastructure is at or past its anticipated useful life. The recommended improvements could bring the marina to the higher end of the market according to the marina study. It is recommended by the study that the City of Rock Island maintain ownership and either outsource operations or keep them in house.⁹

⁹ Edgewater Resources LLC feasibility study date February 5, 2023

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Strengths Helpful to the Development	
Internal Origin	
Location strengths include:	
Along the Mississippi River.	
Beautiful beaches.	
Adjacent to a marina, also owned by city.	
At beginning of 65 mile Riverway Trails System recreation trail. Also connects to the American Discovery Trail which goes from coast to coast.	
Easy access to property via highway.	
50 acre protected lake with access to the Mississippi River.	
26 acre backwater lake for canoeing, kayaking, and fishing can occur.	
Developer strengths include:	
Project leaders have experience managing city administrative process.	
Project leaders are open to new ideas and concepts.	
Property strengths include:	
Mature trees.	
Some infrastructure already there.	
Well known in area with a strong reputation.	
Several boat ramps and marina already on property.	
Excellent waterfront location for possible Wubit Park for Day Use program.	
Level ground.	
City water and sewer available.	
A 4" sewer line enters the property at IL 92 and 31st Avenue.	

Weaknesses

Harmful to the Development

Internal Origin

- Very low pricing in market at public sites.
- Located in flood zone, property floods on an annual basis.
- Increased build and operational costs due to flood zone.
- Higher than average labor rate with union employees.

Opportunities

Helpful to the Development

External Origin

- Create quality riverfront outdoor recreation.
- Offer unique river boat rentals.
- Offer treehouse rentals.
- Possibility of Wibits Water Park to expand Day Use program.
- Pettifer Island offers unique recreation opportunity in the future.
- Combine operations with marina for optimization of expenses and labor.

Threats

Harmful to the Development

External Origin

- Uncertainty of seasonal flooding.
- Uncertainty of economy.
- Rising cost of construction.

Today's RVs

RVs come in two categories - motorized and towable. The various RV types are illustrated below. RV parks may serve any or all these units depending on the business model selected and the market served.



RV TYPES, TERMS & PRICES

An RV is a motorized or towable vehicle that combines transportation and temporary living quarters for travel, recreation and camping. RVs do not include mobile homes, off-road vehicles, snowmobiles and conversion vehicles.

Towables: Designed to be towed by family car, van or pickup truck. Can be unhitched and left at the campsite while you explore in your auto.	Motorized: Living quarters are accessible from the driver's area in one convenient unit.
CONVENTIONAL TRAVEL TRAILER Wide range of floor plans and sizes Affordable homelike amenities Sleeps up to 10 Average Cost: \$25,000 to \$30,000 new 	TYPE A MOTORHOME Generally the roomiest of all RVs Luxurious amenities Sleeps up to 8 Average Cost: \$100,000 to \$140,000 new 
FIFTH-WHEEL TRAVEL TRAILER Vast space of a motorhome in a towable Towed with a pickup truck Sleeps up to 8 Average Cost: \$43,000 to \$63,000 new 	TYPE B MOTORHOME Commonly called Camper Vans Drives like a family van Sleeps up to 4 Average Cost: \$95,000 to \$135,000 new 
TRAVEL TRAILER WITH EXPANDABLE ENDS Ends pull out for roomy sleeping Lightweight Towing Sleeps up to 8 Average Cost: \$9,000 to \$15,000 new 	TYPE C MOTORHOME Similar amenities to Type A Motorhomes Optional sleeping space over the cab Sleeps up to 8 Average Cost: \$80,000 to \$120,000 new 
FOLDING CAMPING TRAILER Folds up for lightweight towing Commonly called Pop-up Campers Sleeps up to 8 Average Cost: \$5,000 to \$25,000 new 	Towable/Motorized:
TRUCK CAMPER Mount on pickup bed or chassis Go wherever your truck can go Sleeps up to 6 Average Cost: \$17,000 to \$26,000 new 	SPORT UTILITY RV Available motorized and towable Built-in garage for hauling cycles, ATVs, and other sports equipment Sleeps up to 8 Average Cost: \$30,000 to \$60,000 new 
PARK MODEL Movable resort unit Designed for part-time recreational use Sleeps up to 10 Average Cost: \$35,000 to \$80,000 new 	FIND MORE ABOUT ALL RV TYPES AT GORVING.COM

RV Rentals

RV rentals and RV vacations compete with cruises, air travel, boats, motorcycles, second homes, condos, timeshares, and other high-ticket products and services for the consumers' discretionary travel and vacation dollars. The 2023 RVshare Travel Trend Report conducted by Wakefield Research reveals the desire to hit the road has never been stronger.

Ninety-nine percent of Americans plan to travel in 2023. Of those travelers 61% plan to make that travel a road trip or a vacation in an RV. Half of travelers indicate an RV is among their top three accommodation choices. Fifty percent planned to travel with family in 2023 and eighty-one percent of parents are likely to consider renting an RV in the future. The top travel interests in an RV for renters include road trips, going to National Parks or scenic areas, trips with family or friends, going to events, and working remotely.

Travelers, both domestic and international, have determined renting an RV gives them travel freedom not achievable in other forms of travel. They can set their own pace and see what they want when they want.¹⁰

The RV travel vacation continues its growth with 62% of RV travelers likely to consider renting an RV. RV travel is spanning generations with 75% percent of Millennials, sixty-five percent of GenXers, and fifty-eight percent of Gen Z plan to take a road trip or vacation in an RV in the next twelve months. The economy isn't deterring plans for an RV vacation. RVers are just making lower cost choices like eating in, traveling during slower seasons, and fewer fee-based activities. Eighty-eight percent are planning to travel the same or more in 2023. The motivations for travel remain similar to previous years with emphasis on relaxing, connecting with family and friends, and enjoying nature and wildlife. "As the global travel industry makes its return, we focused our research on more deeply understanding and assessing the emerging motivators and desires of today's travelers. Our findings are encouraging and reflect the ongoing evolution of the travel industry. While 2020 and 2021 may have been a time of discovery for many when it comes to RV travel, the category is growing in demand as more and more people find RV and motorhome accommodations appealing for a number of priorities and reasons." RVshare CEO Jon Gray said.

RV trips don't limit themselves to driving to a campground. Rented RV destinations include special destinations, iconic events, and other new travel options. According to RV Share's 2023 Travel Trend Report 20% of renters rent an RV to go to an event or festival. Over half of renters indicate they are likely to choose an RV for their accommodation to attend events, festivals, and rallies.¹¹

¹⁰ RVshare's 2023 Travel Trend Report

¹¹ 2023 RV Share Travel Trends

Consumers are renting RVs online, from RV dealers, and from private owners through peer-to-peer platforms. As these peer-to-peer platforms experienced incredible growth more platforms came into the mix. Slightly more than one quarter of dealerships post at least some of their rental inventory on peer-to-peer platforms. Historically some RV dealers have offered RV rentals at their dealerships to consumers calling or visiting their showrooms.

RVshare and Outdoorsy are the two largest sources for peer-to-peer postings of RVs available to rent. This peer-to-peer business model has introduced millions to RVing and camping. These two companies have disrupted the RV rental business in much the same way as Uber and Lyft disrupted the car rental, taxi, and livery businesses. The success of RVshare and Outdoorsy has attracted other online companies to the RV rental industry. Many specialize in certain types of RVs from camper vans to vintage VW bus rentals to luxury coaches.

Outdoorsy claims to be the most trusted, fastest growing, global marketplace for RV rentals. They have over 25,000 unique rentals in 14 countries and 4,800 cities throughout the world, with over 250 million miles driven and over 8,690 vacation years booked. Ninety-two percent of customers rate their experience favorably with 4 or 5 stars. In the United States there are more than 50 cities with listings of RVs to rent. Peer to peer rentals as well as dealerships rent RVs through Outdoorsy.¹²

“Austin-based Outdoorsy identified the opportunity to bring this multi-billion-dollar RV industry online and into the cross-cultural phenomenon of the sharing economy,” CEO Jeff Cavins writes. “The company is capitalizing on a global trend of millennials who want to stay overnight at places other than hotels, which can be pricey and based in commercial districts that cannot provide the same experience of staying in unique locations.”

Tourism Holdings, Ltd (thl) is a global tourism operator based in New Zealand. They are a leading provider of RVs for rent and sale across New Zealand, Australia, North America, and Europe. Three brands provide multi-lingual services meeting different needs of RV vacationers in the U.S.A. and Canada. Road Bear RV Rentals & Sales with six locations in the U.S.A. provides the latest models and most luxurious motorized RVs. El Monte RV Rentals & Sales with twenty-seven locations in eleven states provides various sizes of motorhomes to rent or purchase. Britz provides the adventurer with compact, easy to maneuver vehicles at seven locations throughout the U.S.A.



RVshare was created to make the magic of an RV trip accessible to everyone. It also provides RV owners an opportunity to put their RV to use when they aren't using it themselves. RVshare is the largest online community for RV renters and owners. RV renters have spent



¹² Outdoorsy.com

more than 4 million nights under the stars in the comfort of an RV. RVshare is a community of travelers, adventurers, and outdoor enthusiasts, with a shared vision: To bridge the gap between families hoping to earn a profit from their RVs and families who want to rent one.¹³

In addition to the numerous peer-to-peer sources and RV dealers posting RVs for rent there are companies with locations throughout the United States and Canada who specialize in renting RVs. Cruise America, founded in 1972, and based in Mesa, Arizona owns fleets of RVs for rent at 120 centers in 39 states and 5 provinces. Renting and selling class C motorhomes is Cruise America's specialty providing peace of mind and stress-free convenience for international and local RV vacationers.¹⁴



Rentals are available in all RV types from towable to drivable units. According to a survey released by the Recreation Vehicle Rental Association (RVRA) in May 2022 about eighty-one percent of RV rental dealers rent both motorhomes and RV trailers. Of the dealers surveyed fifty-nine percent indicated more than one-fifth of their business last year was from customers who already owned an adequate tow vehicle.¹⁵ Pickup trucks and SUVs with towing capacity are the best-selling vehicles in North America. It is not surprising that towable RVs are popular with renters.

The RV Dealers Association (RVDA) projects a continued rise in rentals. RV Dealers who also rent RVs expect to do more business in 2023 even when compared to the high-demand year of 2022. Of those responding to the survey 26% expect rental revenue in 2023 to increase while 42% expect revenue to be about the same. They also do not have a concern for availability of RVs with 70% expecting manufacturers to be able to deliver the needed RVs. Consumers want to rent RVs that can sleep a minimum of three adults. The term of rental averaged 3 nights in 2022 and most dealers expect that to remain the same in 2023. 2023 survey results are still not available.

Interest in RV vacations continues to grow with 62% of Americans likely to consider renting an RV for a trip in the future. This is a 9% increase compared to 2022. Having the rented RV delivered to the destination makes 79% of Americans more likely to rent an RV. Thus far in 2023 forty-one percent of RV rentals were delivered to the destination. Both RV owners and RV dealers are willing to deliver a rented RV to the place where it will be used. According to insights from 2022 nearly 50% of RV rentals were delivered.¹⁶

Research has confirmed that an RV vacation costs less than other types of vacations. This includes consideration for the cost of RV ownership as well as fuel prices. Considering the various types of RVs, the average savings for a 4-person trip were 60%

¹³ RVshare.com/about

¹⁴ www.cruiseamerica.com

¹⁵ RVRA Survey, www.rvda.org

¹⁶ RVshare 2023 Travel Trend Report

with the average savings at 46% for a 2-person trip. Gas prices would have to reach between \$17 & \$18 and diesel prices between \$25 & \$26 for an RV vacation to be more expensive than the least costly non-RV vacation. Researchers determined these fuel prices are unlikely for the foreseeable future. Even when fuel prices rise, RV vacationers save by taking shorter trips and staying longer in one destination.¹⁷

In March 2022 RVshare launched the RVshare Campground Partnership Program. This program allows campground and RV park operators to work with RVshare by providing a great experience for renters while earning revenue from RV rental bookings at their campgrounds. Operators simply post RVshare listings on their website and within their parks.

“Working together with our growing network of campground partners allows us to improve the traveler experience by providing preferred campground recommendations, delivery-friendly destination options, and easy access to RV rentals on our partners’ websites,” said RVshare’s VP of Marketing Martijn Scheijbeler. “We are working to build a bridge between our platform, RV parks and campgrounds that welcome RV renters with open arms.”¹⁸

RVshare partnered with another company, RecNation (the U.S.’s largest RV storage company) to provide a solution to a pain point experienced by RV owners and renters. RecNation created the White Glove Rental Program. The program includes thorough inspections, diligent and informative check-in procedures, and an experienced on-site staff equipped to meet the demands of the rental business. The goal of the partnership is to knock down barriers experienced by owners renting their RV peer to peer. “This partnership is a win-win for RV owners and renters,” RecNation CEO Gary Wojtaszek said. “This program will help owners be hands-off while making more revenue. And renters can expect professionalism and reliability throughout the rental process.”



RecNation is piloting the rental program in the Dallas/Fort Worth metro area with local RVshare owners. There are plans to expand the program to other locations. RecNation has 14,000 storage units spread across 51 locations in six states with plans to continue to expand across the U.S.¹⁹

Potential RV buyers are also turning towards rental websites to get a feel for different vehicles before committing to RV ownership. Many of the rental platforms also offer purchasing options for when the renter is ready to become an owner.

In response to the demand for rental units, RV Education 101, a video, and RV consumer information company, launched an RV Rental Course. RV Education 101 offers affiliation programs to private RV owners who rent for a low monthly fee.

¹⁷ RVIA.org /news-insights/study-shows-families-save-money-vacationing-rvs

¹⁸ RVsharepress.com Microsoft Word - Press Release_RVshare Campground Partnership Program.docx (ctfassets.net)

¹⁹ RV Business August 17, 2023

RV Industry Shipments and Sales

The number of RV-owning households in the U.S. is 11.2 million and 9.6 million plan to purchase an RV within the next five years.

The RV and camping industry demonstrated its resiliency during the pandemic and was an industry which flourished. During 2020 – 2022 the industry reacted quickly and decisively to keep business growing as it had been growing for the previous ten years. Industry leaders worked tirelessly to get campgrounds recognized as essential businesses adapting and implementing touchless reservation, remote check-in procedures, and stringent sanitizing standards ultimately making camping an increasingly popular travel option. The manufacturing side continued to produce and ship new RVs at record levels to support the growing consumer demand.

As 2023 began to unfold campgrounds had just seen two years of record setting demand and occupancies. As predicted by industry leaders demand and occupancy leveled off beginning a recovery period in 2023 with demand and occupancy matching previous year levels. Despite the high gas prices and record inflation, recessionary fears did not dampen the wanderlust spirit of Americans who want and need their vacations and opportunities to travel. Camping's affordability remained attractive to individuals, couples, and families.

The RV Industry Association (RVIA) has repeatedly shown the value of an RV vacation compared to other types of travel. The most recent study published in 2023 compared real RV trips and learned that RV vacations save vacationers with 4 people in their party 22% to 60% over a non-RV vacation. A 2-person trip was 9% to 46% less than a non-RV vacation. Interestingly to note, the research showed that fuel prices would need to rise to \$17 - \$18 per gallon for gas and \$25 - \$26 per gallon for diesel for RV vacations to lose their economic advantage.²⁰



Going into the pandemic years the RV industry was in a period of growth. Sales of RVs in these years and the decline of available RV sites enticed investors and developers toward developing and purchasing RV parks.

An optimistic outlook from RV manufacturers and dealers continues in 2023 even as output and sales drop to 2019 levels. Changes in the U.S. passenger car fleet sales,

²⁰ 2023 Vacation Cost Comparison Study | RVIA

with pickups and sport-utility vehicles dominating sales, fuel this optimism. “You have half the investment for a towable RV already sitting in your driveway,” said Mike Happe, President and CEO, Winnebago Industries Inc.²¹

The entire RV industry has experienced growth over the past forty years. This success comes from industry cooperation and a focus on promoting and protecting the RV industry. The industry’s support of the Outdoor Recreation Roundtable (ORR) saw the passage of The Great American Outdoors Act in 2021. This act increases and improves outdoor recreation, provides for infrastructure improvements, and drives economic and job growth in rural communities. As RVing continues to grow and become more popular with younger and diverse Americans this is a critical achievement²².

Camping has been growing for the past decade and now represents 32% of the leisure travel market. Camping is an important subset of leisure travel. During 2022 over 58 million households went camping and spent \$52 million in local communities visited. Additionally, over 10 million households took a glamping trip in 2022.²³

RV shipments ended 2021 with a record 600,240 wholesale shipments, surpassing 2017’s record year of 504,599 shipments by 19%. Total RV shipments for 2021 increased 39.5% over the 430,412 units shipped in 2020. 2022 RV shipments ended the year with 493,268 units, a decrease of 17.8% compared to the 600,240 units shipped during 2021. Though a significant decline 2022 was the third best year on record.

ITR Economics, the publisher of “Roadsigns”, reports in the Fall 2023 issue that RV wholesale shipments are expected to retreat in 2023 in the face of challenging economic conditions. The latest forecast for 2023 RV shipments ranges from 307,000 to 287,200 with a median of 297,100. This represents a 32% decline from 2022. Looking forward to 2024 the forecast anticipates shipments to rise above 350,000 units with the new forecast for 2024 RV shipments to range between 363,700 and 375,700 units with a median of 369,700 units. This total would represent a 22-24% increase over the expected 2023 year-end of 297,100 units.

Macroeconomic headwinds are driving the decline in RV shipments in 2023. Negatively impacted consumer budgets are causing consumers to delay or forgo large discretionary purchases. The end of 2023 is expected to see this trend reverse.

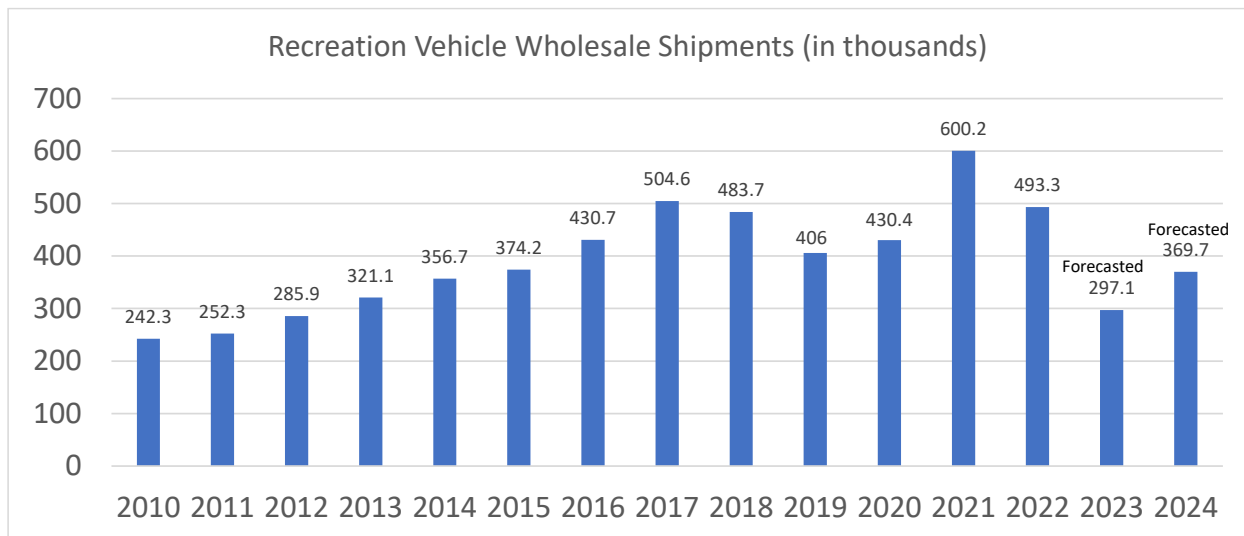
“In recent years, we’ve seen RV buyers get younger and more diverse. September is an exciting month for the RV industry as many manufacturers debut new units and features to appeal to these new RV buyers,” said RV Industry Association President & CEO Craig Kirby. “With RVs available at nearly every price point and with features that allow people to work from the road and get off-grid, RVing remains one of the most affordable ways for people and families to travel and make lifelong memories.”²⁴

²¹ Wall Street Journal December 2019

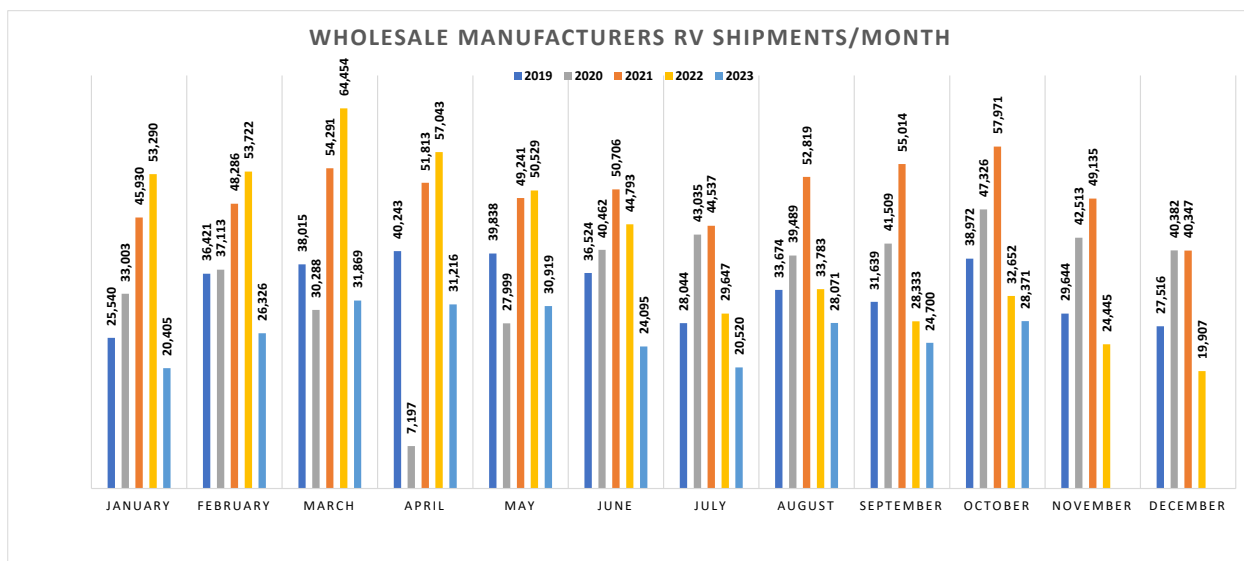
²² RVIA 2021 Annual Report

²³ The 2023 North American Camping & Outdoor Hospitality Report sponsored by Kampgrounds of America, Inc

²⁴ RV RoadSigns-Fall 2023, RVIA, ITR Economics



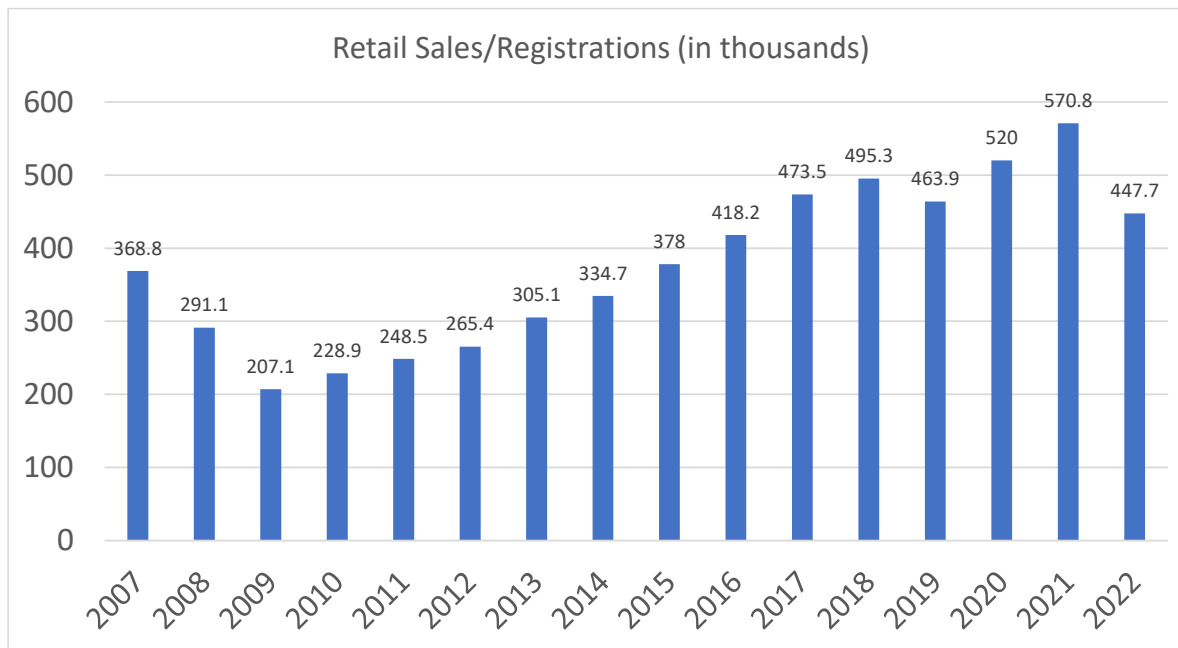
The RV Industry Association's (RVIA) October 2023 survey showed total shipments ending the month of October with 28,371 shipments, a decrease of 13.1% compared to October 2022. Year to date 2023 showed shipments down 40.6% compared to 2022. Towable RVs led by conventional travel trailers were down 9.2% compared to last October with shipments totaling 244,825 units. Motorized units were down 33.4% for the same period with 3,546 units. Park model RVs shipped 431 units, a 15% decrease over October 2022²⁵



RV dealers are concerned with a slowing retail environment and the decline of retail sales. There were 316,127 retail registrations through the end of September 2023, according to Statistical Surveys Inc., the firm that tracks retail sales and consumer

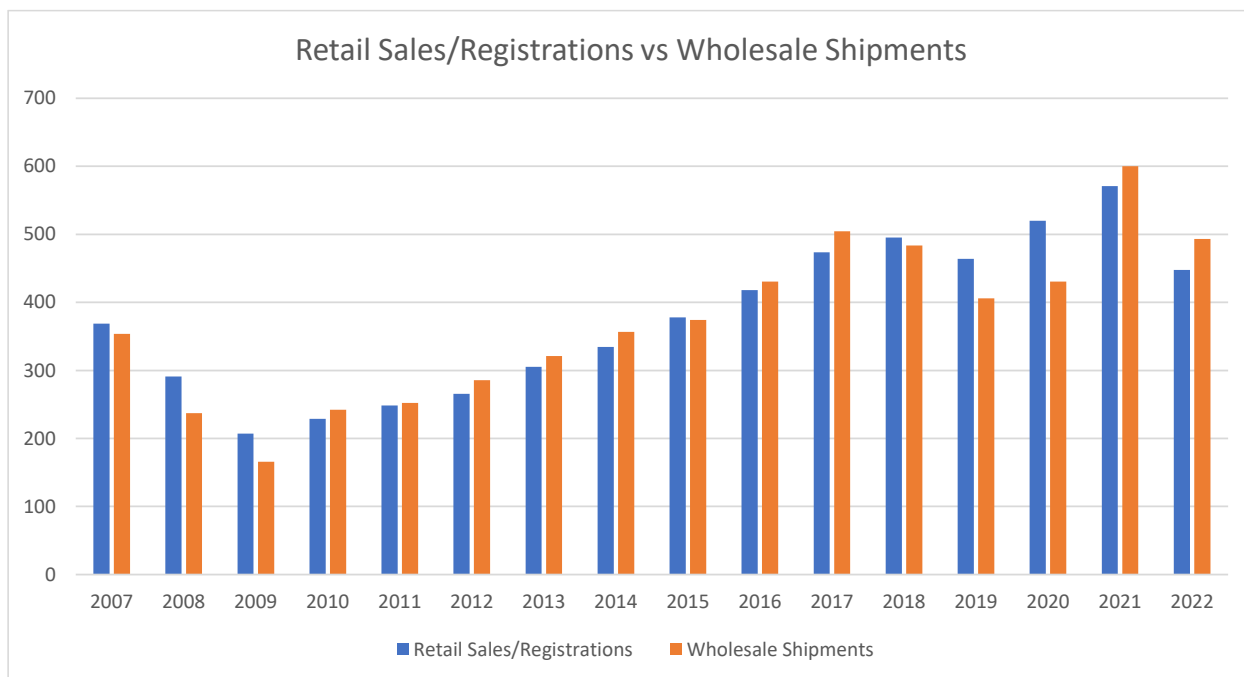
²⁵ RVIA.org

demographics for the RV industry. 2023 retail registrations are down 16.6% from 379,049 in September 2022 and this trend is expected to continue. September is also the seventh month in a row that retail sales are outpacing wholesale shipments as dealers continue to work through an excess of field inventory. Retail sales were 11.3% higher than wholesale shipments in September 2023.²⁶



The December 2022 retail registration figure coincides with the industry's return to a more normal trajectory, in which the pandemic years of 2020 and 2021 have proven to be an aberration to this multi-year pattern of growth.

²⁶ RV Business November 8, 2023, SSI: Retail Registrations Down 21.3% in September 2023



The differences in RVDA's numbers from RVIA's reflect the inventory levels at RV dealers. For further comparison the difference between total wholesale shipments and retail registrations in 2019 and 2020 accounts for dealer inventories. 2021 was a major restocking year for most RV dealerships.²⁷

²⁷ RVDA.org

2023 RV Shipments East North Central Region		
Total RV Shipments as of September 2023	238,121	
East North Central Region States	% of total shipments	# of RV's shipped each state
Illinois	1.45%	3,453
Indiana	2.90%	6,906
Michigan	3.80%	9,049
Ohio	4.14%	9,858
Wisconsin	2.20%	5,239
Total shipments for Region	14.49%	34,504

RVIA includes Illinois as part of the East North Central Region for shipments. The states that make up this region and their corresponding percentages of RV shipments for 2023 are listed in the chart. Illinois received 1.45% of overall U.S. shipments and 10.01% of shipments for the East North Central Region with 3,453 units shipped.

“With milder weather, spectacular fall landscapes, and family-friendly activities at campgrounds, 38 million Americans are choosing RVing as their vacation of choice this fall,” said RV Industry Association President & CEO Craig Kirby. “RV manufacturers and suppliers continue to innovate and release new features and products for today’s RVers who are looking to spend time with friends and family while also enjoying the many physical and mental health benefits of living an active outdoor lifestyle.”²⁸

The number of used units entering the consumer marketplace is not accounted for as the industry only accounts for new RVs. RV dealer used sales are not published. In addition to used dealer sales many used units are sold from one customer directly to another in a similar manner to used cars. Private sales are uncouned. As many RVers “age out” of RVing, their units become previously owned “new” RVs for new RVers and campers or are sold as upgrades to other RVers whose used unit is then sold to another RVer. RVDA estimates used RV unit sales at 1.5 used units sold per new unit retailed.

Camping World management reports that used RV sales were 42% of total sales in 2022. Camping World reports year over year that used vehicle unit sales increased by 4.9% to 51,325 units while new vehicle unit sales decreased 9.4% to 70,429 units. Based on RVDA’s 2022 retail sales of **447,718 units** and assuming Camping World’s used vehicle sales percentages are experienced at most RV dealerships, the number of used RV sales from dealerships is estimated at 188,042 units for 2022.²⁹ In 2023, Camping World reported for the second quarter that used RV unit sales were a record 17,774 units up 14.3% from the previous quarter.³⁰

²⁸ RVIA September 2023 Shipment report

²⁹ Camping World Holdings 4th Quarter Report 2022

³⁰ Camping World Holding 2nd Quarter Report 2023

Rental Accommodations

Starting in the mid-1980s, campground owners looking for ways to increase revenue other than raising campsite and RV site rates, introduced what was at the time frequently referred to as a “hard sided” tent. These small wood cabins were very basic - usually 12' x 12' and built out of wood on a skid to facilitate the ability to move the unit, usually for zoning purposes, and justifying the “hard-sided tent” name. These bare-bones or rustic cabins had a single light fixture, usually a double bed and mattress, a bunk bed with mattresses, and maybe a chair or two and a small table. Some units had a small porch, a picnic table, and an outdoor fireplace with a charcoal grill. As the cabin rental market expanded, microwaves and dorm-size fridges were added to these accommodations. Zoning and building departments accepted this unit as a form of a tent and allowed placement in a campground.

With the evolution of the camping industry, there are now many types of accommodations found in RV parks and campgrounds. These accommodations now include:

RV Park Trailers (or Park Models) - Widening acceptance among state and local regulators has made the recreational vehicle park trailer (or park model) a popular rental offering for most campground operators. The use of these units as rentals in KOA, Jellystone Park Camping Resorts, other national corporate park brands, and independent campgrounds has been substantial. (See further discussion below). This unit is registered and licensed as an RV. The wheels and tongue are kept on the unit and generally hidden from view for aesthetic reasons once placed on the site.



Cabins or cottages – Typically log cabins or a unit sided in a material and color appropriate for the location. These units include a variety of amenities such as multiple bedrooms, full bathroom, living room, kitchen, or kitchenette, and often a porch. Most often these units are manufactured off-site, shipped to the park, and installed on-site. Other cabins are stick-built at the property. The placement of these units in an RV park often requires some action or approval from the local zoning officials.



Travel Trailers – usually permanently set up on an RV site and rented nightly or longer. (These RVs may be park-owned, dealer-owned, or arranged through one of the online rental websites).



Teepees – a conical tent made of canvas on frame poles with an opening at the top for ventilation.



Safari or platform tents - often considered “glamping” or glamorous camping and set in a remote area of the campground.



In August of 2023 Outdoorsy announced the launch of the Oasis Fund — a \$30 million dollar initiative dedicated exclusively to providing funding for the purchase of safari glamping tents for eligible entrepreneurs looking to become part of the glamping revolution. The Oasis Fund provides financial support for safari glamping tent purchases to individuals seeking a private getaway or to a campground owner looking to enhance their guests’ experience. ³¹

³¹ [RVBusiness](#) | Aug 11, 2023

Yurts – a circular wooden frame with a canvas covering.



Treehouse – often built on a platform in a tree.



Unique Rentals – such as Airstream travel trailers, Conestoga wagons, Hobbit huts, Storage containers, Dry-docked yachts, etc.



Park model on pontoons

Rental accommodations have become an essential component in many successful RV parks and campgrounds across America. Aside from the higher nightly rates charged for these rentals and the consequent increased gross revenue for the park, rental accommodations allow campgrounds to expand their market far beyond those who RV or tent camp.

Some parks have upgraded rental accommodations into “glamping” or glamorous camping experiences. The glamping upgrades provide an opportunity to add amenities that increase the campground’s average daily rate and overall rental revenue.

Rentals are a significant force in driving an RV park or campground's revenue growth and occupancy. Rentals expand the target market to everyone and not just consumers who camp in an RV or tent. It should be noted that RV parks offering cabin or cottage rentals have a competitive advantage. The ambiance and atmosphere in a campground are different (not necessarily better) than in a hotel. Staying in a cabin or cottage is a different experience than staying in a hotel room. In addition, many RV-owning families have friends and families who want to camp. and Rental units accommodate this demand. Rentals allow parks to compete with hotels, motels, vacation rentals, and private rentals in the market as well.

Other than park models, there is no credible market data on the sales of cabins, tiny homes, yurts, teepees, or other rental units.

The necessity of rental accommodation for the proposed development will be discussed further within this report.

The RV Park Model Market

The following discussion about RV Park models is provided to round out the possible options available in RV park and campground development.

The exterior of a Park Model can be designed to fit into any environment to enhance the development's appearance and theme. Likewise, the interior may also be designed and furnished to aesthetically complement the development's appearance and theme. It may also be finished at different levels of luxury, dressed up or down, to significantly adjust the price point to meet camper demand.

RV park models are a type of RV that is growing in popularity; especially among older RVers who love the RV lifestyle but no longer plan to do extensive RV travel. Many people at both ends of the active camping age groups are looking for a means to enjoy the camping experience and an outdoor recreation lifestyle without owning an RV. The costs associated with insuring, storing, and towing an RV are alleviated. A park model located at an RV park, camp resort, or campground that had been intended for the extended-stay guest, offers this opportunity, and allows for frequent visits.

Additionally, the more comfortable park model can be a convenient and affordable vacation home at an extended-stay RV park, camp resort, or campground.

Park Model RVs (also known as Recreational Vehicle Park Trailers)



Background Information

In 2012, the Recreational Vehicle Industry Association (RVIA) created a new membership category for manufacturers of park model RVs (PMRVs), putting all RV types under one association. A park model RV (also known as a recreational park trailer) is a trailer-type RV designed to provide temporary accommodation for recreation, camping, or seasonal use.

PMRVs are...

1. Built on a single chassis.
2. Mounted on wheels.
3. Have a gross trailer area not exceeding 400 square feet in the set-up except in Florida where the gross trailer area may not exceed 500 square feet*.
4. Certified by their manufacturers as complying with the ANSI A119.5 standards for recreational park trailers.

The RV Industry Association (RVIA) operates a safety standards and inspection program requiring member manufacturers of recreation vehicles to affix an RVIA standards program seal to every unit built in their factories. This seal designates the RVIA and manufacturer certification and assures the RV complies with the requirements of all applicable standards. A recreational park trailer can always be identified by the blue and gold RVIA ANSI A119.5 certification seal (or its predecessor green RPTIA seal) affixed adjacent to the main door of the unit.³²

**Florida park models have a unique exemption by H.U.D. These park models may exceed 400 square feet up to but not more than 500 square feet. They are built to comply with the H.U.D. Manufactured Home and Safety Standards. This type of unit is licensed and titled as a recreational vehicle in Florida. HUD park models must meet all hurricane wind codes for Zones II and III as dictated by State guidelines. These homes are specifically designed for RV parks and communities. Again, Florida is the only state that allows the use of 500 sf H.U.D. park models in RV parks.*

³² Recreational Vehicle Industry Association 2015

Recreational Park Trailers: Definition and Use

What a Park Model RV is:

As stated above, a park model RV (PMRV) is a unique trailer-type RV that is designed to provide temporary accommodation for recreation, camping, or seasonal use. PMRVs (also sometimes referred to as recreational park trailers) are built on a single chassis, mounted on wheels, and have a gross trailer area not exceeding 400 square feet in the set-up mode.

PMRVs are most often used in recreational vehicle campgrounds. They may be owned by the campground and rented to guests, or they may be privately owned. If privately owned a yearly rental fee is paid to the campground for the use of the site. They can also be placed by their owners on private property when permitted. These units are designed and built to be used for recreational/camping purposes only. They are not meant to be affixed to the property in any way, they do not improve property values, and they are neither designed nor intended by their manufacturers to be used as permanent residences. Park model RVs are titled as motor vehicles just like other RV types.

What makes PMRVs unique is that they are up to 12 feet in width and 36 feet long with a peaked and shingled or metal roof. Some offer gabled windows, and siding choices of cedar, aluminum, vinyl, Masonite, or even split logs for a rustic look, while others are made of full solid logs. They are often designed with built-in porches, decks, and/or storage areas. Most look like tiny summer cottages. Others look more like traditional RV travel trailers but are slightly longer.

Most park model RV owners (67%) locate their unit within a few hours' drive from their primary residences and use it for weekend camping get-a-ways. Some owners may place their PMRV in a warm climate location and use them as a seasonal/ temporary get-a-way to escape the cold gray winter weather, others may place their PMRVs in cooler climate locations to escape the summer heat and humidity back home.

In the off-season, these units are typically winterized when placed in northern locations (i.e., have antifreeze in the water lines, and are unusable because water and sewage facilities are not operational) or "summerized" (i.e., water lines drained) when located in warmer climates. While PMRVs are movable (by special permit and a commercial driver's license), most units are left onsite when not being used.

What a Park Model RV is not:

Although the distinctive appearance of park model RVs may lead people to think they are small, manufactured homes, appearances can be deceiving. PMRVs are titled and registered just like any other RV through the department of motor vehicles. Due to their design, small size, and use as recreation, vacation, and seasonal units, PMRVs are explicitly excluded from being considered or used as a manufactured home under the

codes and regulations of the U.S. Department of Housing and Urban Development (HUD) because they are a type of recreation vehicle (Title 24 § 3282.8(g)).

Park model RVs are built following the national safety standards set forth by the American National Standards Institute (ANSI) A119.5 Standard. This is not to be confused with the HUD requirements that manufactured homes are mandated to comply with. The key distinction is that manufactured homes are single-family dwellings, permanently affixed to a foundation, that are designed and built for *permanent* residency under standards set by the Department of Housing and Urban Development. PMRVs are not housing or permanent residences and should not be used as such. Park model RVs are designed and built to be used for recreational camping or seasonal accommodations.

Like motor homes, travel trailers, and fifth-wheel trailers, park model RVs are built to ensure safety and are not required to meet the building codes or installation codes that stick-built or manufactured homes are required to meet. They are designed to remain on their axles and wheels, ready for movement, and are not connected to the ground by footers, foundations, or columns. However, some local units of government do require them to be anchored to the ground due to excessive local winds, but even then, they can easily be detached in minutes with only hand tools.

There is no practical difference in the use of PMRVs than travel trailers or fifth-wheel trailers. They are not 'improvements' to campgrounds any more than a travel trailer placed and used in a campground is an improvement. They are simply one choice among many in the RV camping environment.

Park Model Manufacturer Shipment Review

At its peak, in the early years of this century, park model shipments were as high as

2023 Park Model Unit Shipments					
Month	2019	2020	2021	2022	2023
January	323	359	331	332	547
February	323	320	373	309	501
March	418	364	493	379	540
April	433	240	378	433	483
May	394	281	304	411	480
June	389	310	285	363	391
July	294	334	261	380	382
August	390	321	309	446	380
September	310	311	301	387	334
October	353	333	354	507	431
November	308	270	290	394	
December	288	268	244	382	
Total Shipments	4,223	3,711	3,923	4,723	4,469

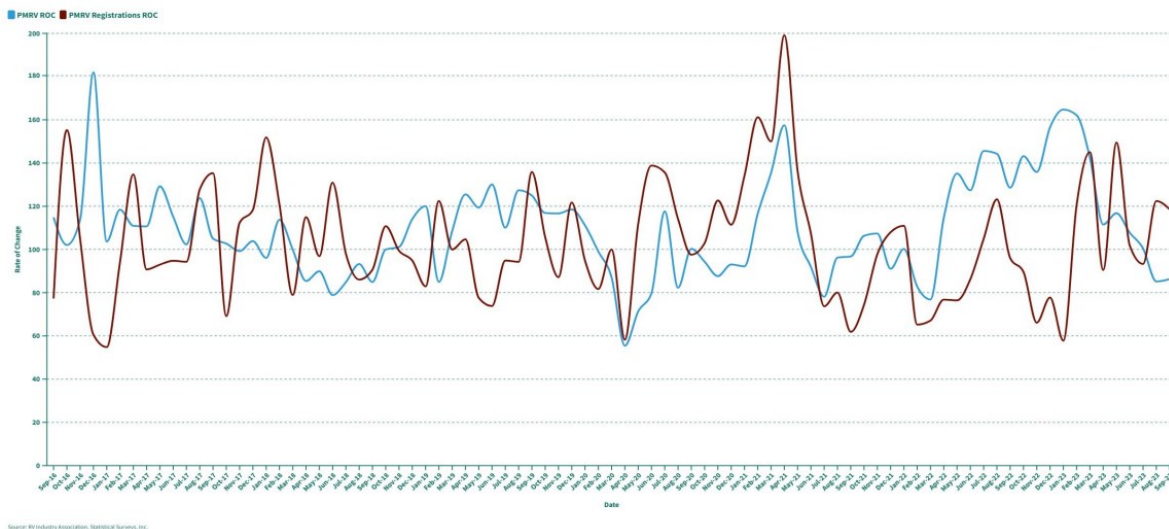
10,000 units. Based on sales numbers, the park model share of RV shipments is now relatively modest. Park Model RV wholesale shipments in 2022 were 20.4% higher than 2021, with a reported 4,723 units shipped.

Manufacturers of park models have seen continued increases in the sales of park models to RV parks and campgrounds for rental programs. Park models are affordable, and typically a zoning convenient alternative for parks expanding their rental options. Park model manufacturers are expanding

their plants and several new park model manufacturers have entered the industry to accommodate the rising demand.

Park Model RV registrations (vs. shipments) during 2022 trended below shipments for the entire year ending with 2,332 official registrations in 2022. Park Model RV registrations in October 2023 were 172 units approximately 40% of October shipments.³³

PMRV Wholesale Shipments Compared to PMRV Registrations



Tiny Homes or Houses & RV Parks

Consumer interest in Tiny Homes appears to be growing. Many RV Park owners and developers have expressed interest in the tiny house as a potential rental unit within an RV park or campground. The information below explains the substantial differences between tiny homes and RVs.

The Tiny House Community, an organization created in 2010 to help enthusiasts find resources to help them learn, build, park, and live in a tiny house, provided much of the information that follows.

Definition: A tiny house on wheels (THOW) is a structure intended as a full-time residence or year-round rental property and meets these seven conditions:

1. Built on a trailer registered with the owner's local DMV.
2. Able to be towed via bumper hitch, frame-towing hitch, or fifth-wheel connection. It is not designed to move on its own, nor can it.

³³ Statistical Surveys Inc (SSI)

3. It is no larger than allowed by applicable state law. (The typical THOW is no more than 8'6" wide, 30' long, and 13'6" high. Larger tiny houses may require a special commercial driver's license and/or special permits when being towed.)
4. The roof height is measured from the bottom of the tires to the highest exterior point on the house, including any protrusions. The roof height may be taller when stationary if it is collapsible for the towing of the THOW. Chimney piping may need to be removed for travel to meet use clearance requirements. It can then be reinstalled.
5. If the house has slide-outs, the plans should be reviewed and approved by a [structural engineer](#), licensed by the state where the THOW was built.
6. The first-floor interior living space must be a minimum of 70 square feet and cannot exceed 400 square feet (excluding any lofts).
7. Includes [basic functional areas](#) that support normal daily routines (such as cooking, sleeping, and toiletry).

Note: The guidelines provided are for the tiny house builder who wants to record how his or her home was constructed. These guidelines are **NOT** recognized by any government authority and following them does not convey any particular benefit or special privileges. Guidelines are intended as a first step in establishing standards that might later be adopted by agencies when creating unique, new zoning or code regulations for tiny houses.

Outdoor Hospitality/RV Park Industry Business Models

There are a variety of campground business models with some catering to the recreational camper, others catering to RV living, and some a mix of both. Parks offer a wide variety of accommodations ranging from rustic to luxurious RV sites to cabins, park models, yurts, rental RVs, “glamping” and traditional tent sites. These models are meant to attract outdoor enthusiasts and satisfy the needs of all generations and interests, whether RVer or non-RVer.

Vacation leisure guests referred to as transient guests, typically stay less than 30 days with the most common length of stay 2 – 7 nights. Extended-stay campers also referred to as monthly, seasonal, snowbird, full-timers, and yearly/annual RVers, generally stay with their RV of various types or in a recreational park trailer (commonly called a park model) for longer periods of time.

Millennials and 20-something outdoor enthusiasts, along with young families, are drawn to traditional tent camping. Many RV parks and campgrounds set aside areas designed for tent camping. These specialized sites provide nearby restrooms, water, and electric connections, a (covered) picnic table, and grilling area. Other tenting amenities such as Wi-Fi, community sinks for dishwashing, platform decks and outside kitchens provide further upgrades to tent sites. RV manufacturers have also begun to develop combination RV and tent units designed to appeal to this younger market looking for adventure camping experiences at a modest price point.

The overnight site rental price difference between RV sites and tent camping sites has grown narrower and narrower in recent years. Both types of guests have access to all the park’s amenities and recreation, both take up approximately the same amount of square footage, and tent campers usually place greater demands on the park’s restroom and other indoor facilities. For these reasons, tent site rates and RV site rates are generally within a few dollars of one another.

In addition to RV sites and camping (tent) sites, many RV parks also offer one or more of the many rental accommodations previously described. The type, style, and offerings will depend on the park’s business model, location, theme, and zoning. Parks offering rental accommodations have a marketing advantage over more traditional RV parks or campgrounds, targeting the large demographic of non-campers in their marketing campaigns. These non-campers are looking now more than ever toward RV and camping opportunities as an alternative to other types of travel.

Many RV parks and campgrounds offer RV storage areas since RV storage at an RVer’s residence is often not practical, legal, or available. Additionally, parks may offer trailer moving services to and from sites for campers desiring to own an RV but who do not own a vehicle capable of towing the unit or who prefer to have their RV moved from storage to their site and ready to be used upon arrival. This service helps promote repeat visits as campers participating in this program are limited to staying at the campground where their RV is stored.

A storage program is also very appealing to local campers. Campers may store their RV at an RV park or campground close to home and frequently return for weekends or holidays without having to tow or drive the RV. Storage also provides the flexibility to take their RV out of the campground for trips elsewhere.

Additionally, RV storage areas may be used to store boats, utility trailers, extra vehicles, and equipment not able to fit comfortably or aesthetically on a camper's site. Most parks and/or jurisdictions limit the number of RVs, tents, vehicles, trailers, and accessories that may be kept on a camper's site due to overcrowding, accessibility, appearance, and safety.

Providing storage in areas of the park where RV sites are not suitable can be an important factor in developing strong ancillary storage income.

Types of RV Parks & Campgrounds

Building around the various RVing and camping styles noted above, RV parks and campgrounds generally fall into one of the following business models:

Open to the public RV parks are parks that can accommodate campers of all ages and family composition, traveling for any purpose in any type or size RV, tent trailer, or tent. These parks accept all types of RVs and park model RVs bearing a seal attesting to the fact that the unit is manufactured in compliance with A119.2 or A119.5 National Standard for Recreational Vehicles. These parks generally fall into two categories. The first is usually located off a major interstate with easy access for travelers. The second are destination RV parks and campgrounds found close to a major attraction or offering significant facilities, recreation, and amenities.

Many of the parks in the U.S. that fall into the classification of "open to the public" are either privately owned, operated on public land by a concession operator, or by a public governmental entity. These parks serve RVers, tent campers, and often rental accommodation guests for any length of time.

Open to the public adult-only RV parks are parks where the average age of the guests/residents must be 55 or older. These parks must comply with the Housing for Older Persons Act administered by HUD. Many 55+ parks have facilities and amenities that are specifically designed to cater to a 55+ market. These communities generally rent the sites on a daily, weekly, monthly, or extended stay for multiple months or an annual basis and may allow the placement of RV park trailers (park models) on the sites. However, many of the "seniors" who reside in an adult-only park, also own RVs, and camp at other parks. The 55+ parks are common in warm winter destinations in Florida, Texas, Arizona, and Southern California.

Restricted RV parks are open to the public but allow only specific types of RVs and/or specific types of campers in the park. These restrictions may limit occupancy to Class A

motorhomes only, to RV park trailers only, or allow a combination of unit types or sizes while excluding certain older or non-RVIA certified RVs from occupancy. Restricted RV parks may also focus on a lifestyle or hobby; for example, LGBT, nudists, equestrians, and ATV enthusiasts, to name a few. Restricted sections within an open-to-the-public park may be an appropriate model for some developments.

Extended-Stay or Seasonal RV parks may specify a minimum or maximum length of stay for any guest. This model is essentially used as a second home or vacation home community by the guests, whether winter or summer season predominates. For a variety of reasons in some regions of the country, some extended stay parks cater to campers desiring affordable or temporary living. This model is essentially an affordable living community with guests staying on an annual basis but usually paying monthly, depending on the state tenancy laws, to avoid creating a landlord/tenant relationship.

Land Lease RV parks are parks where the guest leases the site and resides in their RV of any type on the site for any length of stay. In many of these parks, the guest may own an RV park trailer (park model) and place it on the site, which is then leased on an annual basis. This type of lease may allow full-time occupancy of the unit or restrict occupancy to a limited time to comply with local regulations. Many land lease RV parks are owned by Real Estate Investment Trusts (REITs) and are popular locations for RVers who own a recreational park trailer. This type of RV park operates like the open-to-the-public model.

Workforce Housing parks cater to RVers who are in the area while working on major construction projects, at amusement parks, tourist destinations, seasonal employment opportunities, or in hospitals or other health care facilities. Workforce housing may be in stand-alone facilities or within sections of one or more of the other open-to-the-public RV parks.

Student Housing parks cater to students and faculty who are in the area while attending a college or university. Student Housing parks may be in stand-alone facilities but typically student housing is a section within an open-to-the-public RV park that caters to extended-stay campers.

Ownership or Condominium parks allow guests to purchase their site (the land) or lease it on a 99-year lease and place their RV unit on the site. In addition to the purchase price for the site, each owner pays a monthly maintenance fee to a homeowner or property owner association to cover common area park expenses. Ownership parks often allow lot owners to rent their sites through a rental program operated by the park or a designated real estate agent. Many allow the site owner to rent their sites directly as well. Any restrictions on unit type, age, or size that apply to site owners must apply to renters.

In areas where second home ownership is popular, the ownership or long-term lease model is increasingly popular. RVers are often eager to purchase sites to avoid dramatic rental rate increases and avoid loss of occupancy. There is also peace of mind

in being assured of a site should the rental park be sold for higher and better use. Ownership parks also provide the site owners with the opportunity to grow their investment over time as prices rise.

Many RV parks and resorts have converted existing sites to ownership as part of an exit strategy for the park developer or owner to cash out at prices significantly higher than could be achieved by selling the entire park to a single buyer. Also, the growth in popularity of this type of RV park business model has enabled the construction of several new resorts in high-interest locations where the cost of construction otherwise would be too high to allow for the development of a traditional, open-to-the-public rental park.

Many ownership parks experience increased site values over time, allowing the site owner to increase the value of their purchase investment.

Membership parks include parks where individuals purchase a membership with the right to use the park according to the rules of membership, timeshare, or fractional ownership or RV parks where buyers purchase either a specific period or points that may be used to reserve available space. These alternative models are financially rewarding but generally involve developing a sales organization to sell the memberships or fractional parts. The cost of sales is typically quite high and is labor-intensive.

Boutique RV parks have grown in popularity. The concept has been incorporated into several RV park projects in certain parts of the country. The defining element of a boutique RV park is based on theme, design, size, and location. While it is argued that boutique RV parks are typically smaller in size, many larger parks are creating the boutique look and feel.

One such boutique park is Holiday Cove RV Resort in Cortez, Florida with 97 sites on 9 acres with a small canal with boat docks just about ¼ of a mile from Sarasota Bay and the Gulf of Mexico. The Park was demolished in 2007 and rebuilt in 2008 as a boutique park with a new modern clubhouse, sparkling laundry room, professionally equipped fitness center, and restrooms decorated in floor-to-ceiling tile. Visit the park's website at [Holiday Cove RV - Bradenton RV Condos \(holidaycovervinc.com\)](http://holidaycovervinc.com)

Mystic Quarry in Canyon Lake, Texas, was an older park that was purchased by an energetic husband and wife team who are slowly converting the park to an artsy boutique RV resort. Rentals include modern and hip tiny homes, Sioux-style tipis, cabins, and cottages. Musicians are invited to play on their raised deck and live music occurs every Friday night. There are beehives, and chickens freely roam the property. Throughout the park, there are many arbors with hammocks for relaxing. Visit [Mystic Quarry | Canyon Lake, TX | Cabins, Glamping & RV Resort](#) for more info on this park.

While there are not many boutique parks, you will find them in “hip” locations such as Napa Valley, CA, Jackson Hole, WY, Lake George, NY, Bar Harbor, ME and Front Royal/Luray, VA.

Boutique-type characteristics are being incorporated into park models and tiny homes by many of the manufacturers. RVs such as Airstream and some of the very new teardrop trailers, retro trailer models, and small travel trailers are also incorporating boutique characteristics.

Glamping Resort describes a style of camping with amenities, and, in some cases, resort-style services not usually associated with "traditional" camping. Instead of the hard ground and too-cold sleeping bags, glamping often includes feather beds, comfy blankets, and sometimes a toilet and shower. Glamping includes all the amenities of high-end hotels set in a natural environment. A resort can be 100% exclusively targeted at the glamping market or there may be a section within a traditional RV resort.

Examples include:

Equity LifeStyle Properties (ELS), a publicly held REIT which owns and operates hundreds of manufactured housing communities and RV parks throughout the country, has introduced glamping sections, including tiny homes, yurts, and tipis, within their parks, and branding it as www.petiteretreats.com. There are many Petite Retreats throughout the U.S. spanning from Maine to Washington.



Mendocino Grove, a collection of plush safari-style tents (starting at \$115) and refurbished Airstream trailers, is tucked into 32 wooded acres in Mendocino County in Northern California. Classic 12' by 14' canvas tents are outfitted with queen beds, while larger 16' by 20' family tents include a queen bed and two sets of bunks or a queen and two twins. Accommodations are brought to life with organic materials like indigenous wood, vintage-inspired decor, and "touches of whimsy." Shelters are furnished with a minimalist mindset including a table, nightstands, folding chairs, coat rack, steamer trunk, lanterns, and jars of loose-leaf tea. Mendocino Grove created a cozy vibe by layering organic textures like sisal rugs, down duvets, gray flannel sheets, and wool blankets. A central bathhouse with a contemporary spa-like feel is outfitted with redwood, marble vanities, and subway tile-lined showers enhancing the "glam" theme to a bathhouse.

KOA's Terramor Outdoor Resort was a corporate-owned KOA campground in Bar Harbor, Maine. The Park was completely rebuilt and converted into KOA's first 100% outdoor glamping resort with no obvious affiliation to KOA. The resort opened in August 2020 and has reported high occupancies since opening. The rental selection is all glamping tents. There is a lodge, fields for outdoor activities, pool, hot tub, and restaurant. Visit www.terramoroutdoorresort.com.



Camp Aramoni ([BOUTIQUE CAMPING - Camp Aramoni](#)) in Tonica, Illinois is a resort with lavish accommodations about 100 miles southwest of Chicago which opened in August of 2021. Campers find exciting camping experiences paired with the best of hotel-like amenities. Taking glamping another step further Chef Cleetus Friedman provides "tent service" with meals delivered right to your luxurious tent.



Utopia Feels Botanical Glampground in British Columbia, Canada is nestled on property that was once a nursery. Many different species of trees create a utopian effect. Happiness above all else is the motto here. The resort opened in 2021 and is cannabis, alcohol, and party friendly.

Visit [Glamping Destinations, Information and Experiences | Glamping.com](#) to view hundreds of glamping examples throughout the world.

RV Park Franchise and Affiliation Opportunities

There are just a few franchise opportunities and affiliations available to RV park/campground owners and developers. Two franchises offer branding opportunities to new and existing campgrounds.

Kampgrounds of America: KOA is the world's largest system of open-to-the-public campgrounds with a 60-year history and more than 520 locations across the U.S. and Canada. Forty of the locations are owned directly by KOA. Owning campgrounds is a core component of KOA's business strategy and allows them to grow key operational knowledge that improves offerings across the system. KOA has consistently been listed in the "Top 50 Franchises, Franchisee Satisfaction Awards" by Franchise Business Review. KOA reports a 99% renewal rate of existing franchises in 2021.



In 2021, KOA had their best year on record after a decade of nearly constant growth. 2021 revenue performance topped 2020 performance by 33.2% and was 33% higher than 2019, their previous highest revenue year. In 2022, KOA surpassed this by 1.3% to close out their 60th year with record revenue. "To finish our 60th anniversary with

record-setting revenues is monumental,” said Toby O’Rourke president and CEO of Kampgrounds of America Inc. “The numbers point to the strength of our long-standing brand and the continued preference for KOA by campers. We appreciate the partnership with our franchisees, their confidence in our vision and the dedication and focus of our employees.”³⁴

The company hit a major milestone in 2023 crossing the \$500 million mark in registration revenue. Registration revenue is up 36% since 2019 with a 5% growth rate and KOA expects to hit the \$700 million mark by 2027. Short term camping nights were down 4.8% in 2023 but compared to 2019 overall camper nights are still up over 5%.³⁵

The KOA brand has seen impressive growth in franchise partnerships. The company expects to have 15 new conversions entering the system and six new construction contracts in place by the end of 2023.

“It is great to see this kind of movement even with higher interest rates. Six of the 15 new conversions are from KOA owners that are doubling down by adding more parks.” O’Rourke recently highlighted at the 2023 KOA International Convention.

KOA offers three levels of branding – KOA Journey, KOA Holiday, and KOA Resort – to help campers select a KOA that best meets their camping needs. All KOA parks offer laundry facilities, convenience stores, playgrounds, and Kamp K-9 pet parks. Journey branded KOA parks are located near highways and byways with long Pull-Thru RV Sites, Premium Tent Sites, and well-lit after-hours check-in service making the guest’s experience convenient. KOA Holiday parks are geared toward campers who are exploring the local area or just looking for a place to relax, hang out and play. Holiday branded KOA parks offer upgraded RV Sites with a KOA Patio™, Deluxe Cabins, amenities, activities, and services to make the guest’s experience memorable. Resort branded KOAs are geared toward vacationers looking for an outdoor destination experience with robust activities and amenities. KOA Resorts have upgraded sites with a KOA Patio™, Deluxe Cabins with full bathrooms and linens, Premium Tent Sites, a resort-style pool, and indoor and outdoor group facilities offering carefree guest experiences.

KOA has an optional camping loyalty program called KOA Rewards offering campers 10% off daily registration rates all year long. Reward points accumulate for cash discounts off future stays and a free night of camping during KOA Reward Weekends at participating parks. The cost is \$36 annually.

KOA requires at least 13 acres for initial development and requires 75 RV sites and 90 total sites when rentals and tents are included. A “New Construction Franchise” costs \$30,000. It includes land planning services and KOA proprietary management software. This fee may be negotiable if land planning services are completed. Five-year franchise

³⁴ <https://rvbusiness.com/koa-reports-record-revenue-continued-growth-in-2022/>

³⁵ <https://rvbusiness.com/koa-surpasses-500-million-in-camper-registration-revenue-2023>

agreement royalties are 10% on camping registrations and there is a \$1,750.00 franchise fee each year.

There are nine KOAs in Illinois and four KOAs in Iowa. The parks range from 59 miles to 333 miles from Rock Island. The closest KOA to the proposed property is the Galesburg East/Knoxville KOA Journey in Knoxville, Illinois, 59 miles from the proposed property. Galesburg East/Knoxville KOA Journey is branded a KOA Journey geared towards transient and short stay guests.

A KOA franchise is probably not available for the proposed location. KOA provides operational, promotional, training, reservation, design, and construction support to its franchisees. The KOA business model is not a consideration for this project.

Yogi Bear's Jellystone Park™ Camp Resorts: The Yogi Bear's Jellystone Park franchise system was founded in 1969 and multiple ownership groups have controlled the franchising company in the brand's 50+ year history. The franchisor, Camp Jellystone, was purchased by Sun Communities, a Michigan-based REIT, in December 2021 for \$23 million.



There are currently more than 75 Jellystone Park locations across the United States and Canada. Each location is independently owned and operated. The Jellystone Park franchise focuses on providing guests with amazing family entertainment experiences filled with great attractions (pools, water slides, mini golf, and lots more), fun activities (foam parties, dance parties, wagon rides, and more), and unforgettable costumed character interactions with Yogi Bear™, Boo Boo™, Cindy Bear™, and Ranger Smith™.

The Yogi business model is a vacation destination model and strongly appeals to families with young children. The brand's recognition is extraordinarily strong. The Jellystone model is heavily based on planned recreation, special events, and high levels of amenities.

As one might expect from the name of the parks, this system appeals primarily to families with children. It is the only campground brand focused on the expanding millennial family camping market.

Given the location's resort-style offerings, the Jellystone Park brand attracts many families with high household incomes. During the summer of 2022, 58% of their guests reported household incomes of \$100,000 or more with 27% of their guests stating that their household incomes are \$150,000 or more. The brand primarily attracts families with kids in the 6-12 range and as cabins and luxury accommodations continue to proliferate at their locations, the brand is attracting more and more non-camping families who are impressed by the brand's vacation offerings. In summer 2022, 42% of guest

households reported that they visited a Jellystone Park location for their first time ever and 33% of their guest households reported that they had not spent any nights at any non-Jellystone Park campgrounds within the previous 12 months.

Under the leadership of President Rob Schutter and his staff and their franchise owners, the Jellystone Park system has blossomed in the recent past. The Jellystone Park system just celebrated its 17th consecutive year of sales growth and record all-time revenues. Thanks to its recent performance, Yogi Bear's Jellystone Park Camp-Resorts has been ranked one of the nation's top franchisees by *Entrepreneur* magazine for six years in a row. It's 2023 ranking of #274 in the United States is an improvement of 74 slots compared to the previous year. In 2023, *Franchise Business Review* also once again honored the Jellystone Park brand as one of its top franchises of the year.

On the consumer media front, in 2022 *Good Housekeeping* honored the Jellystone Park brand with a Best Family Travel Award. Last summer, *USA TODAY 10 Best* readers voted the Jellystone Park location in Pelahatchie, Mississippi the top RV park in the country and two other locations were Top Ten finalists in the categories of best RV parks and best Luxury RV resorts.

Revenues in 2022 were up 12.2% and ancillary revenue increased 10%. Through the third quarter of 2023 same-park revenues were up 7.5% when compared to the same period in 2022. Over the last two years, revenues at the average Jellystone Park location have grown by 55%, with average park sales now topping \$3 million. "Our continued strong performance, despite the inflationary pressures impacting all households, demonstrates the value Jellystone Park delivers to families looking to have fun and create lasting memories," Schutter said. "Families in general continue to prioritize experiencing the outdoors, and those with children view glamping and camping as more cost-effective choices than other vacation options." ³⁶

Qualifying campground developments and conversion parks (operating RV parks that convert to a Jellystone) join the Jellystone Park system by signing an initial seven-year agreement and a franchise fee of \$15,000 (new builds pay \$7,500 on signing and \$7,500 prior to opening). Royalty payments are 5.5% on gross revenue (which consists of a 4.0% operating royalty rate, a 1.0% brand marketing fee, and a 0.5% Club Yogi™ Rewards loyalty program fee) for new builds. Conversion royalties are 6% royalty starting on dollar one after the business base exclusion, 1% marketing and 5% CYR on dollar one. Included in the franchise fee is a 10' statue of Yogi Bear and the 3 bear costumes. The agreement includes minimum royalty fees in the first five years totaling \$13,000. To be considered for entry into the Jellystone Park brand, a campground must meet the brand's minimum facility requirements, execute a Jellystone Park organized activities program, and feature at least four cabins with kitchenette and bathroom.

There are three Jellystone Parks in Illinois and one Jellystone Park in Iowa near Rock Island. These parks range from 77 miles to 148 miles from Rock Island. A Jellystone

³⁶ Pressroom - Jellystone Park (campjellystone.com)

Park franchise is possibly available for the proposed location. Although Jellystone Parks typically require greater amenity development and are more challenging to operate, this franchise model is not a consideration for this project.

Good Sam: Parks affiliated with Good Sam Parks and Campgrounds receive a variety of advertising and marketing benefits which are offered in the Good Sam RV, Campground & Travel Directory, online at the Good Sam website [RV Parks & Campground Directory | Find a RV Park | Good Sam](#). Good Sam parks offer Good Sam camping members a 10% discount on nightly camping. Parks may also sell Good Sam memberships and earn the enrollment fee for each membership sold (currently \$39). Parks pay an annual affiliation fee of a set amount regardless of the number of Good Sam members who visit the park.



Good Sam is the largest camping enthusiast group in the world. There are approximately 1.85 million members nationwide. Good Sam is owned by Camping World. Membership provides discounts, roadside protection, travel assistance, financing, and more.



There are 193 parks listed on the Good Sam (GS) Website in Illinois, of which 21 are officially designated to offer the Good Sam 10% discount. Iowa has 248 parks listed with 11 designated to offer the Good Sam discount. Many other undesignated parks in Illinois and Iowa will honor the same discount, upon request, to remain competitive. The GS discount is typically not offered on weekly or monthly rates since these rates are already discounted compared to the nightly rate.

There is no territorial exclusivity offered with the Good Sam Parks and Campgrounds designation. Any park that applies and meets the basic requirements can become a Good Sam affiliate park. A new RV park should become a Good Sam Park, at least in the first couple of years of operation. Good Sam members are often loyal to Good Sam parks and the brand does drive business. KOAs are not Good Sam Parks, and therefore, the GS affiliation can help level the competitive playing field with any competitive KOA franchises.

Other than the information available through online reviews on Google, Yelp, Trip Advisor, RV Park Reviews, and several other review sites, the Good Sam rating system is the only numerical benchmark for consumers to evaluate park quality before visiting. The system rates parks in facilities, restroom cleanliness, and general ambiance. Each area can achieve a rating from 1 - 10.

A new RV park development should be built to the 10/10/10 highest Good Sam rating if possible. (The scoring system for the Good Sam Rating is attached to this report). Parks are rated annually by Good Sam representatives who also sell advertising in the Good Sam print directory and online at the Good Sam website, www.rv.net. These representatives also market GS affiliation, advertising, and marketing packages.

Additional RV Park/Campground Brands and Multi-Park Operators

There are multiple organizations throughout North America making significant investments in the RV park and camping industry.

One of the largest companies is Equity Lifestyles, a real estate investment trust (REIT) traded on the New York Stock Exchange under the symbol "ELS." ELS is one of the nation's largest real estate networks with 450 manufactured housing and RV communities containing 171,707 sites in 35 states and British Columbia. They operate approximately 210 RV parks under the Thousand Trails and Encore brands.



Sun Communities, Inc is a publicly traded real estate investment trust (REIT) under the symbol "SUI" that invests in manufactured housing (MH), RV parks, and marinas. As of the end of September 2023, the company owns or has an interest in 670 communities, of which 182 are RV park investments in the U.S. and Ontario Canada with over 29,770 RV sites in 39 states, Canada, and the UK. In addition to their own Sun RV Resort brand, several KOA and Jellystone franchised properties are also owned. Total revenues for the quarter ended September 30, 2023, increased by \$.5 million, or .3%, to approximately \$163.1 million compared to \$162.6 million for the same period in 2022.³⁷



SUN COMMUNITIES, INC.®

Sun RV Resorts recently rebranded itself to Sun Outdoors. "Sun Outdoors is seeing tremendous growth as demand for outdoor travel continues to surge. From RVing to glamping to even tent camping, more people are looking for experiential activities in natural settings" reveals Nate Philippsen, VP of Marketing at Sun Outdoors. Part of the rebrand includes the introduction of four sub-brand divisions within Sun Outdoors that give guests the flexibility to choose how they want to experience the outdoors. The sub-brands include Sun Outdoors for short-term vacation resorts, offering travelers expansive grounds, unique amenities, and recreational programming; Sun Retreats for seasonal vacation resorts that attract guests in search of longer stays; Sun Resorts & Residences for 55+ resorts offering long-term active-living amenities and activities; and Sun Uncharted for glamping resorts designed for travelers looking for a mystical, picture-perfect backdrop. Currently there 44 Sun Outdoors, 52 Sun Retreats, 45 Sun RV Communities, and 9 Sun Resorts & Residences, one Sun Uncharted, and 75 Jellystone Park partners.³⁸

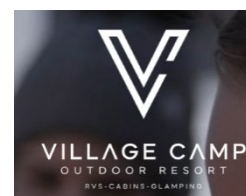
³⁷ <https://suncommunities.gcs-web.com/news-releases/news-release-details/sun-communities-inc-reports-2023-third-quarter-and-year-date>
<https://suncommunities.gcs-web.com/news-releases/news-release-details/sun-communities-inc-reports-2023-third-quarter-and-year-date>

³⁸ <https://www.sunoutdoors.com/brands/sun-outdoors>

Roberts Resorts has a 55-year history of inviting guests to “live the good life”. Their resort style amenities, luxe RV sites and affordable homes in award-winning communities across Alabama, Arizona, California, Utah, Colorado, and Texas, are the gold standard with well-appointed grounds and five-star features.



With a desire to break the mold of stodgy standard design, Scott Roberts, son of R.C. Roberts, founder of Roberts Resorts created Village Camp using mountain contemporary design elements to rival a master-planned community. It is a luxury outdoor resort with upscale RV camping plus adventure cabins for rent and sale. This concept provides a means for the average family to own a holiday home. There are currently two locations for Village Camp, one in Belmont Arizona near Flagstaff and one in Lake Tahoe, California. These parks are positioned to attract a new generation of adventure seekers.³⁹ Village Camp encourages guests to stay active, be eco-conscious, adventure like a local, and relax in the community spaces around the camp.⁴⁰



Many other private brands and chains are on the increase. Northgate RV Parks, Zeman Homes, Adventure Bound Camping Resorts, Legacy RV Resorts, Quality RV Resorts, RVC Outdoors, Athena Real Estate LLC aka Applebrook RV Parks, Great Escapes Camping Resorts, AutoCamp, and Highway West to name a few. None of these brands or companies offer affiliation opportunities.

Companies with national recognition such as Guy Harvey and Jimmy Buffett’s Margaritaville brand have entered the RV resort industry.

Camp Margaritaville RV Resorts invites guests to “join us for good food, signature concoctions, and sophisticated fun”. Currently 6 locations are in Pigeon Forge, Tennessee, Lake Lanier in Buford, Georgia, Crystal Beach, Texas, Breau Bridge, Louisiana, Mount Pocono, Pennsylvania, and Auburndale, Florida.



There are other resorts opening soon and/or currently booking. Upscale RV sites and cabins coupled with amazing amenities are available in these resorts. Find your paradise where it is 5 o’clock somewhere.

Northgate’s first Camp Fimfo launched in New Braunfels, Texas on July 1, 2021. A brand-new experience for campers combining comfortable accommodations with the great outdoors. Camp Fimfo combines family fun with Millennial-aged attractions. At Camp Fimfo kids and adults alike will have a great time in age-appropriate activities. Currently located in Texas Hill Country and Waco, Texas but seeking other locations.



³⁹ woodallscm.com/roberts-resorts-builds-off-vision-with-village-camp/

⁴⁰ www.robertsresorts.com

Guy Harvey Outpost Resort in St Augustine, Florida gives guests a great beach experience and is close enough to enjoy the oldest city in United States. The resort offers upscale RV sites and cabins on the Atlantic coast. In addition to the St Augustine Resort, they also have four lodges located in Florida, Bahamas, Little Cayman and Mexico; an RV resort in Florida and two marinas in the Bahamas.



Glamping parks capitalizing on locations near national parks, the great outdoors, and eco-friendly recreation are also gaining in popularity.

Located outside twelve national parks Under Canvas encourages guests to immerse in the great outdoors without forgoing the comforts of home.



Private safari-style tents have ensuite bathrooms, king-size beds, and wood-burning stoves. Under Canvas® has a mindful approach which fosters connection with family and friends, minimizes impact on the environment, and enhances the great outdoors.



AutoCamp offers overnight accommodations in modern Airstream suites and luxurious tents at locations in Cape Cod, Yosemite National Park, the Russian River Valley, Catskills, and Joshua Tree National Park. Opened in 2023 is a location outside Zion National Park. Anticipated in 2024 are sites in Asheville, North Carolina, Texas Hill Country, and Sequoia. AutoCamp brings high-end, boutique-style amenities, mid-century modern design, and welcoming hospitality to some of America's great landscapes. "Go to sleep in an Autocamp accommodation and wake up to some of America's greatest landscapes".⁴¹



Outdoorsy, the peer-to-peer RV rental website and organization, is the leading global marketplace in outdoor travel. The Outdoorsy Destinations Network has acquired two RV parks, Outdoorsy Bayfield in Colorado and Outdoorsy Yosemite in California. These parks make renting an RV very easy since the renter can make a site reservation and have the rental delivered directly to the campsite. These family friendly parks are located near two of the nations most popular outdoor recreation areas. Building campers' relationships to the outdoors and each other is the mission of Outdoorsy Destinations Network which has a goal of eventually acquiring 500 campgrounds. Outdoorsy has also partnered with Bushtec Safari who provide glamping tents to Outdoorsy as well as other glamping venues. Outdoorsy's new \$30 million Oasis Grant Fund provides funding to assist development of glamping properties.



⁴¹ Autocamp.com

RV Park/Campground Owner Associations

On November 7, 2023, National Association of RV parks and Campgrounds (ARVC) proudly announced rebranding to OHI Advancing Outdoor Hospitality. This rebranding solidified the organization's role in advancing the outdoor hospitality industry. "In an era of booming outdoor recreation, the expectation for our organization to direct the bright future of outdoor hospitality for all our current and future members is higher than ever," says Paul Bambei, President, and CEO of OHI. "Whether you're the ultimate stop on a journey, an overnight stay, or the starting point of a larger adventure, a state association supporting these businesses, or one of our industry partners offering new innovations and opportunities, all of outdoor hospitality creates incredible experiences and lasting memories for the campers, RVers, and adventurers our members serve every day."



OHI is the trusted voice for all outdoor hospitality businesses. The 60 years of experience will continue under the OHI name and will support the entirety of the outdoor hospitality industry. No other organization holds a wider view of the road, combining earned trust with proven resources and practical expertise to advance the next decades of the outdoor hospitality industry. The organization can be found on the web at www.ohi.org.

OHI is the only national association dedicated to representing the interests and needs of private RV parks and campgrounds in the U.S. and Canada. There are over 3,100 member campgrounds in 49 states and 6 Canadian provinces. A fee is required for membership. Member benefits range from discounts on supplies to education to networking to advocacy. Joining one of 23 partnering state associations includes OHI membership. (Three states are working with OHI to become partnering states. Each fall OHI hosts the Outdoor Hospitality Conference and Expo (OHCE). The next conference is November 4-7, 2024, in Oklahoma City, OK. The consultants have witnessed and experienced the value of joining the national organization (www.arvc.org).

State Campground Owner Associations are organized in many but not all states. Several states have campground owner associations which operate independently of OHI. Campground members in these states join each organization separately to be members of both. Some very well-organized state organizations outside of OHI, such as the Texas Campground Owners Association (TACO), Campground Owners of New York (CONY), Florida and Alabama RV Park & Campground Association, and the California Outdoor Hospitality Association offer valuable member benefits geared towards their state. State organizations typically offer valuable marketing opportunities by promoting camping within their state. State Associations also offer the most accurate information on state and local regulations.

The Illinois Campground Association and the Iowa Campgrounds are industry associations that represent the interests of RV park and campground owners and

operators throughout Illinois and Iowa. As a member of these Associations parks are part of a powerful team focusing on the common needs and interests of all RV parks and campgrounds. Members are provided with advocacy, education, and promotion opportunities to help park operators become more successful and profitable. The Illinois Campground Association has 46 member parks and is dedicated to promoting its parks and improving family camping in Illinois. Additionally, two annual conferences are held featuring educational opportunities and networking opportunities. Iowa Campgrounds provides similar services for 23 Iowa member parks. Consultants have personally experienced the benefits of these associations.

American Glamping Association

As glamping locations have become more mainstream, the American Glamping Association was founded in 2018. Its mission is to advance the quality of the glamping community through the access of information and build bridges of connectivity throughout the industry. The American Glamping Association is dedicated to creating opportunities for new and existing business owners within the emerging Glamping industry to grow as a community. The Association provides resources and education regarding the Glamping industry through internal tools and external partnerships. The Association provides the utmost satisfactory Glamping experience to both owners and consumers. It is a nonprofit trade association similar to ARVC. The Glamping Show USA explores the business of luxury camping each October in Aurora Colorado. The show provides training, networking, and buying opportunities specific to providing glamping experiences.



Bureau of Land Management (BLM)

Recognizing the demand for outdoor recreation the BLM has produced [“Blueprint for 21st Century Outdoor Recreation”](#). Through the Blueprint, BLM is establishing a new vision to proactively manage exceptional and unique recreational experiences that invite all to share in the enjoyment and stewardship of their public lands.

A myriad of outdoor recreation including hiking, fishing, camping, climbing, hunting, ATVing, horseback riding, mountain biking, snowmobiling, boating, and more is found on the 245 million acres managed by the BLM. These experiences contribute billions of dollars to the national and local economies. The blueprint will help the agency support outdoor enthusiasts as well as local outdoor recreation economies in a focused and deliberate manner and provide resilience and sustainability for the future enjoyment of BLM lands and waters.⁴²

⁴² RV Business September 1, 2023

RV Park & Campground Industry Outlook

The outdoor hospitality industry entered this decade amid double-digit growth and has shown resilience and continued growth. Steady economic growth and interest from multiple age groups supported industry growth. RV sales data and economic impact reports verify the growth of the industry.

The demand for camping and outdoor hospitality increased dramatically, evolving stronger and faster than all other travel markets, and producing record numbers for 2020-2022. The June 2023 Tourism Economics' travel forecast model states "The latest forecast projects that domestic leisure travel, which has surpassed pre-pandemic levels, will remain resilient while domestic business travel will continue its slow but steady recovery. International inbound travel will remain sluggish as it continues to face headwinds, with a full recovery not expected prior to 2025."⁴³

As evidenced by new reservations and current occupancy the Canadian Snowbirds have returned. The U.S. has felt the impact of decreased restrictions and snowbird areas are expected to return to normal pre-COVID levels for the 2023/2024 season.

While consumers are eager to travel, many are still unsure and remain cautious; fearing for their health, and, for many, finances are strained. Of all travel options available, camping in whatever form is the safest and most affordable means of vacationing. Camping naturally lends itself to social distancing. Campgrounds and RV parks are organically adaptable to healthy safety measures especially compared to other travel options.

Camping after COVID-19

Camping became a part of the mix for leisure travelers who did not camp previously, and this is the most significant impact of COVID-19 on the camping industry. Recognizing camping and glamping as a part of a new travel culture, millions of travelers chose an RV or camping vacation over other types of travel finding flexibility, freedom, safety, and peace of mind. Camping has realized steady growth in both the number of households actively camping and in the length of time spent camping annually. Most campers agree that camping offers a safer option when compared to other forms of leisure travel.

Many travelers chose an RV or camping vacation to replace other types of vacations. Those travelers headed to both public and private RV parks and resorts, but then also found alternative camping choices on farms, at wineries, and in someone's backyard. These same travelers also discovered tailgating and attending festivals and events was easier in an RV.

⁴³ U.S. Travel Association Travel Forecast February 2, 2023

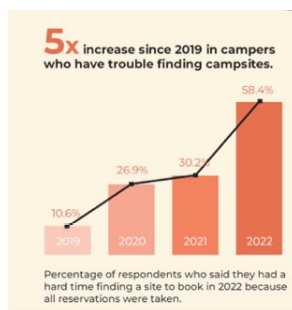
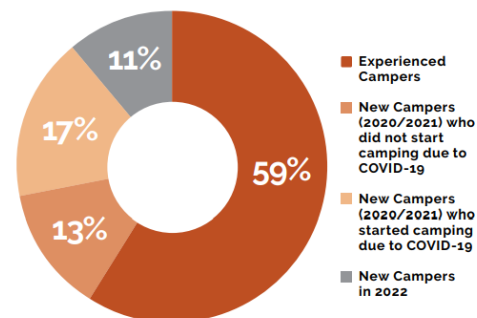
The historic reasons for camping; relaxation, stress relief, and rejuvenation have remained most important to campers. The importance of down time, mental health, and spending time with family has become a priority for families. Eighty-six percent of all campers view camping as a time to relax and escape from the stress of everyday life.⁴⁴ They also believe camping helps improve emotional well-being and improves relationships with family and friends.

Operational procedures and camping habits changed during the pandemic and are predicted to remain changed into the future. Guests are staying longer and camping more often midweek desiring flexible cancellation policies, contactless transactions, high speed internet and transparency in a park's safety and cleaning policies.

Going forward RV parks and campgrounds must continue to heed the guidance and instruction from state and federal health officials. Special attention must be given to the cleanliness of restrooms, playgrounds, swimming pools, rental units, and other areas. New cleaning and disinfecting procedures and non-contact registration procedures must be implemented and marketed. Gatherings of multiple campers may require regular evaluation. Seeking innovative ways to enhance family experiences and activities must be on going.

Camping in 2022

In 2022, camping persevered despite economic uncertainty. Sixty-four percent of campers camped more or replaced other types of trips with camping in 2022. Camping households exceeded 2021 figures by 1.5 million. Gas prices and inflation caused campers to adjust their camping behavior, traveling shorter distances and spending less while camping, but still camping.



Because of the growth in the number of campers it has become challenging to book a campsite. According to The Dyr, the leading app for information and reservations in the outdoor hospitality sector, campsites were twice as hard to find in 2022 as they were in 2021. 2022 was by far the hardest year yet to find an available campsite. Finding a campsite has become increasingly challenging with five times the increase since 2019.⁴⁵

Like 2021, almost 24% of campers said they worked remotely while camping in 2022. "With return-to-the-office efforts across the country, one might have expected the work-

⁴⁴ KOA Monthly Research Report December 2022

⁴⁵ The Dyr 2023 Camping Report

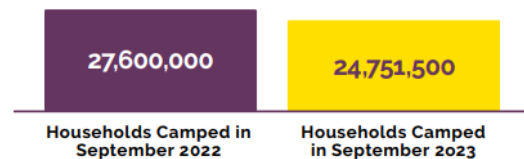
from-campsite rate to decrease, but it stayed level. Work from campsite is here to stay” says The Dyrts’ CEO Kevin Long.

Both new and seasoned campers found camping a viable travel solution even during the most challenging of times with 74% of campers from 2022 planning to continue camping in the future.⁴⁶

Camping in 2023 and 2024

By end of January 2023 campers were making solid plans for the rest of 2023, including 26% who have already booked some or all their camping trips and 86% already deliberating or choosing their destinations for 2023.⁴⁷ Weather and overcrowding impacted camping this spring and summer. Weather caused a change in camping plans for 67% of campers during the first part of 2023.⁴⁸ Fourth of July camping in 2023 was flat when compared to 2022 but still substantially better than 2021. Compared to 2022 a small dip in camping was seen for July, August, and September 2023 even though customer satisfaction was high with 58% indicating their camping trips exceeded expectations.⁴⁹

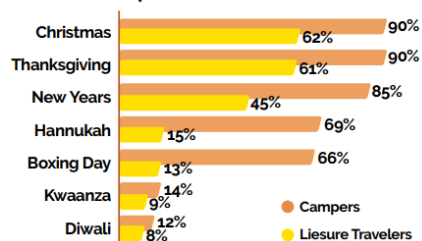
September 2022 Camping vs September 2023



By August camping activity remained favorable as compared to 2022. The Dyrts reported in August that campers were still finding it 5 times more difficult to find campsites this summer. Reacting to this problem, the Dyrts has built a new feature, Dyrts Alert, which allows campers to be notified when there is a cancelation at a campground they have selected. This feature allows the camper the ability to find a last-minute campsite.

As the season moved into Fall campers indicated weather was a factor in planning camping trips. The top reasons for changing camping trips were too hot, too cold, and bad air quality. Therefore, plans are now being made closer to the time of travel,

Potential Holiday Travel

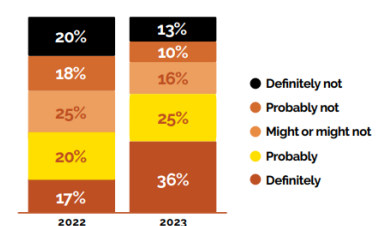


during the holidays is high among campers with 90% anticipating camping during both Thanksgiving and Christmas holidays compared to 61% and 62% for non-

different types of accommodations are being selected, and trips are planned away from wildfire zones.

Enthusiastic campers looked toward the late fall and winter for their camping trips. Reversing the summer trend, October showed an increase in camping households from 10.24 million in 2022 to 11.38 million in 2023. Travel

Winter Camping Intent



⁴⁶ KOA Monthly Research Report January 2023

⁴⁷ KOA Monthly Research Report February 2023

⁴⁸ KOA Monthly Research Report August 2023

⁴⁹ KOA Monthly Research Report September 2023

campers. Hanukkah celebrations will include camping for 36%. There is a strong interest in outdoor activities during the holidays.⁵⁰

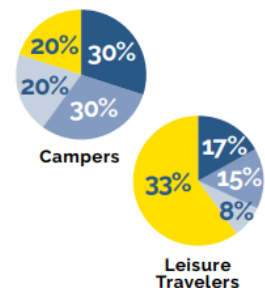
Campers are planning their winter and 2024 camping trips. Winter camping increased from 17% in 2022 to 36% in 2023. Seven in ten campers plan to see the solar eclipse while camping with 18% of campers having already booked their stay. Looking toward 2024 a full 51% of campers have already booked some of their trips compared to only 13% of leisure travelers.⁵¹



Of campers who make advanced plans 60.9% are booking three months ahead with 8.6% booking a full year ahead. Those who prefer a more spur of the moment time frame 50.7% are booking less than a week ahead and 21.1% are booking less than a month ahead.⁵²

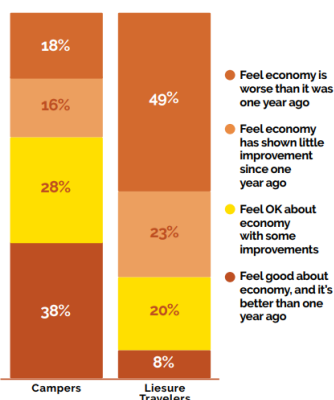
RVshare's 2023 Travel Trend Report predicted another blockbuster travel year for 2023! The new research conducted by Wakefield Research revealed nearly all Americans (99%) were planning a leisure trip in 2023 with 61% planning a road trip or a vacation in an RV. Fifty-one percent of travelers were planning to travel more in 2023.⁵³ Anticipation for travel in 2024 is strong with 30% of campers already booking their 2024 trips and another 30% having booked most of their trips. Only 17% of all leisure travelers have made plans for 2024 with another 15% having booked most of their trips. Weather concerns have campers booking closer to travel dates, altering accommodations, and choosing locations less prone to weather disasters.⁵⁴

**Percent of Campers
Booking 2024 Trips**



Camping remains a priority even in a lagging economy. Camping

View of Economy



is seen by half of all campers as a cost-friendly way to travel. In the event the economy worsens 38% of campers say they will continue to camp and reduce the number of other types of vacations. A camping trip will not be replaced by other travel options for 89% of campers.⁵⁵ Campers also tend to be more optimistic regarding the economy than leisure travelers. Thirty eight percent of campers feel good about the economy and believe it is better than a year ago compared to 8% of leisure travelers.⁵⁶

⁵⁰ KOA Monthly Research Report October 2023

⁵¹ KOA Monthly Research Report July, August, September, October 2023

⁵² The Dyrft 2023 Camping Report

⁵³ RVshare 2023 Travel Trend Report

⁵⁴ KOA August 2023 monthly update

⁵⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

⁵⁶ KOA Monthly Research Report October 2023

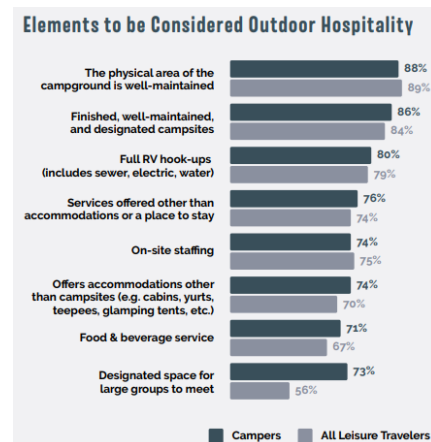
Relaxing and spending time with family and friends continue to be important to leisure travelers. Fifty nine percent of 2023 travelers are still interested in relaxing and unwinding but a 12% decline is expected compared to 2022. Half of 2023 leisure travelers are motivated by spending quality time with family just a 7% decline from 2022. Forty-seven percent enjoy nature and wildlife. Forty-nine percent prioritize enjoying peace and quiet. Thirty four percent place importance on catching up with friends.⁵⁷

Travel decisions are still impacted by flexibility in the workplace which is becoming more permanent for many Americans. Camping is remote work friendly and allows those with workplace flexibility the opportunity to enjoy vacations while working remotely. This has created “hush trips” which are vacations taken without taking days off. Fifty six percent of all working adults are likely to take a “hush trip”. Over a third of Gen X and nearly all Millennials, have remote jobs, already planned a “hush trip” for 2023.⁵⁸

Camping in the Future

Many of the 2022 travel trends are still positively impacting camping. These trends include the major pent-up demand for travel. Health and safety concerns influencing how and where people travel. The increased desire to be outside and travel with friends and family. The desire and need of many (57%) to travel with their pets.⁵⁹ The increased demand for vacation rentals and cabins over hotel rooms.⁶⁰

Over the past decade camping incidence has increased significantly and has established itself at nearly one third of leisure travel. As travelers design their outdoor experiences outdoor hospitality plays a major role. Outdoor hospitality is not just providing accommodation. Sixty-one percent of campers strongly agree that outdoor hospitality must have services in addition to accommodation. Campers expect outdoor hospitality to include a well-maintained property, nicely finished and well-maintained campsites, water, electric, and sewer hookups, on-site staffing, additional accommodations besides campsites, food and beverage service, and designated space for a large group to meet. When identifying which outdoor accommodation providers have the highest level of outdoor hospitality, private campgrounds rank the highest for campers at 41%, and outdoor themed resorts and hotels lead the way for leisure travelers at 59%.⁶¹



⁵⁷ RVshare 2023 Travel Trend Report

⁵⁸ RVshare 2023 Travel Trend Report

⁵⁹ KOA Research Report July 2023

⁶⁰ <https://www.usatoday.com/story/travel/news/2022/01/19/family-travel-10-trends-to-watch-2022/6563010001/9+iu>

⁶¹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

Safety fears, government restrictions, work status, and personal finances all play a significant role in when and how people will camp. While distance traveled increased in 2020, most campers continue to stay within 150 miles of their home. The desire to visit less crowded destinations is evident. The demand for extended-stay camping is increasing.

The popularity of camping has remained strong even as virus infections rise and fall. “The RV and camping industry had tremendous resiliency during past economic downturns and has proved to be significantly recession resistant. For decades RV sales were a reliable indicator of the beginning and end of a recession. Sales dipped as an economic downturn approached, and sales rose right before the recovery.” says Dr. Richard Curtin, former RVIA’s Industry Analyst.

Note: Dr. Curtin conducted research on the RV market from 1979 - 2020, including RVIA’s series of RV Consumer Demographic Profiles and the RV RoadSigns forecast. ITR Economics has been conducting RVIA’s research since Dr. Curtin’s departure. ITR is the oldest, privately held, continuously operating economic research and consulting firm in the United States, providing businesses with forecasting, economic information, insight, analysis, and strategy.

In tough times, people still vacation, although the way they vacation often changes. A fundamental reason people purchase RVs is for independent travel. Unlike cruises, where thousands of people are traveling together, and airplane travel, where passengers may be exposed to unknown viruses, RVers travel in small family groups in their vehicles staying in their RVs. Further, the nature of RVing and camping as an outdoor activity keeps RVers and campers from large gatherings in closed spaces. The RV and camping industry continues to show resiliency over the decades and is in better shape than other travel and recreation sectors going forward.

Gasoline Prices Impact on Camping

Gas prices influence camping enthusiasm and habits. Approximately 70% of campers say that increases in gas prices affect their plans, whether it’s taking fewer trips (24%), traveling less distance per trip (25%), or staying closer to home (32%). The threshold for gas price increases is much lower for younger campers, with the most significant impact coming when prices reach \$4.50 per gallon.⁶²

Impact of Gas Price Fluctuations on 2022 Camping Plans

32%	plan to camp closer to home
25%	plan to take fewer trips, but stay longer
29%	say it will not change their camping plans
28%	plan to take a cross-country road trip
24%	plan to take fewer trips overall
20%	delaying trips to later in the summer or fall

⁶² KOA Monthly Research Report April 2022

Inflation, gas prices & recessionary risks on camping industry

The economic headwinds affect all forms of travel, not just camping. Inflation raises the costs for all types of travel. Over the years camping has been known as one of the most affordable ways to vacation.

Economic conditions impact camping plans. Campers stayed closer to home (within 100 miles of their home this past year), took fewer trips, stayed in one location longer, and spent less during trips.

Change in RVing During an Economic Downturn

Use RV for more trips instead of other types of travel

33%

No change to RV travel plans and continue to take the same number of trips regardless

23%

Use RV for fewer trips and instead use other forms of travel

17%

Take fewer trips overall

17%

Uncertain

9%

Thirty-eight percent of campers continued to camp but took fewer other types of vacations. Eighty-nine percent of campers did not sacrifice a camping trip for another type of trip. One fourth camped more often. Nearly 90% made some type of adjustment and/or re-evaluated their plans in 2023.⁶³

RVing may not appear to be an attractive travel option due to the costs of operating the RV and higher

campsite costs. More than half of RVers say they will use their RV more or the same amount during an economic downturn.⁶⁴ Few RVers plan to get rid of their RVs because of an economic downturn with most making no changes at all, planning to upgrade, or renting to others.⁶⁵

Views Toward RV Ownership During an Economic Downturn

No plans to sell or rent RV	46%
Rent or borrow an RV	14%
Rent my RV to others	11%
Plans are still uncertain	10%
Planning to sell my RV and purchase a different RV	9%
Planning to sell my RV and not purchase another RV	6%
None of these	5%

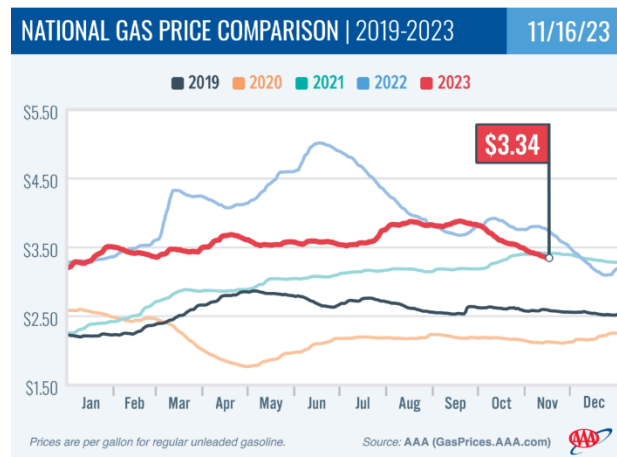
⁶³ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

⁶⁴ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

⁶⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

According to the AAA, America's largest motoring and leisure travel membership association, fuel prices peaked in June 2022. Regular gasoline at \$5.016 and diesel at \$5.816. Early August of 2023 saw gas prices hovering at the same level as August 2022. The U.S. Energy Information Administration predicts oil prices will average \$3.63 through the end of 2023. Unplanned U.S. refinery outages and higher crude oil prices will impact these prices. On November 27, 2023, AAA reported the national average price for regular grade gasoline was \$3.250 with diesel at \$4.229.

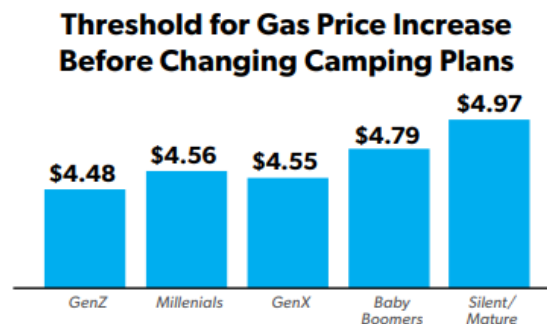
Gas prices are experiencing a slow decline due to lower demand at the pump and lower prices on crude oil. Cautious optimism on gas prices is encouraged even though prices have remained steady or fallen since mid-September.⁶⁶ AAA reports consumers conserve gas consumption by driving less and combining errands. When at campgrounds guests are spending more time at the campground and less time at area attractions and dining out.



Diesel prices are of concern. The distillate supply (diesel, jet fuel, and heating oil) is at the lowest level since 2008. This is important because the American economy runs on diesel. In addition, many of the vehicles used for RVing also use diesel. The lower supply coupled with strong demand will result in an upward pressure on diesel fuel prices.⁶⁷

Changes in the price of crude oil and the resulting effect on gas and diesel prices cause changes in how campers camp, but not whether they will camp. During these times many campground operators adapt to their guests' new camping habits and report strong occupancy and, in many cases, increased business. Several

current and past industry leaders agree the impact of gas prices depends on the type of park operated. RV parks that attracted vacationers and weekend campers or more transient campers found their guests traveling shorter distances and/or staying longer once at the park. RV parks that attracted destination travelers saw little change since the cost of gas was a small part of the camper's overall expense and/or budget. RV parks also pivoted with many vacation leisure parks offering seasonal or extended stay sites. Many parks began offering RV storage for the first-time allowing campers the option to leave their rigs at the park and save money on towing the RV. Some parks



⁶⁶ Gasprices.aaa.com

⁶⁷ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

introduced various types of incentives (like a gas card bonus for staying a certain length of time) to gain occupancy.

Campers also spent less while traveling. Thirty-one percent of campers have adjusted to increased costs by spending less in local areas while traveling rather than not traveling at all.⁶⁸ Fifty-seven percent will cook their own meals instead of dining out, 49% will travel during off season when rates are less, and 43% plan to partake in fewer fee-based activities to keep traveling.⁶⁹

Overall, during times of historically high gas prices and recessionary periods the campground industry continued to flourish and attract campers. Even in a lagging economy camping is a priority and the most cost-friendly way to travel.⁷⁰ History shows the resilience of the campground industry during inflationary times and economic challenges, and the determination of RVers to enjoy their RV and get outdoors no matter the obstacles.⁷¹

Long Term RV Sales

Dr. Richard Curtin, Ph.D., and Director of the University of Michigan's Survey Research Center estimated in 2016 that the RV industry may be shipping as many as 500,000 units per year by 2020. This projection was reached in 2017.⁷²

What is the potential peak in retail RV unit sales? Would RV retail sales have rebounded in 2020 and 2021 absent the pandemic? How will the pandemic and the economic downturn affect RV sales in 2023 and beyond? Forecasting long-term trends of highly discretionary purchases is never easy. The first step is to assess the factors that produced the last peak and make intelligent assumptions about the future.

In the previous decade, the RV industry experienced record-breaking sales generated by disproportionate increases in home values, free-flowing credit, and natural disasters, such as Hurricane Katrina in 2006. In recent years a record number of hurricanes have increased the demand for RVs and may very well have accelerated industry sales. No one could have predicted the pandemic and its effect on travel and tourism, and ultimately, camping. The pandemic introduced new travelers to camping, and many of these travelers purchased RVs. These newbies are the major contributing factor to the record RV sales years and almost 50% of them plan to continue camping in the future.⁷³

The RV retail market is in a period of synchronization matching supply with demand. Demand for new RVs still exists and is historically very strong, particularly by younger buyers. The ongoing efforts of the Go RVing campaign include mainstream national TV programs supporting the RVing lifestyle and new product offerings by manufacturers.

⁶⁸ KOA Monthly Research Report August 2022

⁶⁹ 2023 Travel Trend Report RVshare

⁷⁰ The 2023 North American Camping Report sponsored by Campgrounds of America, Inc., conducted by Cairn Consulting Group

⁷¹ Woodall's Campground Magazine February 28, 2022 Lookback: Could High Gas Prices Impact Your Park?

⁷² Road Signs, Summer 2016 RV Industry Association

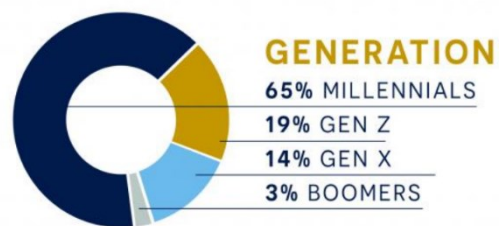
⁷³ KOA Monthly Research Report September 2022 Edition

Consumer sentiment towards traveling and RVing post-pandemic keeps camping in the forefront.

Industry research completed before the pandemic indicated newer and younger RV owners and shoppers demonstrated higher and more robust shopping intentions than older RVers. Additionally, most RV owners said they would probably purchase another RV sometime in the future. Research completed during the pandemic indicates new consumers who never camped and those who never considered camping are renting or purchasing RVs now and in the immediate future. Even celebrities embraced and promoted RVing. Jimmy Kimmel and Dax Shephard both acquired motorhomes in 2020.⁷⁴ Drew Barrymore and Ross Matthews teamed with Go RVing and embarked on a Texas RV road trip from Dallas to Waco in 2022. Their trip can be viewed on YouTube.⁷⁵

The right quality and mix of RV products are crucial for attracting and keeping millennials as well as repeat baby-boomer buyers. According to Dr. Curtin, if that mix is found, RV sales will continue to benefit from demographic trends. According to a study performed by GoRVing, the promotion arm of RVIA and RVDA, 49% of RV owners are between the ages of 55 and 74 – always a sweet spot for the RV industry with their love of large units. RV owners between the ages of 35 and 54 were 29%, and the youngest RV owners between the ages 18 and 34 comprise 22% of the market share. This reveals that 51% of RV owners are under the age of 55.

The new RV buyer is skewing much younger and comprised of primarily Millennials. Appealing to the younger generations is an important factor contributing to the longevity of the camping industry.⁷⁶



RVIA leaders remind us that even though there was a decline in RV shipments during 2022 and to date 2023 the industry is still in a positive position. 2022 RV shipments were the third best year on record. Consumer interest in RVing remains high. Jeff Rutherford, Chairman of Airxcel, indicates the younger and more diverse clientele point to continued industry growth. Karen Redfern of Go RVing points to the new buyers staying in the RV lifestyle. Craig Kirby, President RVIA suggests the lower average age of buyers (age 33) bodes well for the future.

“Travelers continue to choose RVing as a top travel option because of its affordability and ability to bring family and friends closer together,” said RV Industry Association President & CEO Craig Kirby. “This new forecast shows that RV shipments will continue to level off through the remainder of 2023 and then begin to improve in 2024. Our

⁷⁴ RV Industry Association News & Insights February 2, 2021

⁷⁵ Woodall's Campground Management April 8, 2022

⁷⁶ <https://www.rvia.org/news-insights/infographic-get-know-2022-new-rv-buyers>

research shows that consumer interest in living an active outdoor lifestyle remains strong, and there are RVs available at every price point for consumers eager to get outdoors and recreate.”⁷⁷

Go RVing and Other Industry Efforts

The different components of the outdoor hospitality industry continue to work together. Manufacturers, dealers, and campgrounds all need each other to survive. Cooperation among these entities provides significant benefits to each of them.

Go RVing is a partnership between the RV Industry Association (RVIA) and the RV Dealers Association (RVDA) initiated in 1994. It relies on both manufacturer members and dealer partners to provide support to grow the campaign and raise awareness of RVing.⁷⁸ The Go RVing program has become a trusted brand to American consumers. Its annual multi-million-dollar promotion attracts broad consumer interest and is gaining widespread exposure for RVing.

Go RVing launched new branding, messaging, and creative content in Spring of 2022. The campaign is broken down into three categories – Recruit, Retain, and Educate. Social media also plays a key role. Facebook awareness campaigns produced millions of videos making RVs part of the conversation and consideration set for vacations.

The 2022 media and marketing campaign focused on efforts to recruit, diversify, and retain RVers. A mix of broad media generated top of mind awareness and consideration of RVs to high value audiences of outdoor enthusiasts, diverse audiences, and child-free explorers. Targeted media encouraged “One more Weekend!” for current RV owners. The full-funnel approach which was designed in 2021 continues to drive consumers deeper into the purchase funnel and into local dealerships with the continued updating of the “Go on a Real Vacation” assets. Nearly 50 different RVs ranging from small travel trailers to large motorhomes support the message of RVing is for everyone and commercials reflecting America’s diversity were on National TV, satellite, and terrestrial radio, print and across digital channels and social media throughout 2022 and into 2023.

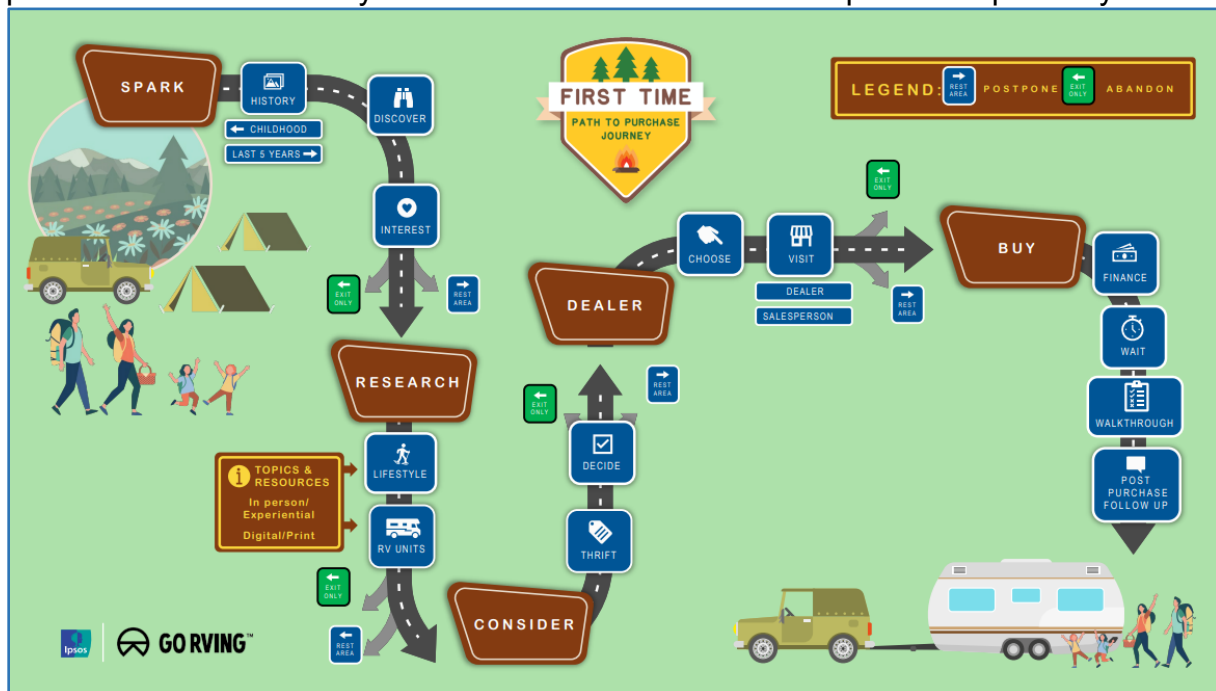
⁷⁷ www.rvia.org

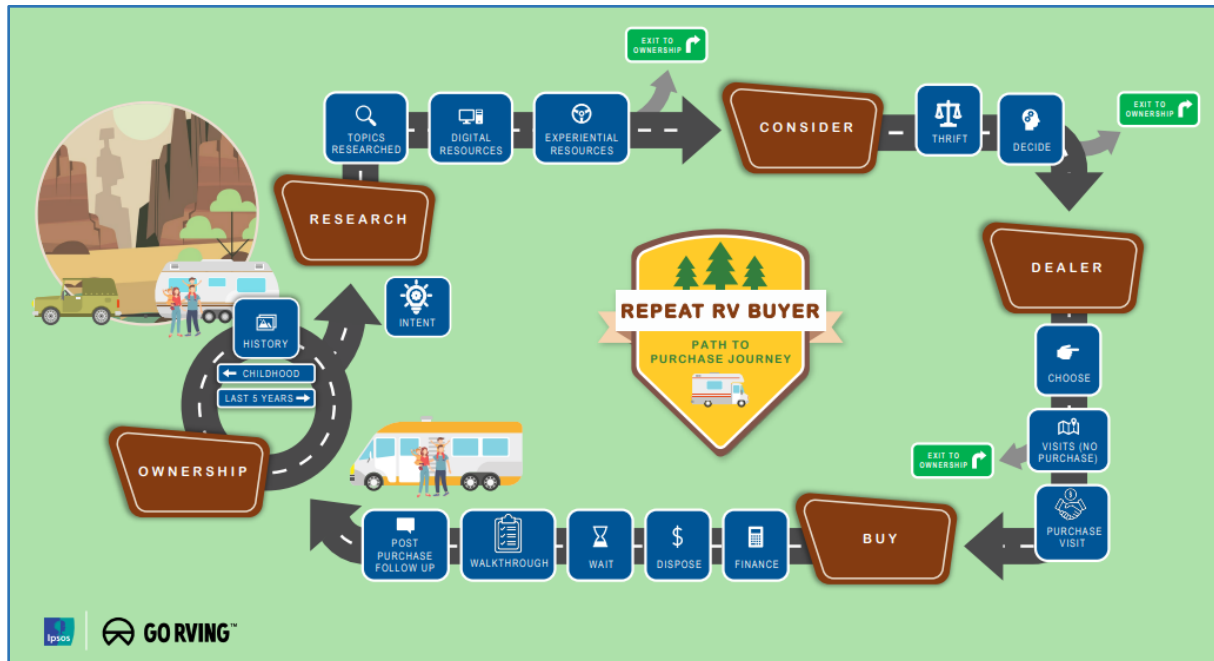
⁷⁸ www.rvia.org

“Go on A Real Vacation” began two years ago and continues to resonate with consumers and is designed to target those who put their fly/cruise vacations on hold. The “recruit” efforts have seen strong performance, with non-RV owners increasingly engaging in the creative content.



In addition to enticing people to Go RVing, analytics are used to produce various reports reflecting the path to purchase for the various types of RVs. The reports also analyze first time buyers and repeat buyers. These reports help in understanding the steps a consumer follows from idea to purchase. The following chart shows the path to purchase for first time buyers. The second chart shows the path for repeat buyers.





79

The GO RVing website offers tips and inspirations, explores all types of RVs, gives instructions on getting started and assists consumers in finding the right brand, dealer, and campground. The Go RVing First-Timers Tool Kit provides expert and how-to tips for the millions of new RVers who are looking for guidance on how to use their new RVs. The “Real Time” series introduces the audience to “Real” families, couples and individuals who camp for a variety of reasons. “Real Trends” monitors both business and consumer trends and most importantly what’s changing each month in the RV and camping industry. The monthly report is a source for trends and insights impacting the RV community.



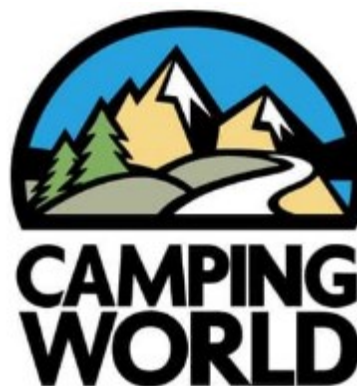
Other Marketing Efforts

Partnerships being built between dealerships, rental companies, and campgrounds sharing a local market help to increase industry awareness and unity. These partnerships typically help new users decide where to go and how to use their new or new-to-them RV.

Additionally, cable TV has introduced many RV-friendly shows such as Flippin’ RVs, Going RV, and Extreme RVs. These programs have brought the enjoyment of RVing and camping to the attention of the American consumer and marketplace.

⁷⁹ www.rvia.org/rv-path-purchase-journey

Camping World Holdings, Inc. (CWH) together with its subsidiaries is the largest retailer of RVs and related products and services in America. CWH became a public NYSE Company in 2016. Camping World was the first RV retailer to enter the public investment market.



Camping World, its second brand, Gander RV, and other subsidiaries, have brought RV sales mainstream investing millions in national TV, digital and print. It continues to purchase RV dealerships across the U.S. The company operates over 203 RV and Outdoor Retail locations in 42 states. Going forward, Camping World will provide an additional benchmark on the health of the camping industry. The third quarter of 2023 revenue was \$1.7 billion, a decrease of 6.8% compared to the third quarter of 2022. Mark Lemonis, Chairman and CEO of Camping World Holding recently stated; “We are laser focused on the final stages of cleansing our inventory going into 2024. These actions have come with near-term gross margin compression, but we believe now is the moment to put the finishing touches on our industry-leading inventory position and prepare the business for the next up-cycle. In 2024, we expect total company revenue, same store unit sales, total gross margin, and earnings to increase year over year.”⁸⁰.

Lazy Days RV dealership based outside of Tampa and the largest single RV store in the United States also became a publicly traded company in 2018. Lazy Days RV is ambitiously purchasing RV dealerships across the United States and currently has 23 locations in 12 states.

Blue Compass RV (formerly RV Retailer LLC) is a privately held company with roots in Auto Nation, America’s largest automotive retailer. Founded in 2018, and rebranded in November 2022, Blue Compass RV, the fastest growing RV retail company has 117 dealerships in 33 states with 1,000 service bays, 4,000 highly trained and certified associations, and continues to expand. Combined, these dealerships have over 15,000 new and pre-owned units in inventory encompassing over 50 brands. Blue Compass RV has a mission to provide an exceptional RV sales, service, and ownership experience that exceeds customer expectations. In 2019 Blue Compass RV established a partnership with Coach-Net (a premier provider of roadside and technical assistance with a network of over 40,000 providers) and announced in February 2023 the acquisition of the company. The first dealership purchased, Motor Home Specialist, was recognized for the 10th year in a row in 2022 as the #1 seller of new motorhomes by a



⁸⁰ <https://investor.campingworld.com/press-releases/press-release-details/2023/Camping-World-Holdings-Inc.-Reports-Third-Quarter-2023-Results-Total-Unit-Sales-of-32330-Exceeds-2022-Rigorous-Inventory-Discipline-and-Continued-Acquisitions-Set-Stage-for-Improved-2024/default.aspx>

single dealership. Revenue was reported at over \$3 billion in 2022 according to an August 15, 2023, press release.

Founded by the Hirsch family in 1966, Campers Inn has grown from the family's front yard to 38 locations in 18 states. It is the largest family operated RV dealership group in the nation. Ensuring every customer receives fair and respectful service, Campers Inn endeavors to be the hometown dealer. The family tradition is solidified with the third generation now part of the team.



Campers Inn RV is the first RV dealership group to partner with Care Camps with an employee giving and corporate match program. The program easily allows Campers Inn RV employees to donate any amount to Care Camps with the dealership group kicking off the program by matching employee donations dollar-for-dollar. Recently Campers Inn was the second major RV dealer to join the Harvest Hosts Adventure Ready program. This partnership confirms that all RVs sold will be evaluated and verified as self-contained and meet all the Harvest Host requirements allowing them to park overnight at any of Harvest Hosts' 8,000 plus locations.

Thor Industries, Winnebago, and Forest River (owned by Berkshire Hathaway, aka Warren Buffet) are the leading public RV manufacturing companies. Thor currently makes up the world's largest RV manufacturer with Airstream, Cruise RV, Dutchmen, Entegra Coach, Jayco and Starcraft to name a few in their manufacturing family.

In August 2019, Winnebago acquired Newmar, a manufacturer of high-end motorhomes and 5th wheel travel trailers. Tiffin Motorhomes, a family-owned luxury motorhome manufacturer, was acquired by Thor Industries, Inc. in December 2020. Consolidation among RV manufacturers is expected to continue.

Camping and RVing continue to gain popularity nationally and are becoming more mainstream even among companies that are not part of the camping industry. Ben & Jerry's Ice Cream has two (2) camping-inspired special flavors "Glampfire Trail Mix" and "Gimme S'more."



Dunkin' Donuts tapped into the RV travel trend in 2021 with their Dunkin' Refreshers RV. A lucky Massachusetts fan won a week-long RV experience. YouTube has several channels that follow



the users on their RV trips and gives tips and hints for RVing and RV repairs that can be done without a professional. The reality show "RV Unplugged" on YouTube sends eight RV Influencer teams into the wild, for a chance to win \$10,000. To survive, they compete in reality-show style games for points and supplies.

More and more camping and RVing are appearing as the backdrop in advertising in all media, further bringing outdoor recreation to the public's top of mind awareness.

Future RV Industry, RV Park, and Campground Trends

RV shipments are expected to continue to rise above 350,000 units in 2024 according to the Fall 2023 issue of RV RoadSigns, the quarterly forecast prepared by ITR Economics for the RV Industry Association. Despite a tight labor market and rising wages, cumulative inflation and elevated interest rates have weighed on consumers' purchasing power over the past year. Consumers' inflation-adjusted savings are also declining, leading to additional downside pressure on the RV industry business. Annual wholesale shipments will likely stabilize later this year as the effects of rising interest rates subside and RV inventory levels normalize. A defined rising trend is likely to emerge in mid-2024 as the downside pressures on shipments from the macroeconomy will have eased.⁸¹

The new Fall forecast projects 2023 RV shipments to range from 287,200 to 307,000 units with a most likely year-end total of 291,700 units. This would represent a 41% decline from the 2022 year-end total of 493,300 units.

As the economy enters a relatively mild recession in 2024 the RV industry expects a recovery trend ahead of the overall economy typically. The relatively good financial standing and strength of the consumer and the labor market despite the headwinds is good news for the RV industry.

"While the RV industry is not immune from the effects of larger macroeconomic factors impacting consumers and the economy, the forecast shows the RV industry is continuing to normalize to pre-pandemic shipment levels," said RV Industry Association President & CEO Craig Kirby. "The long-term health of the industry remains strong thanks to the droves of younger and more diverse buyers who have entered the RV lifestyle over the past few years."

According to the RV Industry Association an estimated 65 million Americans took an RV trip in 2022 and 67 million planned an RV trip in 2023. Among people who have already taken an RV trip in an RV they own, rent, or borrow 50% (up 14%) plan to make an RV purchase in the next year.⁸²

Consumers have a strong attachment to the RV lifestyle. There is an enthusiasm for camping that shows no signs of abating despite the virus and economic pressures. The removal of barriers to participation in camping has resulted



⁸¹ 2023 Fall RVIA RoadSigns ITR Economics

⁸² RVIA January 12, 2023

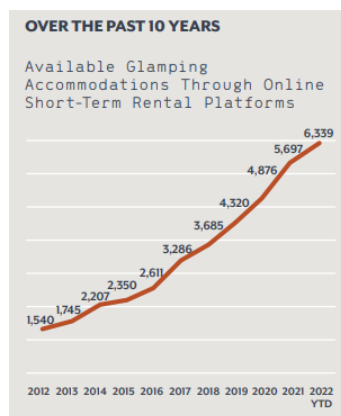
in an eagerness for camping across all ages and ethnicities.⁸³

Demand for on-site rentals is rising. Consumer demand for RV storage is strong and RV parks that offer storage have an advantage, especially in attracting guests from both the local and national market areas. Providing opportunities to store RV units when not in use is crucial, especially in many southern and western states accommodating snowbirds who migrate north for the summer season.

Sales of used RVs were accelerating before the pandemic and are expected to continue. Ample facilities to repair and recondition RVs have extended their longevity and increased the quality to first-time purchasers of these used units. There is considerable interest in vintage RVs as camping enthusiasts repurpose these units for modern use.

The opportunity to keep camping in the mainstream of travel is tremendous. RV road trip vacations are replacing other types of vacations. Moreover, as revenue grows, industry profit margins are expected to creep up slowly, making the industry more appealing for potential entrants. Between 2022 and 2024 more than 11,000 RV sites and 600 rental units will be built across the country. At least 31 new parks are currently under construction while existing parks are adding thousands of sites. Additionally, KOA has 19 parks under development with four of these parks ready to open in 2023.⁸⁴ Competition, record growth, and high occupancy has prompted park owners to expand and improve their campgrounds to keep up with increased demand, changing technologies, modern camping units, and current camping habits. A new camping consumer is driving into their parks.

Likewise, glamping resorts are realizing exponential growth. In the past six years the number of glamping providers has grown from 91 in 2015 to 230 in 2022. The glamping industry has seen a 310% increase in short term rentals defined as accommodations available through online vacation rental platforms such as VRBO and Airbnb. At the same time there was a 290% increase in glamping businesses.



⁸³ KOA Monthly Research Report April 2022

⁸⁴ Woodall's Campground Management January 6, 2023 Expansion to add thousands of sites

There is no confirmed number of commercial, for-profit RV parks and campgrounds operating in the United States. RVIA's 2022 Industry Market Analysis estimates 12,290 private campgrounds and 15,119 public ones. Ninety-nine percent of the campgrounds offer RV sites. Less than a third of the private campgrounds offer tenting and rentals. The private parks provide 1.5 million campsites and 1.4 million RV sites according to the analysis.

Good Sam lists approximately 11,278 parks nationwide online and in the Good Sam directory, of which 1,933+ are officially Good Sam Parks that offer the discount. There are likely 3,000+ more parks that are operating but not listed in the Good Sam directory. The National Association of RV Parks and Campgrounds (ARVC) estimates there are 13,000 private RV parks and campgrounds with 28% of them planning to expand their RV parks or build new ones in the next 12 months. In the coming year, an estimated 104,000 new FHU RV sites are being developed.⁸⁵

Additionally, employment within the RV park and campground industry is also expected to increase though the industry will continue to use temporary employees during peak guest periods.

The progressive aging of the population, particularly people aged 55 to 74, will total 79 million by 2025. People between the ages of 30 to 45 will total 72 million by 2025 and will continue to influence demand and industry revenue growth positively. The steady rise in camping from the Gen Xers and Millennials, which exceeds the growth of these segments of the general population, will also positively influence demand and industry revenue gains. The continuing strong demand for RV sales and the sale of used RVs will support this increase.

There will be an increasing trend toward the franchising of campgrounds and other forms of industry consolidation. Operators owning multiple parks will benefit from joint promotional activities, access to online information, economies of scale in operations, and purchasing products for park use and central reservation systems. Significant increases in direct online bookings by guests are already occurring.

All types of RV parks and campgrounds continue to be in high demand. RV sites in highly desirable tourist and outdoor recreation areas are experiencing a considerable rise in demand due to an increase in new and used RV sales. As new RV sales rise so does the demand for RV sites and more particularly modern RV sites. Camper night increases are expected to drive higher occupancies at RV parks and campgrounds.

Camper nights are also increasing as younger campers who have been tenting begin renting or purchasing RVs and camping more often. Lifestyle changes, as this group ages or starts having families, drive their desire for RVing rather than tenting. These

⁸⁵ 2022 Industry Trends and Insights Report, ARVC, February 2022

campers desire modern RV sites in unique settings and/or highly desirable tourist and outdoor recreation areas.

Rental accommodations of all types are further increasing camper nights in RV parks throughout the country. These non-campers are often experiencing camping for the first time. Campers in this segment desire unique and modern accommodations in unusual settings (also known as glamping) or highly desirable tourist and outdoor recreation areas.

Interest in glamping is highest among Millennials and Gen Zs even though all generations are aware of glamping and are interested in trying it out. The older generations are looking for couple get-a-aways while the younger generations want to include friends and family in their experiences.⁸⁶

The continued enthusiasm in outdoor hospitality is expected to last and remain strong. However, will those who started camping and glamping during the pandemic continue to camp when their confidence and convenience with other travel options is more secure? Will this new interest in outdoor hospitality accommodation be temporary, or will it contribute to long-term industry growth? Will these new campers and glampers return to previous vacation habits, or will they continue to include outdoor recreation in their travel plans? The answers to these questions will depend on the experiences for these new campers and how the industry responds to their demands.

Increasing investment in new RV parks and campgrounds and improving facilities and amenities in older RV parks and campgrounds are needed to retain campers and new travelers. Promoting the benefits of RVing and camping activities will need continuous support from the RV and camping industries through national campaigns. Maintaining strict quality standards in the manufacturing of RVs and strong service relationships between RV dealers and consumers is needed to maintain the strength of the industry.

There is a shortage of quality RV sites throughout the United States and demand is outstripping supply. The increased number of RV sales and the new camping consumer has increased the demand for RV sites, campsites, and rentals. Campers report increasing difficulties in the availability of RV sites, campsites, and rentals especially during peak travel periods. 2022 was by far the hardest year yet to find an available campsite.⁸⁷ Seasoned campers report difficulties in camping without advanced reservations and overcrowding in many campgrounds. These concerns are being addressed by developing new RV parks and expanding campgrounds in the private sector.

For decades campgrounds on federal lands have suffered from deferred maintenance and deterioration. Outdoor industries have long advocated federal funding for these campgrounds. The RV Industry Association's government affairs team continues to

⁸⁶ North American Glamping Report 2022

⁸⁷ The Dyrtr 2023 Camping Report

work with policymakers to ensure public campground modernization and expansion initiatives.

On August 4, 2020, President Trump signed the Great American Outdoors Act into law. “The Great American Outdoors Act (GAOA, Act) is a historic investment in the protection and sustainment of our public lands and Bureau of Indian Education (BIE)-funded schools. The Act established the National Parks and Public Land Legacy Restoration Fund (LRF) to address overdue maintenance needs.” The GAOA also provides for continued funding for the protection of our natural areas and cultural heritage with the Land and Water Conservation Fund (LWCF).

As part of the act, \$1.9 billion to be used from 2021 – 2025 to address the deferred maintenance and repair backlog was authorized. There are projects throughout the country focused on repairing roads, buildings, and trails.

The Federal Interagency Council on Outdoor Recreation was reformed in 2022. This has agency leadership discussing how to increase access, modernize infrastructure, prepare for future technologies, help underserved communities gain access to public lands and waters, and the benefits of outdoor recreation.

“Outdoor recreation not only boosts the American economy, it boosts Americans’ health, but many trails and public lands suffer from maintenance backlogs and infrastructure work delays. Reviving FICOR can help federal agencies work together to address these needs, improving and expanding recreational access to millions of Americans.”⁸⁸

The RV and RV park/campground industries are well-positioned to experience continued growth in unit sales and campground occupancy. This growth is a compelling contributor to the continued growth and profitability of well-located, well-maintained RV parks and campgrounds.

⁸⁸ ORR Annual Report 2022

Economic Impact of the RV Industry, Campground Industry and Related Industries

Impact of increased Occupancy and Site Nights

RVIA recently reported a median RV usage remaining steady at 20 nights annually per owner. The most comprehensive RV owner study reveals that a record 11.2 million households own RVs. These households are split almost equally between those over and under age 55 with the largest uptick amongst new campers being the 18 – 45 years in modern RV towables. There is significant growth among millennials aged 18 – 34 with an impressive 84% of 18-to-34-year-olds planning to buy another RV in the next 5 years.⁸⁹

People intending to purchase an RV plan to use their RV a median of 25 days per year. This is indicative of the changing attitudes towards remote work and the ability for people to work remotely. The growth in both new and used RV sales has led to a substantial increase in new camper nights, resulting in higher occupancies at RV parks and campgrounds throughout the United States.⁹⁰

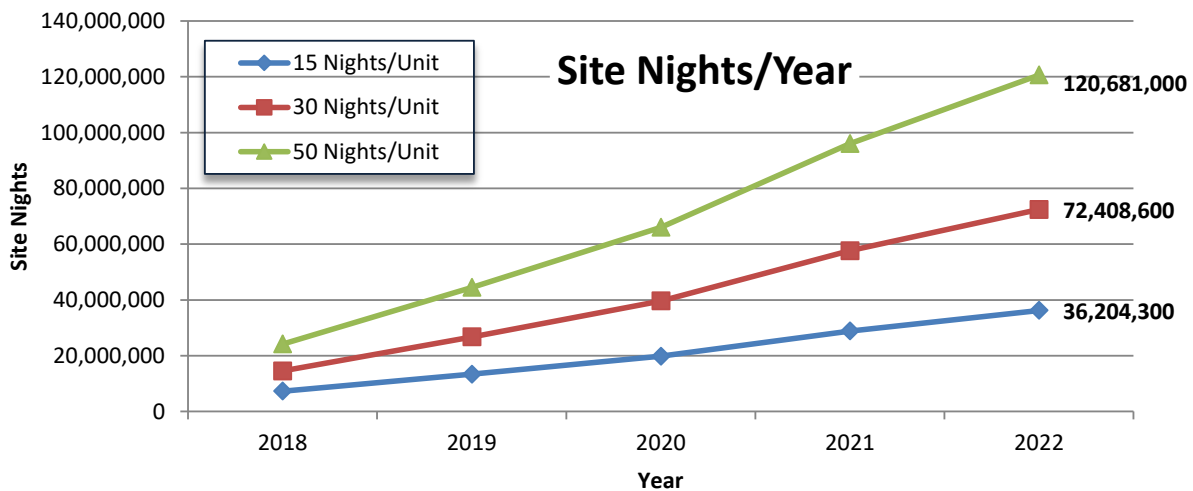
"The data revealed by this study provides fascinating insight, not only into the RV industry, but into the ways in which Americans have changed how they work, play, and enjoy the great outdoors," said RV Industry Association President and CEO Craig Kirby. "The great news for the industry is that more and more people are traveling in the products we build. This study shows that it is no longer accurate to describe a typical RVer, rather that enjoyment and interest in RVing is expanding across every type of traveler, person, and age group."⁹¹

The usage behavior below illustrates the effect of new RV buyers on site nights during their first years of RV ownership for those camping 15, 30 and 50 nights. These numbers do not include those who purchase a used RV.

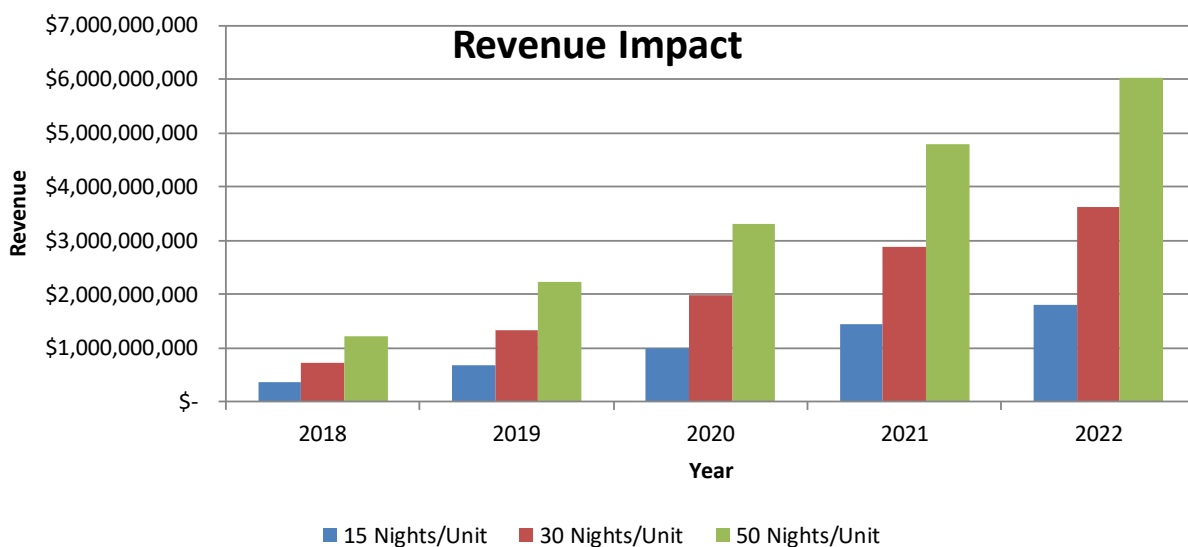
⁸⁹ RVIA 2021 Annual Report

⁹⁰ www.gorving.com

⁹¹ [RVIA.org/Comprehensive RV Owner Study](http://RVIA.org/ComprehensiveRVOwnerStudy)



Over the last 5 years RV shipments have been growing at a compound annual growth rate of .49%. Revenue impacts on RV parks and campgrounds, because of expanding RV ownership and usage are shown below for 2018 to 2022. The revenue impact below is the result of new RV shipments only and do not consider the sale of used units. (Reliable public data on used unit sales is not available. Camping World and Lazy Days are public companies and therefore report their unit volume, but other dealerships do not.)



- 2.41M new RVs shipped between 2018 and 2022
- Between 105.41M and 351.37M new site nights annually depending on assumed number of nights per new RV unit
- At \$50/site night, increased annual revenue between \$1.81B and \$6.03B in 2022
- 2018-2022 total revenue increase between \$5.27B and \$17.57B

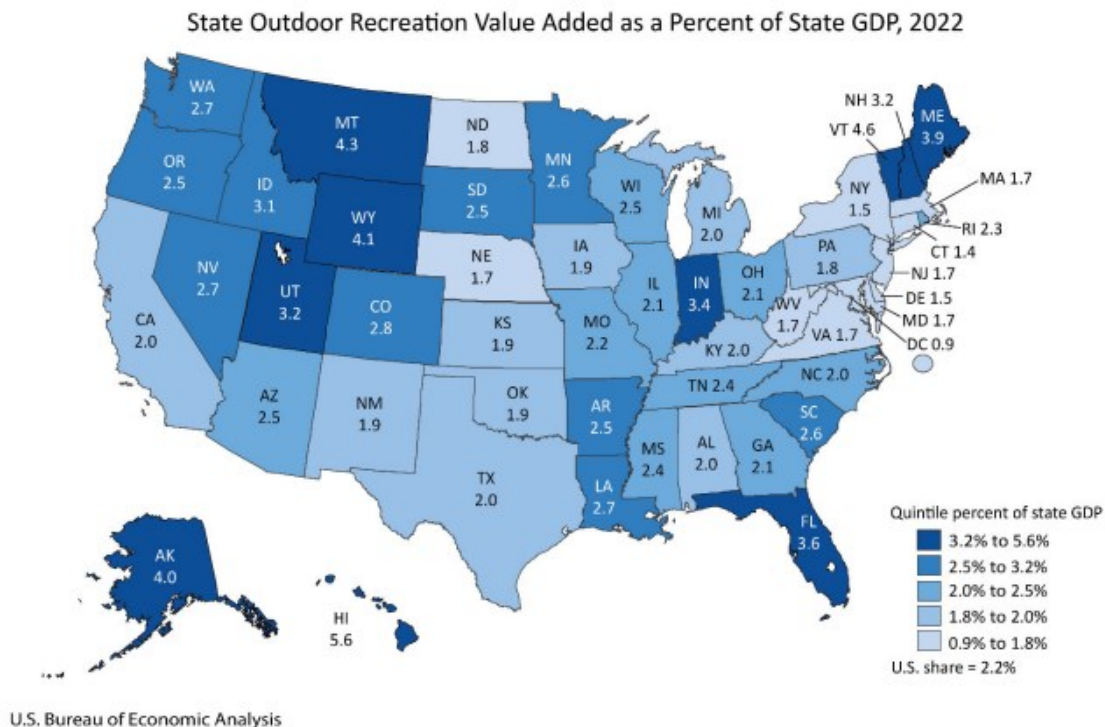
Outdoor Recreation and GDP

Data released by the U.S. Department of Commerce Bureau of Economic Analysis (BEA) on November 17, 2023, shows the outdoor recreation economy accounted for \$1.1 trillion in economic output and 4.98 million jobs or 3.2% of U.S. employment. This means that outdoor recreation contributes more to the economy than mining including utilities, oil and gas extraction, computer/electronic production, and farming. Outdoor recreation accounts for 2.2% of the national GDP in 2022.⁹²

Economic Impact by State

Tourism in Illinois adds \$21.9 billion and 177,120 jobs. This is 2.1% of the state economy and 2.9% of state employment.⁹³

At the state level outdoor recreation value added, as a share of state GDP ranged from 5.5% in Hawaii to 1.4% in Connecticut. The map below shows the value added as a share of state GDP by state in 2022. Compared to 2021 most states increased this percentage while a few remained the same.



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⁹² <https://recreationroundtable.org/news/new-government-data-report-showcases-outdoor-recreation-economys-growth-clout/>

⁹³ <https://orr.wpengine.com/resources/state-recreation-data>

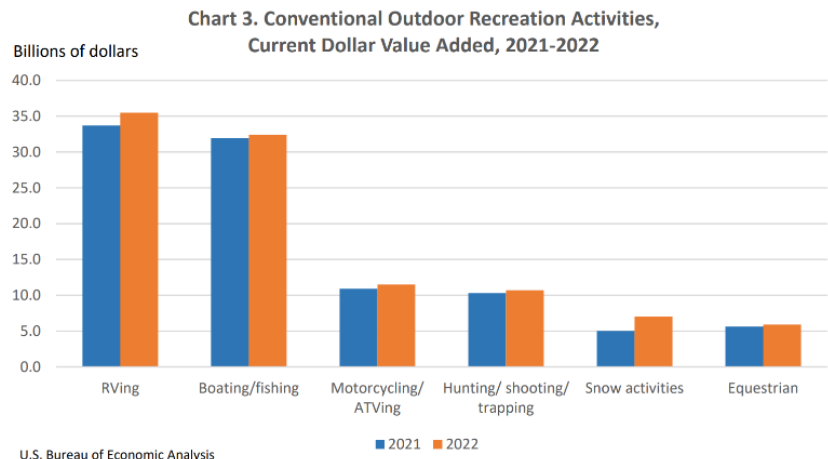
⁹⁴ Bea.gov

Outdoor Recreation by Activity

Outdoor recreation activities fall into three general categories: conventional activities (such as bicycling, boating, hiking, and hunting); other core activities (such as gardening and outdoor concerts); and supporting activities (such as construction, travel and tourism, local trips, and government expenditures). RVing and camping fall under the conventional activities

category. In 2022, conventional outdoor recreation accounted for 34.2 percent of U.S. outdoor recreation value added, compared with 37.4 percent in 2021. Other outdoor recreation accounted for 19.8 percent of value added in 2022, compared with 19 percent in 2021. Supporting activities accounted for the

remaining 46 percent of value added in 2022, compared with 43.6 percent in 2021. Growth in supporting activities was led by travel and tourism, reflecting growth in spending on transportation, hotels, and restaurants. RVing was the largest conventional activity nationally at \$35.5 billion in current-dollar value added in twenty-two states. The largest contributors were Florida (\$4.4 billion), California (\$2.4 billion) and Texas (\$2.1 billion).⁹⁵

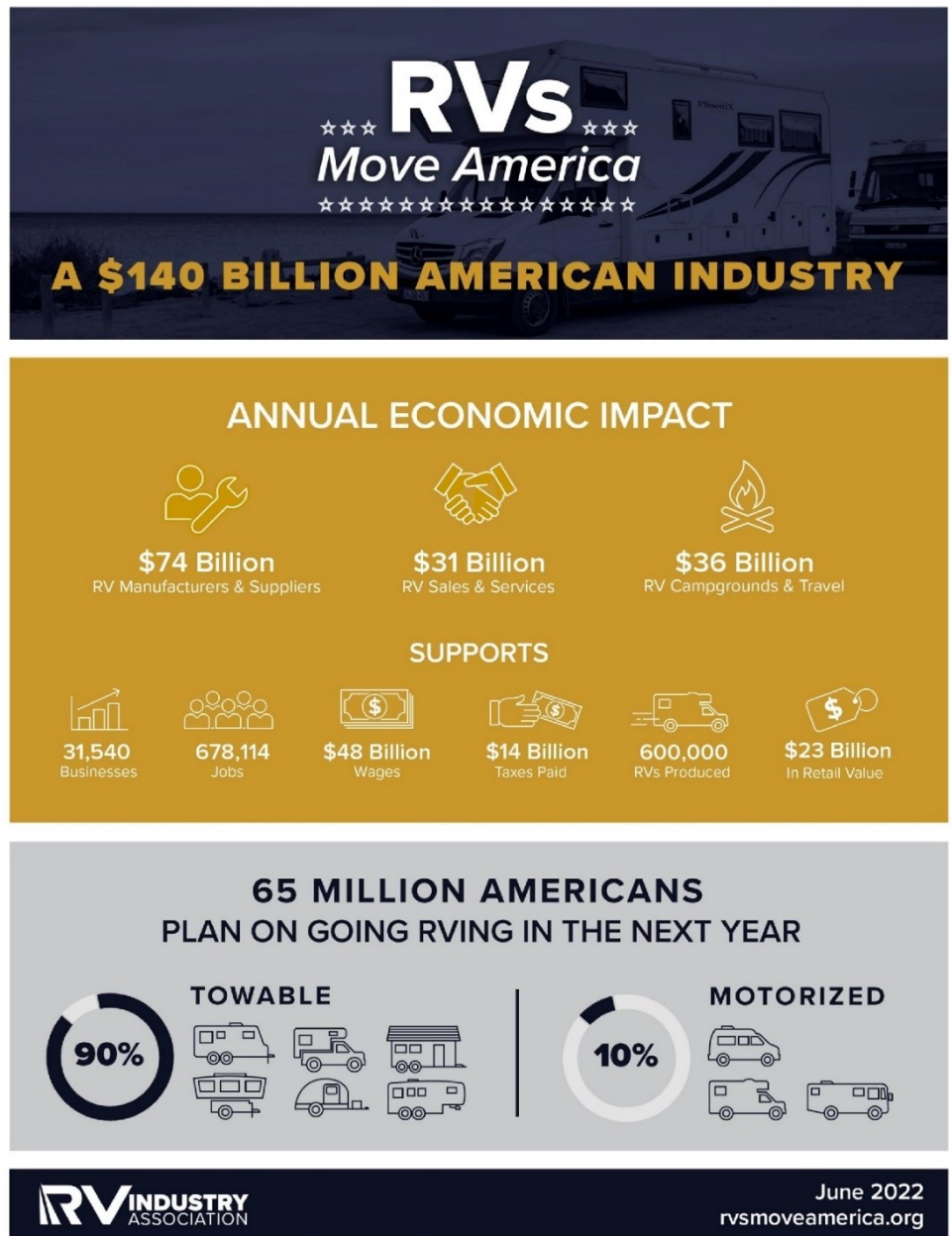


⁹⁵ <https://www.bea.gov/news/2022/outdoor-recreation-satellite-account-us-and-states-2021>

Overall Economic Impact in the United States

RVIA compiled extensive data on the economic impact of the RV industry in the United States. Included are RV manufacturers, dealers, providers of goods and services integral to the manufacturing, operation, and maintenance of RVs, RV service, and RV parks and campgrounds. The most recent publication was in June 2022.

The RV industry is a dynamic part of the U.S. economy, accounting for \$141 billion in total economic output. RV Parks, Campgrounds, and RV Travel specifically contributed \$36 Billion. The RV Industry paid \$14 billion in taxes and \$48 billion in wages. According to the study, the average wage for those employed full-time or the equivalent of full-time in the RV sector is \$70,784. This is a 23% increase in economic impact in the past three years.⁹⁶



⁹⁶ RVs Move America June 2022

Overall Impact on the Local Community

In 2023 camping households spent \$50 per day per person or \$200 per day for a family of four within the local community. The typical nightly cost of an RV or tent site is \$61 per night and the typical cost of a cabin or rental accommodation is \$110 per night. The impact per day on the local community when including the cost to stay at the campground, is \$275 per night. Glampers spend the most on expenditures in local areas and on-site. The most avid campers spend the most during their trips.^{97 98}

⁹⁷ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

⁹⁸ Generational Camping Report 2023 OHI Advance Outdoor Hospitality

Domestic & International Tourism Impacts

Domestic & international tourism is a crucial part of the Outdoor Hospitality Industry. Export-oriented industries are those industries that primarily market their products and services to other regions, states, or nations. The travel industry is export-oriented because goods and services are sold to visitors, not residents. The travel industry injects money into local economies, as do the exports of other industries. The Travel and Tourism Industry is an important “export-oriented” industry in many states. Spending by visitors generates sales in lodging, food services, recreation, transportation, and retail businesses. These sales support U.S. jobs and contribute tax revenue to local and state governments.⁹⁹

Travel is essential to driving economic growth and job creation in states, destinations, and communities across America, and it is indispensable to our nation’s global competitiveness. Travel accounted for \$1.2 TRILLION in direct spending in 2022—which produced an economic footprint of

\$2.6 TRILLION—a return to 2019 levels. In 2022, travel supported nearly 15 million American workers and directly employed 8 million. Leisure and hospitality (L&H) returned to pre-pandemic employment levels, yet still had 1.5 million open jobs as of February 2023—resulting in the highest job openings rate across all industries.¹⁰⁰ States, destinations, and communities across the country rely on travel and traveler spending for economic development, job creation and tax revenues. Travel spending generated nearly \$160 billion in total tax revenue, including \$84 billion in state and local tax revenue in 2022. Rather than taxing constituents, travel brings money into our communities, which helps fund public programs such as police, firefighters, teachers, road improvements and community revitalization projects.¹⁰¹



Key Monthly Highlights:

- Travel spending totaled \$104 billion in September. Alaska (+19%), Wyoming (+16%), Mississippi (+16%) and New Hampshire (+14%) experienced the strongest YOY growth in travel spending.
- Total travel spending growth slowed somewhat to 0.8% above last year's levels and was up 3.5% year-to-date through September.
- Air travel demand was up 10% in September compared to the same month last year but slowed slightly from June and July.

⁹⁹ RVs Move America June 2022

¹⁰⁰ U.S. Travel Association, U.S. Travel Answer Sheet

¹⁰¹ answersheet_2023_final.pdf (ustravel.org)

- Hotel demand remained flat in September for the fifth consecutive month.
- Leisure and hospitality employment increased 4.3% compared to September 2022, the largest gain since January.
- Credit card spending on airlines (+ 3.5%) and cruise lines increased in September compared to the same time last year.
- Overseas arrivals recovered further in September and are now 16% below 2019 levels.¹⁰²

The vaccine rollout and easing of travel restrictions gave way to steady increase in the travel and hospitality industry. A wave of travel demand was created in 2021 – 2022. Even though there are lingering public health concerns, many travelers have moved past these concerns to resume travel.

Survival and growth in the future will depend on the industry and its ability to resolve new issues raised by travelers in the past few years. The basics – product, performance, and price require attention to move out of this once in a generation crisis. How the hospitality industry creates an opportunity for satisfying American’s wanderlust with high quality and affordable experiences will impact how Americans experience travel.



U.S. Travel Association President and CEO Roger Dow highlighted the five key areas of focus that will drive the association and the broader travel industry in the months and years ahead:

- Workforce
- Facilitation and security
- The future of travel mobility

¹⁰² <https://www.ustravel.org/research/monthly-travel-data-report>

¹⁰³ Deloitte 2023 Travel Industry Outlook

- Sustainability
- Diversity, equity, and inclusion

“We have a robust policy agenda and a clear strategy to revive America’s travel industry, but Congress and the Biden administration must continue to work closely with the travel sector to help the industry bounce back quickly,” said Dow.

U.S. Travel Association and Oxford Economics’ proprietary travel forecasting model originally projected it would take four years (2024) before the travel industry returned to pre-pandemic levels. However, in November 2021 the U.S. Travel Association adjusted their forecast to predict travel spending would reach pre-pandemic levels in 2023 one year sooner than the original travel forecast. (Higher prices are responsible for some of the increase in spending.)

Travel Forecast Summer 2023

SPENDING

U.S. TRAVEL FORECAST - SPENDING (ADJUSTED FOR INFLATION)*

	ACTUAL				FORECAST			
	2019	2020	2021	2022	2023	2024	2025	2026
Total Travel Spending	\$1.17 T	\$722 B	\$909 B	\$1.02 T	\$1.09 T	\$1.15 T	\$1.18 T	\$1.20 T
Leisure	\$867 B	\$622 B	\$787 B	\$799 B	\$839 B	\$878 B	\$897 B	\$921 B
Business	\$306 B	\$101 B	\$122 B	\$219 B	\$254 B	\$269 B	\$278 B	\$282 B
Domestic	\$992 B	\$682 B	\$868 B	\$918 B	\$960 B	\$989 B	\$1.01 T	\$1.02 T
Leisure	\$722 B	\$589 B	\$753 B	\$718 B	\$731 B	\$749 B	\$759 B	\$765 B
Business	\$270 B	\$93 B	\$115 B	\$201 B	\$229 B	\$239 B	\$248 B	\$252 B
Transient	\$157 B	\$63 B	\$81 B	\$122 B	\$134 B	\$140 B	\$146 B	\$148 B
Group	\$113 B	\$30 B	\$34 B	\$79 B	\$94 B	\$99 B	\$103 B	\$104 B
International**	\$181 B	\$41 B	\$41 B	\$99 B	\$133 B	\$158 B	\$168 B	\$185 B
Leisure	\$145 B	\$33 B	\$34 B	\$81 B	\$107 B	\$129 B	\$139 B	\$156 B
Business	\$36 B	\$8 B	\$7 B	\$18 B	\$25 B	\$29 B	\$29 B	\$30 B
Transient	\$22 B	\$5 B	\$5 B	\$13 B	\$16 B	\$18 B	\$18 B	\$18 B
Group	\$14 B	\$3 B	\$2 B	\$6 B	\$9 B	\$11 B	\$11 B	\$11 B

U.S. TRAVEL FORECAST - SPENDING, YOY % CHANGE (ADJUSTED FOR INFLATION)*

	ACTUAL				FORECAST			
	2019	2020	2021	2022	2023	2024	2025	2026
Total Travel Spending	0.9%	-38.4%	25.9%	11.9%	7.4%	5.0%	2.5%	2.4%
Leisure	0.6%	-28.3%	26.6%	1.5%	5.0%	4.8%	2.1%	2.7%
Business	1.7%	-67.0%	21.4%	78.9%	16.0%	5.7%	3.5%	1.6%
Domestic	1.9%	-31.3%	27.4%	5.8%	4.5%	3.0%	1.8%	1.1%
Leisure		-18.5%	27.9%	-4.7%	1.9%	2.5%	1.2%	0.9%
Business		-65.5%	24.2%	73.8%	14.0%	4.7%	3.7%	1.7%
Transient		-59.7%	29.0%	50.1%	10.1%	4.6%	3.8%	1.9%
Group		-73.5%	14.0%	130.6%	20.1%	4.9%	3.7%	1.4%
International**	-4.1%	-77.6%	0.8%	142.6%	33.7%	19.2%	6.4%	10.3%
Leisure		-77.4%	3.6%	138.5%	32.7%	20.1%	7.6%	12.3%
Business		-78.4%	-11.1%	162.4%	38.4%	15.2%	1.3%	0.7%
Transient		-77.5%	-6.6%	176.1%	26.9%	12.4%	0.6%	0.4%
Group		-79.8%	-18.6%	136.0%	64.4%	20.1%	2.5%	1.3%

U.S. TRAVEL FORECAST - SPENDING, % OF 2019 LEVELS (ADJUSTED FOR INFLATION)*

	ACTUAL				FORECAST			
	2019	2020	2021	2022	2023	2024	2025	2026
Total Travel Spending	100%	62%	78%	87%	93%	98%	100%	103%
Leisure	100%	72%	91%	92%	97%	101%	104%	106%
Business	100%	33%	40%	71%	83%	88%	91%	92%
Domestic	100%	69%	88%	93%	97%	100%	102%	103%
Leisure	100%	82%	104%	99%	101%	104%	105%	106%
Business	100%	34%	43%	74%	85%	89%	92%	94%
Transient	100%	40%	52%	78%	86%	90%	93%	95%
Group	100%	26%	30%	70%	83%	88%	91%	92%
International**	100%	22%	23%	55%	73%	87%	93%	103%
Leisure	100%	23%	23%	56%	74%	89%	96%	108%
Business	100%	22%	19%	50%	70%	80%	81%	82%
Transient	100%	22%	21%	58%	74%	83%	83%	84%
Group	100%	20%	16%	39%	64%	76%	78%	79%

*All spending data is cited in "real" 2019 \$, deflated based on the Travel Price Index

** Includes general travel spending and passenger fares (does not include education/health/worker spending)

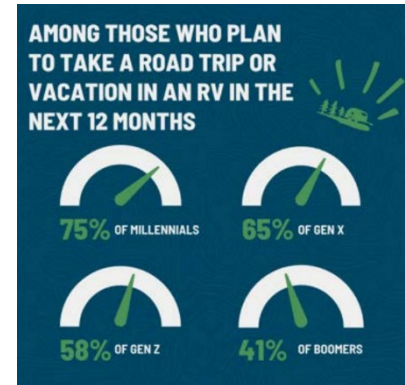
RVshare's 2023 Travel Trend Report predicts another blockbuster year for travel.

According to the research, nearly all (99%) Americans are planning a leisure trip in 2023 with 51% percent planning more trips in 2023. Among these travelers 61% are planning an RV road trip or vacation. An RV is among the top three accommodation preferences for 50% of travelers. Time with family and friends,



relaxation, and work flexibility continue as priorities. Flexible work schedules continue to evolve, becoming a part of American lifestyle and impacts

vacation decisions. RV travel is moving into the mainstream. Road trippers span generations with 75% millennials, 65% Gen X, 58% Gen Z, and 41% Boomers. Travelers are adjusting spending by cooking their own meals, traveling during the off season, and participating in less fee-based activities.



Travelers are choosing an RV trip over other forms of travel for a variety of reasons. These include a higher level of comfort, more flexibility, and lower cost. The ability to change their itineraries and schedules is a significant benefit of traveling by RV to 3 in 5 travelers. Other considerations include more stable travel costs and no fees for extra baggage.¹⁰⁵

Other Factors Impacting Travel

Changes in domestic and international travel costs play a large part in determining travel patterns. For many years, the depreciated U.S. dollar motivated domestic travel and made foreign travel more expensive. This benefitted the Outdoor Hospitality Industry by encouraging Americans to travel domestically while encouraging foreign tourists to travel to the U.S. Other non-economic factors include travel time, safety, cultural and family links, and travelers' ages.

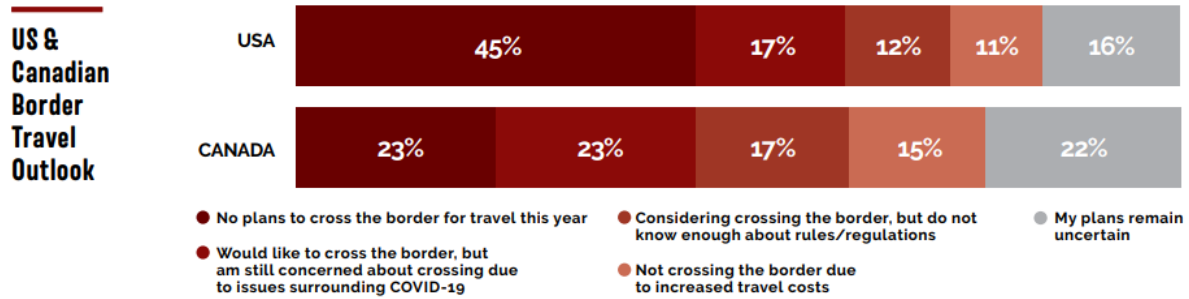
Canadian Travel Market

One of the few exceptions is the Canadian market. The dollar's strength or weakness influences the number of Canadians frequenting U.S. RV parks and campgrounds except for Canadians who wish to go south for warm winter weather. The strength of the U.S. dollar significantly reduces the number of Canadians camping in the United States. Many northern parks in the U.S. reported less Canadian traffic than in previous years.

Canadian RV owners on average spent one more night camping compared to U.S. RV owners. Canadian RVers also are more likely to require higher level of technology

¹⁰⁵ RVshare 2023 Travel Trend Report

because of working while traveling. Seventy-seven per cent of Canadian campers are likely to cross the U.S./Canadian border for travel. Canadian campers eagerly embrace a variety of travel experiences. The most popular experience is taking a trip to experience natural events with food tourism experiences close behind.¹⁰⁶



¹⁰⁶ The 2023 North American Camping & Outdoor Hospitality Report sponsored by Kampgrounds of America, Inc.

Consumer Demographics and Trends

Camping connects people with the outdoors and with each other. Overall, campers seek outdoor experiences for what is a relatively consistent and common set of drivers: escaping the stressors of everyday life, relaxation, clearing their minds, and spending time with friends or family.¹⁰⁷

The camping industry and the broader landscape of outdoor hospitality has experienced significant growth in the past decade. Camping incidence has grown significantly over the past decade and now anchors about one-third of the leisure travel market.¹⁰⁸ Studies by KOA, RVIA, and others support continued growth among every generation and ethnic group. RV ownership, RV living, RV sharing, and on-site rental accommodations continue to increase. Additionally, campers are excited about different types of camping including glamping tents, full-service cabins, and van camping. Camping is becoming synonymous with other outdoor recreation such as hiking, biking, boating, and fishing.

Outdoor travel provides more flexibility and freedom compared to other forms of travel. Advances in technology and the work-from-home trend increase the appeal and functionality of camping. Glamping and camping are generally viewed as affordable and replace other types of travel in times of economic uncertainty.

The 2022 Camping Year in Review ¹⁰⁹

Camping is now a formidable part of leisure travel and has experienced a marked increase with over 58 million households camping in 2022. One out of every three leisure trips (32%) included camping or glamping in 2022, down slightly from a high of 40% in 2021.

In total 92 million U.S. households identify as campers. Among active campers, camping trips account for nearly 60% of leisure trips and this has remained constant year to year.

Gas prices and inflation caused campers to adjust their camping habits rather than cancel their camping trips. Camping persevered because it was a more viable and affordable option than other types of travel.

2022 results from campgrounds across the country and research results from KOA, RVIA and others support very strong results for 2023 camping. Winter camping in 2023 exceeded 2022 by approximately 1.3 million additional households reaching a total of 8.2 million.¹¹⁰ Memorial Day and Fourth of July weekend camping exceeded 2022 in 2023. Peak summer camping in 2023 is mirroring 2022.

¹⁰⁷ www.woodallscm.com/bahr-understanding-the-sectors-shifting-demographics/

¹⁰⁸ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

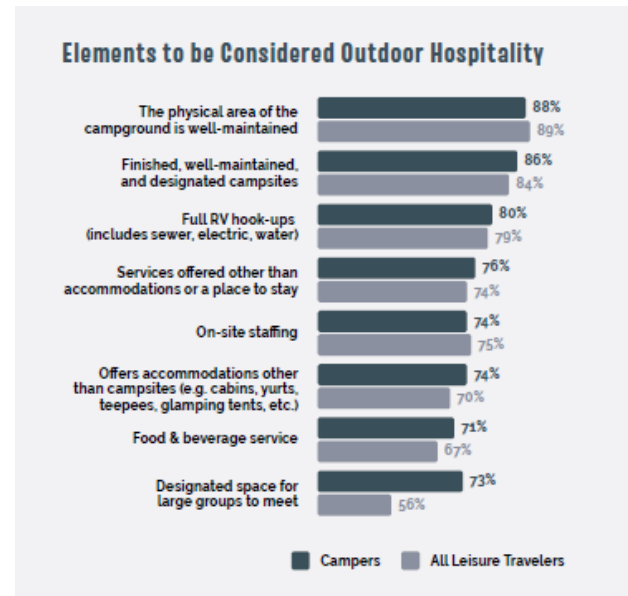
¹⁰⁹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹¹⁰ KOA Monthly Research Report, April 2023

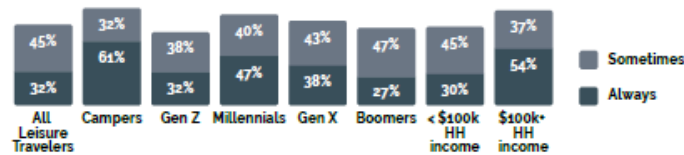
Outdoor Hospitality

Outdoor hospitality is an important subset of leisure travel and includes services and amenities extending beyond the campsite or accommodation. The elements defining outdoor hospitality at a campground include offering varying levels of accommodations, amenities, and services along with the physical space, including the site, being most important.

Half of all leisure travelers and 78% of all active campers say that outdoor hospitality is important and factors into their planning process when selecting their outdoor experience. There is a linear relationship between household income and the importance of outdoor hospitality.¹¹¹

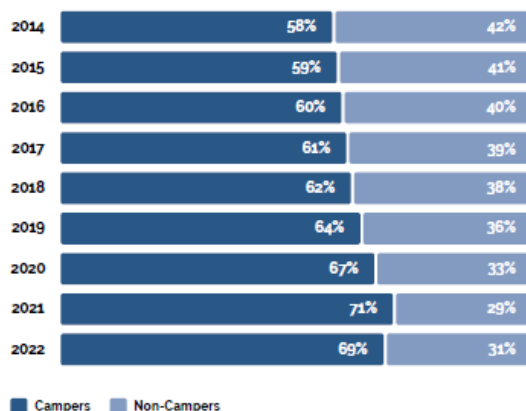


Services & Amenities Expected Other Than Accommodations to Qualify as Outdoor Hospitality



Camping Households

U.S. Camping Households

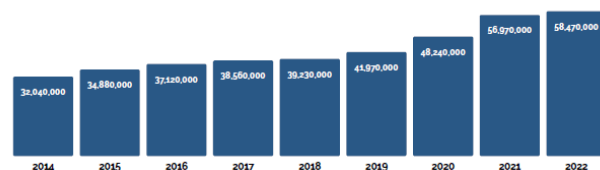


stabilizing when compared to the past three years.¹¹²

Camping continues to be a popular recreation option despite a slight drop in the number of households who identify as campers. In 2021, 93.8 million households identified as campers compared to 92 million in 2022. This minor drop is likely tied to the set of travelers who started camping in the COVID years and are now returning to previous travel habits.

Among the households who actively took a camping trip in 2022, camping still brought in about 1.5 million additional households in 2022

Annual Active Camping Households 2014 to 2022

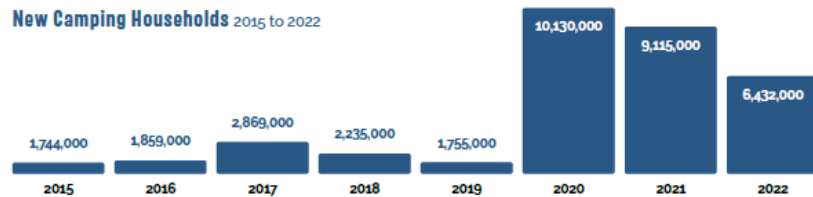


¹¹¹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹¹² The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

New Campers

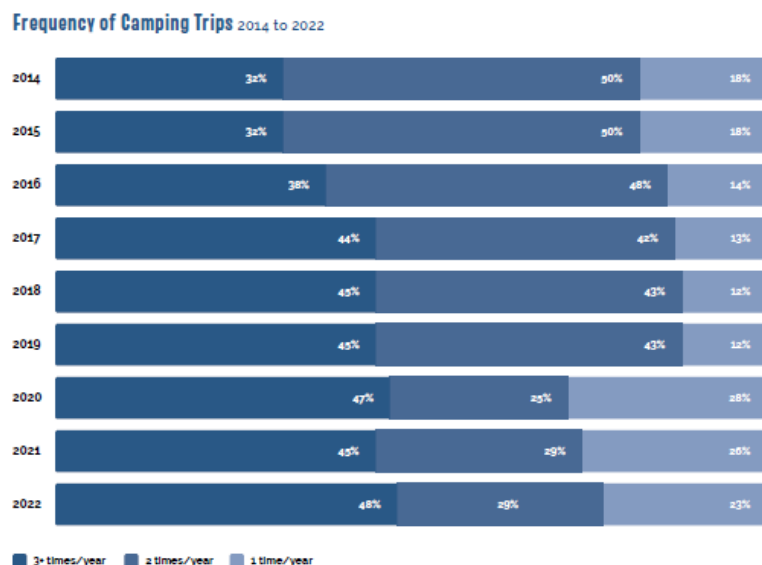
The actual number of new camper households was trending downward prior to 2020 with an average growth rate of 2 million new camper households each year between 2015-2019. Stimulated by COVID, ten million new households camped in 2020, a figure that almost equaled the previous five years combined.



About two-thirds of all campers included those younger than 42 years of age with one out of every three of the newest set of campers in 2022 being 18 – 25. These new entrants are also less likely to have children.¹¹³ New campers are more diverse and 40% have a household income of \$100,000+. For more than a third, COVID-19 was the impetus for starting to camp. More than half camp in tents. Nearly half went glamping though 57% also want to try RVing. They are more likely than experienced campers to list their RV on a peer-to-peer rental website.¹¹⁴

Frequency of Camping Trips & Nights

The vast number of new campers in the outdoor hospitality space increased the one-trip-per-year segment of campers in 2020 and 2021 dramatically. This segment remains much stronger than before COVID, however is declining as less new campers enter the space. This has however been offset by an uptick in those who camp multiple times.

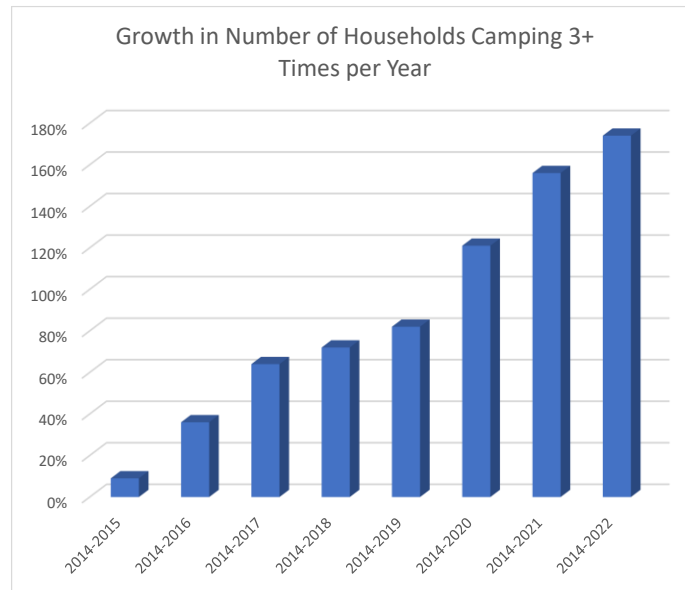


The growth in camping since 2020 is not only attributed to the influx of new campers but also the number of campers who are camping more frequently throughout the year.¹¹⁵

¹¹³ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹¹⁴ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹¹⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group



The most avid campers are RV owners, excluding those who rent or borrow, and higher-income campers. Campers who identify camping as an affordable way to travel and those who use camping to expose children to the outdoors, spend an above-average number of nights camping.

The COVID-19 pandemic increased participation across all demographic subgroups. In many aspects the rates of participation were already trending before 2020. Some new audiences have become an integral part of the outdoor hospitality sector including a greater number of Gen Z guests, a flourishing number of more diverse guests, and the increasing segment of urban dweller guests.

Tried a New Camping Experience

Glamping and overlanding are trending. In the past 3 years about 28% of camping households have taken a glamping trip, 23% have had a backcountry camping experience, 20% went overlanding, 18% took an RV trip and 17% tried new accommodations. Year to year, about 80% of all campers tried some form of camping, adding breadth and depth to their camping and outdoor travel experiences.¹¹⁶

¹¹⁶ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

Interest in Trying for 2023 top 5	2021	2022	Change
Glamping	25%	38%	13
Backcountry experience	23%	28%	5
Overlanding	23%	28%	5
RVing experience	28%	29%	1
Full-time RVing	23%	20%	-3

Rise of the Urban Camper

Urban dwellers are more likely to camp more nights each year, spend more money locally, have children with them, and understand the benefits camping offers for mental health. Urban campers are more likely to glamp. Urban campers are most likely to be millennials (54%) versus rural campers (38%).¹¹⁷

Urban Campers prefer tents and if RVing they are highly likely to be RV owners (82%). Urban Campers seek a variety of new experiences from RVing to backcountry camping to road tripping, to overlanding to glamping. COVID-19 contributed to their increased camping in 2021 but 44% still planned to replace a leisure trip with a camping trip in 2022.¹¹⁸

Accessibility barriers impact urban travelers especially when compared with suburban and rural residents. Transportation is the key barrier followed closely by access to technology. Urban travelers are less impacted by inflation and gas prices and tend to travel greater distances and stay longer with good technology access.¹¹⁹

Camping amongst Leisure Travelers

Two-thirds of all U.S. residents participate in some type of leisure travel. Camping and glamping are critical to the leisure travel market accounting for 32% of all leisure trips taken in 2022, down from a high of 40% in 2021. However, amongst active campers, camping trips account for nearly 60% of leisure trips.¹²⁰

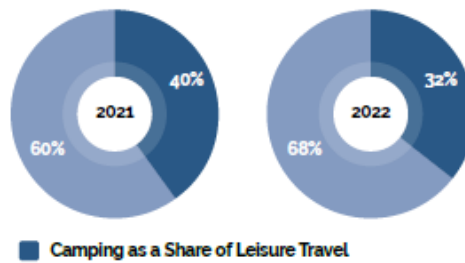
¹¹⁷ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹¹⁸ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹¹⁹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹²⁰ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

Share of Leisure Trips 2021 and 2022



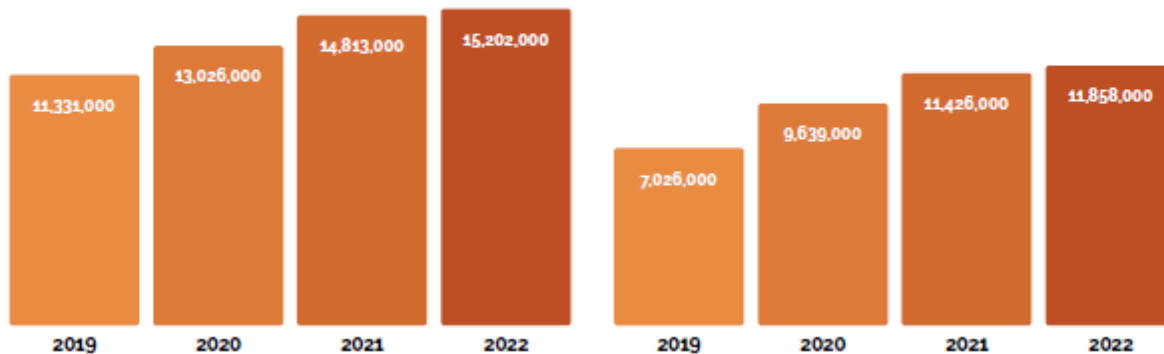
Demographics of the current RV Owner and New RV Buyer

The RV industry experienced steady growth in RV ownership for decades. RVIA's latest survey data shows 26% of travelers want to buy an RV in the next year. Enthusiasm for RVs and the RV lifestyle is supported by 15.2 million households who went RVing in 2022, including 11.2 million RV owners. Record high RV ownership of 11.2 million RV owning households was reported by RVIA in 2020 and 11.9 million RV owning households was reported by KOA in 2022. RV ownership has increased by over 62% in the past two decades. RVIA reports ownership up from 6.9 million in 2001 and 8.9 million in 2011.¹²¹

Growth in RV Households 2019 to 2022

Number of RVing Households (prefer RV camping)

Number of Active Camper Households Owning an RV

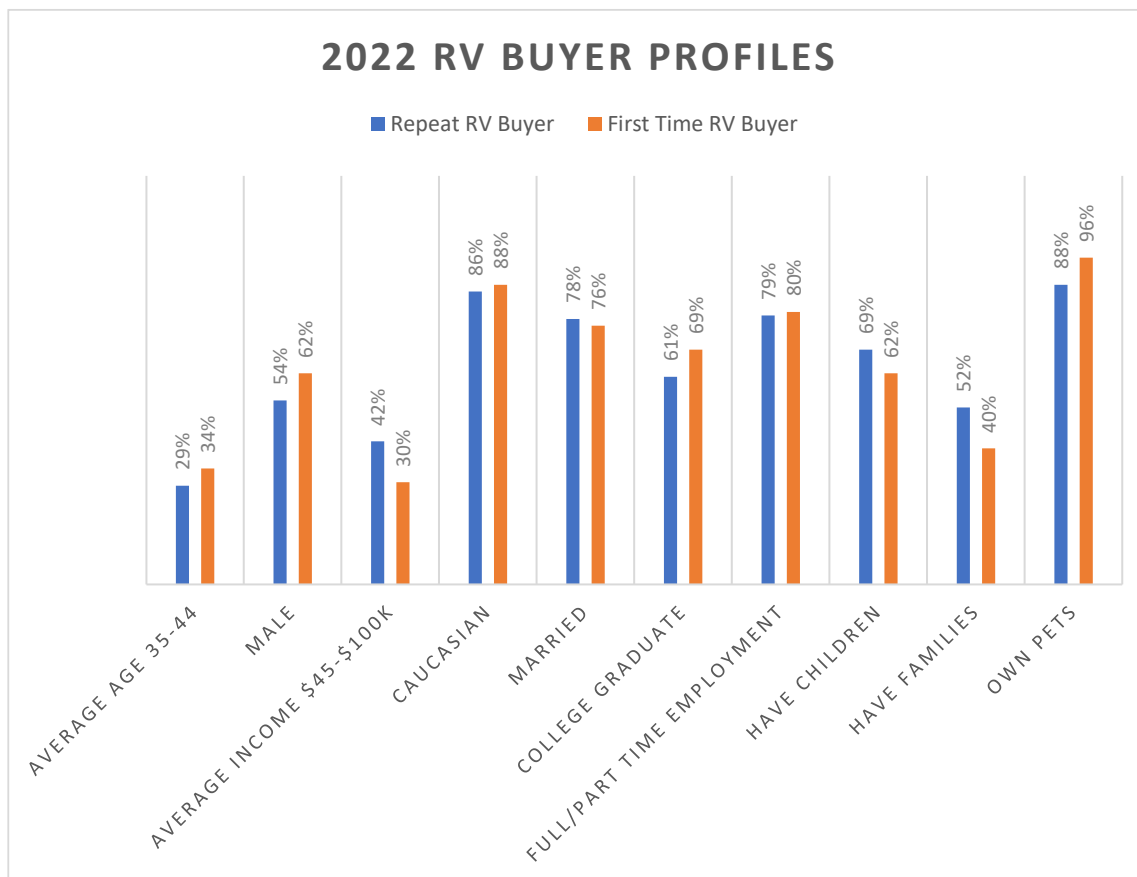


Extensive research by RVIA reveals seven clusters of RVers. The Happy Camper loves RVs and the adventures they bring. Casual Campers use their RV for a few weekends a year in the warm months. Adventure Seekers are outdoor enthusiasts ready to explore. Escapists embrace the RV lifestyle and enjoy the freedom of exploration the RV provides. Avid RVers take every opportunity to use their RV all season. Full Timers have adopted their RVs as their home and travel year-round. Family Campers grew up

¹²¹ RV Owner Demographic Profile, Go RVing February 2021

with an RV and use their RV to bond with family and are limited by their employment for time to RV.¹²²

First time RV buyers are spread across all demographics but are most likely to be 35-54 years old, employed, educated, affluent, and married with children under 18 with at least one pet. They are family campers. Repeat RV buyers are also spread across all demographics but are most likely under 45 years old, employed, educated, affluent, married with children under 18 and own a pet. Repeat buyers are primarily family campers and busy young families who use their RV less than 30 days per year.¹²³



Camping includes a much higher percentage of RV owners (77%) than in the past when many RVers would rent or borrow. However, the RV rental market also exhibited healthy growth adding over 2 million new renters in 2021.¹²⁴ Renting RVs plays an important role in the path to RV ownership as it helps to solidify interest and considerations prior to purchasing; however, some find renting RVs is an easier and cost-effective way to RV and it replaces the need for RV ownership.¹²⁵

¹²² RVIA.org/RV Owner Demographic Profile

¹²³ 2023 RV Path to Purchase Journey conducted by Ipsos for RVIA

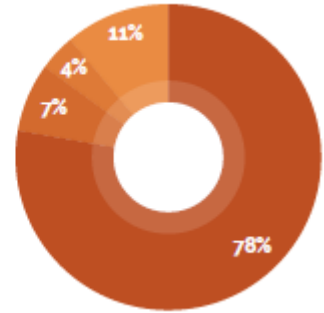
¹²⁴ The 2022 North American Camping Report sponsored by Campgrounds of America, Inc., conducted by Cairn Consulting Group

¹²⁵ RV Owner Demographic Profile conducted by Ipsos for RVIA in February 2021

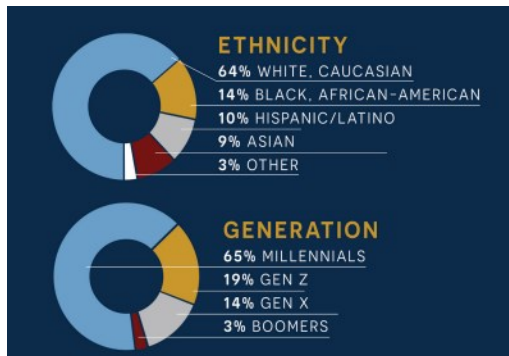
RV usage and ownership has grown significantly since 2019 though relatively flat with a minor but consistent increase from 2021 to 2022. Borrowing an RV continues to drop while rentals from peer-to-peer listings continue to increase though incrementally. RVers in 2023 are less likely to sell their RVs and approximately 25% are planning to upgrade.¹²⁶

RV Access 2022

- Traveled in RV they own
- Borrowed from friends or family
- Rented from company
- Rented from a private owner using a peer-to-peer listing service



Thirty-seven percent of U.S. households have an interest in the RV industry with a large proportion intending to purchase an RV at some point in the future. Among the 20.5 million households planning to purchase an RV, 9.6 million foresee purchasing an RV within the next five years.¹²⁷



The outdoor industry continues to grow younger and more diverse. In the past RV ownership has been driven by couples without children, baby boomers, and GenXers.

RV ownership is now spread widely across all age levels as well as gender, household income, and education. Millennials and Gen Xers were the greatest percentage of new RV buyers in 2022. RVIA reports the current median age of the new RV buyer is 32 years old with 22% of RV Buyers

between the ages of 18 - 34, well below where the industry has been in the past, and a 22% decrease from 2021. Seventy percent are married, with a median household income of \$80,900.

In 2022 thirty-one percent are first time buyers spent an average of \$92,415 on an RV. The majority, 77%, of new RV buyers purchased their RV at a dealership. Most impressive is that among current RV owners, 84% of the 18–34-year-olds are planning on buying another RV in the next 5 years, with 78% of those being a new model.¹²⁸

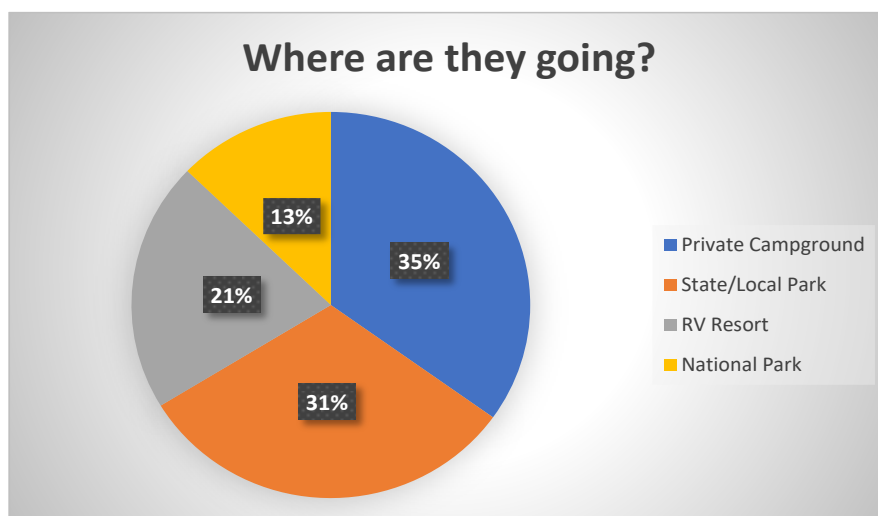
¹²⁶ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹²⁷ RV Owner Demographic Profile conducted by Ipsos for RVIA in February 2021

¹²⁸ 2022 Industry Profile RVIA



RV owners plan to use their RVs an average of 20 days in a year. Those intending a future purchase plan to use their RVs 25 days in a year. While the intended number of usage days are similar, how they plan to use the RV is different. Intenders or new buyers are more likely to travel during their trip while current RV owners choose a single destination.



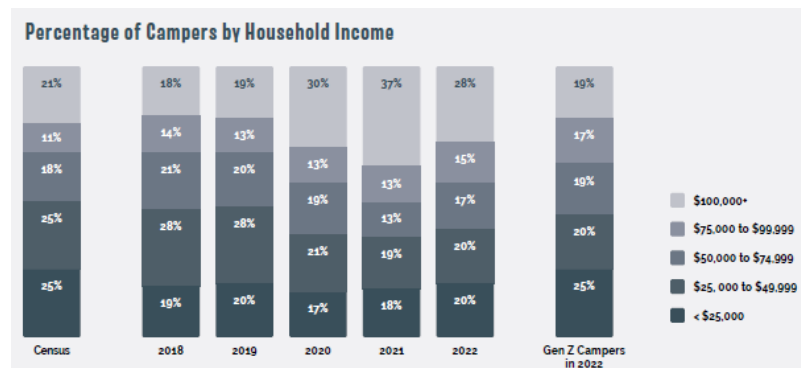
Travel and vacation cost savings are a major reason for purchasing RVs. RV vacations are one of the most economical ways to travel. The average RV vacation is 46% – 60% less expensive than a traditional hotel vacation with airfare included.¹²⁹ RVers typically plan to use their rigs more during bad economic times and in economic downturns.

New RV Owners are motivated by the ease of RV travel and the costs of travel. The look ahead for RVing experiences is highly optimistic with more than half of campers wanting an RVing experience and half of these folks trying out full-time RVing or the van life.¹³⁰



Demographics of the active camper

In general, campers tend to be solidly middle class. Household income among campers in the upper-middle-income and upper-income brackets increased in 2020 and 2021 as higher-income earners, who in the past might have taken other types of trips, decided to camp during the pandemic years. Household incomes reset in 2022 but still include a higher proportion of high-income households when compared to pre-COVID-19 participation. Higher income households are more likely to associate with higher levels of service and amenities within outdoor hospitality.¹³¹

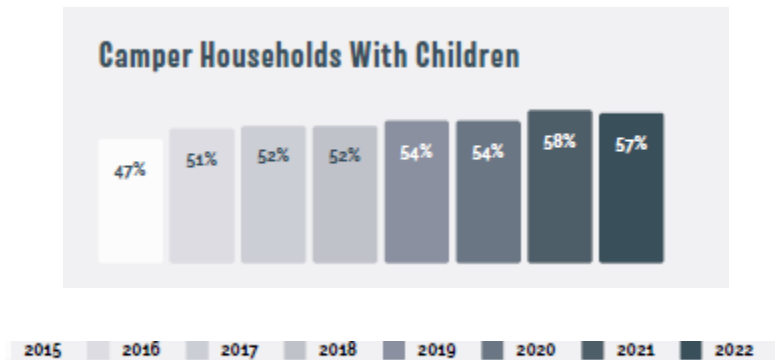


Campers place high importance on sharing camping experiences with their children. Next generations are being introduced to the great outdoors at a rate well above what is observed in the overall population. Sixty percent of campers say that creating new chapters in their family's book of shared experiences is important to them in 2023.

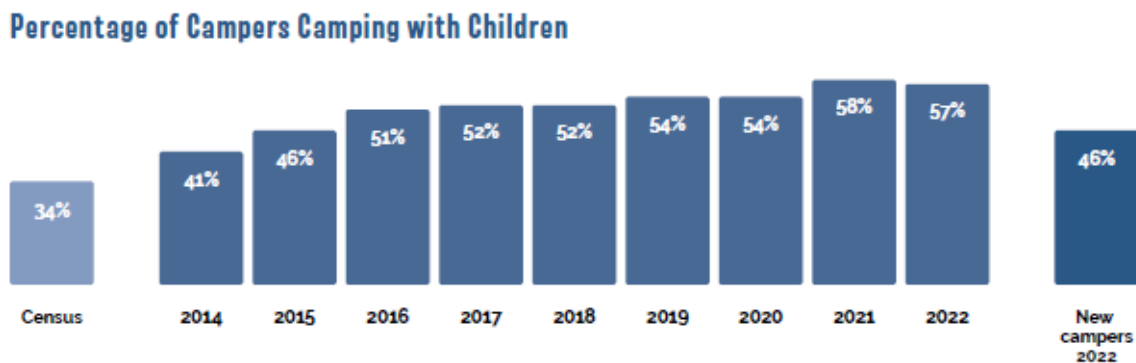
¹²⁹ 2023 Vacation Cost Comparison Study RVIA

¹³⁰ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹³¹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group



From 2014 – 2021 there has been a steady increase in campers with children. The recent leveling in 2022 was impacted by the younger new camper.



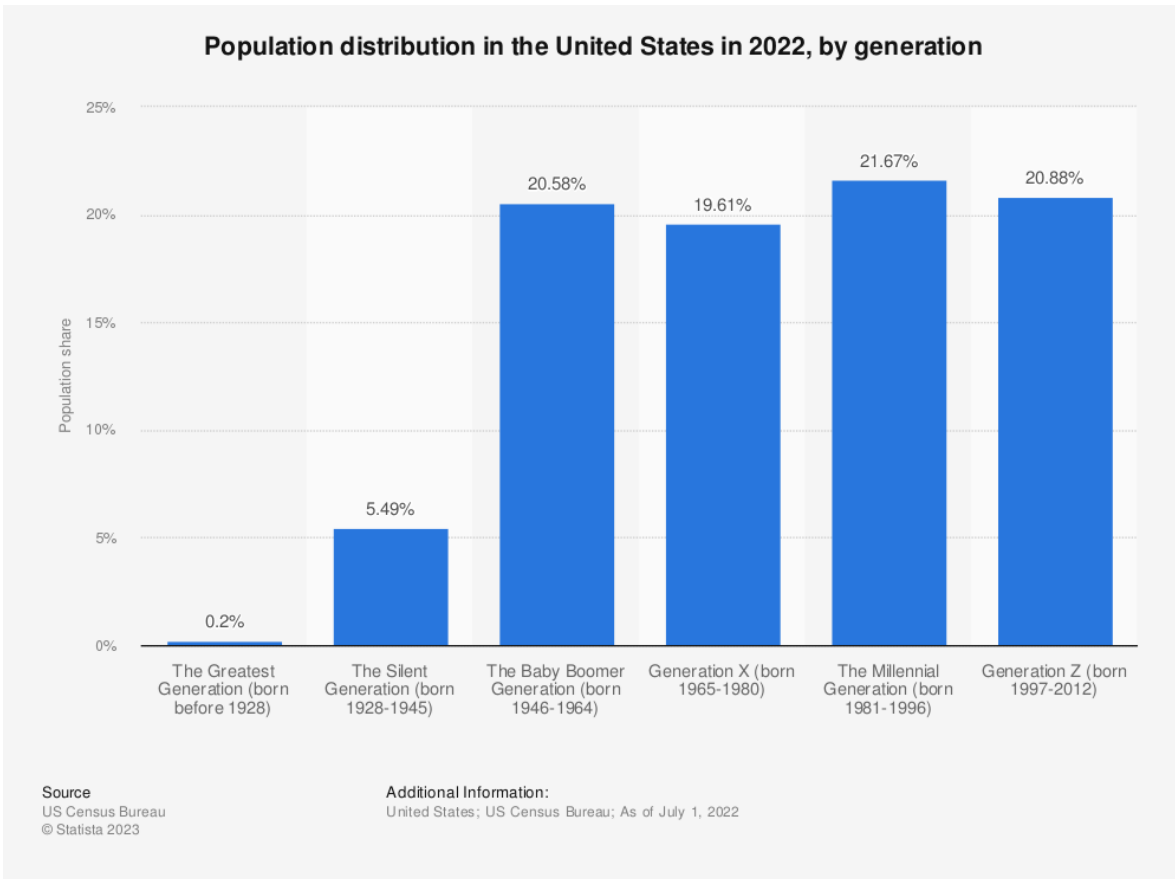
Overall, more than half of campers cite the importance of these shared experiences whether it's the way they camp, the stories or traditions.¹³² Seventy percent of new RV buyers are traveling with 3 or more companions.¹³³

Generations of Active Campers and RVers

Camping has been embraced by all generations, fueling record occupancies at all types of RV parks and campgrounds throughout the U.S. Participation in camping among the younger generations (Gen Xers, Millennial and Gen Z) has grown steadily over time and continues to exceed what is observed in the general population amongst the younger generations.

¹³² The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

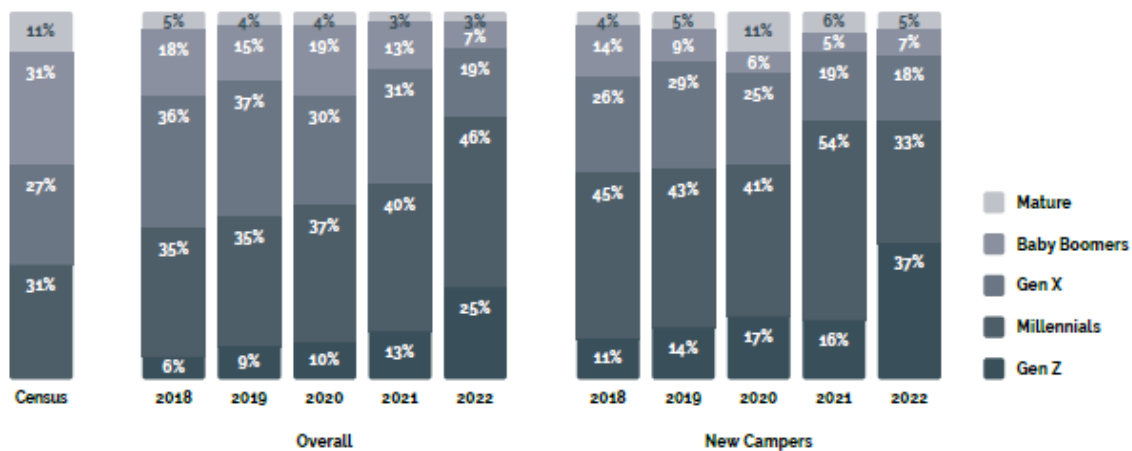
¹³³ RVIA 2022 Industry Profile



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Historically, Baby Boomers have been the generation most interested in camping. However, camping is getting younger over time including the highest ever representation of Gen Z campers in 2022.¹³⁵

Percentage of Campers by Generation



¹³⁴ <https://www.statista.com/statistics/296974/us-population-share-by-generation/>

¹³⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

According to RVIA the younger generations have exhibited an increasing desire to camp because of their passion for outdoor experiences. These age groups are predicted to remain active later in life.

There are differences in guest demographics by region. RV parks and campgrounds in the South and West are more likely to host boomers, while RV parks and campgrounds in the Midwest and Northeast are more likely to report families with children as their primary guest demographic.¹³⁶

Generation Z

Gen Z, known as the Zoomers, the oldest born in 1997 and the youngest in 2012, are currently between 11 – 26 years old. This generation follows the Millennials and is more racially and ethnically diverse than previous generations. With Gen Zers entering the workforce and early adulthood, their behavior and attitudes towards camping are beginning to be studied. This group has more significant limits on their time and financial resources than more experienced campers. Like Millennials, Zoomers love the great outdoors though many started camping due to COVID-19; many have camped as children or teenagers. Life stages and events such as starting or changing careers, earning an income, living independently, and childhood camping memories may drive this generations' desire to camp. Gen Zers prefer tents and are most likely to camp with friends and/or significant others, or their family. Biking is the most popular activity among Gen Zers while camping; they also tend to be less active while camping when compared to Millennials. This group shows less interest in high-speed Wi-Fi while camping but needs a moderate connection for social media. Gen Z comprised 37% of new campers and 25% of all campers in 2022. Fifty-eight percent of Gen Zers plan to take an RV road trip or RV vacation in 2023.¹³⁷ The camping and outdoor recreation industry are watching this generation's consumer habits and preferences and in future years will need to adjust their offerings to accommodate this next generation of campers.¹³⁸

Benefits of Camping Among Gen Z Campers



¹³⁶ www.ibisworld.com

¹³⁷ RVshare Travel Trend Report 2023

¹³⁸ The 2023 North American Camping Report sponsored by Campgrounds of America, Inc, conducted by Cairn Consulting Group

Millennials

Millennials, the oldest born in 1981 and youngest in 1996, are 27-42 years old and represent the largest U.S. generation and outnumber the baby boomers. This generation are building their families and careers and are taking to the outdoors in unprecedented numbers. The Millennials will impact the camping sector for years to come as they experience lifestyle changes and adjust their camping habits and preferences to the transitions associated with maturing in age.¹³⁹ The most significant characteristic of the Millennials is that they share core RV values. They have a deep attachment with family and friends to the outdoor lifestyle and possess an active interest in exploring and traveling. They are attracted to products and marketing strategies that reflect these characteristics.¹⁴⁰

Research by GO RVing, examining future RV buyers, indicates a new market landscape for Americans ages 18 to 44. This "Future Ready" study found that adults have different motivations affecting RV purchasing decisions. The age group of 27 to 36 is more likely to buy RVs. They own homes, are primarily urban, educated, and married with kids. This group embraces an active lifestyle and seeks out "cool" experiences. They love to travel, enjoying as many activities and adventures as possible. Millennials appreciate the convenience and freedom RVs provide.

Millennials are also more diverse in their ethnicity, living arrangements, and lifestyles, and they face a less favorable economy than prior generations. They are the first generation of the internet and social media age.

Millennials comprised 46% of all campers and 33% of new campers in 2022. Millennials are more likely than other generations to associate higher levels of service and amenities with outdoor hospitality.¹⁴¹ Seventy-five percent of millennials plan to take an RV road trip or RV vacation. Millennials, most employed in remote jobs, have embraced "hush trips", trips taken while continuing to work. Most Millennials already claim to have a "hush trip planned for 2023"¹⁴²



A larger segment of campers with children is likely due to the Millennial generation, and some of these children are entering their teen years. Since 2016 over 50% of campers reported having minor children. In 2022, 57% of campers reported having children in the household.¹⁴³

Campgrounds will need to adjust their offerings, services, facilities, and amenities to meet the needs of this large population segment. Accommodating the Millennial

¹³⁹ www.woodallscm.com/bahr-understanding-the-sectors-shifting-demographics/

¹⁴⁰ <https://www.statista.com/statistics/296974/us-population-share-by-generation/>

¹⁴¹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹⁴² RVshare Travel Trend Report 2023

¹⁴³ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

generation's desires should be incorporated into the vision and plans for an RV park serving multi-generations. Millennials are a continuing opportunity for the RV and the RV park industries to expand the market.

Generation X

Gen Xers, the oldest born in 1965 and the youngest in 1980, are currently between 43 – 58 years old, and represent 65.2 million people in the U.S. This generation falls between Millennials and Boomers and is approaching the middle of their careers and potential peak-earning years.

Most Gen Xers have children, and 70% take family-oriented trips, with weekend trips being most popular. Generation X is most likely to spend more on vacations due to their family size and responsibilities. Their children are still in school, forcing them to travel during the most expensive travel seasons, school breaks, and summer vacations. This generation travels domestically and is less likely to travel abroad as opposed to other generations.¹⁴⁴

As outdoor enthusiasts, this generation, who describe themselves as “lifelong” campers, embrace the services and amenities of glamping. Life stages and events such as increased income, the desire for exploration, and children getting older drive the Gen Xer's desire to camp.¹⁴⁵ Forty-one percent of Boomers plan to take an RV road trip or RV vacation in 2023.¹⁴⁶

Baby Boomers

Baby Boomers were born between 1946 and 1964 and range in age from 59 to 77 years old. Baby Boomers are hitting retirement age at a pace of 10,000 per day, and this pace will continue through 2029. The 65+ market continues to be a sweet spot for the RV market. RV parks and campground owners, especially in certain geographic regions, are experiencing a large influx of older campers who are camping in RVs, desiring more services and amenities, and engaging in different activities than the younger generations while camping.¹⁴⁷ Fifty-eight percent of Boomers plan to take an RV road trip or RV vacation in 2023.¹⁴⁸

Diversity

Diversity and representation among campers are reflective of the overall population. Camping demographics are closely following the overall demographics of the U.S. population and demonstrates the appeal of camping across the spectrum of U.S. residents.

¹⁴⁴ <https://www.thewanderingrv.com/travel-statistics-by-age-group/>

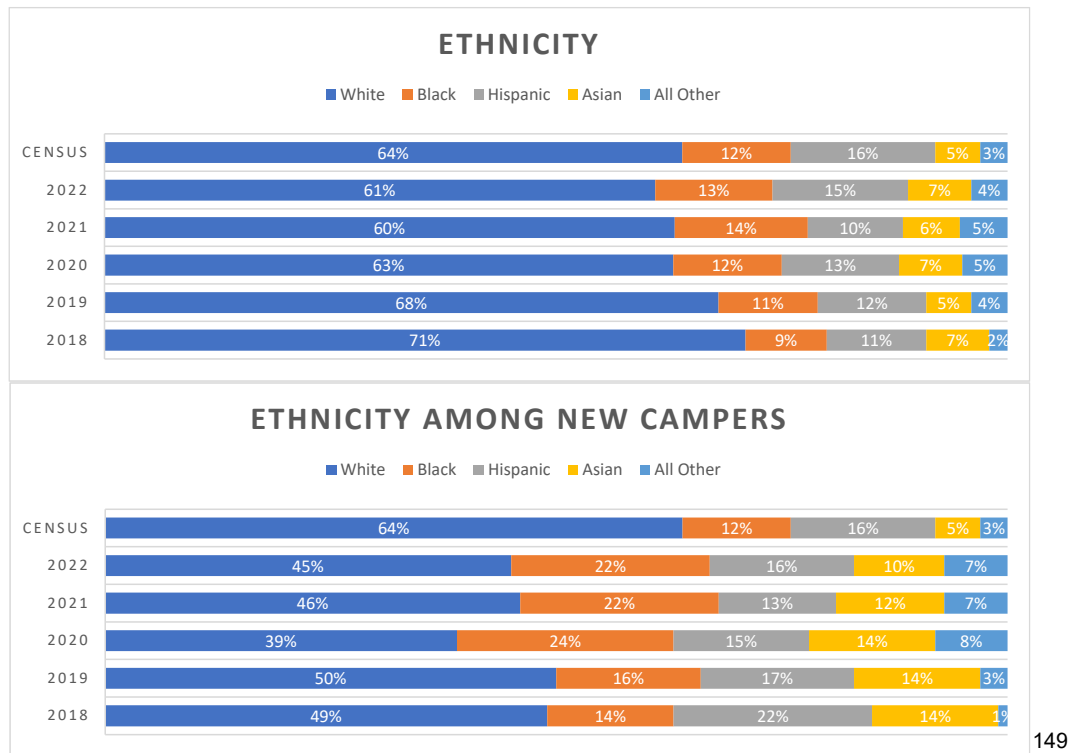
¹⁴⁵ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

¹⁴⁶ RVshare Travel Trend Report 2023

¹⁴⁷ www.woodallscm.com/bahr-understanding-the-sectors-shifting-demographics/

¹⁴⁸ RVshare Travel Trend Report 2023

New campers have driven the change in diversity among campers. Since 2014 the proportion of camping households who identify as Black has more than doubled, while the proportion of Hispanic campers has improved nearly three-fold.



Fourteen percent of camping households are same sex households, increasing by 2% since 2021 and 9% since 2015. Camping is more likely to attract same-sex households with children.

Within the set of non-white campers there is an interest in trying new camping experiences. While growth among Black, Hispanic, and Asian campers has increased over the past decade, many are at risk of lapsing. Reports of feeling unwelcome or uncomfortable outdoors have been reported. Youth camping in whites is much higher than these ethnic groups. The primary reasons for fall-off in these ethnic groups is safety and security while camping, having a bad camping experience, and having no one to camp with.¹⁵⁰

Go RVing is attracting a diversified RV audience through traditional media, digital media, social media, and experiential events to expand, broaden, and develop the overall industry. African American, Hispanic, LGBTQ, and women RVers are drawn to RVing's values, benefits, and opportunities.

¹⁴⁹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹⁵⁰ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

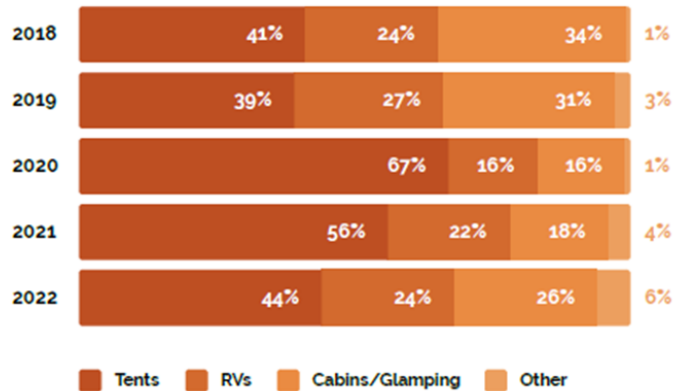
Diverse groups and camping clubs exist and are growing in membership. Camping Clubs such as the National African American RVer's Association (NAARVA) have 1,400+ members across the country.

How Campers Camp

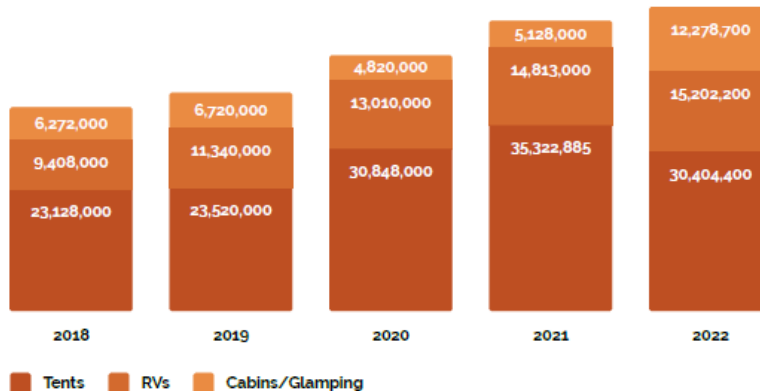
Camping includes everything from a tent to RV site to accommodations such as cabins. The types of accommodations have remained relatively consistent. The greatest increase in participants is among cabin and glamping campers. RV growth slowed but still grew in 2022 when compared to 2021.

2020 saw the highest usage of tents among new campers. This has declined and is now more in line with pre-2020 results.¹⁵¹

Primary Accommodations Among New Campers 2018 to 2022



Number of Camping Households by Primary Camping Accommodations 2018 to 2022



If money were no issue, half of tent campers would migrate to RVs (22%) or cabins (27%).

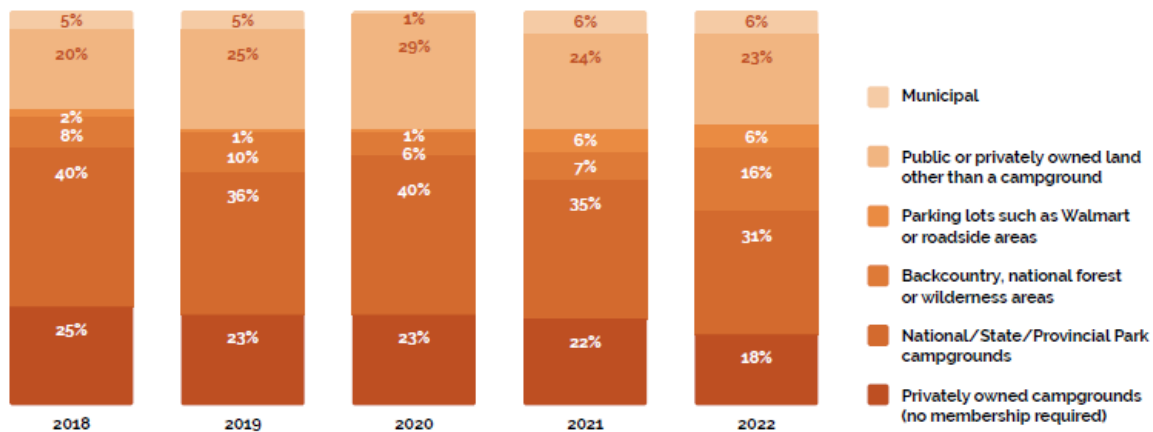
Preferred Camping Locations in 2022

The proportion of camping nights spent at campgrounds both public and private declined in 2022 and alternative usage increased. Forty nine percent preferred public and private campgrounds down from 57% in 2021. Private campgrounds are most common among those who do not camp with children, Gen Xers, and rural residents. Boomers are being drawn to privately owned land and state park campgrounds. RVers

¹⁵¹ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

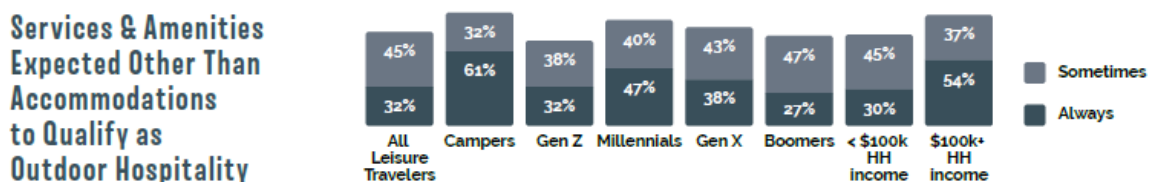
are using alternative locations such as dispersed camping areas, casinos, and music festivals.¹⁵²

Proportion of Nights Camped by Location 2018 to 2022



Campground Selection and Offerings¹⁵³

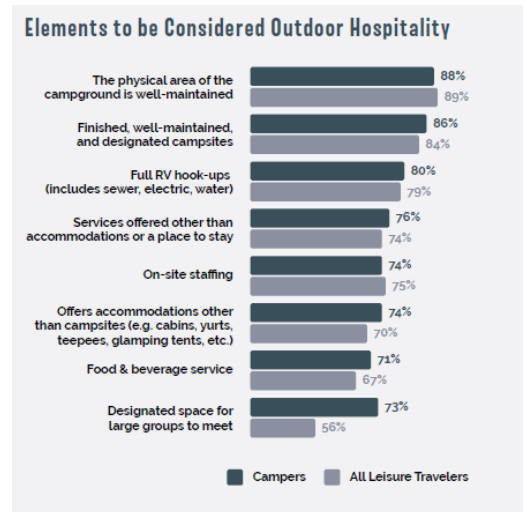
Outdoor hospitality is a broad term but 61% of campers agree that offering services and amenities above the accommodation or campsite is necessary.



The elements that define outdoor hospitality at a campground include the ability to offer varying levels of accommodations, amenities, and services, with the physical space, including campsites, being the most important consideration.

¹⁵² The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹⁵³ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group



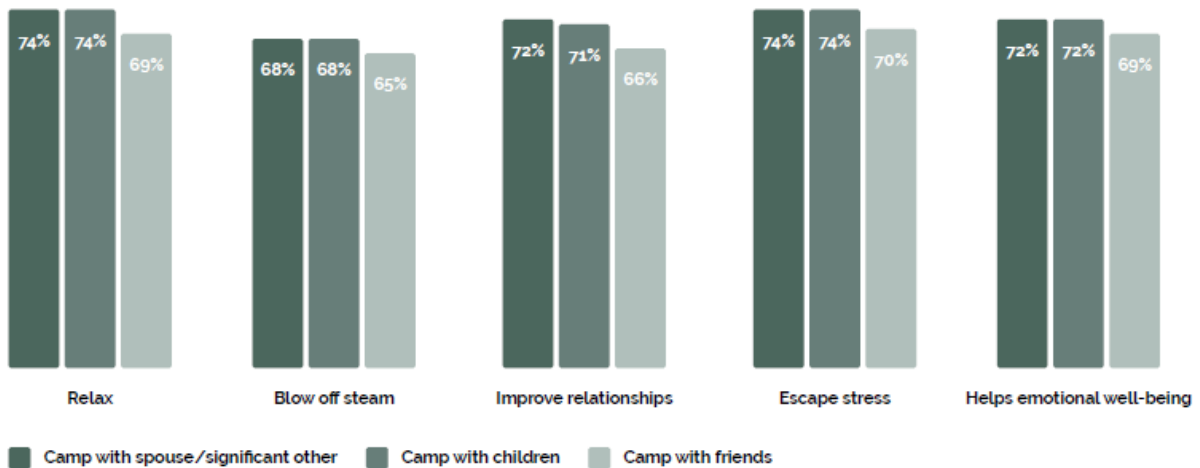
Weekend getaways and family vacations are typically why people camp. The increased health and mental health benefits of camping are more prevalent than in years past. Escaping the stress of everyday life, relaxing, clearing the mind, spending time with family and friends, and affordability are desired camping benefits.

Like Most About Camping	2021	2022	Change
Spending time in the outdoors	53%	49%	-4
Spending time with friends or family	45%	46%	1
Just being able to relax	43%	44%	1
Sitting around the campfire	25%	41%	16
Getting away from crowds	24%	34%	10
An affordable way to travel farther distances from home	20%	33%	13
Having time to expose kids to the outdoors	26%	32%	6
Visiting new places	28%	30%	2
Experiencing nature (e.g. seeing wildlife, plants, etc.)	33%	29%	-4
The food	11%	28%	17
Being able to camp close to home	17%	26%	9
Participating in other outdoor recreation activities	27%	23%	-4
Meeting new people	13%	12%	-1

There are wellness benefits from camping with family and friends. Those who camp often feel that camping not only helps improve their relationships but their overall well-being.¹⁵⁴

¹⁵⁴ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

Percentage Agree About the Benefits of Camping with Friends and Family 2022



Camping is also a way to blow off steam and relieve tension.

Preferred Ways to Blow Off Steam While Camping top 5



The popularity of recreational outings for activities such as hiking, fishing, sightseeing, canoeing, kayaking, biking, birdwatching, and visiting historical and cultural sites is increasing. Hiking and backpacking rival fishing for the most popular camping activity. Notably almost 20% participate in organized team sports and activities while camping.

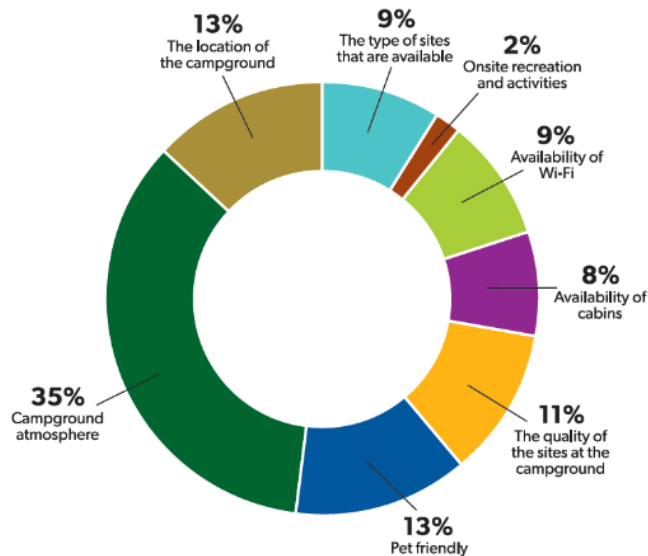
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¹⁵⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

Recreation While Camping	2017	2018	2019	2020	2021	2022	Change since 2020
Fishing	47%	50%	49%	52%	36%	49%	-3
Canoeing/Kayaking	35%	37%	37%	32%	31%	44%	12
Hiking	53%	51%	51%	46%	37%	42%	-4
Bird watching	23%	25%	25%	31%	29%	33%	2
Biking	26%	30%	30%	35%	33%	31%	-4
Hunting	10%	14%	14%	19%	12%	23%	4
Taking scenic drives/Sight-seeing	30%	30%	30%	27%	21%	23%	-4
Mounting biking	13%	18%	18%	19%	19%	23%	4
Visit historical sites	25%	25%	25%	19%	16%	19%	0
Golfing or tennis	6%	10%	10%	8%	7%	17%	9
Running/Trail running	15%	15%	15%	16%	17%	16%	0
Geo-caching/Orienteering	7%	8%	8%	6%	6%	16%	10
Horseback riding	10%	12%	12%	8%	8%	16%	8
Rock climbing or bouldering	9%	11%	11%	12%	10%	14%	2
Water sports	9%	10%	10%	11%	9%	14%	3
Motor sports	9%	10%	10%	19%	17%	13%	-6
Organized team sports	6%	7%	7%	15%	18%	10%	-5
Stand-Up paddle boarding	5%	7%	7%	6%	7%	10%	4
Motor boating or jet skiing	9%	9%	9%	7%	5%	10%	3
Snow skiing or snowboarding	4%	7%	7%	7%	7%	9%	2
Whitewater rafting/Kayaking	6%	7%	7%	7%	6%	9%	2
Pickleball	3%	4%	4%	7%	6%	8%	1

Atmosphere is the key driver in determining whether campers will stay at a location or even consider camping at all. Safety and security are essential to all generations of campers; however, this information is often not available or apparent before arriving at the campground. The following chart summarizes the overall factors in selecting a campground.

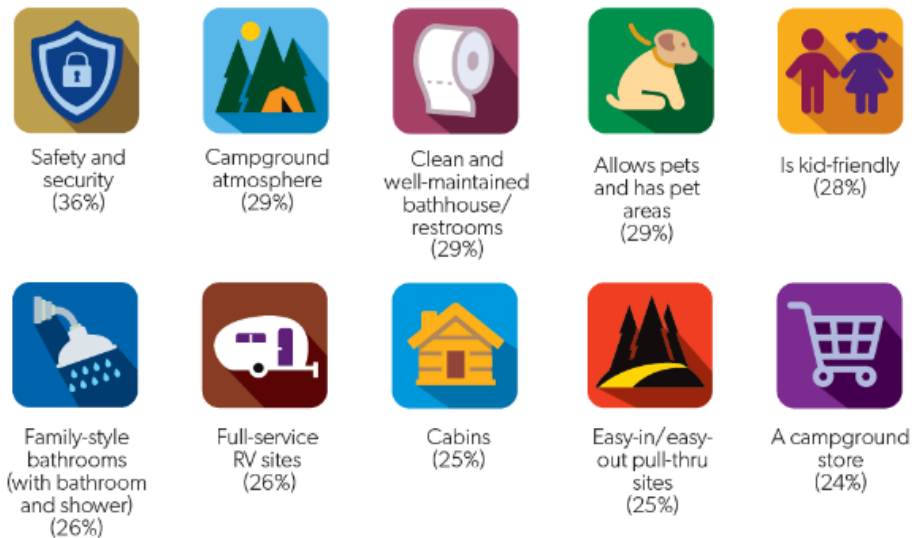
MOST IMPORTANT FACTOR IN CAMPGROUND SELECTION (2019)



While atmosphere is the most important factor in choosing a campground, once at a campground, safety and security, campground atmosphere, (landscaping, activity levels, friendliness, etc.), clean and well-maintained bathrooms, pet friendliness and kid-friendly are most important.¹⁵⁶

Generationally there are variations in the top ten considerations when staying at a campground. Safety and security rank at the top with all generations.

— Top Considerations When Staying at a Campground —



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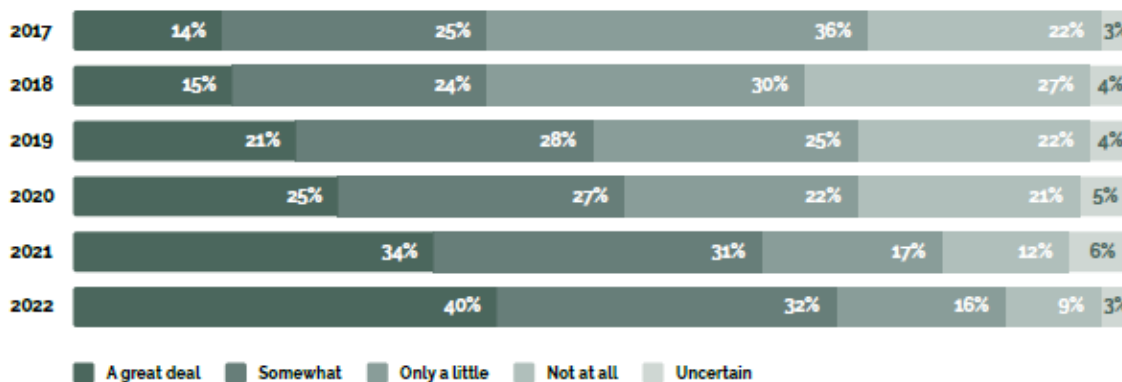
Access to technology has become increasingly important to stay connected to family and friends, work remotely, and facilitate learning. Hence, robust technology in parks

¹⁵⁶ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

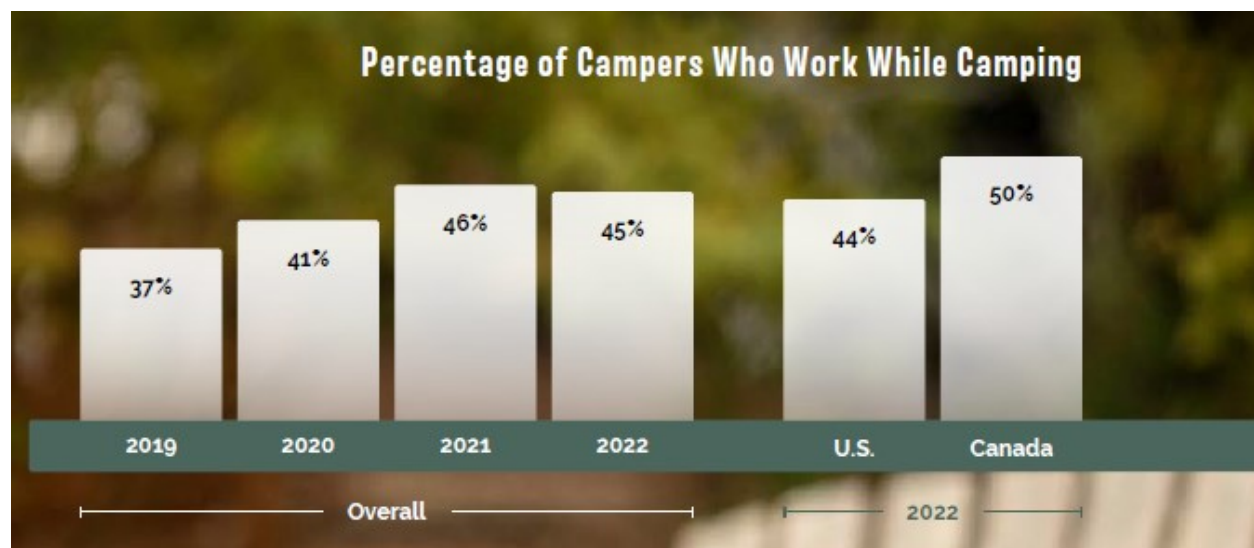
¹⁵⁷ The 2021 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

will facilitate more camping trips and longer camping stays. Wi-Fi access importance has grown over the years to an all-time high in 2022. Having the ability to work or learn remotely impacts how often campers enjoy camping and their ability to camp longer and more often.¹⁵⁸

Influence of Wi-Fi on Ability to Camp More



A steady rise in the number of campers who may work from home has increased the frequency of working while camping. Approximately 44% of U.S. campers work while camping. Campers indicate access to technology impacts if they will camp and how long they will stay at a park. This has grown since 2017 from 14% to 40% of campers stating technology access has “a great deal” of importance to length of stay. The first-time camper is more influenced by technology.¹⁵⁹



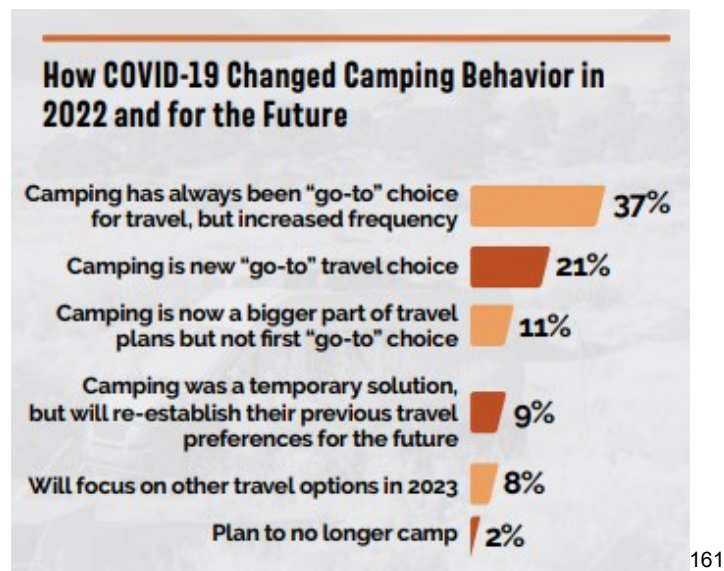
¹⁵⁸ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group

¹⁵⁹ The 2022 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

Continuing the work from the road trend, 19% of all leisure travelers have worked from an RV in the past year and 29% say they are considering working from an RV in the coming year. Millennials show the greatest intention to work from an RV in the coming year (59%) followed by Gen Z (44%) then Gen X (35%).¹⁶⁰

Camping in the “new normal” post COVID

COVID-19 moved camping into the mainstream of American travel. The freedom to travel and experiencing the great outdoors while controlling the environment is the primary reason for owning an RV.



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A fundamental shift signaled by the pandemic has changed how Americans travel, vacation, and live. Record-breaking RV production and sales over the past couple of years and the public's long-standing desire to visit the great outdoors are keeping campgrounds and RV parks around the country at high occupancies.

RVers are experiencing higher levels of satisfaction and intend to buy another unit. "Today, one-in-five leisure travelers are considering purchasing an RV and four-in-ten leisure travelers would consider an RV trip," said RV Industry Association President & CEO Craig Kirby. "This bodes very well for the future growth of the industry and is a strong indicator of the lasting popularity of RVing."

Outdoor enthusiasts are eager to try new things. There has been an uptick in people exploring the outdoors through camping, hiking, cycling, fishing and other outdoor recreational activities. A hunger for new experiences is driving camping trips in 2023.¹⁶²

¹⁶⁰ RVIA Industry Association, RV Travel Trends, August 24, 2023

¹⁶¹ KOA Monthly Report January 2023

¹⁶² The 2023 North American Camping Report sponsored by Campgrounds of America, Inc, conducted by Cairn Consulting Group

Camper Retention

Nowhere is the longing for the great outdoors more evident than in RV campgrounds and national parks throughout America. Ninety percent of people who went RVing during the pandemic are likely to continue RVing.¹⁶³

In March of 2023 KOA reported 74% of campers from 2022 were planning to camp again in 2023. Advanced reservations and advanced interest in booking was strong going into the 2023 summer and fall seasons. Despite weather and economic challenges camping remained a favorable form of travel through summer.

A remarkable 58% of campers stated that their camping trips in 2023 surpassed their expectations. Fifty-one percent of campers have booked some sort of travel for 2024.¹⁶⁴

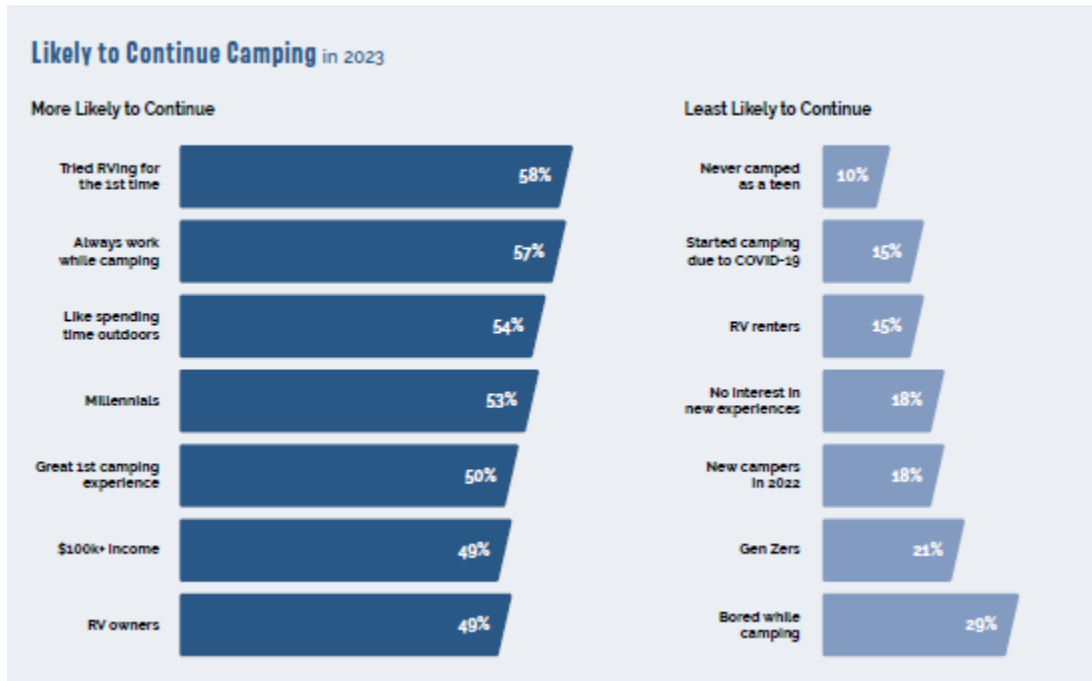


While there is strong interest from those who camped during the pandemic to re-establish their previous forms of travel, there is still great interest from those who started camping during the pandemic. There is a higher level of turnover in those who started camping for reasons other than the attraction of the outdoor experience. The importance of having great experiences impacts whether first-time and new campers will continue to camp in the future. The demand for different types of camping experiences and modern RV sites has never been higher. Even with other forms of travel returning, consumers view camping and RVing as an ideal way to get outdoors and enjoy an active outdoor lifestyle.¹⁶⁵

¹⁶³ RVIA 2022 Industry Profile

¹⁶⁴ KOA Monthly Report October 2023

¹⁶⁵ The 2023 North American Camping Report sponsored by Kampgrounds of America, Inc, conducted by Cairn Consulting Group



Going forward the camping and RV industries can keep camping and RVing in the mainstream of travel by addressing the challenges in front of them to retain campers. These challenges include first time camping experiences that were not enjoyable and uncomfortable because they did not have the right gear or equipment or rental. Campers also had problems with their new RV or RV rental, and campgrounds did not provide the services, amenities, or level of hospitality desired.

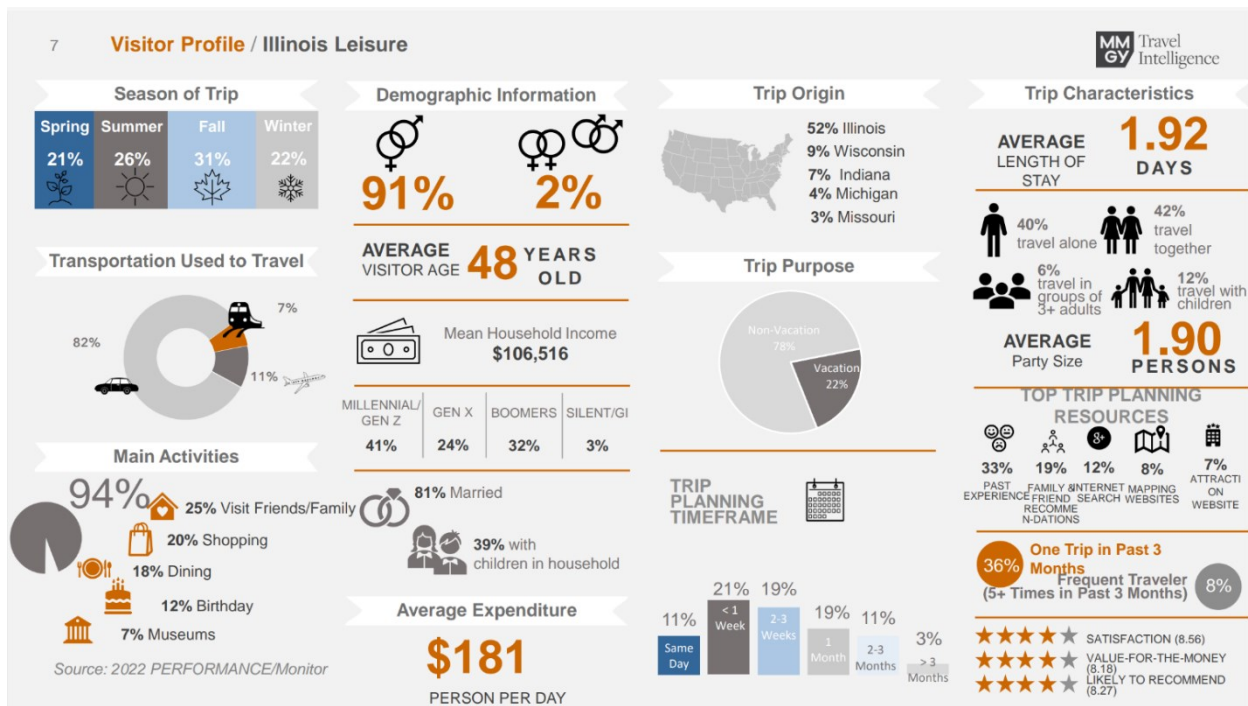
Most new campers are in the younger generation, many under 35. Most new campers are single and camping with friends or siblings. More than half of new campers are diverse. Most new campers camped in small tents or small RVs and many in rented RVs. Seventy percent of new campers started camping because of COVID-19 and not the love of the great outdoors. Urban campers turned to camping for an experience with less crowds, peace and quiet, and a slower less hectic pace. Campgrounds must gear amenities, facilities, and services to this age set and these needs. New future forward RV parks and campgrounds with larger sites, deluxe tent sites, buddy sites, EV charging, variety of rental and glamping accommodations, high speed internet, and other services and activities that support the needs of the new camper and address the challenges of the new camper is a must.

The industry can address these challenges as new campgrounds are developed and older campgrounds are improved and expanded. The outdoors is for everyone to enjoy, and it is obvious all walks of life seek camping experiences. It is the industry's responsibility to control its own fate and continue to attract and importantly retain those who have experienced their first camping or RV trip.

Market Analysis

The market analysis considers many factors when determining whether a market can support a significant campground expansion or a new campground development. These factors include local, regional, and state tourism components, the draw to the area, the economic outlook for the region, the size of the local and regional target markets, and whether there is sufficient population in these markets to sustain an expansion or new campground, and the national appeal, if any, for the area.

Illinois Tourism Info – Key Findings



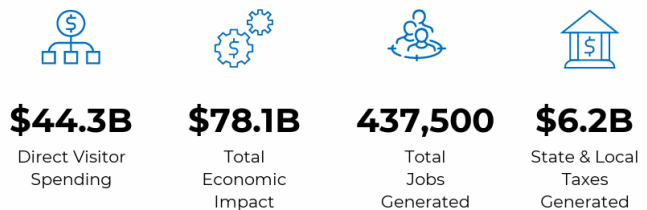
Leisure travel in Illinois is balanced between all four seasons. The strongest season for visitors is Fall followed closely by summer. Surprisingly winter is slightly stronger than Spring 22% versus 21% of travelers. Most travelers (82%) come by vehicle. These travelers come for five purposes. Visiting family and friends is the top reason for travel followed by shopping, dining, celebrating a birthday, and visiting museums. The traveler is likely to be married with a household income of over \$100,000. Millennials and Gen Z-ers represent 41% of the travelers to Illinois with an average age to 48 years.

Travelers come from neighboring states with a large portion (52%) coming from within Illinois. The average daily spend is approximately \$180 per person per day. The average trip duration is 1.9 days and has been planned within the past month.

Top 10 Origin States

Illinois	52.4%
Wisconsin	8.5%
Indiana	7.3%
Michigan	4.2%
Missouri	3.1%
California	2.2%
Texas	1.8%
Iowa	1.8%
Florida	1.7%
Ohio	1.5%

Visitor spending for 2022 in Illinois reached 97% of pre-pandemic levels with \$44.3 billion. This spending resulted in direct and indirect economic impact of \$78.1 billion. There were 437,500 jobs created and \$6.2 billion in state and local taxes generated.¹⁶⁶



This spending was divided into 5 different sectors. Transportation was the largest sector with 44%, food and beverage garnered 21%, lodging 18%, recreation and entertainment 9% and retail sales 8%. Almost 60% of all travelers are day visitors (59.1%) and 40.9% stay overnight.



Enjoy Illinois promotes tourism in Illinois with the slogan “the middle of everything”. Travelers are encouraged to take a road trip, explore the outdoors, get inspired, and find Illinois made products. A visitor guide is produced annually and available to travelers to help guide their travels within the state.

The state is divided into four regions. Chicago & Beyond, Great Rivers Country, Land of Lincoln, and Trails to Adventure. The City of Rock Island is in the Great Rivers Country region denoted by a yellow star on the map. The main feature of this region is the Mississippi River which is the western border of Illinois. No matter which season you travel the Great Rivers Country region will have exciting adventures awaiting.¹⁶⁷



Iowa Tourism Info – Key Findings

Visitor spending for 2021 in Iowa reached \$6.1 billion spanning multiple industries. This spending resulted in direct and indirect economic impact of \$9.4 billion. There were 65,000 jobs created and \$1 billion in state and local taxes generated.

¹⁶⁶ MMGY Travel Intelligence Year-End 2022 Published July 2023

¹⁶⁷ Enjoyillinois.com



\$6.1B

Direct Visitor
Spending



\$9.4B

Total
Economic
Impact



65,000

Total
Jobs
Generated



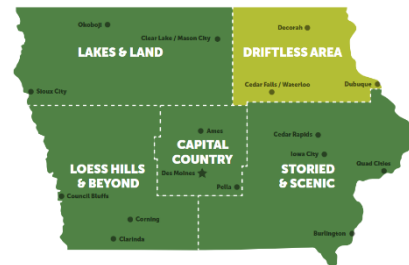
\$1.0B

State & Local
Taxes
Generated

This spending was divided into 5 different sectors. Lodging, including the value of second homes, accounted for \$1.6 billion, 26% of the average visitor dollar. Transportation, including both air and transportation within the destination, resulted in \$1.4 billion (22%). Retail captured 19%, a total of \$1.1 billion. Food and beverage comprised 17%, with recreation registering 16% of each visitor dollar as well.



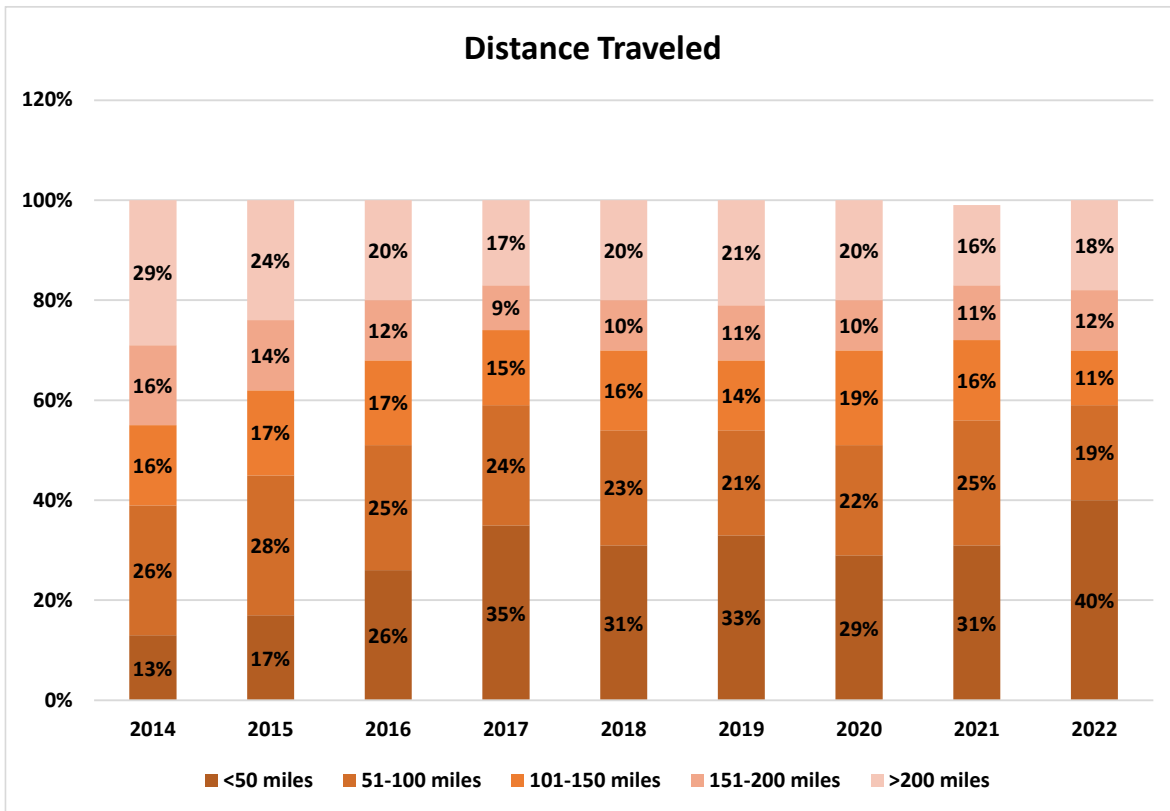
Travel Iowa promotes tourism in Iowa. Travelers are encouraged to plan a road trip and get more inspiration using various travel guides printed seasonally to help select the travel experience desired. Iowa is divided into 5 regions. Lakes and Land, Driftless Area, Loess Hills & Beyond, Capital Country, and Storied & Scenic. While the City of Rock Island is in Illinois it is just across the Mississippi River from Davenport, Iowa in the Storied & Scenic region.¹⁶⁸



Distance Traveled

In general, for most RV parks and campgrounds their major target markets are 200 miles or less with over 80% of campers traveling 150 miles or less to their destination. Camper diversity, age demographics, economic factors, the park's business model and location determine the strongest markets for an individual property. For example, older campers tend to drive longer distances than younger urbanites, and destination properties pull from longer distances.

¹⁶⁸ Traveliowa.com



Distance traveled has changed over the years as camper demographics shift younger. In 2022 fifty-nine percent of campers preferred traveling 100 miles or less with 40% traveling 50 miles or less.

Target Markets

The consultants consider several parameters when analyzing the potential market for a proposed RV park and campground development. The distance traveled to arrive at the proposed RV park determines the market.

Camping closer to home began trending in 2017 with the surge of younger and more diverse campers and remained predominant during the early stages of COVID because the public was cautious regarding their “away from home” and “safe social distancing” activities. Except for a brief break from this trend in 2020 the closer to home camping trend continued in 2021 and spiked even higher in 2022.

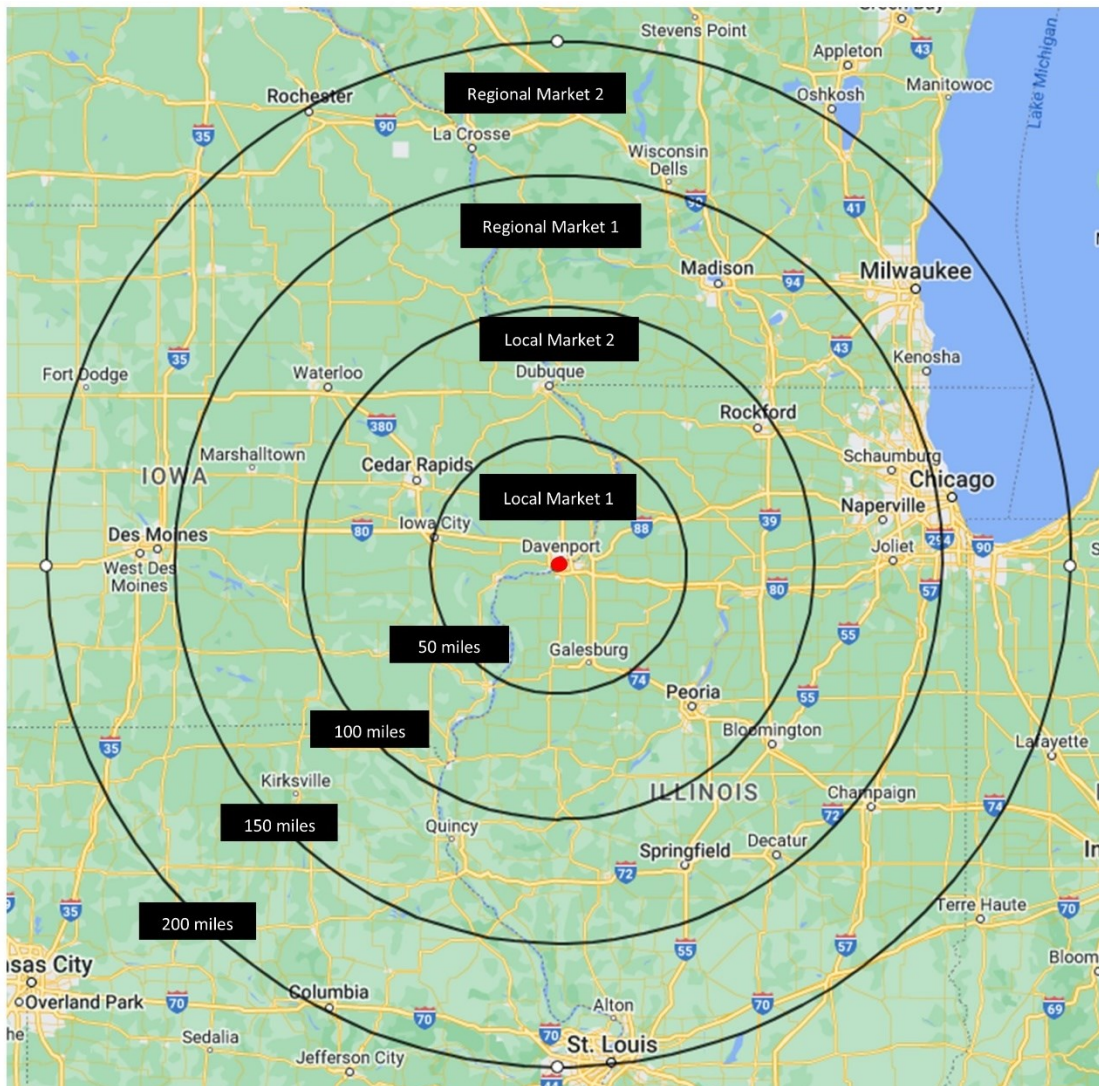
There are three primary target markets for potential vacation leisure, transient, and extended-stay RVers, and campers. These markets are defined by the distance traveled to the proposed RV park and campground – local (less than 100 miles), regional (101 – 200 miles), and national markets (201+ miles).

¹⁶⁹ The 2022 & 2023 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

The local market is divided into two (2) segments; those travelling from within 50 miles of the property and those from 51-100 miles. Likewise, the regional market is divided into two (2) segments; those traveling 101-150 miles to the property and 151-200 miles to the property. Typically vacation leisure campers for short-term and extended stays come from these markets and are the strongest markets for most RV parks and campgrounds.

The national market is 201+ miles. Many types of travelers are in this market, including vacation/leisure, workforce, snowbirds, and retirees living in RVs. These travelers often travel 750 miles or more. The national market typically consists primarily of extended stay campers and occasional short-term or vacationing guests visiting a destination area or visiting family and friends in a particular area.

The map on the following page illustrates the market areas described. The property location is tagged in red.



All target markets are essential, but most parks need strong local and regional markets to obtain maximum occupancy. National destinations such as Orlando, Las Vegas, or Branson, MO, or those RV parks located near National Parks such as Yosemite, Great Smoky Mountains, and Yellowstone for example primarily attract travelers from the national market and depend on the national market to obtain maximum occupancy.

The Local and Regional Markets

Research reveals that 40% of all campers travel 50 miles or less to their camping destination, and 19% travel 51 to 100 miles. The local market has been divided into two groups to accommodate a more diverse and younger demographic, who are camping closer to home.

Local Market – Segment 1

Local market segment 1 includes campers traveling 50 miles or less. The number of households within 50 miles is estimated to be almost 260,000 households based on a population estimate from 2020. There are approximately 20,775 RV-owning households in this market and 238,917 non-RV-owning households. Non-RV-owning households are a market for potential rental unit guests.

The local RV owner market, especially those within 50 miles of the property, may be attracted to the park for last-minute camping weekends and short stays. Non-RV owners in this market are attracted to rental accommodations for the same reasons.

Local market segment 1 is the smallest of all market segments in both the local and regional markets for both RV and non-RV owning households for an RV park in the City of Rock Island. A substantial number of travelers (40%) are expected from this market. Rental units are important for attracting non-RV owning households from all market segments but especially for the travelers from the local market segment 1 desiring a destination within 50 miles of their residence.

Local Market – Segment 2

Segment 2 of the local market includes campers traveling 51 – 100 miles. There are approximately 800,000 households within 51-100 miles of the City of Rock Island with an estimated 62,743 RV-owning households and 721,545 non-RV owning households.

This is a large market and includes Dubuque, Iowa City, Cedar Rapids, Iowa, and Peoria and Rockford, Illinois. This is the largest of the local market segments for the City of Rock Island. The folks from this market will be attracted to boating on the Mississippi River, the nearby recreation trails, John Deere headquarters, casino boats, and golf courses in the area.

Local RVers within 100 miles of the property often look for new places to visit with their RVs closer to home. Local RVers often desire seasonal locations to either place their

RVs on a site for the season or store their RV at a campground to frequent the park as a vacation home or getaway location. Non-RVers within 100 miles of a property are eager to enjoy a weekend or short getaway in a rental unit. The non-RVing local market with almost 1 million households will be enticed by the treehouse and river boat rentals and this is a strong market for these rentals.

The anticipated group of travelers who reside within a 100-mile radius around the property or within a 1-1.5-2-hour drive of the property represents an average market for campers seeking sites and an above average non-RVers market desiring rental accommodations. Campers in the local market often look for more accessible weekend destinations that do not require extensive pre-planning. These local campers and non-campers are likely to be familiar with the area and all that it offers.

Local market segment 2 is substantially larger than segment 1 though still one of the smaller market segments overall. The estimated number of RV owning households in the entire local market is 83,518, underwhelming when compared to the regional market segments for RV ownership and RV site demand. Almost 60% of the proposed park's guest base could be supported by the local markets. It will be important to offer sites and rentals that cater to this market's demographics and needs.

Regional Market – Segment 1

National camping research reveals that 11% of campers surveyed in 2022 traveled 101-150 miles, and 12% traveled 151–200 miles. Hence, the regional market has been divided into two groups representing travelers within 101–150 miles from the property and those travelers 151–200 miles from the property.

Regional market segment 1 includes campers within 101–150 miles or 2-2.5-3 hours' drive of the property. The number of households in this market is approximately 4.4 million. An estimated 351,316 RV-owning households and over 4 million non-RV-owning households reside in this segment of the regional market. This market dips into the Chicagoland area and includes Springfield, Illinois, Madison, Wisconsin, and Waterloo, Iowa.

Regional market segment 1 is over 4 times larger than the local markets combined and in addition to an extremely large non-RV owning market it contains a significant number of RV owning households.

Regional Market – Segment 2

Regional market segment 2 includes campers within 151-200 miles or 3-3.5-4 hours' drive of the property. The number of households in this market is almost 3 million. An estimated 177,147 RV-owning households and almost 2.8 million non-RV owning households reside in regional market segment 2.

Regional visitors traveling this distance stay for various lengths of time, and usually stay longer than the local market traveler. Households in regional markets typically represent overnight campers for extended weekends, and longer vacation stays during summer and holiday periods. The regional markets may also represent extended-stay campers who use an RV park as a seasonal or summer second “getaway” home. Finally, the regional markets may also represent retirees desiring a second summer home close to home but in tourist destination areas.

Two of the “top 50” populous markets in the U.S. are within regional market 2. These cities are Chicago, Illinois and Milwaukee, Wisconsin. Additional metropolitan areas are Des Moines, Iowa, and St Louis, Missouri.

The estimated total market size of the local and regional markets for an RV park in the City of Rock Island to draw upon is more than sufficient to support an RV park for either or both vacation leisure and extend stay campers. The approximately 611,981 RV-owning households and over 7.7 million non-RV households within 200 miles of the property represent a very robust target market area for an RV park in the City of Rock Island for both RV sites and rentals.

National Market

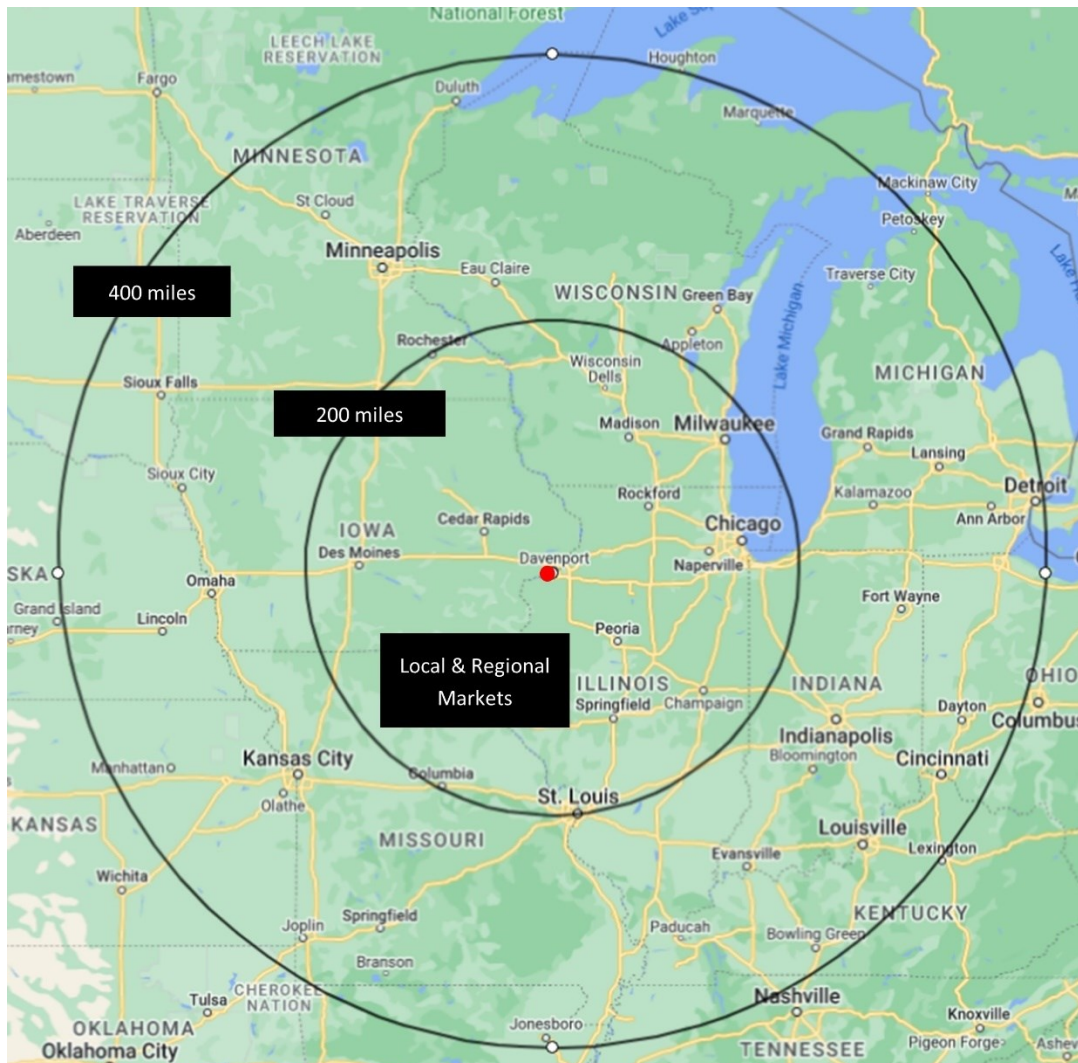
The final group of visitors in the national market reside 201+ miles outside the radius. This group comprises travelers who will drive 4+ hours, and many drive more than one day to reach their destination.

There is currently no way to accurately measure the number of RV visitors to the area from the national market beyond 201+ miles from the property. There are 13 million RVs in service traveling in America today. Research reveals that an average of 21% of campers traveled more than 200 miles between 2014 - 2022.¹⁷⁰

The national market consists of guests who are full-time RVers, vacation travelers, family and friends visiting a particular area for a variety of reasons, RVers traveling to sporting or specific events and traveling workers for temporary work.

Notably, there are eleven major population areas within a 400-mile radius or a one to one-and-a-half-day drive to the City of Rock Island. The map below illustrates those markets.

¹⁷⁰ 2023, 2022, 2021 North American Camping Reports Conducted by Cairn Consulting Group & sponsored by Kampgrounds of America, Inc.



These markets represent over 16.1 million households of which approximately one million households own RVs. While this market will not likely frequent the new RV park because of the distance it is an enormous market within a reasonable drive time for all campers and all lengths of infrequent stays for a variety of reasons.

Estimated Total Market for RV Sites & Rental Units for the City of Rock Island*						
Market	Distance in miles	Population	# of Households**	% of RV Owning Households***	RV Owning Households	Non RV Owning Households
Local Market - Segment 1	<50	657,021	259,692	8%	20,775	238,917
Local Market - Segment 2	51 - 100	1,984,249	784,288	8%	62,743	721,545
Local Market Subtotal		2,641,270	1,043,980		83,518	960,462
Regional Market - Segment 1	101 -150	11,110,356	4,391,445	8%	351,316	4,040,129
Regional Market - Segment 2	151 - 200	7,469,692	2,952,447	6%	177,147	2,775,301
Regional Market Subtotal		18,580,048	7,343,892		528,462	6,815,430
Local and Regional Subtotal		21,221,318	8,387,873	-	611,981	7,775,892
Major Markets	201-400	40,804,227	16,128,153	6%	967,689	15,160,464
Total Market		62,025,545	24,516,026		1,579,670	22,936,356

*<https://www.statsamerica.org/radius/big.aspx>

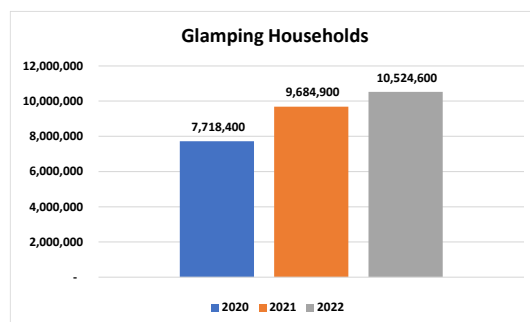
**USA average household population is 2.53 according to statista.com

***Consultants' Methodology: According to the latest GO RVing 2021 RV Owner Demographic 11.2 million households own RVs. This figure represents approximately 8.7% of total U.S. households. RV Owner Demographic has increased from 7.4% in 2011. Campground Consulting Group LLC typically estimates RV ownership at a more conservative 8%. Consultants believe the estimated number of RV-owning households may be overestimated in the larger cities or urban areas where vehicle ownership may be less than suburban and rural areas. Because of the anticipated lower RV ownership rate in these urban areas, consultants adjust the percentage of RV-owning households from the typical 8% to 6% when appropriate. Six percent more accurately and conservatively represents the number of potential RV-owning households in these larger cities or urban areas.

The pandemic has changed how people vacation. Vacation travel by vehicle has become more popular than air or cruise travel. Post pandemic, this travel trend is expected to continue. Because of this trend, the consultants expect an opportunity in these markets to draw guests for longer stays and vacations.

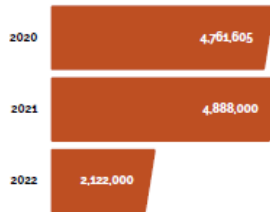
Tent Sites, Glamping & Rental Units – Market Potential

Glamping is a worldwide phenomenon. Glamping experiences provide opportunities to glamp or camp and not give up the comforts of a luxurious hotel. In 2022, 18% of active camping households experienced glamping resulting in over 10 million households taking a glamping trip in 2022, up nearly 3 million households since 2020.¹⁷¹ New glampers continue to steadily rise since 2020 totaling over 11 million.



¹⁷¹ 2023 North American Camping Reports Conducted by Cairn Consulting Group sponsored by Kampgrounds of America, Inc.

New Glampers Since 2020
Over 11 million total



Glampers want to experience the benefits of staying at a resort but be in the outdoors. Unique accommodations such as deluxe cabins, glamping tents, teepees, yurts, treehouses, houseboats (or park model units on pontoons), and covered wagons coupled with enhanced services and amenities are also part of the appeal of glamping. The desire for a new experience resonates with 33% of campers as well.¹⁷²

Tenting removes many entry barriers. U.S. campers are more likely to camp in tents when compared to Canadian campers. New campers are less likely to stay in tents

Why Travelers Want to Experience Glamping	2021	2022
An experience that blends the benefits of staying at a resort and the outdoors	37%	63%
Wanting to stay in unique accommodations	48%	53%
Having services and amenities that aren't available with camping	28%	40%
Do not want to go camping, but still want to have an outdoors experience	N/A	33%
Want a new or different kind of vacation	32%	33%

when compared to experienced campers. Campers with children and higher-income campers are also more likely to be tent campers. Boomers represent the group most likely to stay in a cabin/glamping accommodation. With the overall increase in the number of camping households there is a corresponding additional increase in millions of tent campers.

Campers' behavior between how they start (introductory accommodation) and how they continue (preferred accommodations) camping can change based on life shifts and as first-time campers find their preferred camping style.

The outdoor hospitality industry is well-positioned to embrace the glamping trend by taking advantage of lower development costs. Premium daily rates equal to or exceeding fine luxury hotels are attainable. RV parks can place familiar amenities in an unforgettable setting creating a memorable experience. The opportunity to generate substantial ancillary revenue with glamping and/or tenting add-on experiences is strong. Glamping activities include but are not limited to yoga immersions, walking tours, cycling, hiking trips, meditation sessions, healthy culinary activities, kayaking, and recreational boating. Many of these activities and recreational opportunities are already found at most camping resorts.

A search of Hipcamp.com and glamping.com, well-known websites listing glamping experiences, showed there are glamping sites throughout Illinois and Iowa. Draco Hill Farm in West Branch, Iowa has 3 tent sites for \$32 per night 39 miles from the property,

¹⁷² 2023 North American Camping Reports Conducted by Cairn Consulting Group sponsored by Kampgrounds of America, Inc.

Cottage on the Bay in New Boston, Illinois has 1 cabin for \$120 per night 32 miles from the property, Captains Cove in Muscatine, Iowa has 1 cabin for \$200 per night 19 miles from the property, and Timber Ridge Outpost Cabins in Elizabethtown, Illinois has 4 treehouse cabins from \$120 - \$195 per night 386 miles from the property.

City of Rock Island Economics & Demographics



The City of Rock Island is on the Mississippi River 175 miles west of Chicago, Illinois. It is the county seat for Rock Island County and as of the 2020 census had a population of 37,108. Agriculture, business, industry, city parks, and residences blend to create the City of Rock Island. The city is intersected by three major highways, Interstate-80, Interstate-74, Interstate-280, and the Mississippi River come together in this region to create four quadrants, thus giving the area its all-encompassing name, The Quad Cities. These interstate highways provide access to the area from all directions. I-80 is a major east/west route and I-74 is a major north/south route.

The City of Rock Island was originally platted on July 10, 1835, and named Stephenson. It was renamed Rock Island in 1841. The city was built where Fort Armstrong sat as a trading post and military installation. The land was taken from Chief Black Hawk a great Sauk warrior who lived in the area. The Chicago-Rock Island railroad brought a variety of industries to the area. These industries included lumbering, pottery, and the manufacturing of farm implements and railroad supplies.

The government of the City of Rock Island is a council-manager form of government. A mayor and seven aldermen elected from wards for four-year terms. The City is a home rule unit under the 1970 Illinois Constitution. As such it has broad powers to support development activity in the community. Administrative functions are unified through the direction of the city manager who is appointed by the mayor and council and charged with overseeing the day-to-day operations of the city and its more than 350 full-time employees.

The City of Rock Island is a major city in the area called the Quad Cities. The Rock Island Arsenal and National Cemetery are in the city. There is a variety of housing in the community including historic homes, new downtown condos, new construction in the heart of the city, and wooded retreats.¹⁷³

Rock Island County Development – Overview

With low housing costs, exceptional health care, quality schools and a wide range of recreational activities and tourist attractions, it's no wonder Rock Island County is home to nearly 150,000 residents and thousands of visitors each year.

¹⁷³ Rigov.org

Four cities and eleven villages make up Rock Island County. The fourth largest river in the world, the mighty Mississippi River forms the north and western edges of the city with the Rock River flowing through the center providing a varied and rich landscape.

Rock Island County is part of the Quad Cities Metropolitan Area of approximately 360,000 residents, nestled along the Mississippi River on the Illinois/Iowa border between Chicago and Des Moines. The area is served by interstates I-80, I-88, I-74, I-280, several major state highways and the [Quad City International Airport](#).¹⁷⁴

The top major employers in the Quad Cities area are shown on the chart below.

Business	Employees	Industry
John Deere	8,572	Agricultural, Construction & Forestry Manufacturing
Rock Island Arsenal	6,300	Defense Manufacturing
UnityPoint Health - Trinity	6,100	Healthcare
Genesis Health System	4,700	Healthcare
Hy-Vee	4,200	Retail Grocery
HNI Corporation	3,800	Office Furniture Manufacturing
Walmart	3,600	Warehouse Clubs and Supercenters
Arconic	2,400	Aerospace and Defense Aluminum Manufacturing
Tyson Fresh Meats	2,400	Food Manufacturing
Kraft Heinz	1,200	Food Manufacturing
Tri-City Electric Co.	1,200	Electrical Contractor

175

The City of Rock Island Housing Market

On the day of research there were 125 homes for sale in the City of Rock Island. The median listing price was \$124,950. Homes were on the market for a median of 38 days. The median rent in the area was \$825 per month.

There appears to be sufficient income-based housing in the area currently.

Need for Temporary Housing in the City of Rock Island and the surrounding area.

Approximately 1 million full-time RVers in the United States live in their RVs for various reasons.

The camping industry is benefiting from the increase in full-time RVing. Temporary workers are traveling and living in their RVs, for extended periods away from home and family. Retirees (empty nesters) living in their RVs are enjoying the freedom of this lifestyle. Professionals and non-professionals who have chosen a career path with the

¹⁷⁴ Rockislandcountyil.gov

¹⁷⁵ Quadcitieschamber.com

flexibility to travel and work remotely are also populating campgrounds as they travel. In addition, more families live in their RVs; some home-school their children as they travel, exposing them to educational and cultural life experiences. There has also been an increase in college students turning to RV living as an alternative and affordable option to overcrowded and expensive student housing.

Temporary housing is primarily needed by workers on contract employment, full-time RVers living in their RVs, and others needing affordable housing. The need for temporary housing is usually dictated by the amount of commerce and development within a reasonable drive from the property coupled with the lack of temporary housing in the area.

The cost of utilities in an apartment is typically higher than utilities in an RV park. Most rentals also do not have the level of recreational amenities found at an RV park. As a result, cost-conscious RVers save significantly by living at an RV park.

There appears to be sufficient temporary housing in the area currently.

Local Area Attractions/Services – What is there to do in and near the City of Rock Island

Ninety percent of all campers leave campgrounds to participate in other activities including sightseeing, dining, shopping, or other recreational opportunities. Proximity to local attractions is important to 39% of campers.¹⁷⁶

Consultants use a 30-mile/30-minute rule to gauge the attractiveness of a location. Most campers will find 30-miles or 30-minutes an acceptable distance and time to travel to a store, restaurant, services, recreation, and attractions. Distances or times beyond this amount are no longer selling points for the property as campers may view these greater distances to services as inconvenient. Additionally, the 30/30 guideline is used for services such as supermarkets, department stores, gas stations, casual restaurants, post offices, banks, medical services, and hospitals. It is more acceptable when nearer rather than further from the property.

Guests who come for short stays (a week or less) are likely to drive more than the 30 miles or 30 minutes for attractions, but not likely for the services and conveniences noted above. However, guests staying for extended periods will find it acceptable, and not consider it a deterrent, when attractions and some services are within a 60-mile and 60-minute distance from the park. Therefore, the 60/60 guideline is reasonable for day trips for extended-stay guests.

¹⁷⁶ The 2019 North American Camping Report sponsored by Kampgrounds of America, Inc., conducted by Cairn Consulting Group

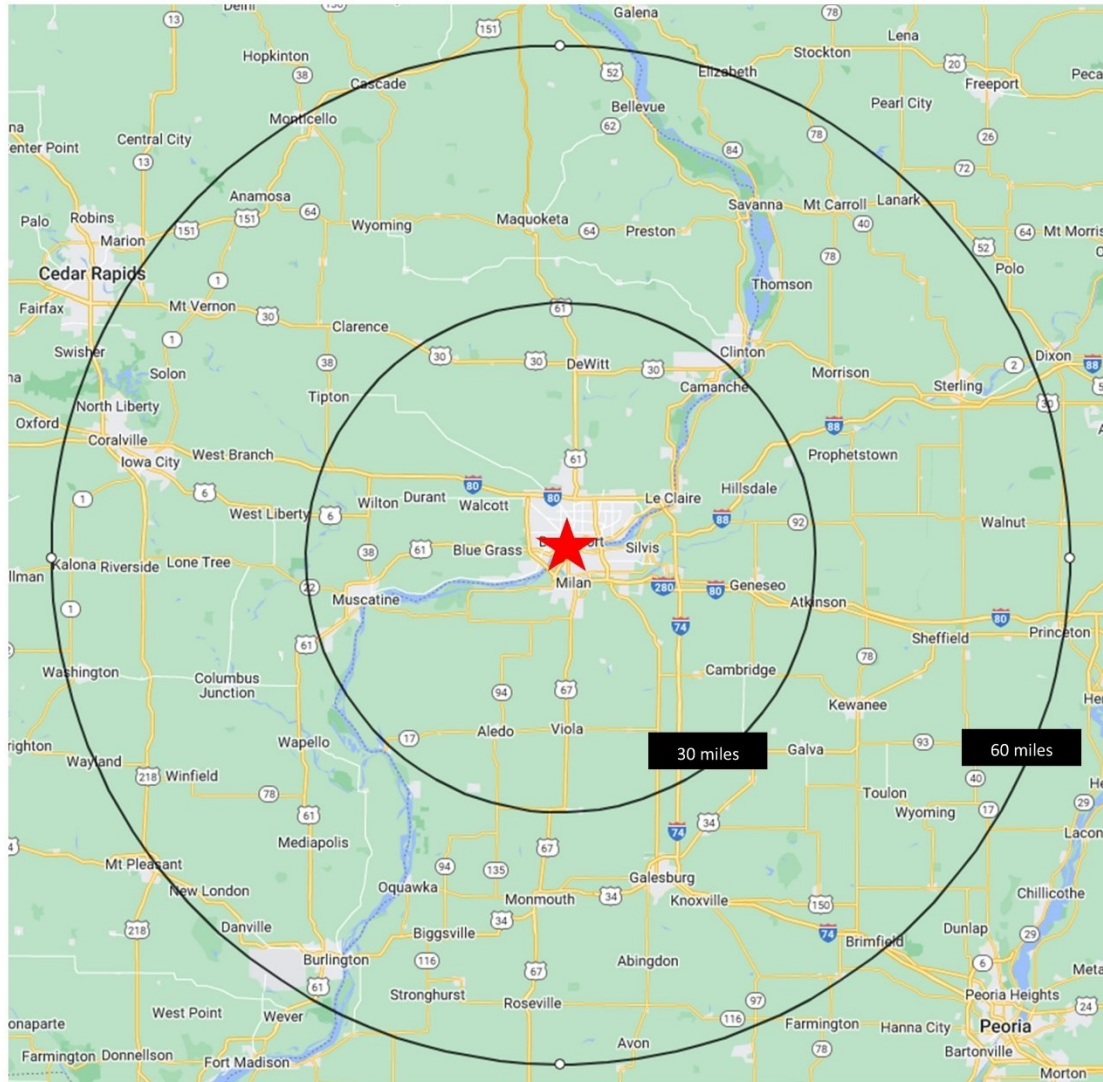
What Campers Do When Camping

Virtually unchanged since 2014, hiking, canoeing, kayaking, and fishing are the most popular recreation types among campers. Notwithstanding, these activities are less popular among first-time campers and more popular among older and experienced campers, possibly indicating future changes. Younger campers are replacing more sedentary pastimes with more physically active and extreme pursuits such as mountain biking, rock climbing, and motorsports.¹⁷⁷

Recreation While Camping	2017	2018	2019	2020	2021	2022	Change since 2020
Fishing	47%	50%	49%	52%	36%	49%	-3
Canoeing/Kayaking	35%	37%	37%	32%	31%	44%	12
Hiking	53%	51%	51%	46%	37%	42%	-4
Bird watching	23%	25%	25%	31%	29%	33%	2
Biking	26%	30%	30%	35%	33%	31%	-4
Hunting	10%	14%	14%	19%	12%	23%	4
Taking scenic drives/Sight-seeing	30%	30%	30%	27%	21%	23%	-4
Mountain biking	13%	18%	18%	19%	19%	23%	4
Visit historical sites	25%	25%	25%	19%	16%	19%	0
Golfing or tennis	6%	10%	10%	8%	7%	17%	9
Running/Trail running	15%	15%	15%	16%	17%	16%	0
Geo-caching/Orienteering	7%	8%	8%	6%	6%	16%	10
Horseback riding	10%	12%	12%	8%	8%	16%	8
Rock climbing or bouldering	9%	11%	11%	12%	10%	14%	2
Water sports	9%	10%	10%	11%	9%	14%	3
Motor sports	9%	10%	10%	19%	17%	13%	-6
Organized team sports	6%	7%	7%	15%	18%	10%	-5
Stand-Up paddle boarding	5%	7%	7%	6%	7%	10%	4
Motor boating or jet skiing	9%	9%	9%	7%	5%	10%	3
Snow skiing or snowboarding	4%	7%	7%	7%	7%	9%	2
Whitewater rafting/Kayaking	6%	7%	7%	7%	6%	9%	2
Pickleball	3%	4%	4%	7%	6%	8%	1

¹⁷⁷ 2023 North American Camping Reports Conducted by Cairn Consulting Group sponsored by Kampgrounds of America, Inc.

The map below illustrates the area within a 30-mile and 60-mile radius of the property; the area campers will frequent while staying at the proposed RV park development. A red star indicates the property.



The chart below represents a partial listing of the services, attractions, and things to do in and around the City of Rock Island and Rock Island County, Illinois.

Things to do in and near the City of Rock Island			
Attraction	Miles from property	Attraction	Miles from property
Adventure & Recreation		Nature Activities & Wildlife Viewing	
Channel Cat Water Taxi	5.2	Quad City Botanical Center	3.4
Backwater Gamblers Water Ski Shows	5.7	Nahant Marsh	9.1
Celebration River Cruises	7	Smith's Island Nature Trail	15.0
Twilight River Cruises	18	Wildcat Den State Park	23.0
Quad Cities Kayak River Adventures	21	Maquoketa Caves State Park	55
Golf Courses		Devonian Fossil Gorge	65.0
Saukie Golf Course	4.0	Casinos	
Highland Springs	6.1	Bally's Quad Cities Casino & Hotel	3.7
Duck Creek Golf Course	7.2	Isle Casino Hotel	7.1
Indian Bluff Golf Course	11.0	Rhythm City Casino Resort	10
Byron Hills Golf Course	23.0	Shopping	
Museums, Galleries & Historic Sites		Dollar General	2.1
Haugberg Estate	2.3	Target	6.5
Karpeles Manuscript Museum	2.5	Kohl's	6.6
Black Hawk State Historic Site	3.5	Northpark Mall	8.1
Figge Art Museum	3.5	Dillard's	-
Fryxell Geology Museum	3.7	JCPenney	-
Colonel Davenport House	4.0	Von Maur	-
Rock Island Arsenal Museum	4.5	Southpark Mall	8.6
Putnam Museum & Science Center	5.0	Dillard's	-
John Deere Pavilion	5.4	JCPenney	-
Buffalo Bill Cody Homestead	18.0	Dick's Sporting Goods	-
Theaters, Arenas, & Stadiums		Von Maur	-
Circa 21 Dinner Playhouse	2.6	Walmart	8.7
Vibrant Arena at The Mark	5.4	The Original American Pickers Store	18
Modern Woodmen Park	3.4	Supermarkets & Pharmacies	
Davenport Junior Theatre	6.5	HyVee	2.4
Personal Services & Care		Jewel-Osco	3.7
Mark Jeffrey Salon	2.3	Fresh Thyme Market	7.7
Ray's Barber Shop	2.6	Nearby Airports	
The Hair Stop	4.0	Quad Cities International Airport	8.3
Happy Nails	6.6	Davenport Municipal Airport	11
Great Clips	6.6	Gen-airpark Airport - 3G8	33
Restaurants & Spirits		Fairs, Festivals and Special Events	
Hungry Hobo	2.2	Beaux Arts Fair	3.5
Whitey's Ice Cream	2.2	Bix Jazz Festival	3.6
Galleries in the District	2.5	Quad City Symphony Riverfront Pops	3.9
McDonalds	2.5	Floatzilla	4.4
El Patron Mexican Restaurant & Bar	2.6	Mississippi Valley Fair	6.3
Radicle Effect Brewwerks	2.8	Quad Cities Balloon Festival	10
Happy Joe's Pizza & Ice Cream	2.8	Tug Fest	21
Pizza Hut	3.1	World Series of Drag Racing	29
Jim's Rib Haven	3.2	Nearby Cities	
Mulkeys Restaurant	3.3	Rock Island, Illinois	2.5
D J's Steakhouse	3.8	Davenport, Iowa	3.8
Blue Square Café	3.8	Moline, Illinois	6.1
Riverfront Grille	4.7	Bettendorf, Iowa	7.5
Lagomarcino's Confectionery	5.3	Silvis, Illinois	11.0
Tony's Chicago Style Pizza	5.8	LeClaire, Iowa	18.0
Lavender Crest Winery	21	Colona, Illinois	19.0
Colleges & Universities		Port Byron, Illinois	25.0
Trinity College of Nursing & Health Sciences	2.5	Muscatine, Iowa	29.0
Eastern Iowa Community College	3.7	Geneseo, Illinois	30.0
Augustana College	3.9	Cordova, Illinois	31.0
Palmer College of Chiropractic	4.3	Camanche, Iowa	35.0
Saint Ambrose University	4.7	West Liberty, Iowa	42.0
Midwest Technical Institute - Moline	7.2	Tipton, Iowa	45.0
La James International College - Davenport	7.4	Kewanee, Illinois	52.0
Orion Technical College	8.4	Prophetstown, Illinois	53.0
Capri College - Davenport	8.8	Galesburg, Illinois	55.0
Black Hawk College	14.0	Morrison, Illinois	59.0
Hospitals		Rock Falls, Illinois	60.0
Community Health Care, Inc.	2.0	Bellevue, Iowa	68.0
University of Iowa Women's Health Hospitals	2.4	Mount Carroll, Illinois	68.0
Unity Point Health	2.5	Springfield, Illinois	172.0
OSF Children's Hospital of Illinois	5.7	Des Moines, Iowa	172.0
Genesis Medical Center	5.9	Chicago, Illinois	181.0

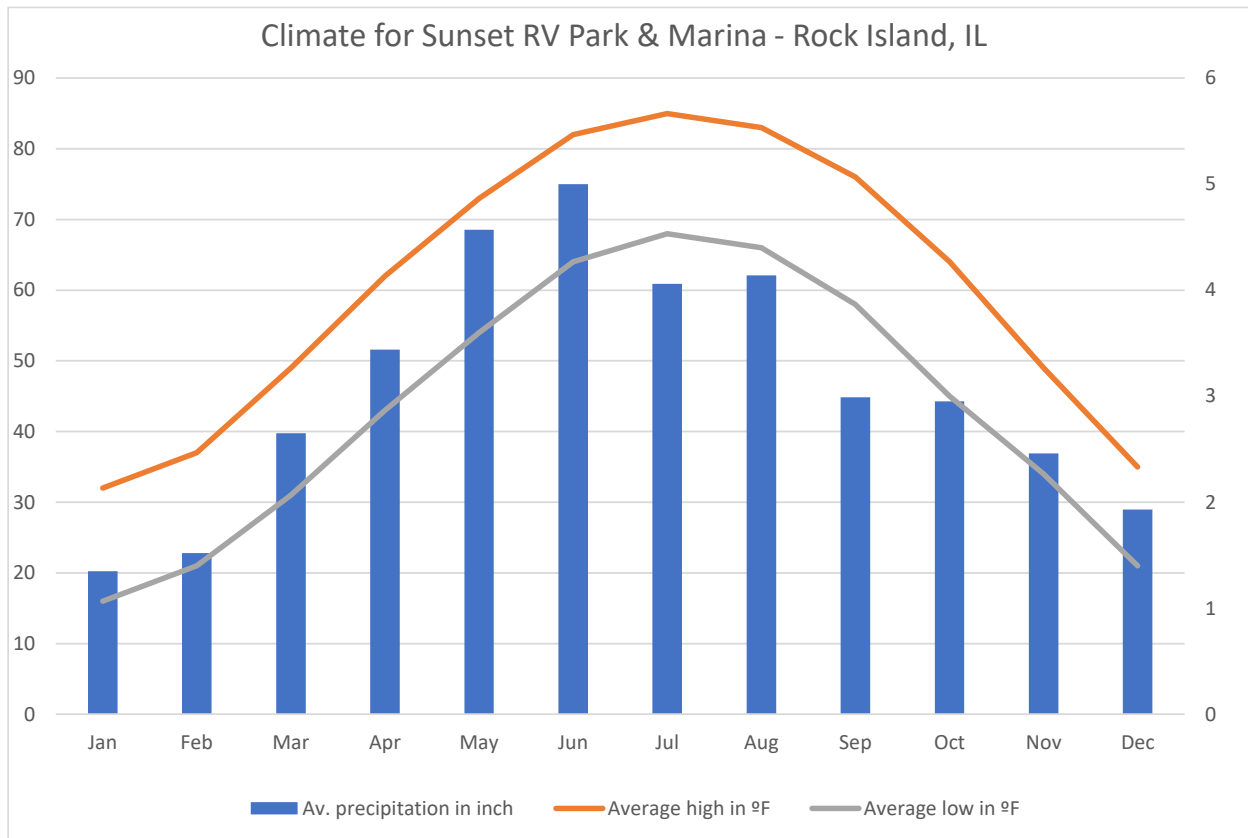


Quad Cities Kayak River Adventures

Guided Kayak Adventures on the Rock and the Mississippi Rivers



Weather



The City of Rock Island enjoys all four seasons. May and June are typically the rainiest months abating some in July and August with the Fall months being relatively dry. Temperatures are mostly moderate, but summertime temperatures can reach 90 – 100 degrees. Occasional overnight lows below freezing in April and October can be experienced.

The park will operate during three seasons, Spring, Summer, and Fall. The Spring season will be subject to potential annual flooding. The range of flooding is mild to severe. Flash floods are uncommon and there is usually ample time to prepare for the flooding. The major risk of flooding ends around May 15th each year.

Local Competitive Parks

There are 332 campgrounds listed by RV Life and 193 campgrounds listed by Good Sam in Illinois of which 46 are state association members. The Illinois Campground Association welcomes both publicly and privately owned campgrounds.

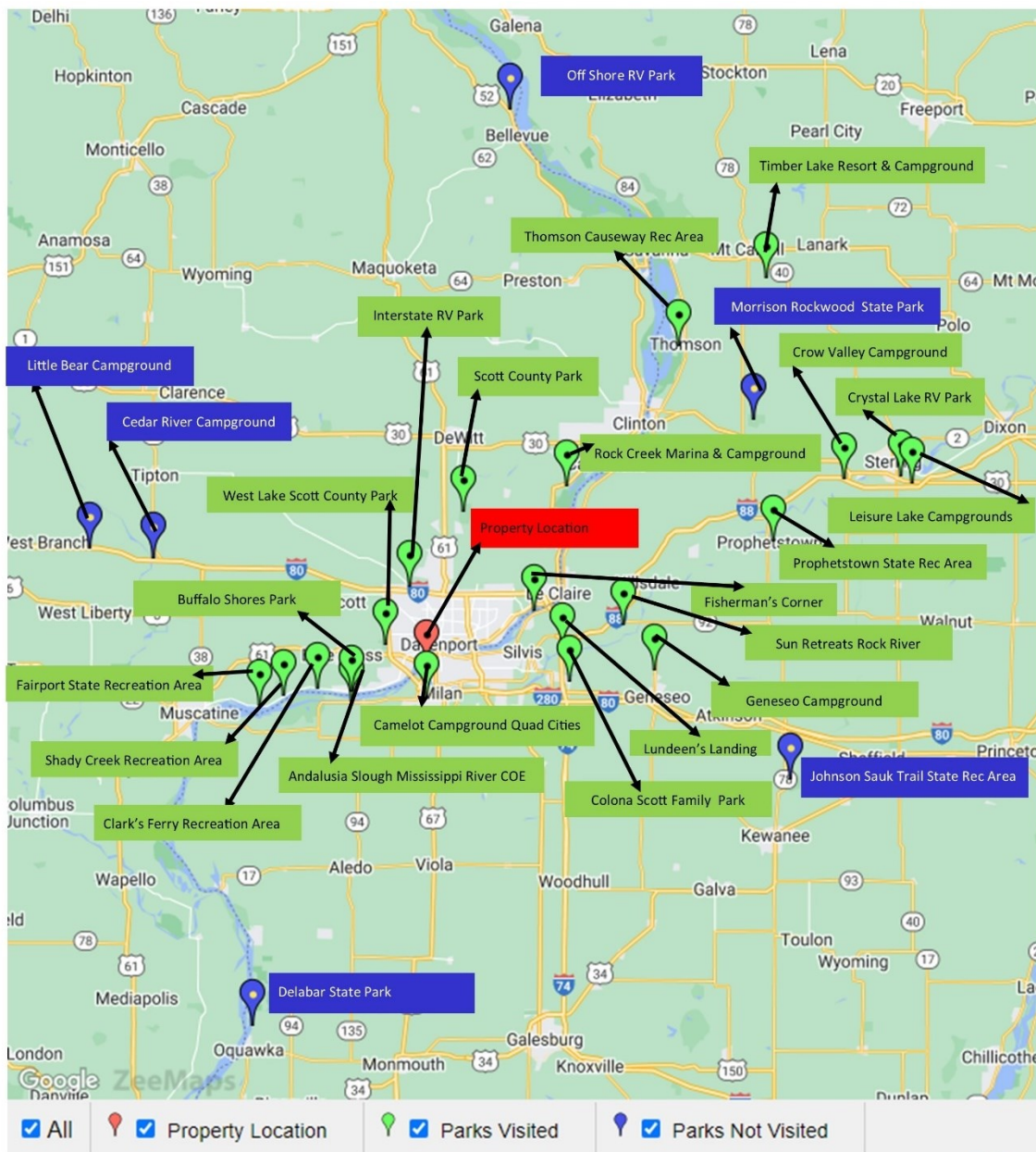
Iowa has 453 campgrounds listed by RV Life and 248 listed by Good Sam. The Iowa Campground Association has 23 campground members.

Good Sam is an international organization of RV owners and the largest RV enthusiast group in the world. It is focused upon making RVing safer and more enjoyable and saves club members money through club endorsed benefits and services. It is also the only independent campground inspection and rating system within the campground industry. There are over 1.8 million members worldwide. Good Sam's parent company is Camping World.

It is difficult to quantify the number of private parks within any State, although the Good Sam website lists 193 RV parks and campgrounds in Illinois. In addition to the private sector, there are 67 state campgrounds, 2 national parks, 14 Corps of Engineers campgrounds, and 1 military RV park in Illinois with the closest ones being Andalusia Slough just 12 miles and Fisherman's Corner just 14 miles from the property. Illinois State Parks, the Corps of Engineers parks, and the national park limit maximum stays of 14 consecutive nights.

There are 17 parks listed on www.goodsamcamping.com within 25 miles of the property. This number increases to 37 when the radius is extended to 50 miles. Ten Good Sam-rated parks are included in the Comparative RV Park Analysis chart below. Six of these parks had high Good Sam ratings (2024 Good Sam Guidelines attached). Four of the listed parks are Good Sam designated parks which offer a 10% discount to Good Sam members. There are approximately 3,424 campsites and 128 rental units within 74 miles of the property.

Twenty-seven parks are included on the following comparative park analysis chart, and most are potential competitors to the new RV park development. Twenty-one parks were visited during the consultant's site visit and are within 74 driving miles from the property. Visited parks are highlighted in green on the chart and labelled and tagged in green on the map below. The proposed RV park development is the red marker. Parks not visited are tagged and highlighted in blue. Three parks are identified as strong competitors to the new RV park being proposed. The closest is 19 miles and the furthest is 74 miles away. These parks are denoted with an asterisk and purple font on the chart.



The competitive information for the following charts was compiled by phoning parks, internet research and park visits. The first chart below details the competition, comparing the size of the park, the distance to the proposed RV park development, facilities, amenities, and Good Sam (GS) rating for the GS-rated parks. The 2024 GS Rating Guideline is utilized by salespeople who visit campgrounds to inspect them and sell ads in GS media. A second campground rating is charted for rated parks. These rating guidelines are found on www.campgroundreviews.com and are consumer based. A 5-point rating system, with 5 best, is based on guest experiences and reviews.

Comparative RV Park Analysis-Sunset RV Park & Marina-Rock Island, Illinois							
Park Name	Camelot Campground Quail Cities (Formerly KOA)	West Lake Scott County Park	Interstate RV Park	Andalusia Slough Mississippi River COE	Buffalo Shores (county park)	Fisherman's Corner Mississippi River COE	Lundens Landing
Town/City, elevation if pertinent	Rock Island, Illinois	Davenport, Iowa	Davenport, Iowa	Andalusia, Illinois	Buffalo, Iowa	Hampton, Illinois	East Moline, Illinois
Distance from Property	5.5	8.7	10	12	12	14	15
Access Road Quality (5 max)	3.5	4	3.5	4	4	4	2.5
Business Model	VO, SE	VO	VO, SE	VO	VO	VO	VO, SE
Total # of units	141	400	100	25	65	77	78
# of RV sites	103	384	100	25	65	46	50
# of tent sites if designated	20	14	0	0	0	31	28
# of rentals	18	2	0	0	0	0	0
Type of Rentals	RC, DC	DC	N/O	N/O	N/O	N/O	N/O
G S Rating (10 max)	9/10/8.5	NR	9.5/9/9	NR	NR	NR	6/7.5/7.5
RV Life Campground Reviews (5 star max)/# of Reviews	3.5/110	4.5/60	3/77	NR	4.5/8	4.5/84	4/3
Google Rating (5 star max)/# of Reviews	4/569	4.5/1,010	3.5/152	4/12	4/152	4.5/245	4.4/45
Camping Season	All year	Apr 15 - Oct 15	All year	May 15 - Oct 15	All year	May 1 - Oct 28	Apr 1 - Oct 31
Nearby or Onsite Ponds/Lake/ River	Mississippi and Rock Rivers nearby Round Table Lake Serpent Lake Boating Fishing Fishing Piers	Mississippi and Rock Rivers nearby Blue Grass Lake Lake of the Hills Lambach Lake Railroad Lake Fishing Swimming Beach	Mississippi River nearby Boating Fishing	Mississippi River Boating Fishing	Mississippi River Boating Boat Ramp Fishing Swimming Beach	Mississippi River Day use area nearby Canoe Ramp Fishing	Mississippi River nearby Rock River Boating Boat Docks Boat Ramp Fishing Swimming Beach
Gated Entry	X	X	N/O	N/O	N/O	Guard House	N/O
Road type/quality	Asphalt, Gravel/ Adequate	Asphalt/Adequate	Gravel/Adequate	Asphalt/Adequate	Asphalt/Adequate	Asphalt/Adequate	Gravel/Adequate
Reservation Platform if pertinent	Campspot	Scott County Proprietary	N/O	Recreation.gov	Iowa SRA Proprietary	Recreation.gov	Roverpass
Common Areas w/details as pertinent							
Pool	Pool Hot Tub Splash Pad	N/O	Pool	N/O	N/O	N/O	N/O
Lodge/Clubhouse/Rec Hall	Rec Hall	Boathouse	N/O	N/O	N/O	N/O	N/O
Pavilion	X	5 Picnic Pavilions	X	X	X	N/O	X
Food Service (type & location)	Snack Bar	N/O	N/O	N/O	N/O	N/O	N/O
Outdoor gathering space	Gazebo	9 Picnic Areas	N/O	N/O	N/O	N/O	N/O
Outdoor games	Basketball Bounce Pillow Crisp Ball Horseshoes Mini Golf Tetherball Volleyball	Disc Golf Hiking Trails	Horseshoes	Biking & Hiking Trails	N/O	Biking & Hiking Trails Direct access to the Mississippi River Trail	Horseshoes Nature Trails Shuttle Service to area attractions
Recreation Amenities	Outdoor Movie Screen Fish Cleaning Station Pedal Boats	Boat, Kayak & Paddle Boat Rentals	Game Room	N/O	N/O	Amphitheater	Canoe, Kayak, Tube Rentals
Playground	X	X	X	N/O	X	X	X
Activity Program	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Restrooms	Updated/Clean	Outhouse	Adequate/Clean	Outhouse	Outhouse	Adequate/Clean	Adequate/ Unclean
Laundry	X	N/O	X	N/O	N/O	N/O	N/O
Store	X	N/O	X	N/O	N/O	N/O	X
Fitness Center	N/O	Outside Fitness area	N/O	N/O	N/O	N/O	N/O
Dog Park/Walk/Wash	Park/Walk	Walk	Walk	Walk	Walk	Walk	Walk
Propane	X	N/O	N/O	N/O	N/O	N/O	N/O
Storage	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Sites & Rentals							
Site Pad Surface	Concrete/Gravel	Gravel	Gravel	Gravel/Grass	Concrete	Concrete	Gravel
Site Pad angled	SS	Yes	Yes	No	Yes	Yes	Yes
Site Pad size	PT 27x40 BI 25x40	PT 15x60 BI 15x60	PT 24x50 BI 22x50	UNK	BI 15x30	BI 12x32	PT 30x65 BI 40x65
Site Spacing	Cramped	Spacious	Cramped	Cramped	Spacious	Adequate	Adequate
Pull Thru	X	X	X	N/O	N/O	N/O	X
Back Ins	X	X	X	X	X	X	X
Tents Allowed	Yes	Yes	No	Yes	No	Yes	Yes
Site Patio	SS	N/O	Concrete	N/O	Concrete	Concrete	SS Concrete
Picnic Table	X	X	X	X	X	X	X
Fire Pit on Site	X	X	X	X	X	X	X
Wi-Fi	X	N/O	X	N/O	N/O	N/O	N/O
Cable TV	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Quality	Average	Average +	Good	Fair	Good +	Good	Average
Location	Strong	Strong	Strong	Remote	Strong	Strong	Good -
Occupancy DOV/day of week	40%/TU	70%/TU	65%/M	8%/TU	15%/TU	70%/M	70%/M
Additional Notes/Consultant Comments	Some tent sites are specifically designated for motorcycles.	Maximum stay is 14 days in a 28 day period.	Commercial buildings surround the campground	Maximum stay is 14 days. Mostly Tents and day use area. No reservations taken.	Maximum stay is 14 days. Minimum stay May - Oct 2 nights. Holidays 3 nights. Self contained units only allowed. Park is closed due to Spring flooding.	Self service campground. All reservations are made online. Maximum stay 14 days.	Recreation open to public. Railroad tracks in front of campground
LEGEND: BYO=Bring Your Own BI=Back-In CW=Coronet Wagons D=Dryer DC=Deluxe Cabin (full kitchen, bath) DNE=Does Not Exist DOV=Day of Visit EXT=Extended Stay *~limited sites & services off season EXTRVL=Extended stay RV living GLT=Glamping Tent MH=Mobile Home NA=not available/applicable N/O=Not Offered NR=Not Rated N/S=No Swimming Occupancy=Est DOV OSS=On Site Storage PT=Pull-Through PH=Pull-In PM=Park Model RC=Rustic Cabin (no kitchenette) RE=Rustic Efficiency (kitchenette) RV = recreation vehicle RVSC=RV Storage Covered RVSD=RV Storage Open SE=Seasonal S=Select Sites SL=Storage Lockers T=Transient TBB = To Be Built TH = Tiny Home UNK=Unknown VD=Vacation Destination VN=Vacation Nightly S=Weekday WE=Weekend W=Washer X=Exists at park \$=Additional Fee							

Comparative RV Park Analysis-Sunset RV Park & Marina-Rock Island, Illinois						
Park Name	Clarks Ferry Mississippi River COE	Scott County Park Six Camping Areas *	Shady Creek Mississippi River COE	Colona Scott Family Park (city park)	Fairport State Recreation Area	Sun Retreats Rock River
Town/City, elevation if pertinent	Montpelier, Iowa	Eldridge, Iowa	Muscatine, Iowa	Colona, Illinois	Muscatine, Iowa	Hillsdale, Illinois
Distance from Property	15	19	19	20	21	23
Access Road Quality (5 max)	4	4.5	4	4	4	5
Business Model	VO	VO	VO	VO, SE	VO	VO, SE
Total # of units	44	401	53	186	43	446
# of RV sites	44	398	53	180	43	428
# of tent sites if designated	0	0	0	0	0	0
# of rentals	0	3	0	6	0	18
Type of Rentals	N/O	DC	N/O	DC	N/O	DC, PM
G S Rating (10 max)	NR	NR	NR	NR	NR	9/10/9
RV Life Campground Reviews (5 star max)# of Reviews	4.5/28	5/33	4.5/28	4.5/5	4.5/13	4.5/61
Google Rating (5 star max)# of Reviews	4.4/181	4.6/1,114	4.5/143	4.2/121	4.2/102	4.4/337
Camping Season	May 1 - Oct 22	All Year camping Water to sites Apr 15 - Oct 15	May 1 - Oct 22	All year	All year	Apr 11 - Oct 19
Nearby or Onsite Pond/Lake/ River	Mississippi River Boating Boat Ramp Fishing Fishing Pier	Mississippi River nearby Pride Lake Canoeing & Kayaking Fishing	Mississippi River Boating Boat Ramp & Parking Fishing Fishing Dock	Mississippi and Rock Rivers nearby Boating Fishing	Mississippi River Boating 2 Boat Ramps with 2 lanes each Boat Docks Fishing	Mississippi and Rock Rivers nearby Boating Fishing Sunset Lake Boating Boat Dock Fishing
Gated Entry	X	X	Guard House	N/O	N/O	X
Road type/quality	Asphalt/Adequate	Asphalt/Adequate	Asphalt/Adequate	Asphalt, Gravel/Adequate	Asphalt/Adequate	Concrete, Gravel/ Adequate
Reservation Platform if pertinent	Recreation.gov	Scott County Proprietary	Recreation.gov	N/O	Iowa SRA Proprietary	Sun Outdoors Proprietary
Common Areas w/details as pertinent						
Pool	N/O	Pool	N/O	Enclosed Pool	N/O	Pool Splash Pad
Lodge/Clubhouse/Rec Hall	N/O	N/O	N/O	Rec Hall	N/O	Clubhouse
Pavilion	N/O	7 Pavilions	X	Enclosed	N/O	4 Shelters
Food Service (type & location)	N/O	N/O	N/O	N/O	N/O	Snack Bar
Outdoor gathering space	N/O	N/O	N/O	N/O	N/O	Picnic Area
Outdoor games	Horseshoes Volleyball	Basketball Biking & Hiking Trails Volleyball	Horseshoes Volleyball	Basketball Horseshoes Mini Golf Rolie Bolle Tennis Volleyball	N/O	Basketball Cornhole Gaga Ball Horseshoes Jumping Pad Mini Golf Pickleball Rolie Bolle Shuffleboard Tennis
Recreation Amenities	N/O	18 Hole Golf Course	N/O	Hammock area	N/O	Canoe & Paddleboat Rental Community Garden 2 Little Libraries
Playground	X	X	X	X	X	X
Activity Program	N/O	N/O	N/O	N/O	N/O	X
Restrooms	Outdated/Clean	Updated/Clean	Outdated/Clean	Adequate/ Unclean	Outdated/Clean	Updated/Clean Adequate/ Unclean
Laundry	N/O	N/O	N/O	X	N/O	X
Store	N/O	N/O	N/O	N/O	N/O	X
Fitness Center	N/O	N/O	N/O	N/O	N/O	N/O
Dog Park/Walk/Wash	Walk	Walk	Walk	Walk	Walk	Park
Propane	N/O	N/O	N/O	N/O	N/O	X
Storage	N/O	N/O	N/O	X	N/O	RVSO, Boat & Trailer
Sites & Rentals						
Site Pad Surface	Concrete	Concrete/Gravel	Concrete/Gravel	Gravel	Gravel	Concrete/Gravel
Site Pad angled	Yes	Yes	Yes	Yes	Yes	Yes
Site Pad size	BI 20x50	BI 15x30	BI 20x50	PT 25x40 BI 25x40	BI 15x25	PT 35x60 BI 35x60
Site Spacing	Adequate	Spacious	Adequate	Adequate	Spacious	Adequate
Pull Thrus	N/O	N/O	N/O	X	N/O	X
Back Ins	X	X	X	X	X	X
Tents Allowed	Yes	Yes	Yes	Yes	Yes	Yes
Site Patio	Concrete, Gravel	Concrete	Concrete, Gravel	Concrete	N/O	Concrete SS
Picnic Table	X	X	X	X	X	X
Fire Pit on Site	X	X	X	X	X	X
We-Fi	N/O	N/O	N/O	N/O	N/O	X
Cable TV	N/O	N/O	N/O	N/O	N/O	N/O
Quality	Good	Good	Good	Average	Good	Excellent -
Location	Strong	Remote	Strong	Average	Strong	Strong
Occupancy DOV/Day of week	30%/TU	5%/M	35%/TU	35%/M	15%/TU	60%/W
Additional Notes/Consultant Comments	Self service campground. All reservations are made online. Maximum stay 14 days.	Maximum stay 14 days in 28 day period. 2 Camping areas have full hookups, 1 with water and electric and are reservable. 3 camping areas are first come first served no hookup sites.	Self service campground. All reservations are made online. Maximum stay 14 days.	Some amenities are open to the public.		
LEGEND: BYO=Bring Your Own EXT/RLV=Extended stay RV living Occupancy=Est DOV RV/SC=RV Storage Covered UNK=Unknown BI=Back-In GLT=Glamping Tent OSS=On Site Storage RVSO=RV Storage Open VD=Vacation Destination CW=Conestoga Wagons MH=Mobile Home PT=Pull-Through SE=Seasonal NH=Nightly N/A=not available/applicable PM=Park Model S=Selected Sites VN=Vacation DNE=Does Not Exist RC=Rustic Cabin (no kitchenette) T=Transient WD=Weekday DOV=Day of Visit RE=Rustic Efficiency (kitchenette) TBB = To Be Built WE=Weekend EXT=Extended Stay N/S=No Swimming RV = recreation vehicle TH = Tiny Home W=Washer X=Exists at park S=Additional Fee * Limited sites & services off season * Best Camp in mkt						

Comparative RV Park Analysis-Sunset RV Park & Marina-Rock Island, Illinois							
Park Name	Rock Creek Marina & Campground Clinton County Park	Geneseo Campground	Cedar River Campground FKA Hunt's	Prophetstown State Park	Little Bear Campground	Johnson Sauk Trail State Park	Morrison-Rockwood State Park
Town/City, elevation if pertinent	Camanche, Iowa	Geneseo, Illinois	Tipton, Iowa	Prophetstown, Illinois	West Liberty, Iowa	Kewanee, Illinois	Morrison, Illinois
Distance from Property	30	31	37	42	44	49	52
Access Road Quality (5 max)	3.5	5	UNK	4	UNK	UNK	UNK
Business Model	VO	VO, SE	VO, SE	VO	VO	VO	VO
Total # of units	84	77	200	43	47	96	92
# of RV sites	77	72	185	43	45	70	92
# of tent sites if designated	0	0	15	0	0	25	0
# of rentals	7	5	0	0	2	1	0
Type of Rentals	RC, DC Tree House	RC, Yurt	N/O	N/O	RC	RC	N/O
G S Rating (10 max)	NR	7.5/9.5/9	8/8/7.5	NR	7.5/9/7.5	NR	NR
RV Life Campground Reviews (5 star max)/# of Reviews	3.5/7	4.5/111	3.5/29	NR	4.5/152	4/22	4.5/17
Google Rating (5 star max)/# of Reviews	4.6/234	4.6/435	3.5/267	4.4/189	4.6/236	4.6/503	4.6/486
Camping Season	All year	Apr 1 - Oct 31	Apr 15 - Oct 15	May 1 - Oct 31	Apr 1 - Oct 31	All Year, Camping Water to sites May 1 - Nov 1	All year
Nearby or Onsite Ponds/Lake/ River	Mississippi & Wapipiricon Rivers Boating Boat Dock Boat Ramp Fishing	Mississippi, Rock & Green Rivers nearby Boating Fishing Hennepin Canal Fishing	Cedar River Boating Fishing Retention Pond	Rock River Fishing Coon Creek Boating Boat Ramp Fishing	N/O	Sauk Trail Lake Boating Boat Ramp Fishing Marina Swimming Beach Sauk Trail Pond Fishing	Lake Carlton Boating Boat Dock Boat Ramp Fishing Marina Swimming Beach
Gated Entry	X	N/O	N/O	N/O	N/O	X	X
Road type/quality	Gravel/Adequate	Gravel/Adequate	Gravel/Adequate	Asphalt/Adequate	Gravel/Adequate	Asphalt/Adequate	Asphalt/Adequate
Reservation Platform if pertinent	My County Parks	Camp Life	Park Technologies	ExploitMoreIL	N/O	ExploitMoreIL	ExploitMoreIL
Common Areas w/details as pertinent							
Pool	N/O	Splash Pad	Pool	N/O	Pool	N/O	N/O
Lodge/Clubhouse/Rec Hall	Rec Hall	Rec Hall	Rec Hall	N/O	N/O	N/O	N/O
Pavilion	Picnic Shelter	N/O	X	X	N/O	X	X-3
Food Service (type & location)	N/O	N/O	Poolside Snack Bar	N/O	N/O	Snack Bar	N/O
Outdoor gathering space	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Outdoor games	Biking & Hiking Trails	Horseshoes	Basketball Cornhole Disc Golf Gaga Ball Horseshoes Mini Golf Volleyball Washer Toss	Horseshoes Nature Trail	N/O	Biking/Hiking Trails	Biking/Hiking Trails Horseshoes
Recreation Amenities	Mississippi Eco Tourism Center Mississippi River Aquarium Blue Heron Eco-Cruises Canoe, Kayak, Paddle Boat, Paddle Boards Rental Fish Cleaning Station	Canoe, Kayak Rental	Canoe/Tub/Tub Rental Game Room	Canoe, Kayak Rental	Game Room	Canoe/Kayak Rental Historical Area	Canoe/Kayak Rental
Playground	X	X	X	X	X	X	N/O
Activity Program	N/O	X	X	N/O	N/O	N/O	N/O
Restrooms	Adequate/Clean Outhouse	Adequate/Clean	Adequate/Clean	Adequate/Clean Outhouses	Adequate/Clean	Adequate/Clean	Adequate/Clean
Laundry	X	X	X	N/O	X	N/O	N/O
Store	X	X	X	N/O	X	N/O	N/O
Fitness Center	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Dog Park/Walk/Wash	Walk	Park	Walk	Walk	Walk	Walk	Walk
Propane	N/O	X	X	N/O	X	N/O	N/O
Storage	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Sites & Rentals							
Site Pad Surface	Gravel	Gravel	Gravel/Grass	Grass	Gravel	Gravel	Gravel
Site Pad angled	Yes	SS	SS	No	Yes	No	Yes
Site Pad size	UNK	PT 30x55 BI 30x55	PT 25x50 BI 25x50	BI 20x50	UNK	BI 12x40	PT 15x40 BI 15x40
Site Spacing	Spacious	Adequate	Adequate	Cramped	Adequate	Adequate/Spacious	Spacious
Pull Thru	X	X	X	N/O	X	N/O	X
Back Ins	X	X	X	X	N/O	X	X
Tents Allowed	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Site Patio	N/O	Concrete SS	N/O	N/O	N/O	N/O	N/O
Picnic Table	X	X	X	X	X	X	X
Fire Pit on Site	X	X	X	X	X	X	X
Wi-Fi	N/O	X	X	N/O	X	N/O	N/O
Cable TV	N/O	N/O	N/O	N/O	N/O	N/O	N/O
Quality	Average +	Average +	Average +	Average	Average +	Average	Average
Location	Strong	Good +	Strong	Remote	Strong	Good	Remote
Occupancy DOV/day of week	25%/W	35%/W	DNV	71%/W	DNV	DNV	DNV
Additional Notes/Consultant Comments	Minimum of 2 nights for weekends, 3 nights for holidays. Maximum stay 14 nights. Marina & Dock rentals: Pontoon Slips \$550/season, Houseboat Slips with electricity \$750/season, without electricity \$625/season.			Maximum stay 14 nights.	Maximum stay 3 nights. Perimeter has residential mobile homes.	Maximum stay 14 days.	Maximum stay 14 days.
LEGEND: BYO=Bring Your Own EXTRVL=Extended stay RV living Occupancy=Est DOV RVSC=RV Storage Covered UNK=Unknown BI=Back-In GLT=Glamping Tent OSS=On Site Storage RVSC=RV Storage Open V=Vacation Destination CM=Corstoga Wagons MH=Mobile Home PT=Pull-Through SE=Seasonal VN=Vacation Nightly D=Dryer N/A=not available/applicable PH=Pull-In S=Select Sites WD=Weekday DC=Deluxe Cabin (full kitchen, bath) NB=Nearby PM=Park Model SL=Storage Lockers WE=Weekend DNE=Does Not Exist N/O=Not Offered RC=Rustic Cabin (no kitchenette) T=Transient W=Washer DOV=Day of Visit NR=Not Rated RE=Rustic Efficiency (kitchenette) TBB = To Be Built X=Exists at park EXT=Extended Stay N/S=No Swimming RV = recreation vehicle TH = Tiny Home \$=Additional Fee ~L=Limited sites & services off season							

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The next charts present the 2023 site and rental rates for the RV parks. The charts illustrate the range of site and rental rates, including nightly, monthly, and extended stay pricing, within the competitive area.

Comparative Site Rate Analysis-Sunset RV Park & Marina-Rock Island, Illinois									
2023 site rates for competitive parks based on 2 adults and 2 children or a family rate									
Park Name	# of Sites	G S Rating	# of Designated Tent Sites	Tent Daily	RV Site Daily	RV Site Monthly	RV Site Extended Rate	RV Storage	Notes
Camelot Campground Quad Cities (Formerly KOA)	103	9/10*/8.5	20	\$25 - \$49	\$57 - \$88	\$650 + electric	N/A for 2023	N/O	
West Lake Scott County Park	384	NR	14	\$18	\$23- \$37	N/O	N/O	N/O	
Interstate RV Park	100	9.5/9/9	0	N/O	\$55- \$60	\$550 - \$580 + electric	N/O	N/O	
Andalusia Slough Mississippi River COE	25	NR	0	N/O	\$20	N/O	N/O	N/O	
Buffalo Shores (county park)	65	NR	0	N/O	\$23 - \$37	N/O	N/O	N/O	
Fisherman's Corner Mississippi River COE	46	NR	31	\$14	\$26	N/O	N/O	N/O	
Lundeens Landing	50	6/7.5/7.5	28	\$20	\$45	\$425 - \$475 + electric	N/O	N/O	
Clarks Ferry Mississippi River COE	44	NR	0	N/O	\$20	N/O	N/O	N/O	
Scott County Park Six Camping Areas *	398	NR	0	\$18	\$23 - \$37	N/O	N/O	N/O	3 areas are rustic camping
Shady Creek Mississippi River COE	53	NR	0	\$20	\$20	N/O	N/O	N/O	
Colona Scott Family Park (city park)	180	NR	0	\$25 - \$40	\$50 - \$60	\$600 - \$700 including electric	\$2,200 - \$2,700 including electric 6 months	\$50/month	
Fairport State Recreation Area	43	NR	0	\$18	\$18	N/O	N/O	N/O	
Sun Retreats Rock River	428	9/10*/9	0	\$48	\$62 - \$81	\$1,584 - \$2,763 including electric	\$3,500 - \$4,360 6 - 9 months including electric	\$50/month Only park guests	
Rock Creek Marina & Campground Clinton County Park	77	NR	0	\$15 - \$20	\$20 - \$30	N/O	N/O	N/O	
Geneseo Campground	72	7.5/9.5*/9	0	\$30	\$30 - \$52	\$540 + electric	Winter \$250/month + electric	N/O	
Cedar River Campground FKA Hunt's	185	8/8/7.5	15	\$25	\$40 - \$50	\$1,050 - \$1,350	\$1,750 - \$2,000 including electric	N/O	
Prophetstown State Park	43	0	0	\$20	\$20	N/O	N/O	N/O	
Little Bear Campground	45	7.5/9*/7.5	0	\$36	\$36	N/O	N/O	N/O	
Johnson Sauk Trail State Park	70	NR	25	\$20	\$20	N/O	N/O	N/O	
Morrison-Rockwood State Park	92	NR	0	\$20	\$20	N/O	N/O	N/O	
Crow Valley Campground	100	7.5/7/7.5	22	\$25	\$35 - \$45	\$560 - \$735 including electric	\$1,200 - \$1,300 including electric	N/O	
Thomson Causeway Mississippi River COE	125	NR	5	\$20	\$20	N/O	N/O	N/O	
Delabar State Park	56	NR	0	\$20	\$20	N/O	N/O	N/O	
Timber Lake Resort and Campground*	163	9/9*/9.5	6	\$55 - \$75	\$59 - \$85	\$1,700 including electric	\$2,500 - \$5,000 including electric N/A 2023	N/O	
Crystal Lake RV Park	72	8/10*/8.5	0	N/O	\$60	\$550 and up including electric	\$2,640 and up per 6 months including electric	N/O	
Leisure Lake Campground	65	NR	0	N/O	UNK	UNK	UNK	N/O	
Offshore RV Park*	174	NR	0	N/O	\$69 - \$159	\$2,230 - \$2,530 including electric	\$3,500 - \$4,500 + electric	If returning for next season and deposit made, winter storage available.	

LEGEND:

LOS=Length of Stay
N/O=Not offered
N/R=Not rated

27 * Best Comp in mkt

Comparative Rental Rate Analysis-Sunset RV Park & Marina-Rock Island, Illinois					
2023 rental rates for competitive parks based on 2 adults and 2 children or a family rate					
Park Name	# of rentals	Type of Rentals	Rental Nightly	Rental Monthly	Rental Extended Stay
Camelot Campground Quad Cities (Formerly KOA)	18	RC, DC	\$63 - \$83	N/O	N/O
West Lake Scott County Park	2	DC	\$150 - \$190	N/O	N/O
Interstate RV Park	0	N/O	N/O	N/O	N/O
Andalusia Slough Mississippi River COE	0	N/O	N/O	N/O	N/O
Buffalo Shores (county park)	0	N/O	N/O	N/O	N/O
Fisherman's Corner Mississippi River COE	0	N/O	N/O	N/O	N/O
Lundeens Landing	0	N/O	N/O	N/O	N/O
Clarks Ferry Mississippi River COE	0	N/O	N/O	N/O	N/O
Scott County Park Six Camping Areas *	3	DC	\$165 - \$190	N/O	N/O
Shady Creek Mississippi River COE	0	N/O	N/O	N/O	N/O
Colona Scott Family Park (city park)	6	DC	\$100 - \$150	N/O	N/O
Fairport State Recreation Area	0	N/O	N/O	N/O	N/O
Sun Retreats Rock River	18	DC, PM	\$191 - \$211	N/O	N/O
Rock Creek Marina & Campground Clinton County Park	7	RC, DC Tree House	\$50 - \$150	N/O	N/O
Geneseo Campground	5	RC, Yurt	\$75 - \$90	N/O	N/O
Cedar River Campground FKA Hunt's	0	N/O	N/O	N/O	N/O
Prophetstown State Park	0	N/O	N/O	N/O	N/O
Little Bear Campground	2	RC	\$45 - \$51	N/O	N/O
Johnson Sauk Trail State Park	1	RC	\$45	N/O	N/O
Morrison-Rockwood State Park	0	N/O	N/O	N/O	N/O
Crow Valley Campground	5	RV	\$100 3 night minimum	\$1,200 including electric	N/O
Thomson Causeway Mississippi River COE	0	N/O	N/O	N/O	N/O
Delabar State Park	0	N/O	N/O	N/O	N/O
Timber Lake Resort and Campground*	9	RE, PM	\$149 - \$269	N/O	N/O
Crystal Lake RV Park	0	N/O	N/O	N/O	N/O
Leisure Lake Campground	0	N/O	N/O	N/O	N/O
Offshore RV Park*	52	4 Villas 48 Hotel rooms & Suites	\$139 - \$324	\$4,630 - \$9,630 including electric	N/O

LEGEND:

CW=Conestoga Wagon

DC=Deluxe Cabin

RC=Rustic Cabin

RE=Rustic Efficiency (kitchenette)

* Best Comp in mkt

MH=Mobile Home TH=Tiny Home

MR=Motel room TT=Travel Trailer

N/O=Not Offered TBB = to be built

PM=Park Model

Much of the local competitive market is comprised of city, county, state, and Corps of Engineers RV parks. These parks have 54% of the campsites and 15% of the rentals in the market. These parks do not have full hook up sites and limit the length of stay to 14 days. Most publicly operated parks have spacious sites and beautiful settings.

Of the 27 parks studied three are considered true competitors to the new RV park development in Rock Island. One of the three is a county park and the other two are privately owned. All three of these properties have rental units. Scott County Park has 6 camping areas, lots of amenities, and spacious sites. Two of the camping areas have sites with full hookup, and stays are limited to 14 days in a 28-day period. Timber Lake RV Resort in Mount Carroll, Illinois is 66 miles from the property and set in the woods with a beautiful lake. Sites are well laid out with concrete pads and patios. Offshore Resort is 74 miles from the property and located on the Mississippi River. It has sites, a hotel, and villas but no marina. Both private competitors are resort grade and are well amenitized and operate from April to October.

The comparative chart estimates 3,424 sites and 128 rentals in the competitive area. However, the chart is not an exhaustive list of all RV parks in the comparative area. It is certain that there are additional RV parks throughout the area not listed on the chart which may be competitors to a new RV park in the City of Rock Island.

In addition, publicly operated RV parks and campgrounds, parks owned and operated by state, federal, county or the Corps of Engineers are prevalent within this market. These parks are in beautiful natural settings on magnificent properties, with fewer amenities and facilities than private RV parks and campgrounds. However, many of the roads leading to these parks are difficult to navigate for RVs, and once in the park, the sites are smaller and often do not offer all three basic hookups (water, electric, and sewer). The publicly owned parks provide great sites for tenting, and some have rentals.

The main barriers to entry for a new RV development in any market are typically planning, zoning, and permitting, development costs, utilities, location desirability, market size, market demand, and competitive rates.

- ✓ Planning, zoning, permitting, and utilities are discussed within this report and at this level of study do not appear to be barriers for the proposed project.
- ✓ Consultants are aware of the current high cost of development which includes the higher cost of materials due to an inflationary economy.
- ✓ Public water and sewer available. Electric available.
- ✓ The location is very desirable along the Mississippi River with the added benefit of the marina with its proposed renovations.
- ✓ The over 600 thousand RV owning households and almost 7.8 million non-RV owning households within 200 miles is a significant market to draw both campers and non-campers.
- ✓ Demand for modern RV sites with full-hook-up currently outstrips supply throughout the country. Particularly in this market with a substantially low number of parks with full-hook-up sites. The supply of modern, full-hook-up sites does not appear to satisfy the demand, especially during peak camping periods.
- ✓ Rentals are not overbuilt within the market based on the number of non-RV owning households and the current supply within the market. The proposed river boat rentals are unique in the market. The supply of attractive rentals within the market does not appear to satisfy demand.

- ✓ Competitive rates found currently in the market are lower because of the large number of publicly operated parks which have the goal of providing outdoor experiences at a lower cost. This typically lowers the average daily rates in the competitive market and may not allow a rate that supports development costs.

Consultants' opinion regarding demand versus supply assumes the new development will be built with the desired amenities and facilities as suggested within this study. Marketing and operations are also assumed to be implemented as suggested. Overall, in consideration of all the barriers of entry discussed it appears there is an opportunity for a new RV park to enter this market.

The new RV park development must offer the range and quality of product mix, site selection and size, modern facilities, amenities, recreation, and guest services desired by the camping public. It must accommodate all types of RVs and tents and welcome both vacation leisure and extended stay guests. Sites need full hookups and must be spacious with concrete pads or ribboned gravel pads with concrete patios. Unique rentals must be offered. River boats and treehouse cabins are suggested. A competitive rate-setting strategy will be essential in maintaining the needed occupancy.

A quality modern RV park/campground, professionally designed and competitively priced, offering a strong value, should be able to compete successfully in this market. Value engineering in the park's construction will be paramount in bringing a better camping experience and superior quality at a competitive price into the market.

Comparative Park Site Pictorial

The pictures below are provided to illustrate the essence of the comparative market.

Site size, finish, and spacing will be paramount in distinguishing the new RV development from competitors. The pictures below show the best sites, site finishes, and spacing at the comparative parks.



Pull Thru Concrete Sites



Back In Concrete Site



Back In Gravel Site with Concrete Patio



Back In sites



Paved Sites



Back In Gravel Site



Back In Gravel Site with Concrete Patio

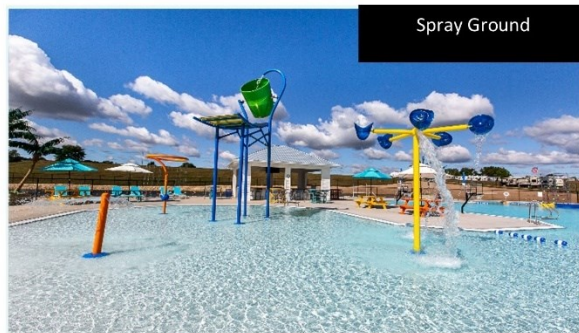


Back In Gravel Site



Back In Gravel Site with Patio

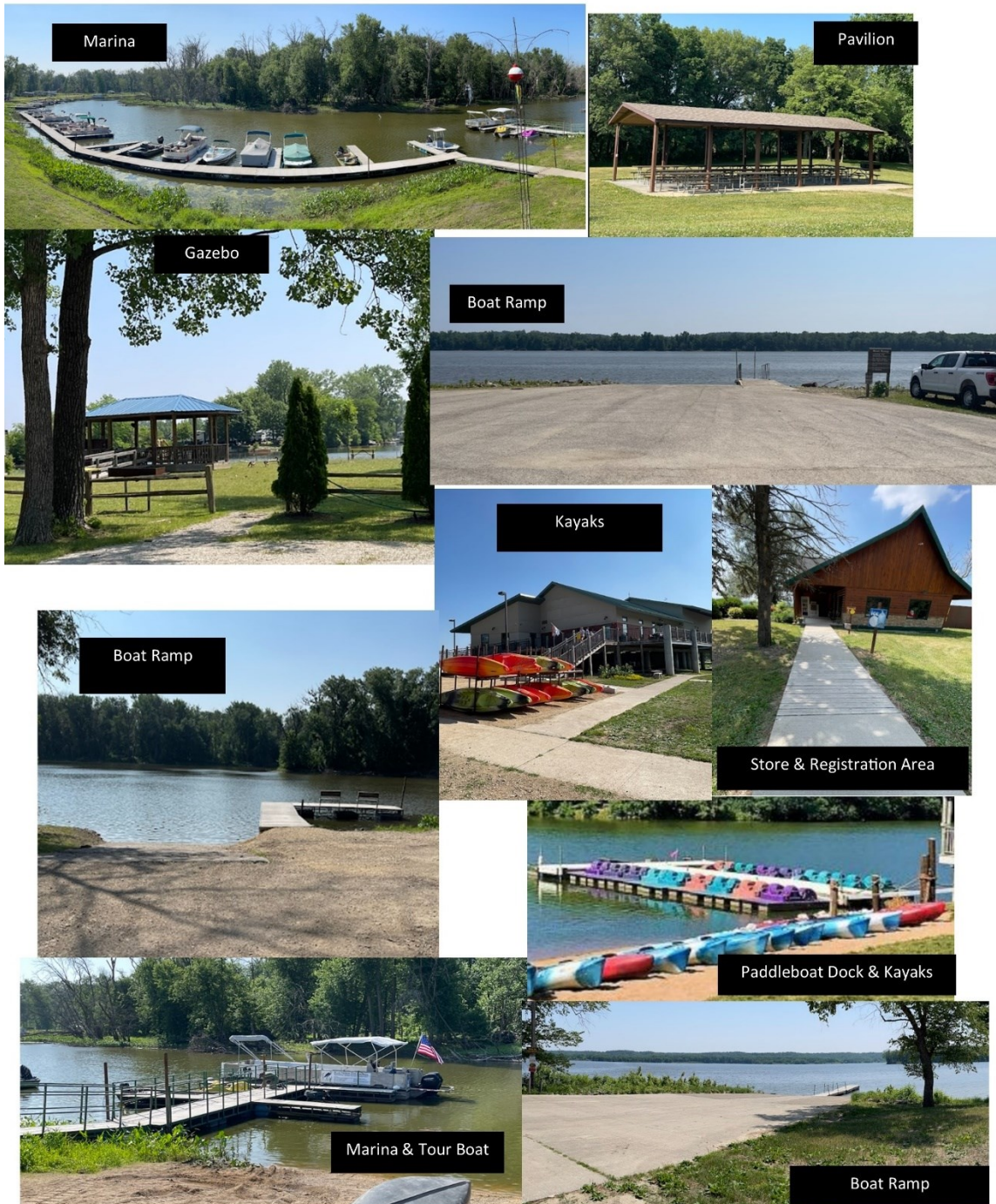
Pictures of pools and water features at parks in the comparative market.



Water Features



Pictures of facilities and amenities at parks in the comparative market.





Nature Trail

Chicken



Decorative Fire Pit



Dog Park



Nature Trail



Clubhouse



Beach & Boathouse



Wheelchair Accessible Table



Gathering Area



Pictures of playgrounds and games at parks in the comparative market.

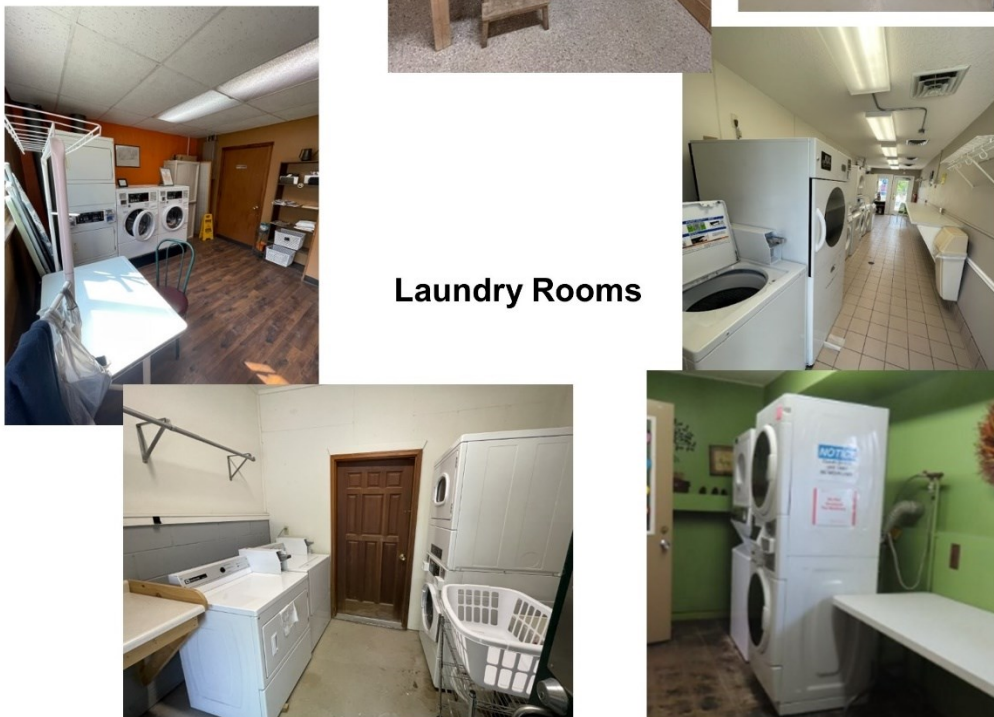


Pictures of bathrooms, showers and laundry facilities at parks in the comparative market.

Restrooms



Laundry Rooms



Rental units in the local area market.



Factors Contributing to the Success of an RV Park and Campground/Outdoor Hospitality Resort

Based on extensive experience, observing hundreds of successful RV parks, campgrounds, camping, and cabin resorts throughout the country, the following are the key factors leading to the success of any RV park and campground model in terms of customer acceptance and rate setting.

Basic RV Park Foundation

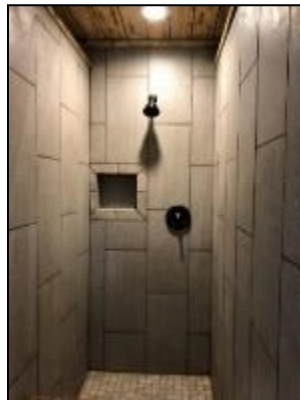
There are several keys to success when planning for any modern RV park and campground. In creating a new park *on any property*, the following four (4) elements provide the foundation for the new RV park and campground and are considered essential, (these elements should always be maintained in like-new condition):

1. All the utilities – water, sewer, electric, cable TV, and the internet – must be built to serve the guests and the accommodations provided. When completed, all utilities must be in A+ condition with new pedestals and connections providing sufficient water pressure, a mix of 50/30/20 or 100/50/30/20-amp electric service at all sites, properly flowing sewer and wastewater systems, and robust internet access preferably via Wi-Fi. Utilities must function as they do at home or at a quality hotel. Electricity should be metered for extended stay guests and guests with an electric vehicle. Future forward RV parks are metering every site or building sites to eventually be metered. Installation of cable TV is not necessary when streaming is possible. Internet must be able to accommodate multiple devices at each site.
2. The interior public roads should be completely dust-free, with appropriate widths and turning radii to accommodate all types of vehicles that may access the park. Asphalt or concrete roads are recommended.

One-way roads are typically 16'-18', two-way roads are 22' unless the fire department requires 24', and main roads are 24'. These widths include gutter and swale. Local and state regulations may override these suggestions. It is also important to flare the driveway at the entrance to the site from the street.

Also recommended is a stacking area or holding area for arriving RVs waiting to check-in. This stacking area should be located at the entrance of the park near the registration building. The stacking area should accommodate at least four (4) simultaneously arriving RVs and adds 10-11' widths to the main road to accommodate.

3. Restroom facilities should provide a standard level comparable to those found in public restrooms in a branded business hotel. Below are examples of modern standard levels for RV park restrooms.



4. RV sites should be level and constructed as previously described within this report. Site pads, where the RV is parked, should be gravel, concrete, or brick paver. Site patios may be brick pavers, concrete, or treated wood decks.



Brick paver site (preferred)



Concrete paved site (preferred)



Gravel site (not acceptable)



Concrete edged gravel site (acceptable)



Crushed granite with a concrete edge (acceptable)

In addition to the four elements listed above a modern-day park at a minimum should include:

- A laundry facility for guests with new machines, folding tables and racks, ironing station(s), TV, Wi-Fi, seating, and 24/7 keyless coded access. Washer/Dryers and laundry equipment may either be owned or shared with a local company that installs, services, and splits the income with the park. Often, these companies will provide the machines and equipment at no cost provided the park agrees to a long-term contract for usually a minimum of a five (5) year contract.
- A fenced-in dog park with separate small and large dog areas with water, shade, benches, dog exercise stations, and clean-up bags. Dog exercise equipment, doggie pools, and dog washes are becoming more common. Half of all people get into RVing because of their pets!
- All buildings, landscaping, roads, utilities, and facilities should reflect a higher level of development than those at any RV parks or communities with comparable price points within the competitive radius. A professional architect can provide designs that meet the park's needs and can value engineer the building for cost efficiencies.
- A clubhouse designed by an architect and interior designer. Minimally, the clubhouse should accommodate a large multi-purpose area with a stage, a TV/movie lounge or theater, fitness center, activity rooms, restrooms, and other elements indicated on the facility chart included in this report. Consultants can assist in assuring that the clubhouse contains all necessary facilities.
- A cloud-based park PMS (Property Management System), capable of handling regular and vacation package reservations, point of sale transactions, check-in/check-out, electric billing, and a myriad of reporting, marketing, and communication functions. A system offering revenue and yield management features is a must.

- Gated entrances and exits. A video security surveillance system in vital locations around the park.
- A state-of-the-art and ADA-compliant responsive website that guests can easily navigate on any device.
- Ancillary Revenue – In addition to regular site rental revenue, additional revenue may be obtained from recreation rentals (golf carts, bicycles, kayaks), special events, meal functions, snack bar, convenience store, vending, on-site advertising from local service businesses, propane sales, storage, and more. See the Ancillary Revenue chart within this report.
- Appropriate, well-trained, and identifiable staff must be available to ensure that the park is operated efficiently and effectively.
- Unique theming and design including an attractive color palette will differentiate the RV park and should reflect the location of the RV park and its brand. All rental units, buildings, and facilities should be designed within this color palette to build and enhance the theme. The developer is encouraged to work with all vendors to achieve the design theme, color palette, ambiance, and unique branding throughout the resort.

Signature Amenities & Features

Incorporating one or more signature amenities into the park design and marketing is critical to site pricing and occupancy. In most markets, the signature amenity or amenities will differentiate a new park from the others in the marketplace. Successful “recreational” RV parks and campgrounds have one or more “signature” amenities or features that provide both the initial attraction and the “WOW” factor for attracting new guests, retaining repeat guests, and increasing referrals.

The signature amenities noted below apply most importantly to a destination RV park or campground and are less important to a park catering to annual stays from temporary workers. However certain amenities and facilities are recommended to attract extended and annual stay guests.

Signature amenities are of less importance when the park location is a key part of the attraction; for example, a park in the Orlando area may not rely on a signature attraction since Disney World, Universal, and other attractions are the area's signature amenities. On the other hand, a park located in “the middle of nowhere” may have to include one or more of the signature amenities discussed below in the park development plan if it wishes to attract vacationers from metro areas.

This section highlights the importance of signature amenities, key features, certain facilities, and certain operating practices critical in attracting new guests. Consultants have placed suggested features in **bold** below for the proposed RV park development.

1. Signature amenities should include one or more of the following:
 - a. **Water Features** are a top major attraction and might include a **pond, lake, or river for fishing, boating**, and/or swimming; **inflatable water park**, an indoor and/or outdoor swimming pool complex; and/or water play areas like rain umbrellas, lazy rivers, slides, or buckets; and/or supplemental pools in areas that are distant from the main pool complex or pools that serve a particular audience such as a quiet pool, adult-only pools, lap pool, etc. Hot tubs or spas, large beaches, and sunbathing or relaxation areas are important and recommended.

The Mississippi River is the signature amenity for Sunset RV Park & Marina. For most campers it will be the reason they camp at the property. Lake Potter and the backwater retention pond provide additional amenity opportunities. The existing boat ramp on the river and the three ramps on Lake Potter and the marina provide boating access to the Mississippi River. Future expansion of the waterfront with canoe, kayak, and paddle boat rentals and water inflatables in Lake Potter are suggested to expand the signature amenity.

- b. **A “wow” clubhouse** that acts as a focal point and possibly the first impression upon arrival and will be the central meeting and activity center for the RV park development. The clubhouse should have space for small and larger social events and gatherings and smaller rooms for various activities. The camp resort check-in office, store, food service, fitness center, bathrooms, and guest laundry may also be found in the clubhouse.

The existing administration building may be adapted, without displacing existing administration activities, to the clubhouse that is needed for this development. The campground and marina check-in office will need to be placed strategically to provide easy access and safe traffic flow for arriving and departing RVs and boats.

- c. **One large, commercial, shaded, playground** with separate play areas for different age groups. *Existing boating themed playgrounds at the marina and along the river may just need refurbishing. An additional new playground near the RV park may also be needed.*
 - d. **Large partially shaded dog park** – one for small breeds and one for larger breeds.

- e. **A lawn game area** with shuffleboard, horseshoes, corn hole, disc golf, checkers, chess, jumping pillow, jumping pad, sports court, and more. *Existing horseshoe court at the marina and volleyball court in the park can be utilized.*
 - f. **A well-equipped Fitness Center** with machines and various weight stations, water cooler, televisions, mats, and other fitness items. *An outdoor fitness course or center is another option.*
 - g. **Pickleball courts.**
 - h. **Sports court.**
2. Unlike most businesses which are open daily, RV parks and campgrounds have varied operating seasons based on the park's location, weather, the type of camping being offered, and the clientele frequenting the park. Understanding camper demand by focusing on different target markets and segmenting the proper number of sites for each market is needed to obtain maximum occupancy.

The City of Rock Island currently operates Sunset Park as a year-round community park and a seasonal marina with access to the Mississippi River. Existing amenities include four boat ramps, one on the Mississippi River and three on Lake Potter. There is a 1.4-mile recreation trail around the lake with benches throughout the path for resting as needed. Additional amenities include a volleyball court, horseshoe court, two playgrounds, community firepit, and two pavilions.

The RV park will operate from mid-April through end of October each year. Building occupancy is a challenge for any new RV park development. The RV Park will target overnight vacation leisure guests for stays of one month or less. Sites will also be available for the entire operating season to seasonal guests. Careful selection of seasonal-stay guests is recommended. The type of campers within a park influences the type of campers the park will attract.

Those guests who do not own RVs will be attracted to the unique rentals. Determining the proper occupancy mix between overnight sites, seasonal sites and rentals will be needed to maximize occupancy and revenue.

3. Flexibility in the type and size of units accommodated will be a contributing factor to success. RV parks and campgrounds that are open to the public should not limit the type or size of camping units allowed. There are circumstances when placing rules and regulations, such as size, age, appearance, and perhaps other factors of the camping units permitted within the park are necessary. However, appropriate site design should enable the placement of travel trailers, 5th wheels, motorhomes, or park models on any site.
4. Rental units attract guests who do not own camping equipment and/or RVs but desire the camping experience. Rental units are recommended from year one. A

variety of rental units with a theme matching the chosen color scheme and overall branding is recommended. Rental units will appeal to approximately 7.8 million non-RV-owning households within 200 miles of the proposed development.

5. Tent camping is recommended. Tent sites will be placed in areas where RV sites cannot be placed. Some of the tent sites may be walk-in sites.
6. Upgraded amenity packages should be added to designated luxury RV and tent sites and on all rental units. This might include patios, decks or porches, outdoor kitchens, patio furniture, hammocks, covered outdoor eating areas, etc.
7. Aesthetics include signage, entry, building styles, and colors, landscaping, lawn condition, tree care, road quality, curbing, and similar elements. These elements give the property a modern, well-cared-for appearance that creates a strong guest impression. Aesthetics also include the appearance, tone, and attitude of all the park staff.
8. Excellence in Customer Service & Hospitality must be the goal. Hiring friendly and competent staff is imperative. Providing the guest with a pleasant experience from the initial phone call to check-in through check-out is extremely important. Word of mouth and reviews on social media will strongly impact business.
9. Name. The naming of the property should provide potential guests with a clear understanding of the park's attraction, location, and level of services. Careful forethought from a marketing and advertising perspective must be considered when naming the park.

The current name of the property is Sunset Park & Sunset Marina. The working title used in this report is Sunset RV Park & Marina. Sunset Park & Sunset Marina have a positive reputation and consultant's suspect there is value in the using the current name. Marketing research may be conducted to confirm the best name to use.

10. A powerful pre-opening marketing plan will be needed. Additionally, it may be necessary to offer some introductory marketing incentives. Initiating a marketing program, a year before the scheduled park opening or when construction begins, is recommended. Building occupancy from near zero is challenging.

Recommended Business Model for Sunset RV Park & Marina

Based on the market analysis, comparative property research, and the consultants' experience and knowledge of the industry, the business model described in the balance of this report is considered the strongest model for the success of the proposed RV park.

Business Model Statement

Sunset Park & Sunset Marina are existing community properties managed by the City of Rock Island. A modern and amenitized RV Park with large beautifully finished sites alongside the Mississippi River with beautiful views of the river is envisioned for the 250-acre property with a 50-acre lake and a 26-acre backwater retention pond. A working title for this new development would be Sunset RV Park & Marina. The RV Park will be open to the public, built to accommodate, and attract all sizes of RV's, motorhomes, travel trailers, 5th wheels, pop-ups, and primitive tents. Unique treehouse and river boat rentals are envisioned for the property. The new park will cater to a variety of guest types including vacation/leisure guests for short term stays of less than 30 nights and extended stay guests staying 30+ nights. All guests will share a variety of facilities, amenities, and activities. A chart showing recommended recreation, facilities, amenities, and services is found later in this report.

The redevelopment of the marina is a separate City of Rock Island project studied by Edgewater Resources LLC. This firm produced a feasibility study for the marina in February 2023. The marina is not part of this study. However, the inclusion of the marina with the RV park development in the next steps of the planning is strongly recommended. Many RV parks have marinas and/or boat slips. The synergy between each business will create opportunities for management, marketing and operational efficiencies while elevating the guest experience for each business.

The RV resort development should adhere to the NFPA Standard 1194 for RV Parks & Campgrounds, local zoning ordinances, all state and county statutes governing outdoor recreation, ADA requirements, the Good Sam 10/10/10 rating chart, and the recommendations within this report.

Sunset RV Park & Marina currently operates all year as a recreation park. The RV Park will operate from April 15th to October 31st serving all RV types displaying an RVIA seal indicating compliance with ANSI 119.2. It will have three seasons. Spring season from April 15th to May 15th should be the slowest season primarily because of the possibility of flooding. The prime season is May 15th through August 31st when activities on the water are in high demand. The fall season is from September 1st to October 31st. Within each of these seasons there will be variability in occupancy. Weekend and holiday occupancy is expected to be greater than mid-week occupancy in each season.

All sites will be categorized and stratified as good, better, or best and priced accordingly to their categorization.

Vacation leisure and transient travelers will camp for shorter stays, primarily for weekends, holidays, and vacations, and will be attracted to the park for:

- A sporting or alumni event at one of the six area colleges and universities.
- Visiting their child who is studying at a local college and/or university.
- A family, life, or special event in the Quad Cities area.
- Simply visiting the area.
- To visit local historical sites and area attractions.
- To visit the John Deere Corporate headquarters and pavilion.
- To enjoy the Mississippi River.
- Tour the Rock Island Arsenal and the National Cemetery on Arsenal Island.

The extended-stay guest, staying 30 days and longer, will be attracted to the property for the following reasons:

- Drawn to the Mississippi River and surrounding area offerings.
- Spending extended time while visiting family and friends in the area.
- Retirees who make Rock Island their spring, summer, and fall retirement location.
- Area campers desiring a seasonal site as a “vacation home”.

Both the vacation leisure and extended-stay market will consist of baby boomers, empty nesters, retirees, and appeal to millennials, Gen Xers, and families with children.

RV Site Recommendations

RV Parks and campgrounds typically have pull-thru, back-in, and pull-in sites (when needed for motorhome front window views). Modern destination parks may offer community or group camping sites catering to friends and families camping together.

The ultimate value of any RV park is determined by revenue, and the capacity of the park drives revenue. A site plan maximizing the number of overall sites while allowing spaciousness and privacy between sites is the objective. It is typically our recommendation to plan for the maximum number of sites allowable and achievable provided the market supports this recommendation.

Pull-thru sites allow campers to enter the site on one end and pull forward to park the rig for their stay, and then pull out forward to exit. Pull-thru sites are typically highly desirable for vacation leisure or transient guests since it is easy to maneuver a trailer or motorhome onto a pull-thru site. This gives the guest the option to keep a towed or towing vehicle hitched to the RV or motorhome. Pull-thru sites are often offered at a premium or higher price. Pull-thru sites are usually larger than back-in sites. Pull-thru sites typically require more space and therefore use more of the available acreage, reducing the number of sites developed on a particular property.

Pull-in sites are situated to give motorhomes views from their front windows. This site type is only recommended for motorhomes and rentals when applicable. Pull-in sites are not appropriate for travel trailers since the tow vehicle cannot be used once the trailer is on the site. Many developments will design pull-in sites to be used either as a pull-in or a back-in site. Doing so involves widening the size of the site pad to have a patio on both sides and adding a second set of utility connections in the correct location at both the front left and rear right of the site.

Back-in sites should be positioned to provide privacy. Whenever possible back-in sites should be positioned and angled for back-in from the driver's side providing clear sight of the utilities. In addition, providing one road width between the driver and the back-in site makes it easier for the driver to back the RV into the site.

Most RV parks have both pull-thru and back-in sites. Whenever possible modern pull-thru sites should be 70' in length and 40' wide (2,800 sq ft) and each back-in site should be 65' in length and 35' wide (2,275 sq ft) with space for parking two (2) vehicles. The larger site size is more desirable for RVs and is a hallmark of a newer, modern park. Some RV Park developments should consider even larger site sizes for a limited number of luxury sites when applicable. A minimum of 10% of sites should be pull-thru sites adjusted down or up based on the park's clientele. Sample RV site layouts are found in NAFPA 1194 2021 edition attached to this report.

The actual size of the sites will vary and be modified with each RV park development. A balance between site density, acceptable site size for the marketplace, and the type of RV park business model needs to be determined on a case-by-case basis. Site size and density, in most cases, determines the profitability and success of the RV park and camping resort.

A chart indicating the minimum number of ADA accessible sites is found further in this report.

All RV sites should be built to accommodate all types of RVs, park models, and other rental accommodations.

Each RV site should include:

1. Full hookup (FHU) pedestals properly placed for any RV. FHU should include water, sewer connection with a secure cap, 20/30/50** Amp electric, internet service, and cable television*. (100-amp sites may be needed for a limited number of sites to accommodate the largest motorhomes, 5th wheel toy haulers, or certain park models).

**Note: An increasing number of new RV park developments with transient or vacation leisure business models are foregoing cable television service in lieu of a Broadband (High Speed) Wi-Fi system which provides high speed internet and streaming services.*

Cable service is more commonly included in the utility package for residential service, even when there is robust Wi-Fi service, in new RV park developments with extended stay business models accommodating mature guests.

***Note: Electrical Vehicle charging options will need to be considered with any new RV park design. Currently Electric Vehicles (EV) represent no more than 1% of the total U.S. market. By 2035 it is expected that 50% of the 17 million U.S. car and light truck sales will be an EV. No one can guarantee exactly how fast the EV market will grow despite the many forecasts that predict EV domination.*

The challenge is how much to invest in an RV park's 100-year infrastructure to accommodate future EV demand. There are two options:

- a. The most economical option is building a centrally located EV Parking Lot with metered Level 2 charging stations (EVSE). The number of charging stations will need to be calculated after the completion of the site plan. Upsizing charging station electric cabling for increased additional loads will allow additional charging stations to be added in the future and will reduce future construction costs. Notifying the local electrical utility of future expected expansion and demand will be required for initial proper sizing of power distribution lines entering the RV Park. Metered charging stations will allow the charging stations to become a profit center. Many new State and Federal rebates and incentives are expected to be available in 2023 and beyond to assist with the cost of Public Charging Stations. Some may require the Charging Station Parking Lot to be open to the public. This should be considered when locating the Charging Station Parking Lot in the land planning design.*
- b. Campsite EV Charging is another option. While this is the perfect solution, construction costs will need to be considered. Electric site pedestals with two circuits will be required. EV Charging requires a continual load for as long as 8-16 hours and this will need to be calculated when sizing electrical cabling, electric pedestals, electric breakers, etc. In addition, a small waterproof EV charging station (EVSE) will be required for each RV site. To reduce costs upsized electric cabling could be installed during initial construction, allowing EV capable pedestals and EV charging stations to be installed in the future, as demand requires. Site electric meters monitored in real time are required. This will allow campsite EV charging customers to pay for the electricity that they consume. After the property site plan is complete campsite electrical sizing options will need to be investigated and costs considered. Local utility and/or other incentives available to help reduce costs should be researched. Notifying the local electrical utility of future expected electrical demands will be required for proper sizing of power distribution lines entering the RV Park.*

2. Each RV or tent site should have a gravel, asphalt, concrete or paver RV pad and an attached concrete, paver, or another surface type of patio area. The balance of the site should be concrete, pavers, caliche, gravel, or grass, depending on what the developer chooses. Treehouse sites should have a gravel pad and be built on stilts keeping them above the highest expected flood stage. They will have concrete, paver, or another surface type of patio area. Each site will also need a parking area for at least one (1) vehicle below the patio or in front of the RV. (Whenever possible the site should provide for the parking of two (2) vehicles.) All site plans must be designed with a plan for the expected annual flooding. It must be determined which site pad finish will best survive the flooding and need the least amount of maintenance and repair.
3. The houseboat sites will be moored on the water at the end of the Skafidas Park peninsula separating Lake Potter with the Mississippi River or at a slip in the marina. The location of the river boats must be out of the way of boat traffic and in a place where the guest can have access to parking near the river boat.
4. A picnic table or patio furnishings.
5. Low-level lighting at the street at each site or on the utility pedestal or preferably at both the street and on the pedestal.
6. A clearly readable site number sign visible from the street.
7. Digital electric meter on all sites or at least the sites intended for stays of 30 days or longer. All staff sites should be metered.
8. Fire ring and/or outdoor grill and/or outside kitchen with a cover.

Note: Many parks throughout the country and depending on the jurisdiction have banned open fires or keep fires in raised wood burning or propane rings. There are many reasons for fire bans including the high risk of forest fires and the smoke nuisance for nearby guests and residents. Propane firepits are becoming more common particularly in certain areas around the country. Propane firepit rentals and sales are often a source of ancillary income at these parks.

9. Landscaping and other appropriate separation between sites.

Each RV site should permit one RV, and at least one car, two cars whenever possible. Extra parking, off the RV site, may be provided in a guest parking area for vehicles and/or in a storage area for vehicles or equipment. Storage and/or parking fees should be charged for these services.

Offering a variety of choices in site amenities is becoming more and more common. Sites with shade and/or rain canopies over the patio, fenced and gated sites for campers with pets or small children, sites with outdoor kitchens or enhanced patios,

storage sheds and even hot tubs are being found in more and more modern RV parks. In addition, buddy sites for 2, 3, or 4 families are being added and becoming more popular.



Patio with canopy



Metal awnings over sites



Fenced site for pet owners



Pet pen site for pet owners



Pull-thru buddy sites



Triple buddy site with shared patio



Covered buddy site, back in & pull-on



Quad site (all pull through sites)



Pull-in site

Park Model and Rental Unit Recommendations

The following general information about park model and rental units is provided for informational purposes. Further discussion is needed during land planning.

Park models are commonly used as rentals. Consultants recommend offering one (1) and two (2) bedroom units with or without lofts in three (3) different designs and colors. Each park model should be equipped similarly to the RV sites and include:

- 50-100 amp electric sufficient for a residential size refrigerator, electric stove, microwave, interior and exterior lighting, hairdryer, dishwasher, coffee maker, toaster, air conditioning, and heating.
- Cable television and/or high-speed Wi-Fi or internet connections.
- Appropriate furnishings following the chosen theme and color scheme.
- Shower, residential commode, sink, and vanity.
- A porch, deck, or patio with patio furnishing, charcoal or gas grill, or outdoor kitchen or a sheltered picnic area on a paved or wood deck area.
- Designated parking for two (2) vehicles

Other types of rental units will be outfitted similarly, although electrical requirements may be more modest in some cases.

Discussion is needed regarding whether to provide linen and towel services for the rental units. Linen and towel service are becoming more common at resort-themed RV parks. There are plenty of rental programs where campers must bring linens and towels. There are other programs offering linen and towel service for an additional fee or only offering the linen and towel service in their premium units. Daily linen and towel service are generally not provided, and service is limited to check-in and check-out. Towels may be exchanged for stays longer than two (2) nights or upon request.

Rental units with housekeeping services should always include a minimum length of stay. Providing linens and towels is a costly endeavor not only because of the costs of

the linen and towel inventory but also the costs to clean them, whether in house or with a third party. Most parks with linen and towel service need a commercial laundry for their housekeepers. Housekeeping costs increase dramatically when linen and towel service is offered.

Today's park models come in all shapes, sizes, and outside finishes. Pictured below are examples of park models.

Park model style and finish will enhance the theme developed for the RV park. Below are 400 square foot park models:





River Boat Rental Unit Recommendations

Due to the anticipated annual flooding the usual park model rental units pictured above are not recommended. River boats, simply a park model on a pontoon, are similar, unique, and more appropriate for the river environment and setting.





Consultants recommend further discussion and research about river boat rentals or other types of rental accommodations for Sunset RV Park & Marina.

Treehouse Recommendations

Consultants recommend offering treehouse rentals. These are simply cabins built on stilts. Consultants recommend offering one-bedroom, and two-bedroom models with full bathrooms and kitchenettes. Treehouses should be placed in remote areas of the park with private, natural settings. The natural environment and rustic setting are as important to the experience as the accommodation and furnishings itself.

Treehouses without baths might be offered in remote areas where sewer hookups are not available. The availability of a nearby bathroom will be needed for these units. Each treehouse should then be equipped similarly to the RV sites and include:

- Electric sufficient for a dorm size refrigerator, microwave (optional), interior and exterior lighting, hairdryer, coffee maker, and overhead fan(s).
- A potable water spigot and drain.
- Wi-Fi or internet connections, and USB ports.
- Furnishings appropriate for the chosen theme and color scheme.
- Beds and bedding.
- Shower, residential commode, and sink.
- Porch or deck with rustic patio furnishings, charcoal, or gas grill, and outdoor firepit.
- Designated parking for two (2) vehicles not necessarily next to the tent.

Pictured below are examples of glamping and treehouse accommodations:



Tent Site Recommendations

Tents sites, whenever possible, should be the same size and configuration as RV sites to allow for easy transition from a tent to glamping to RV use depending on the season and changing demand. Normally, these sites include a sewer connection that can be opened for RV use if needed. Today most tent sites are built to do double duty as a site for pop-up trailers, teardrop trailers, truck campers, vans, small class B motorhomes, and other recreational vehicles generally under 20' in length.

The model shown here is an example of a dedicated modern tent site:



Each campsite (tent site) should be fitted with or consist of:

- a designated space for placing a tent.
- a sheltered picnic table and charcoal grill.
- a 20/30/50-amp electric outlet and USB ports.
- a potable water spigot and drain.
- parking space for two (2) vehicles.
- outdoor kitchens on a limited number of premium tent sites.

Consultants recommend incorporating glamping and primitive tent camping into the final sketch plan for Sunset RV Park & Marina.

Recreation, Facility, Amenity, and Service Recommendations

The chart on the following page indicates the recommended level of development for recreation, facilities, amenities, and services for Sunset RV Park & Marina.

Refinement and description of the individual elements on this chart will require further discussion during the land planning, financial, and construction stages. The final sketch plan will include the refinement of these elements.

Recreation-Facilities-Amenities Services Sunset RV Park & Marina, City of Rock Island					
Recreation		Facilities		Services	
Courts		Business Center		Activity/Social Director & Staff	PT
Basketball Court/Sport Court	X	DIY Garage		ADA Assistance	
Bocce Court		Restrooms	ER 2 !	Babysitting	
Corn Hole	!	General Store/Gift Shop	! ER	Concierge/Guest Services	X
Horseshoes	! ER	Site Delivery Service		Day Use	X
Pickle Ball Courts	X	Laundry	! ER	Escort to Site	
Shuffleboard		Community Firepit	!	Firewood	X\$
Tennis Courts		Marina	! ER	Pet sitting	
Volleyball Court	ER	Food Services		Pre-Arrival Registration	X
Clubhouse or Recreation Center		Café/Coffee Shop		Express Check-In	
Multipurpose room with stage		Ice Cream Shop		Babysitting	
Adult Lounge		Food Truck Park	X	Select site	X\$
Teen Lounge		Restaurant		RV & Boat Storage	!
Movie Theater 35+ seats		Snack Bar		Spa Services-nails, hair, massage	
Library/Lounge	X	Bar		Shuttle to Shopping/Attractions	
Misc. Amenities		Pavilion		Sales Office	
Arcade/Game Room		Large 200 capacity		Check in/Office	X
Bowling Alley		Medium 100 capacity	ER	Gated Entrance	TBD
Disc Golf	X	Small 50 capacity		Propane	
Miniature Golf - 9 holes		Pet Services		EV Charging Stations -parking lot	X\$
Putting Green		Dog Park size divided	X		
Open Field - Softball, Soccer		Doggie Beach	X		
Lazer Tag - Summer		Dog Walk Path	TBD		
Outdoor Movie Theater	X	Dog Wash			
Themed Photo Opportunity		Studios			
Jumping Pillow/Jumping Pad		Ceramics			
Inflatables - Land		Photography/Computers			
Remote Race Car Track		Crafts			
Ropes Course/Climbing Wall		Billiards/Ping Pong			
Skate Park		Music			
Notation Key					
Fitness Center	X	Site Utilities		Recommended	X
Outdoor Fitness Center		20/30 amp	X	Recommended with attention	X?
Recreation		50 amp	X	Small Size	SM
Festivals and Fairs		100 amp		Some Sites	SS
Holiday Celebrations year round		EV Charging (at site)		To Be Determined	TBD
Live Entertainment - Adult		Meters		Consider at some point	?
Live Entertainment - Family		Sewer	X	Extra charge	\$
Playgrounds		Water	X	Offsite coordinated with vendor	OFF
ADA Accessible Playground	X	Wi-Fi	X	Part Time	PT
Auxiliary Playground		Cable TV		At marina	!
Indoor Playground		Site Finishes		Whitewater Junction Water Park	WJ
Main Playground - All ages	X	ADA accessible	X	Exists on site/Renovation	ER
Young Age Playground		Paved Roads	X		
Rentals		Paved Patios	SS		
Golf carts		Paved Site Pad	TBD		
Bicycles/Trikes	X	Gated Pet Site/Pen			
Pedal Carts single and multi	X	Patio Furnishing			
Trails		Fire Pit	X		
Hiking Trail	ER	Picnic Tables	X		
Bike Trail	X	RV Sites			
ADA Accessible Trail	TBD	Standard Pull-Thru	X		
Lake Activity		Standard Back-In	X		
Fishing Pier & Cleaning Station	X	Luxury Pull-Thru	X\$		
Beach & Swim Area	X	Luxury Back-In/Pull-In	X\$		
Wibits (Water Inflatables)	X\$?	Tent Sites			
Water Activity		Standard	X		
Spa/Hot Tub	WJ	Luxury	X\$		
Swimming Pool Indoor All Ages	WJ	Rentals			
Swimming Pool Kiddie	WJ	Cabin			
Swimming Pool Outdoor Adult		Tree Houses	X\$		
Swimming Pool Outdoor All Ages	WJ	Yurt			
Splash Pad	WJ	Conestoga Wagon			
Water Wars - Summer		Glamping tents			
Zero Depth Pools	WJ	River Boat PM	X\$		
Pool Lift					

Consultant's Preliminary Site Development Recommendations

High-level site development and operational recommendations are presented below. These recommendations may be used as a guide as the development of the RV park/campground is further considered.

Site Stratification

Site stratification and site type labeling are a marketing and operational strategy which maximizes the average daily rate.

Sites and other rental accommodations offered to the public may be grouped and stratified into categories such as good, better, and best for rate-setting purposes. These sites should be designated based on size, location in the park, views, site amenities, and finishes. Best sites yield a higher average daily or monthly rate. Over time, with planning, all sites may move up to the next level, and a second upgrade program can continue to improve sites and raise rates.

Implementing the stratification criteria is somewhat subjective since every site is not necessarily the same at any RV park.

- Good Sites are typically back-in sites with basic amenities and finishes such as a gravel pad and driveway and a 10' x 20' patio of concrete or a wood deck.
- Better Sites are back-in sites with a greater level of on-site amenities and finishes and a preferred location. Pads and patios may be larger with a picnic table and fire pit.
- Best Sites are pull-through or back-in sites with enhanced amenities such as brick paver patios, concrete pads and driveways, enhanced patio furnishings or a canopy patio area, water views, and/or a preferred location within the RV park.

Further stratification beyond good, better, and best is also possible. Sites can be categorized as value, standard, and premium and then given a good, better, best stratification within the category. This type of stratification allows for a price range within each classification. For example, a value site with a preferred location may be labeled as a "best value" site and priced higher than a value site with a middle-of-the-row location.

Site and rental stratification are key strategies to increase an RV parks' average daily rate (ADR). Rate setting based on the type of RV site or rental unit (Value, Standard, Premium) and then further stratified with the good, better, and best classifications drive higher rates. Technology has made site and rental stratification easy to implement.

Site Analysis and Preliminary Site Plan

The ultimate value of any RV park is determined by revenue and revenue is driven by the park's capacity. The exact mix between the type of sites; pull-thru, back-in sites, or otherwise is determined at the land planning stage. It is typically our recommendation to plan for the maximum number of sites allowable and achievable provided the market supports this recommendation.

Campers with common traits and camping behavior prefer to be with those who have similar characteristics and behaviors. Therefore, whenever possible, it is best to place vacation leisure guests near or next to vacation leisure guests; extended-stay guests near extended-stay guests with similar length of stays; non-RVers or rental unit guests near other rental unit guests, and so on. Glamping tents and dedicated tent sites should be planned away from the RV and rental sites in separate private areas. Natural environments in private settings create the glamping and tenting experience.

Thorough property analysis, land-use evaluation, regulatory research, and sketch plan design are crucial steps needed early on in planning a new RV park. The property analysis will determine the most effective way to utilize the land considering set back requirements, topography, easements, drainage, flood and wind zones, and necessary land uses.

A land planning site visit, field consultation and land analysis are the next steps. The property analysis results in a bubble diagram which illustrates the organization of park elements and provides preliminary guidance for park layout and sketch design.

Developing a sketch plan follows the bubble diagram. A sketch plan is a key planning document and an essential part of a developer's application with most city and county approval processes for land development. The sketch plan should allow for phasing the RV park development if necessary. The final version of the sketch plan will consider local zoning and permit requirements and depict the number and placement of sites, facilities, traffic flows, and recreational amenities that the property will accommodate. As business develops and markets become apparent, the site allocation may be adjusted to reflect the level of business in each category. A good sketch plan design will facilitate changing the use of a site without hardship.

The sketch plan is the basis for the CAD drawing needed for detailed engineering and this is the last step in the land planning stage of development.

Regulatory Codes and Standards for the Operations of Campgrounds & RV Parks

ADA Compliance

There are three sets of ADA standards to consider for RV park operations and development.

The 2010 Standards for Accessible Design are required for all commercial construction. The guidelines cover everything from building construction, parking, and restrooms to playground equipment, play surfaces, access routes, outdoor recreation, circulation routes, pool and spa entry and egress, door width, door pressure closing speed, and more. These standards can be found at <https://www.ada.gov/regs2010/2010ADAStandards/2010ADAstandards.htm>.

The Guidelines for Outdoor Developed Areas are required for federal, state, and local agencies. However, the fact that they are published makes them “best practice” for any new construction and should be included in all phases of construction. The Outdoor Guidelines cover camping facilities, picnic areas, trails, beach access routes, and more. A copy of the guidelines is attached to this report. The most updated version is found at [Chapter 10: Outdoor Developed Areas \(access-board.gov\)](#)

Accessible campsites and rental accommodation must be provided at the ratio required and found below. These ratios shall apply to each type of camping unit offered (tent sites, pull-through sites, back-in sites, cabins, glamping units). It can be argued that the ratio should apply to each stratification level within the park.

Table 5—Camping Units with Mobility Features	
Total Number of Camping Units Provided in Camping Facility	Minimum Required Number of Camping Units with Mobility Features
1	1
2 to 25	2
26 to 50	3
51 to 75	4
76 to 100	5
101 to 150	7
151 to 200	8
201 and over	8, plus 2 percent of the number over 200

Camping units with mobility features don't have to be identified by signs. Entities should provide information on the location of camping units with mobility features on websites, in brochures, and on bulletin boards or information kiosks at the camping facility. When an entity operates a reservation system for camping units or assigns camping units upon arrival, the entity should establish policies and procedures to ensure that camping

units with mobility features are available for people with disabilities until all other camping units are occupied.¹⁷⁸

Accessible and user-friendly website design and mobile apps now have their own ADA standards. The U.S. Department of Justice (DOJ) has published [guidance on web accessibility and the Americans with Disabilities Act \(ADA\)](#) to inform state and local governments and businesses open to the public on how to ensure their websites are accessible to people with disabilities. This guidance uses plain language and clear examples to review Title II and Title III of the ADA. Further explanations of the importance of web accessibility, barriers that inaccessible websites create for some people with disabilities, requirements of the ADA to web content, and tips on making web content accessible are also included. DOJ's guidance also notes available resources on web accessibility, including the Web Content Accessibility Guidelines (WCAG) issued by the World Wide Web Consortium and information on Section 508 of the Rehabilitation Act from the U.S. Access Board and the General Services Administration. Section 508 requires information and communication technology (ICT) in the federal sector, including websites, to be accessible. The Board's [Section 508 Standards](#) include requirements, federal agency websites, and reference the WCAG (version 2.0)

Technical guidance on website accessibility and the Section 508 Standards is available from the Board at 508@access-board.gov, 1-800-872-2253 (voice), or 1-800-993-2822 (TTY). The Board also provides training on Section 508 Standards upon request and conducts a free webinar series to provide helpful information and best practices in meeting Section 508 Standards. To learn more or to register for a webinar in the Section 508 Best Practices Series, visit www.accessibilityonline.org/cioc-508. Past webinars are archived and available at www.accessibilityonline.org/cioc-508/archives¹⁷⁹ Website designers should be familiar with ADA accessibility standards.¹⁸⁰

For further information on web accessibility under the ADA, contact DOJ through its ADA helpline at 1-800-514-0301 (voice) or 1-800-514-0383 (TTY).

ADA standards are extremely complicated and time-consuming to learn. Therefore, it is vital that architects, engineers, and designers involved in the project must be knowledgeable on ADA standards. If they are not, an ADA expert should be consulted, and an ADA compliance letter issued. A design for an ADA-compliant RV site is attached and available from the state or federal office of accessibility.

It is important to understand that ADA requirements are federal guidelines and not necessarily state requirements. While some jurisdictions require ADA compliance with new developments, most jurisdictions do not inspect for compliance. Compliance is often challenged by handicapped guests feeling discriminated against for lack of accessibility to the same amenities as other guests. For example, a handicapped guest

¹⁷⁸ DOJ Issues Web Accessibility Guidance Under the ADA, ARVC, U.S. Access Board March 21, 2022

¹⁷⁹ DOJ Issues Web Accessibility Guidance Under the ADA, ARVC, U.S. Access Board March 21, 2022

¹⁸⁰ TACO Winter Newsletter, Ron Hinkle, Legislative Consultant

may not be able to swim because there is not a lift for the pool or take a shower without handrails in the shower stalls. These guests may file discrimination lawsuits in civil court. Sadly, many disreputable patrons claim to be discriminated against for lack of access and file and/or threaten frivolous lawsuits costing RV parks and other businesses thousands of dollars. States and courts are developing ways to minimize lawsuits deemed to be frivolous. Operators should look for certification programs which supply documentation and signage that a park is ADA compliant.

NFPA 1194 National Standard for RV Parks & Campgrounds.

NFPA 1194 is a nationally recognized standard developed, maintained, and published by the National Fire Protection Association (NFPA). Members of the NFPA Technical Committee responsible for overseeing NFPA 1194 include government officials, testing and listing agencies, fire consultants, fire marshals, campground and RV associations, developers, consumer clubs, RV manufacturers and suppliers, and other independent experts. To ensure that NFPA 1194 remains a true consensus standard, no single interest group can constitute more than one-third of the overall voting committee membership.

The standard is revised and re-published every three years to incorporate needed changes and new technology through an ongoing process that is transparent and open to the public for review and comment.

NFPA 1194 outlines minimum safety requirements for the general design, fire safety, environmental health, and sanitation. It also establishes uniform definitions. The document includes an “annex” section that addresses typical site plan safety, sanitary disposal stations, operational guidelines, detailed site layout drawings, examples of the variety of RV types, and a comprehensive glossary of relevant terms, with detailed descriptions. The 2018 edition added Annex D, which provides guidance on park operations. The 2021 NFPA 1194 Standard for Recreational Vehicle Parks and Campgrounds includes revisions, deletions, and new materials. This is notated on each page of the report.

This standard is intended to assist all public and private entities engaged in the regulation, oversight, design, and construction of proposed new-build campgrounds, as well as the modernization and expansion of existing campgrounds/RV sites. Some states and local jurisdictions have adopted their own set of RV park standards and requirements that may or may not be more restrictive than NFPA 1194. In jurisdictions that have their own regulations, new development, redevelopment, and expansion must be built to meet those standards. In locations where RV park requirements have not been adopted, consultants recommend parks be built to the NFPA 1194 standards.

Many of the major private-sector campgrounds reporting significant growth in RV overnight stays adhere to the standards set forth by NFPA 1194. Unfortunately, the absence of a national effort to adopt NFPA 1194 has and will potentially continue to result in the construction of RV parks and campgrounds, that fail to meet the essential

standards. This is particularly true of RV parks and campgrounds being constructed on public lands.

The National Association of RV Parks and Campgrounds (ARVC), the Recreation Vehicle Industry Association (RVIA), and the Recreation Vehicle Dealers Association (RVDA) all support and encourage campground operators to adhere to all applicable laws and regulations and to operate campgrounds in compliance with national consensus standards such as the NFPA 1194 Standard for Recreational Vehicle Parks and Campgrounds.

Note: NFPA 1195 is the national standard for the manufacturing of park models and NFPA 1192 is the national standard for the manufacturing of recreational vehicles. Both NFPA 1195 and NFPA 1192 complement the NFPA 1194 standard by providing standardized systems for the safe and proper connection of utilities, (e.g., electrical, plumbing, etc.).

A copy of NFPA 1194 2021 is included with this report as an attachment.

State and Local Codes for RV Parks and Campgrounds in Illinois

Zoning and permitting for RV park and campground development is complicated and varies in each city, town, county, and state. Consultants **strongly recommend** engaging appropriate experts early in the planning stage to advise and guide the project through zoning and permitting regulations. Obtaining the required permits and licenses is tedious, time consuming and usually expensive; however, full compliance is recommended prior to the start of construction.

The City of Rock Island is under home rule and therefore sets its own development guidelines. Attached to this report is the City of Rock Island zoning code and the Illinois Campground Licensing Act. The Illinois document is being provided for informational purposes.

Taxation for the Operations of RV Parks and Campgrounds in Illinois

Taxation for the operations of a RV park and campground varies in each city, town, county, and state. Consultants **strongly recommend** engaging the appropriate taxation experts and/or accountants. All sales tax should be added to the cost of the guest's stay rather than being included in the rate.

- * Illinois Occupation Tax (hotel/motel) is 6% of 94% of gross receipts, this applies to any rental unit. The occupation tax is not charged on sites.
- * The City of Rock Island imposes 7% in addition to the Illinois Tax. This tax applies to rentals but not to sites.
- * Illinois Sales tax rate is 6.25% on all general merchandise sales.
- * Illinois Sales tax rate on grocery items is 1.0%.
- * The City of Rock Island Sales tax is 1.25% on all general merchandise sales.

- * Rock Island County Sales tax is 1% on all general merchandise sales.

The City of Rock Island does not pay property taxes.

Recommended Operational Standards

Marketing

A marketing plan which builds awareness while under construction and allows for advanced reservations is needed. The property entrance should have story boards erected as soon as possible. A well-designed social media marketing plan can build excitement and engage the consumer prior to opening. A substantial pre-construction budget that includes a significant portion allocated to digital or online marketing and advertising is essential. As occupancy grows, a lesser on-going, limited budget will be needed.

Marketing expenses such as website design and technology, online reservation capability, and the implementation of a property management system may be capitalized as part of the development budget.

A modern RV park marketing plan includes some or most of the following:

- Relationship with an advertising and marketing agency experienced in tourism, travel, and recreation businesses.
- Local and regional pre-construction marketing to attract guests for the opening season.
- A yearly marketing campaign to begin operating year one, reviewed and revised each year.
- A current and technologically up-to-date website, user-friendly on all devices, ADA compatible, and linking with all applicable camping, tourism, and travel websites.
- Search engine optimization and website management.
- Google and Bing ad word campaigns.
- Email marketing and establishment of inquiry and customer email lists.
- Social media and review management programs.
- Business cards and promotional rack cards.
- Cable TV advertisements.
- Good Sam affiliation and possible advertising.
- Guest satisfaction surveys.

- Billboards and highway logo signs.
- Exhibit at the area, regional and major national RV, boating, and outdoor consumer shows, at least in the early years.
- RV dealer programs and relationships.
- Repeat, referral, and loyalty programs.
- Listings on websites and in directories including State Campground Guides, any local visitor's guides, the Chamber of Commerce site, and all State Tourism directories and websites are important.

There are vendors serving RV parks and campgrounds by providing RV park maps/guides featuring a site map, park rules, park amenities, contact, and reservation information. These guides, typically several pages in an 8.5" x 11" or 6" x 9" format, also contain local advertising. Advertising in the guide is sold by traveling publisher representatives, and the guides are then provided at no charge to the park. The guides generally need a year of lead time to prepare and should be contacted accordingly. Alternatively, the park could prepare the guide in-house without advertising or with park personnel selling the advertising in the local area during the slower months or off-season. Additionally, meeting with local businesses to sell advertising forges important relationships with the community.

As the park develops and grows, the guide will become more of a vacation guide with details about park activities, special events calendar, rental accommodations, vacation packages, and more. Research shows these guides are impactful for the campground. A survey of 1,000 people indicates 98% found the guide helpful, 68.7% use one or more of the businesses/services listed, 58.9% indicate that the products and services provided in the guide improved their stay, and 81.9% indicate they keep the guides after leaving the park.¹⁸¹

A marketing budget of 5-10% of expected or actual gross revenue should include a significant portion targeted to digital marketing. Higher marketing budgets are needed in the early years of development. Pre-opening advertising and marketing expenses should be added to the allocated percentage budgeted above for the first year.

The best way to control marketing and advertising costs is to focus on providing outstanding guest experiences. Exceptional guest experiences create positive word of mouth among guests and on social media, providing referrals, recommendations, and positive online reviews.

¹⁸¹ Woodall's Campground Management March 4, 2022 AGS Survey on Guest Guides

Marketing efforts should begin as soon as planning approvals are received, and construction begins. Pre-opening marketing expenses should be considered as part of the development expenses, not as an operating expense. Marketing, during the pre-opening and ramp-up periods, is essential to have reservations for the first season. The early years are the most challenging since there is no or little repeat or referral base.

Further discussion and planning are needed to determine the start-up marketing campaign, budget, and timeline. Public relations and market media outreach are also critical components of the marketing campaign. A PR strategy and timetable should be determined and implemented before public awareness of the project. Many state campground associations and tourism offices have PR programs available to their members or constituents to promote new tourism businesses.

The objective of any RV park business is to find and retain campers. All management decisions should be based on this axiom. The park's ultimate success will be determined by the guest experience and retaining first-time guests to visit again and refer the park to family, friends, and co-workers. As the park builds its clientele and strives to achieve the desired level of repeat and referral customers, the marketing budget should gradually decrease.

Staffing

Staffing requirements vary for each RV park or campground. The need for staffing is based on the type of business model implemented, which, most often, determines the type of campers who frequent the park and the experience desired. RV parks found in tourist areas and destination parks offering planned activities, added amenities, and upgraded facilities cater to vacation/leisure guests. These parks have more significant staffing requirements. RV parks and campgrounds catering to transient, short-term guests or parks that accommodate extended-stay, long-term, or yearly guests need less staffing. The size of the RV park or campground also affects staffing requirements, albeit to a lesser degree.

The seasonal, overnight, and destination RV park, as recommended in this report, will serve a broad guest market and be more labor-intensive than other RV park models which cater primarily to extended stay guests. Necessary labor requirements will vary during different periods of the year. The full-time year-round staff will be supplemented with seasonal staff during the operating season and even within this period labor requirements will vary. Close attention to staffing will be needed to avoid overstaffing and excessive payroll expenses during the slower times.

The issue of staffing will involve further discussion once the entire property is planned. Staffing areas needing review and consideration include:

- Retail/Profit Centers
- Reservations & Office
- Marina

- Recreation
- Maintenance
- Pool/Water Attractions
- Housekeeping
- Food Service
- Security
- Human Resources
- Management
- Marketing
- Accounting

Certain staffing areas might be outsourced such as landscaping, garbage removal, housekeeping, and security for example.

Staffing requirements should be addressed as soon as construction begins. A reservation staff should be established and in place when marketing begins. Most campground workers are paid hourly. The minimum wage, unemployment rate, and local demand for workers affect the competitive hourly wage each year.

Some RVers are full-timers, living in their RVs, traveling the country, and working at RV parks and attractions as seasonal employees. These workers are referred to as “Workampers” a trademarked term developed by Workamper News. RV parks advertise in Workamper News, a website and magazine, to hire workamping singles and couples. Visit www.workampernews.com for more information. Workampers are a good source for seasonal employees and sometimes even a good source for a management couple for a new RV park.

Many RV parks have success with international programs hiring students on the J-1 work and study visa and individuals for H-2B nonimmigrant programs. While each of these programs alleviate seasonal and peak load employment needs each are complicated and have challenges such as housing and transportation. Thorough research and legal council is suggested before implementing an international employment program.

Typically, the RV park staff consists of a mix of local workers, retirees, workampers, high school, and college students on a full and part-time basis seasonally and throughout the year.

Third-party management companies specialize in RV park management and oversee operations for developers and owners of RV parks and campgrounds.

A general manager who oversees the operations of the RV park will be needed full-time year-round. Management, staffing and third-party contracts may be shared with the marina, and this is recommended.

Park Management

Park management typically consists of a single person or a managing couple that lives either on or off-site. A park the size of the proposed RV park will eventually need a dedicated manager or managing couple. The manager or management couple might reside on the property in a provided manufactured home, a manager's apartment on the second floor of the clubhouse, or on an RV site provided they own an RV. Manager(s) should be paid a yearly salary plus housing and benefits.

Staff Training

Staff training programs to increase guest satisfaction and service are always needed. Service standards should be established at the highest level. Some service standards examples include employee uniforms, name tags, escorting guests to a site or rental, a maximum 24-hour response time to all email or regular correspondence, and a maximum 12-hour response time to messages or any guest contact.

There are many avenues for staff training for park managers, department managers, and other key personnel who are guest-facing as part of their duties.

Training opportunities include:

- OHI formerly the National Association of RV Park & Campgrounds (ARVC) Conference, Publications, and Webinars
- National School of RV Park & Campground Management
- State Conferences & Workshops
- Training offered by the local Chamber of Commerce and/or Visitors Bureau
- Hospitality programs at the area and state universities and colleges
- Experienced RV Park trainers and consultants

Technology

The advance of technology in the RV park and campground industry has allowed park operators to create efficiencies in operations and minimize staffing requirements in some campground business models.

Property management systems integrate reservations, check-ins, departures, point of sale, accounting, energy control, billing, customer relations data management for guest communications, advertising, marketing, day-to-day management tools, and daily, weekly, monthly, and annual reporting.

Revenue management is a pricing strategy that balances supply and demand in order to maximize profits. Most industry specific property management systems enable revenue and yield management, comparable to hotels and airlines. These state-of-the-art property management and reservation systems provide yield management and dynamic pricing to maximize average daily rates. These systems allow for immediate rate adjustments based on a variety of variables such as date of reservation, level of

resort occupancy on the dates requested, advanced booking window, number of people in the party, and length of stay.

While most campgrounds still report a significant portion (50% or more) of their reservations occur by phone, many campgrounds now report that 60-70% of their bookings are made online. The level of technology, the ease of making an online reservation, the added cost to the consumer for online reservations (a reservation fee), and the complexity of the campground and RV park's offerings influence this reservation behavior. RV parks catering to vacation/leisure and transient guests, or a younger clientele, or who have primarily shorter stays will experience a higher percentage of reservations online. Extended-stay parks and parks with more mature guests take a significant part of their reservations by phone or in person.

Online non-contact reservations and remote check-in have become increasingly important to meet guests' expectations especially in a COVID world. Park management systems have developed new technologies to make contactless check-in easy for the guest and the park. Remote technology including apps for smart phones and tablets as well as the ability to capture signatures and store documents enable no contact check-ins. Automatic gates for park entry automate guest arrivals and give parks the ability to provide a gate code to the guest before arrival at the park. This same technology allows the guest to receive the key code for a rental accommodation upon remote check-in. Internet-based security cameras are important for park security, surveillance, and risk management.

Broadband (High Speed) Wi-Fi for streaming needs to be provided throughout the park, at each site, and at all rentals. The increase in working remotely and road schooling has made high speed Wi-Fi a high priority for most guests. A basic level of service is usually included in the site and rental fees for one device. Additional device access and service levels may be fee based. Many newer properties are including unlimited Broadband Wi-Fi in their site fees to attract and retain customers.

Energy efficiencies using solar energy, lighting systems, electric metering of sites, motion sensors, and other technologies are available and reduce one of the most significant costs of operations.

Financial Model

The financial information set forth provides figures based upon industry averages and operating ratios derived from industry data presently available. Campground Consulting Group LLC makes no representation, expressed or implied, that these figures will, in any way, predict the costs and/or performance that any individual RV park may experience.

A 5-year pro forma model is attached. The financial model is based on a site density of 199 FHU RV sites and 20 primitive tent sites. Rentals consist of treehouses, and one-and-two-bedroom river boats starting with 13 in year 1 and increasing to 51 rentals in year 5. Total site build out in year 5 is 270 units.

The financial model is focused on site and rental revenue based on occupancy, rate setting and seasonality assumptions. Yield management and ancillary revenue are added onto site and rental revenue as a percentage. Site and rental revenue are the basis for a successful RV park. Yield management and ancillary revenue is secondary. At the feasibility stage of planning, financial success should focus on the site and rental revenue based on occupancy, rate, and seasonality assumptions. When this criterion is realized, it is then appropriate to incorporate yield management and ancillary revenue into financial modeling.

The revenue from marina operations is not included in the financial model attached to this report. Future financial planning should incorporate the marina into the model. Efficiencies and increased profitability are expected when managing and operating the two businesses together.

Revenue Management

Revenue Management is a pricing strategy that balances supply and demand to maximize profits. Dynamic pricing or yield management is recommended. Properties implementing revenue management increase site revenue by 5 - 15% in the first year. Vacation destination properties benefit the most from dynamic pricing and report up to a 25% increase in site and rental revenue from yielding. The park's property management system (PMS) should contain revenue management capabilities designed to maximize revenue based on occupancy, length of stay, booking window for future stays, time of year, site type, and other pricing-related factors.

Ancillary Services and Income

Ancillary services and the consequent income vary from park to park depending on the business model, location, park size, number of ancillary revenue sources, and guest composition. RV parks below 199 sites at maturity *may* experience 5-15% in ancillary revenue. Parks over 200 sites may experience ancillary revenue of 10-30%, and at maturity, an exceptionally large RV park may experience 30-40% in ancillary revenue. In fact, many busy vacation destination parks generate 40-50% in ancillary revenue.

RV parks and campgrounds with occupancies primarily consisting of extended-stay and long-term campers typically derive ancillary income from the following sources: storage and rig moving, winterizing units, “summerizing” units, RV washing, RV repair, vending, and other non-recreation-based ancillary income.

RV parks with vacation leisure, recreational, or seasonal guests will have a broader range of ancillary revenue.

The following chart shows many of the ancillary revenue sources available at RV Parks. Recommended ancillary sources for Sunset RV Park & Marina are in bold font.

Ancillary Revenue Sources - Sunset RV Park & Marina			
<i>Retail</i>	<i>Recreation</i>	<i>Site Services</i>	<i>Other</i>
Convenience store	Arcade/Game Room	Cable TV	Attraction tickets
Food Service - Food Trucks	Water rentals -boats, etc.	Decks	Dog wash
Lounge	Beach rentals	Shed rentals	Pet Sitting
Ice	Bike rentals	Site upgrade services	Dog grooming
Propane	Bowling	Landscape services	Shower Meters
Wood	Crafts/Ceramics	Maintenance services	RV repair
Vending-laundry, soda, air	Day Use/memberships	Winterizations	RV wash
Vending-fish food, candy, etc.	Golf course	Grill rentals	Storage - Boat & RV
Marina	Golf cart rentals	RV Maintenance	Babysitting/Day care
	Jumping pillow & pad		Spa/Salon services
	Laser tag		Clubhouse rentals
	Mini golf		Birthday parties
	Movie theater		Day Use Fees
	Horseback riding		Guest Fees
	Wibit park		Weddings & Events
	Wristband programs		Cabana rental pool/beach
	Zip line/Rope course		EV Charging Stations
	Activities/Special events		
	Gemstone Mining		
	Gun/Archery Range		
recommended ancillary revenue sources			

RV Park Construction Cost Model

Construction costs vary significantly based on location, property topography, the economic climate and timing. High line estimates are based on experience and actual costs of similar parks but will require refinement and more accurate estimates based on local contractor bids and final construction drawings. Keeping the development costs as low as possible without diminishing the park's integrity and quality will require careful value engineering and construction management.

During the preliminary stages of feasibility and construction cost planning/budgeting consultants recommend using a per site cost of \$46,000 excluding land costs and including a modest vertical build. Rental units will be phased into the build over a period of 5 years.

Coordination of the construction of the RV park and redevelopment of the marina should be considered.

Note: Construction costs cannot be accurately determined until a final sketch plan is approved and engineered construction drawings are completed.

Summary of Findings & Conclusion

The Summary of Key Development and Expansion Criterion Chart assigns a positive, neutral, or negative value to the specific developmental elements with a 1-10 rating system, ten being best. Negative findings are red flags needing further investigation before continuing forward. Neutral items often need further research and planning. Some neutral items are just that and cannot be improved, such as neutral access, for example. Some neutral items may become development positive or prohibitive upon further research.

The summary of findings below identifies mostly positive factors for the development of the proposed RV park. Two neutral concerns are identified, both need more research and planning. Funding of the development has not been determined and the city has not operated an RV park. These neutral concerns are surmountable. Negative factors inhibiting the development have not been identified.

Sunset RV Park & Marina, Rock Island, Illinois Summary of Key Development Criteria				
Criterion	Positive 8-10*	Neutral 4-7*	Negative 1-3*	Notes
Permitting & Zoning	9			The property is already zoned as a recreation area.
Location	10			Great location on Mississippi River including boating access. Major interstate and roadways are nearby.
Water and Sewer	8			Water is available on the property. There is a 4" sewer line coming into the property at IL 92 and 31st Avenue. All sites and a shower facility would be connected to this sewer line.
Access from Highway or Interstate	10			I-280 a major east/west highway is a mile from the entrance. Park is directly off IL Hwy 92.
Site	10			Direct access to Mississippi River
Natural Water	10			Mississippi River and Lake Potter
RVer Market Share within 200 miles	10			Almost 612,0000 households
Non RVer Market Share within 200 miles	10			Almost 7.8 million households
Broad appeal to all age groups & types of guests	10			Boating, water play, nearby golf courses and water park.
Entertainment/Recreation value in market	9			There are a wide variety of attractions within 20 miles
Experience with development	8			The City of Rock Island is very experienced in project development. There is a board of directors who have varied experiences within the community who must approve project.
Relationship with local community/government	10			The developer is the local government.
Hospitality experience		7		Currently operating a marina using management firm. The city operates a recreation department handling 2 golf courses, a water park, and adult and youth sports leagues. City does not have campground experience.
Funding Availability		4		Funding sources have not been identified. Finding grants, issuing bonds, and borrowing are all possibilities.
Potential flooding			3	Manageable with enough warning to prepare. Development will plan for annual Spring flooding.
*1-10 rating system, 10 best				

Conclusion

On balancing all the factors presented throughout this report, coupled with the consultant's knowledge and experience in the RV park and campground industry, it is concluded that the development of Sunset RV Park & Marina, as described in this report, **has an average level of development risk and a probability of success and profitability over time.** The major contributing factors to the likelihood of growth and success are:

- The current need for FHU RV and camping sites and glamping and the overall increasing demand for RV sites for vacation/leisure and extended-stay camping for a variety of reasons in this area and throughout the country.
- The renovation of the existing marina is needed. The development of the RV park and the redevelopment of the marina may be coordinated to obtain efficiencies in both. The two businesses are complimentary to one another.
- The potential in the market for providing a new rental experience with the treehouse and river boat rentals.
- The proximity of the property to attractions, shopping, restaurants, and other services.
 - Whitewater Junction Water Park is 2.4 miles from Sunset RV Park & Marina.
 - The proposed property is on the Mississippi River with boating access.
 - John Deere Pavilion is 5 miles from the property.
 - Saukie Golf course is 4 miles from the property.
 - Highland Springs Golf course is 4.9 miles from the property.
 - Bally's Quad Cities Casino and the Quad Cities Botanical Gardens are 3 miles from the property.
 - Back Water Gamblers Water Ski Show is 6 miles from the property.
- The population within 200 miles of the property is over 8.3 million households with almost 7.8 million non-RV owning households who will be attracted to river boat and treehouse rentals and over 612,000 RV owning households who will be attracted to spacious and modern RV sites.
- There are already amenities at Sunset Park that may be refurbished during development.
- Opportunity to *possibly* add an inflatable water park in Lake Potter. This could either be just an attraction for the park and/or a profitable day use attraction for the community.

Concerns identified by the consultants are:

- There is a risk of cost over-runs with any construction project. Anticipated costs of construction are higher than normal because of the current economic conditions and higher labor costs. While supply shortages have subsided there are still supply shortages which may delay construction.
- Annual flooding

Careful value engineering and construction management, to keep the development costs as low as possible while maintaining excellent quality, is a challenge that must be met.

It may be challenging to support the new construction and operating costs in the first few years, but this should level out quickly as occupancies grow. The financial model shows profitability in year 3 and a cumulative positive cash flow occurring in year four.

Developing, implementing, and tracking an advertising and marketing strategy and campaign for Sunset RV Park & Marina at the time of starting construction will be necessary to attract local, regional, and national travelers especially in the first year.

In conclusion, at this level of study, the consultants are confident that the proposed RV park development will be successful in attracting new guests to Sunset RV Park & Marina. As with all development projects, continued evaluation including but not limited to land planning, civil engineering, architectural design, construction budgets and additional financial modeling is needed to support our confidence further and ensure the success of Sunset RV Park & Marina.

Feasibility Study for Sunset RV Park & Marina

February 2024



- Jayne Cohen, Founder & President
- 40+ years Campground Operations
 - Began with family park in New Hampshire
 - Expanded to include 12 additional parks
- 13 years Consulting
 - Feasibility & Market Studies
 - Development & Expansion
 - Land Planning
 - Operations



- Sharon Weber, Lead Consultant
- 25+ years Campground Operations
 - Involved in all aspects of operations
 - Outdoor Hospitality Leadership
- 6 years Consulting
 - Feasibility & Market Studies
 - Operations
- 10 years Banking
 - Customer Service
 - Credit Research
 - Commercial Lending
 - Investment Banking



Key Findings Camping Industry

58 million households camped in 2022

32% of leisure trips include camping or glamping

92 million or 69% of US households identify as campers

11.2 million households own an RV

RV vacations less expensive

Historical resilience of camping industry

Record occupancies since 2019, more RVs on road than ever

51% of campers have made reservations 2024

Key Findings Sunset RV Park & Marina

8.4 million households within 200 miles with 612,000 owning RVs

Great location with easy access

Opportunity to provide FHU sites

John Gripp and Luke VanLandegen are committed, long term city employees

RV vacations less expensive

Strong demand for rentals

Extended stay demand is high



RVS MOVE AMERICA



- **\$140 Billion** American Industry
- **92 Million** American households identify as campers
- **65 Million** Americans plan to go RVing in the next year

Local impact

- \$50/day/person
- \$200/day/family of 4
- \$61 typical RV/tent site
 - Assume \$49 for development
- \$110 typical rental
 - Assume \$162 for development
- \$275 impact per day including cost of stay



Opportunity to create recreation destination for residents & tourists

Sunset Park to Sunset RV Park & Marina



RV & Tent Sites



Day Use Amenities



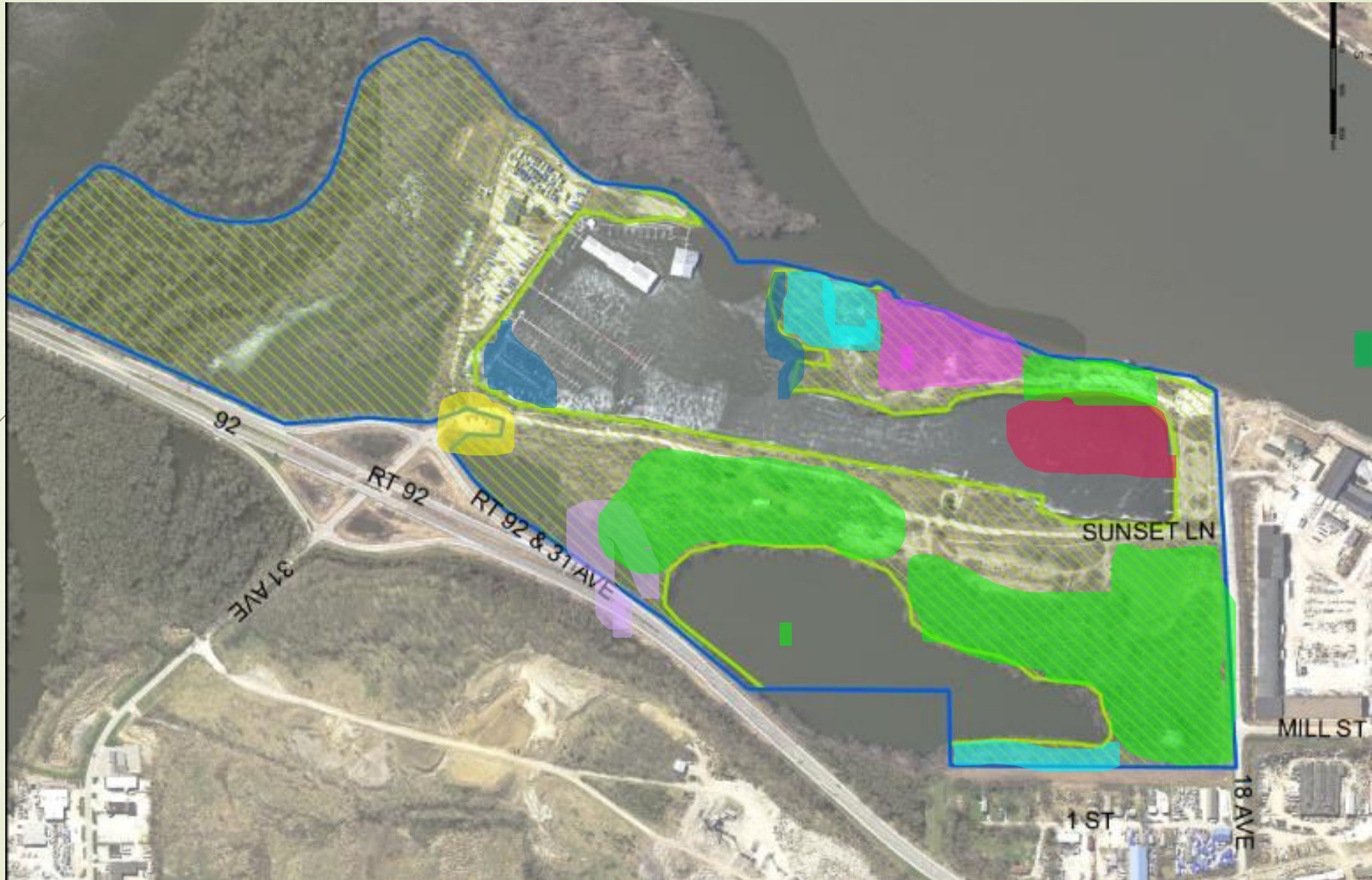
Boat Slips & Boat Ramps

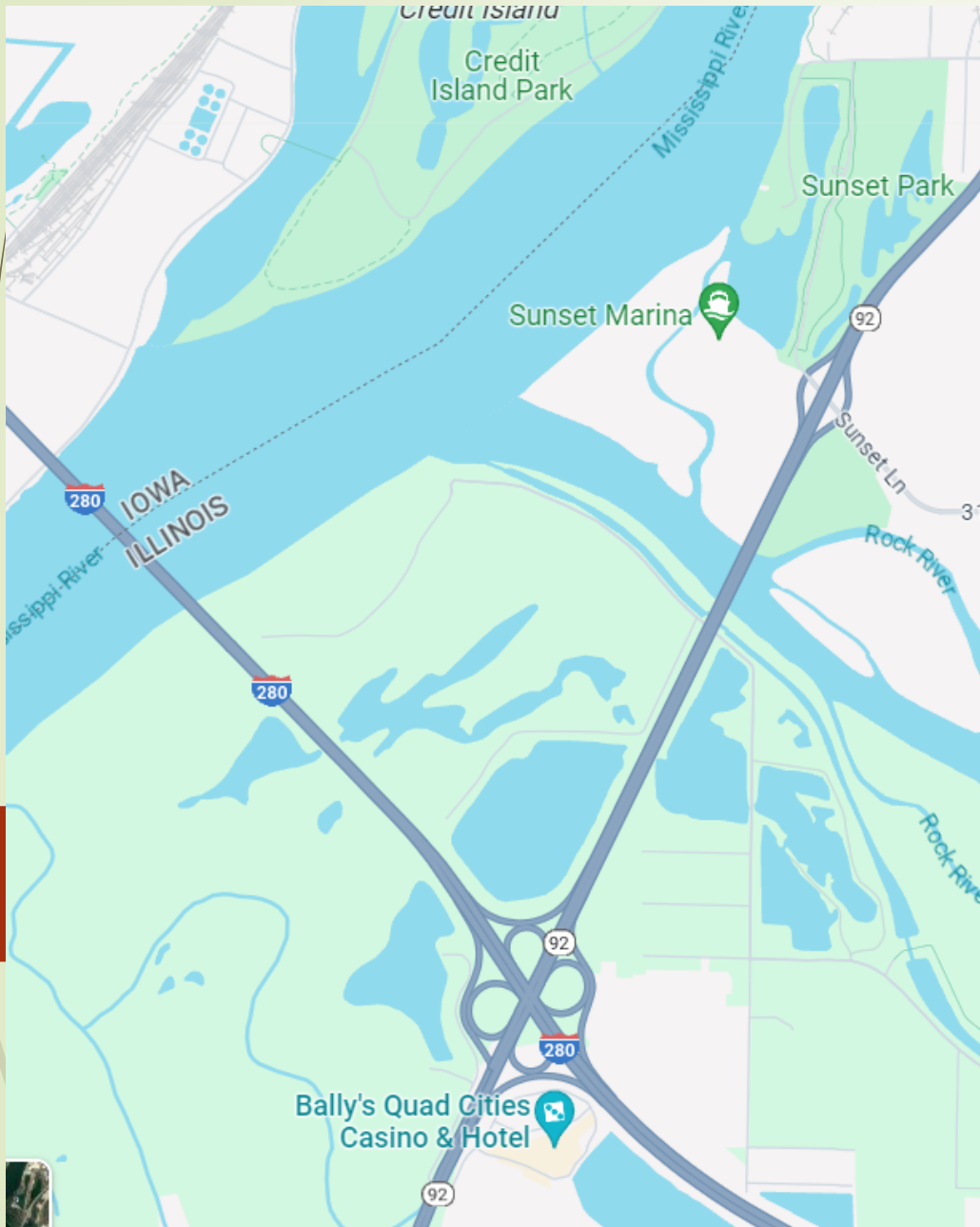


Rentals

Place making spots to benefit citizens of Rock Island

- Tent
- TH
- RV
- RB
- Wib
- Reg

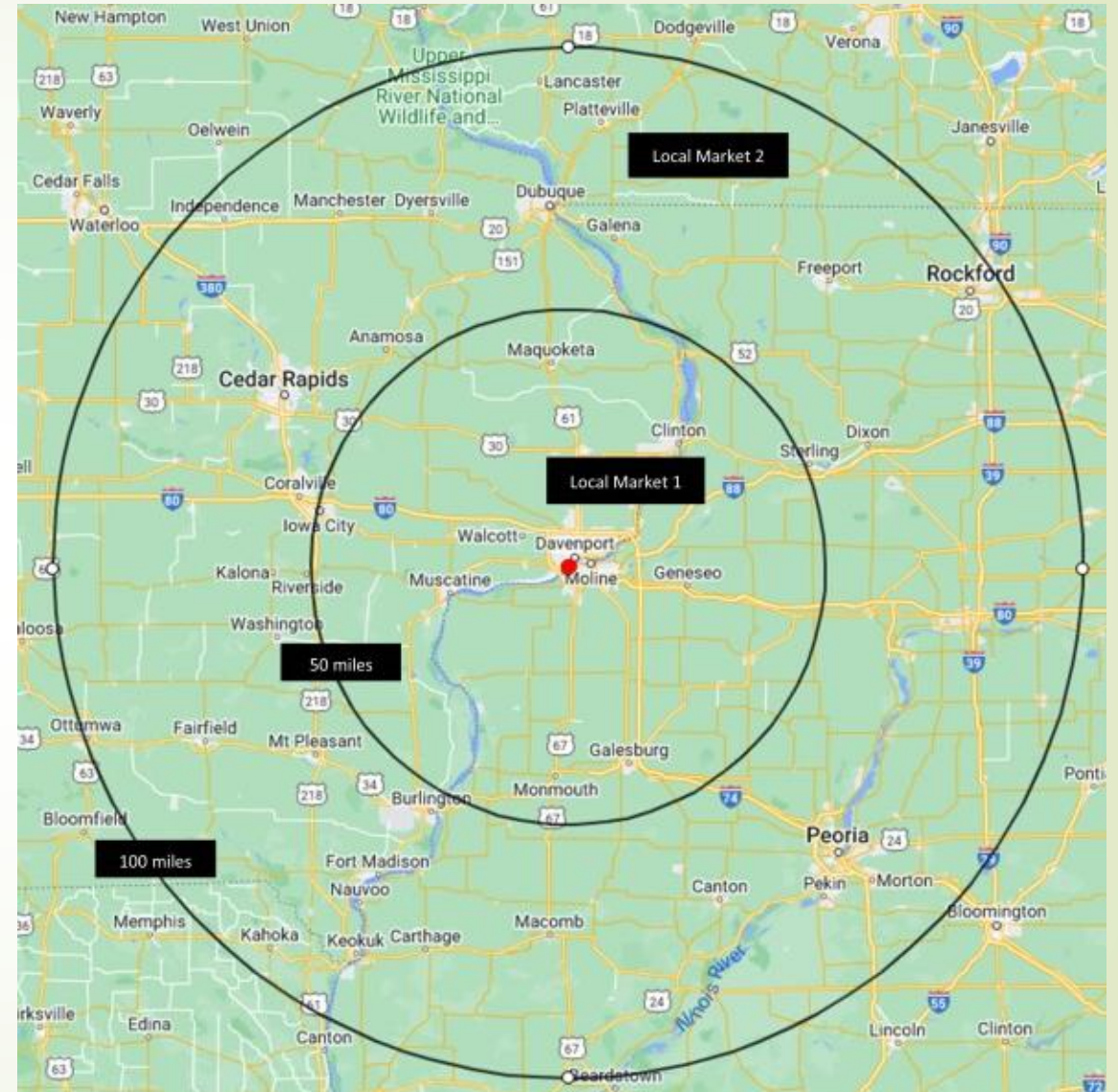




location, location, location
easy access to major interstate
easy access to entrance
access to Mississippi River

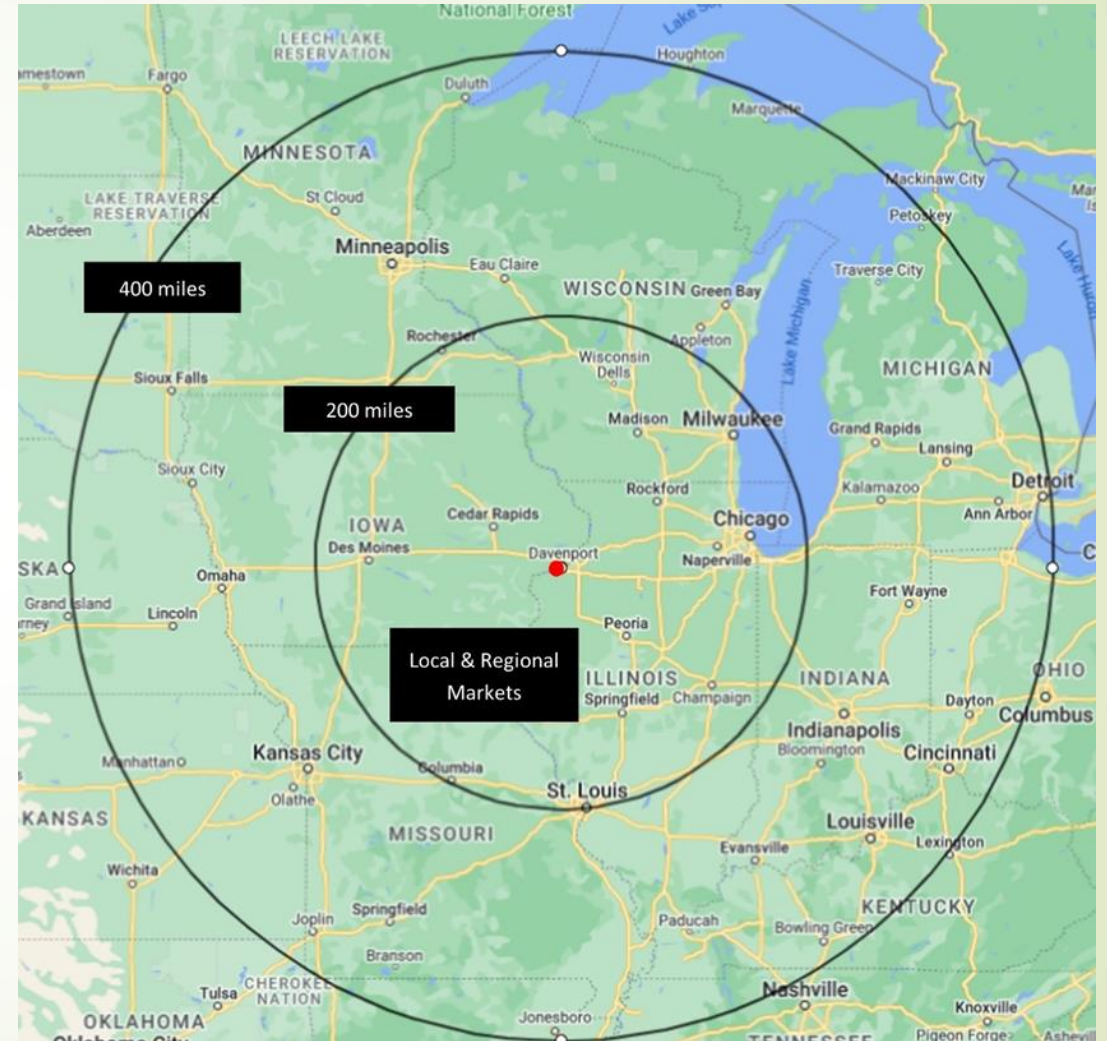
Local & Regional Markets

- Local market
 - 83 thousand RV owners
 - 960 thousand non-owners (rentals)
- Regional market
 - 528 thousand RV owners
 - 6.8 million non-owners (rentals)
- Entire market within 200 miles
 - 611 thousand RV owners
 - 7.7 million non-owners (rentals)



National Market

- Within 400 miles
 - 967 thousand RV owners
 - 15.1 million non-owners (rentals)
- Entire market up to 400 miles including local & regional markets
 - 1.5 million RV owners
 - 22.9 million non-owners (rentals)
- Indiana, Wisconsin, Iowa, Missouri, Minnesota, Kansas, South Dakota
- Chicago, Milwaukee, St Louis, Minneapolis, Detroit, Indianapolis, Cincinnati, Louisville, Kansas City



Proposed Development

RV & Tent Sites

Rentals

Day Use

Marina



FHU Sites - Industry's most demanded sites

Increased ADR

Few exist in market

Competitive advantage



Tree House Rentals – Over 10 million households experienced a glamping stay in 2022



River Boat Rentals – The river boats will provide a unique hospitality experience and substantially increase occupancy and related revenue.

Floating Water Play



Refurbish Existing Amenities





RVing and boating go together



- ❖ Share buildings and amenities
- ❖ Share employees
- ❖ Boaters need a place to stay
- ❖ RVers need a place to put their boat in water
- ❖ Coordinating renovation of marina and new campground development



Operating Season: April through October

Campground Development

Site Types	Number of Sites Year 1	Number of Sites Year 2	Number of Sites Year 3	Number of Sites Year 4	Number of Sites Year 5
FHU RV Sites	199	199	199	199	199
Primitive Tent Sites	20	20	20	20	20
Tree Houses	8	12	16	20	26
River Boats 1 BR	2	3	4	5	6
River Boats 2 BR	3	7	11	15	19
Total available sites	232	241	250	259	270

Overall Campground Development Cost:

\$18.1 million



Key Development Criteria

- ❖ 15 Criteria with 150 total points
- ❖ One negative criteria which is addressable
- ❖ Only 2 neutral both addressable
- ❖ Total score 128
- ❖ Very strong development potential

Sunset RV Park & Marina, Rock Island, Illinois				
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Potential flooding			3	Manageable with enough warning to prepare. Development will plan for annual Spring flooding.
*1-10 rating system, 10 best				

Financial Summary

Campground Consulting Group LLC typically expects profitability between years 2-5 for a new RV park development. Even with conservative modelling, using a minimum site density, the proposed development has a positive net operating income from year 1 and a positive cash flow in year 3.

Executive Summary

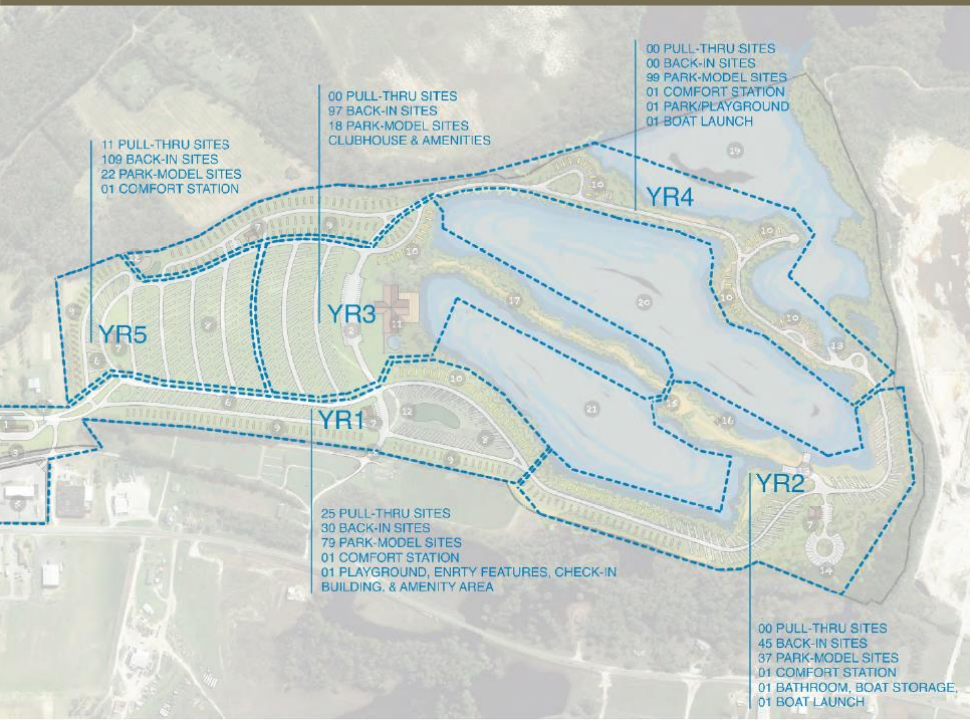
- The current need for FHU RV and camping sites and glamping and the overall increasing demand for RV sites for vacation/leisure and extended-stay camping for a variety of reasons in this area and throughout the country.
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Executive Summary

- The proximity of the property to attractions, shopping, restaurants, and other services.
 - Whitewater Junction Water Park is 2.4 miles from Sunset RV Park & Marina.
 - The proposed property is on the Mississippi River with boating access.
 - John Deere Pavilion is 5 miles from the property.
 - 2 city owned golf courses within 5 miles of the property.
 - Bally's Quad Cities Casino and the Quad Cities Botanical Gardens are 3 miles from the property.
 - Back Water Gamblers Water Ski Show is 6 miles from the property.

Executive Summary

- The population within 200 miles of the property is over 8.3 million households with almost 7.8 million non-RV owning households who will be attracted to river boat and tree house rentals and over 612,000 RV owning households who will be attracted to spacious and modern RV sites.
- There are already amenities at Sunset Park that may be utilized or refurbished during development.
- Opportunity to add inflatable water play in Lake Potter as an attraction for the park and marina guests and a profitable day use attraction for the city. Creating place making spots for Rock Island residents & tourists.



Next Steps

1. Develop Master Land Plan for marina, campground, and day use attraction.
 1. Bubble Diagram
 2. Sketch Plan
 3. Phasing Plan
2. Revise Financial Model
 1. Incorporate Sketch Plan
 2. Incorporate phased development



**Campground
Consulting Group™**

RV PARK AND CAMPGROUND SPECIALISTS

www.CampgroundConsultingGroup.com

Feasibility report is available upon request.

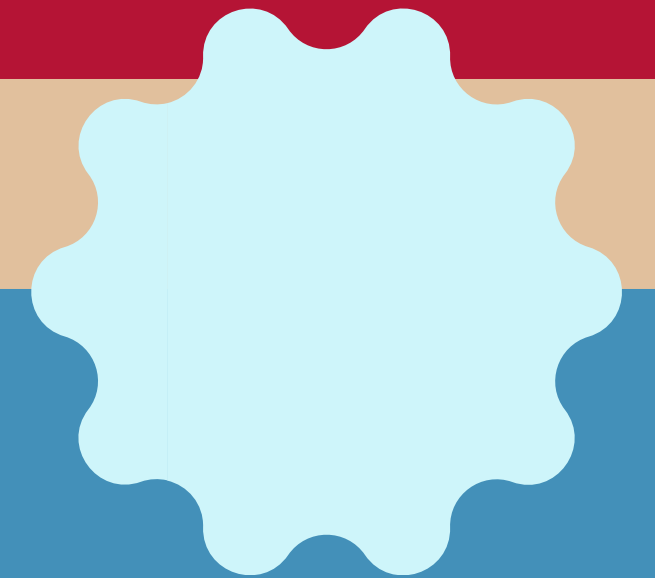
Jayne Cohen, President

jcohen@campgroundcounselinggroup.com

Sharon Weber, Lead Consultant

sweber@campgroundconsultinggroup.com

This presentation was prepared with information from:
RVIA.com, OHI.org, The 2023 North American Camping
& Outdoor Hospitality Report sponsored by
Kampgrounds of America, Inc.



01/01/2023 – 12/31/2023

ROCK ISLAND PUBLIC LIBRARY ANNUAL REPORT

In accordance with 75 ILCS 5/4-10



REQUIRED CONTENTS



Revenues



Expenditures



Collections



Property



Partnerships



Fund Requirements



Liabilities



Accumulations

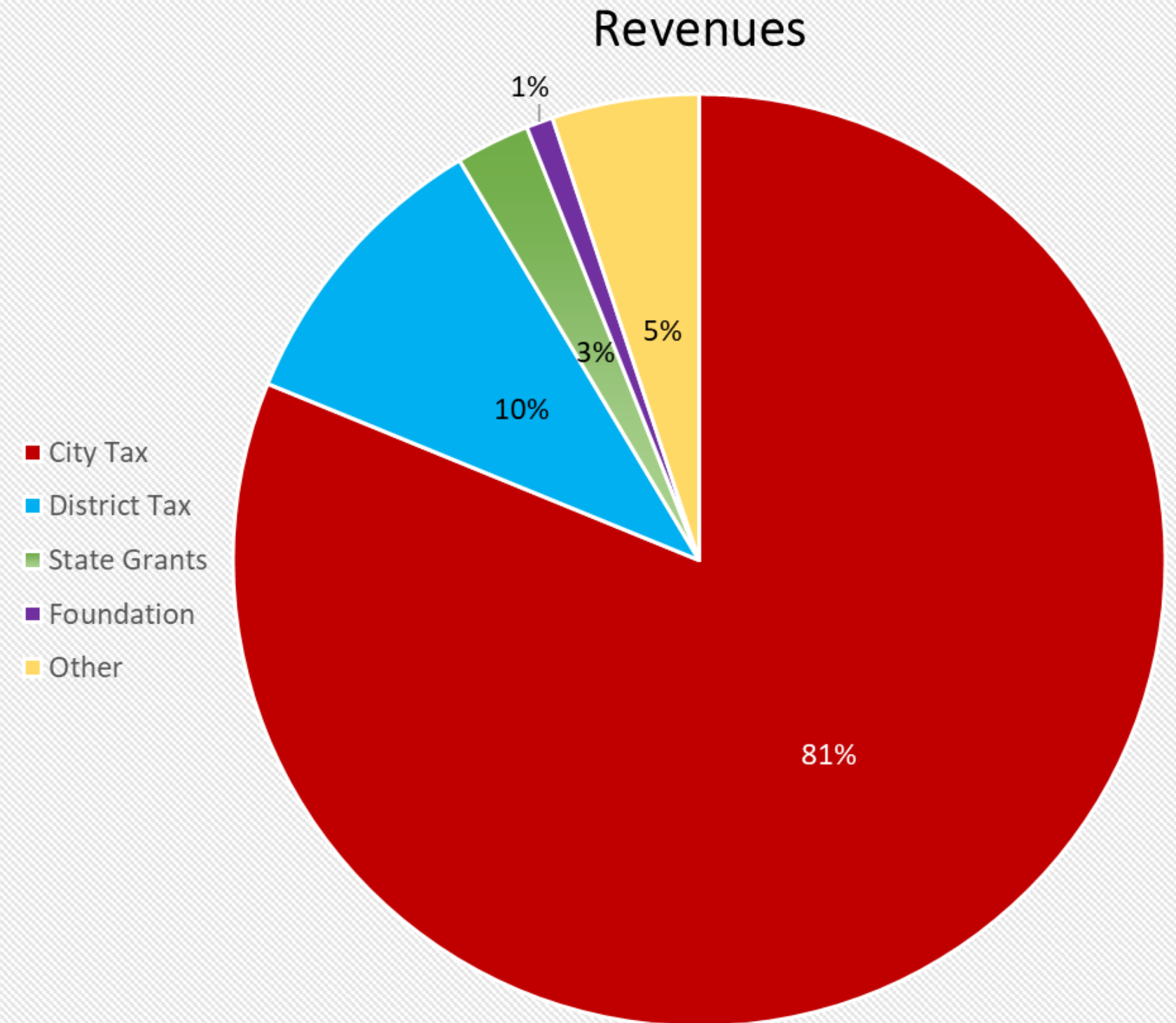


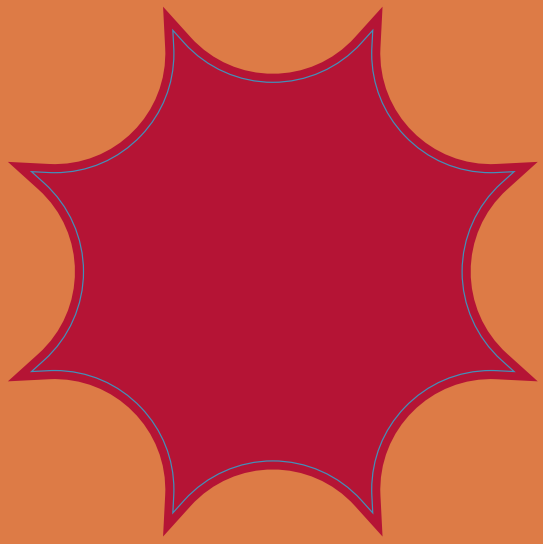
Stats of Note



LIBRARY REVENUE IN *2023*

\$2,836,148





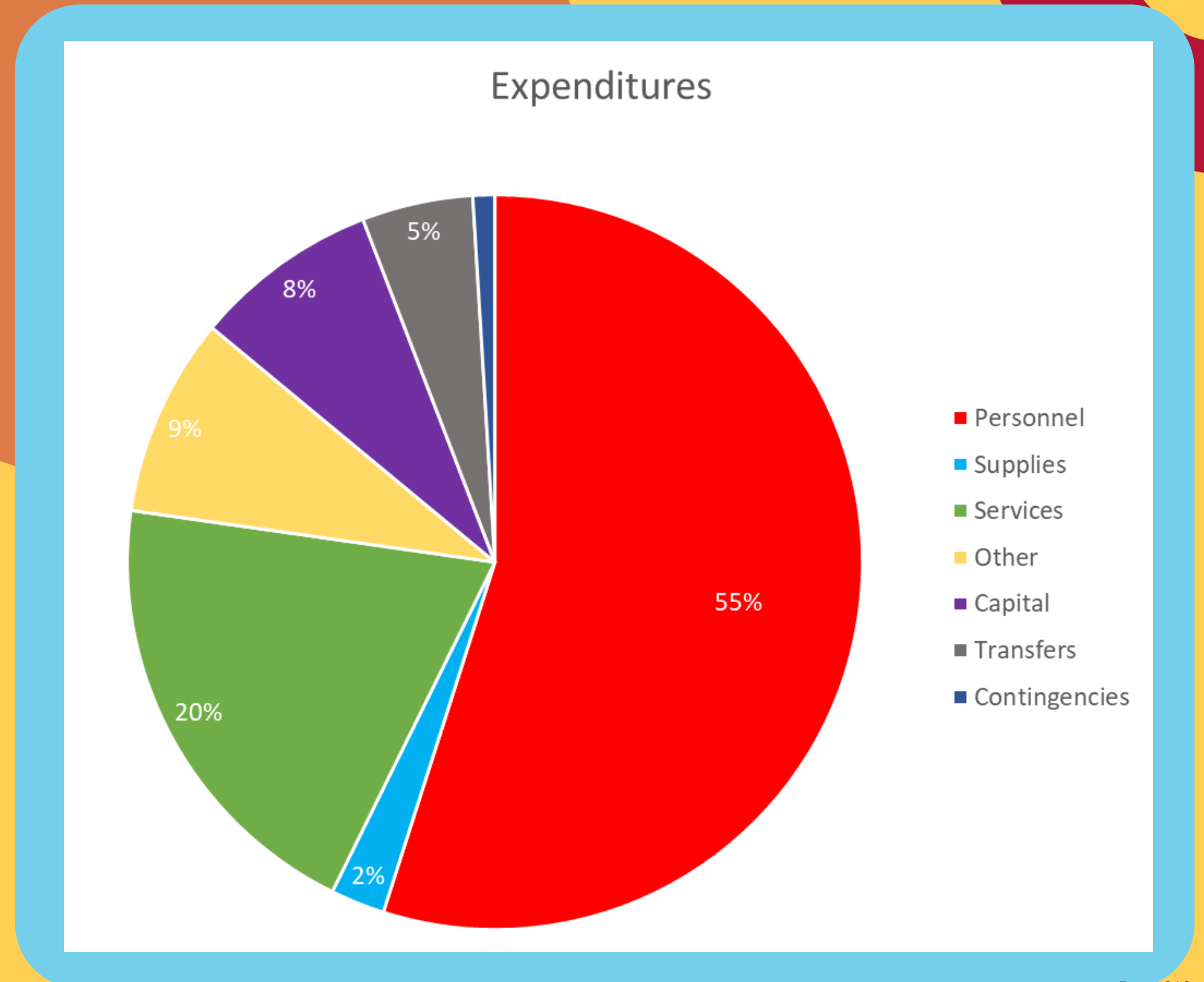
LIBRARY EXPENDITURES IN *2023*

Operational

\$2,955,704

Capital

\$256,156



COLLECTION STATS

Physical Materials
Owned:
161,892

Physical Materials
Circulated:
154,470

Downloading &
Streaming Platforms:
8

Electronic Materials
Circulated:
113,699

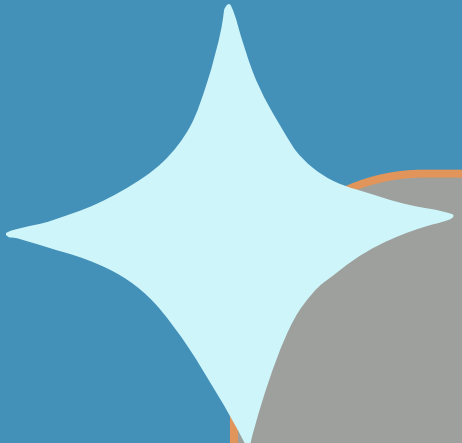


New Parking Lot provides more accessibility to Downtown Library!

PROPERTY ACQUISITION

In 2023, the Board voted to purchase the parking lot adjacent to the south entrance.

Staffers are already working on a plan for the space to enhance the Downtown Library!

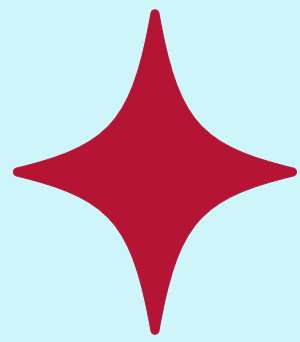


Maximizing
community reach
by partnering with
more than 50+
organizations each
year!

Total LIVE and
VIRTUAL offsite
programs topped
354 in CY 2023, with
11,613 attendees at
partner locations.

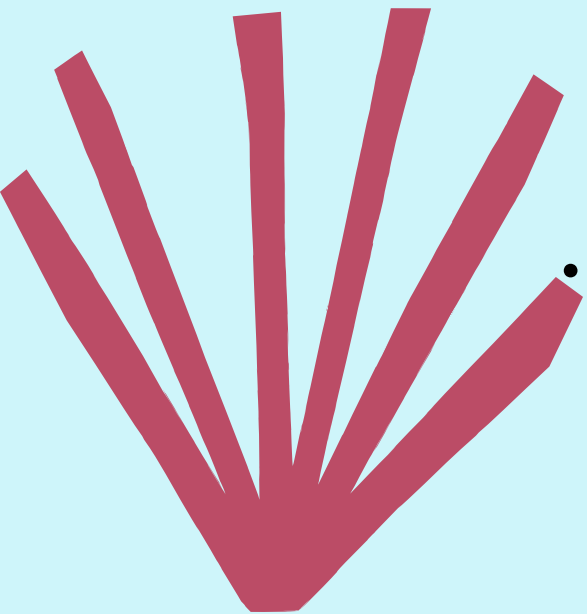
The result?
Increased library
cardholders and
literacy
opportunities for
all!

PARTNERSHIPS



PARTNERS

- Rock Island-Milan School District
- Spring Forward Learning Center
 - MLK Community Center
- Rock Island Parks and Recreation
 - YWCA Quad Cities
- AOK (All Our Kids) Early Childhood Network
 - Clock, Inc.
 - EveryChild
- Rock Island HeadStart & Preschool
 - Skip-a-Long Childcare Centers
- Kinderkids Child Development Center
 - Community Health Care Clinic
 - Midwest Writing Center
 - Quad City Botanical Center
 - Two Rivers YMCA
 - Fort Armstrong
 - Coventry Apartments
 - Friendship Manor
- St. Anthony Nursing & Rehab Center
 - Rotary Club of Rock Island
 - Rock Island Kiwanis Club
 - Goodwill of the Heartland



- Illinois Public Libraries Present
- Reaching Across Illinois Library System
 - PrairieCat Online Consortium
- Augustana College & Archives
 - Bettendorf Public Library
 - Boys & Girls Club
 - Davenport Public Library
 - Geneseo Public Library
 - Jordan Catholic School
 - Moline Public Library
- Army Sustainment Command
 - ARC of the Quad Cities
- Black Hawk College Adult Learning Center
 - Black Hawk College Career Center
 - Black Hawk State Historic Site
 - Family Resources
 - Heart of Hope Ministries
- Jewish Federation of the Quad Cities
- Out of Darkness Holocaust Remembrance
- Progressive Action for the Common Good
 - Quad City Arts
- Rock Island Horticulture Club
 - Rocky Resource Room
 - Seton Catholic School
- US Army Corps of Engineers
 - WIU – QC Campus

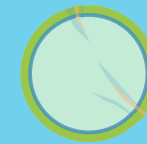




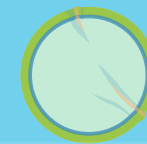
FUND REQUIREMENTS

The Board of Trustees respectfully
requests the following tax levy for
CY 2025:

\$ 2,652,859



**The dollar amount
represents a 7% increase,
which should provide enough
funds for a balanced budget.**



**A tax levy rate increase may
not be necessary, pending a
favorable EAV.**



**Keeping up with inflation
and maintaining a high level
of service is of utmost
importance.**

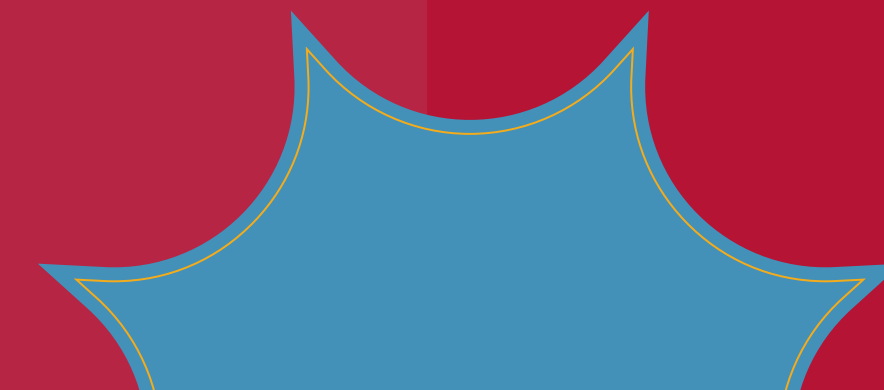


ACCUMULATIONS & LIABILITIES



90-Day Reserve Fund: \$880,958.39
Assigned Capital Fund: \$995,223.41 *

**Note: This will not be accurate until after the City Audit is complete. This fund balances any shortfalls and pays for unexpected projects.*



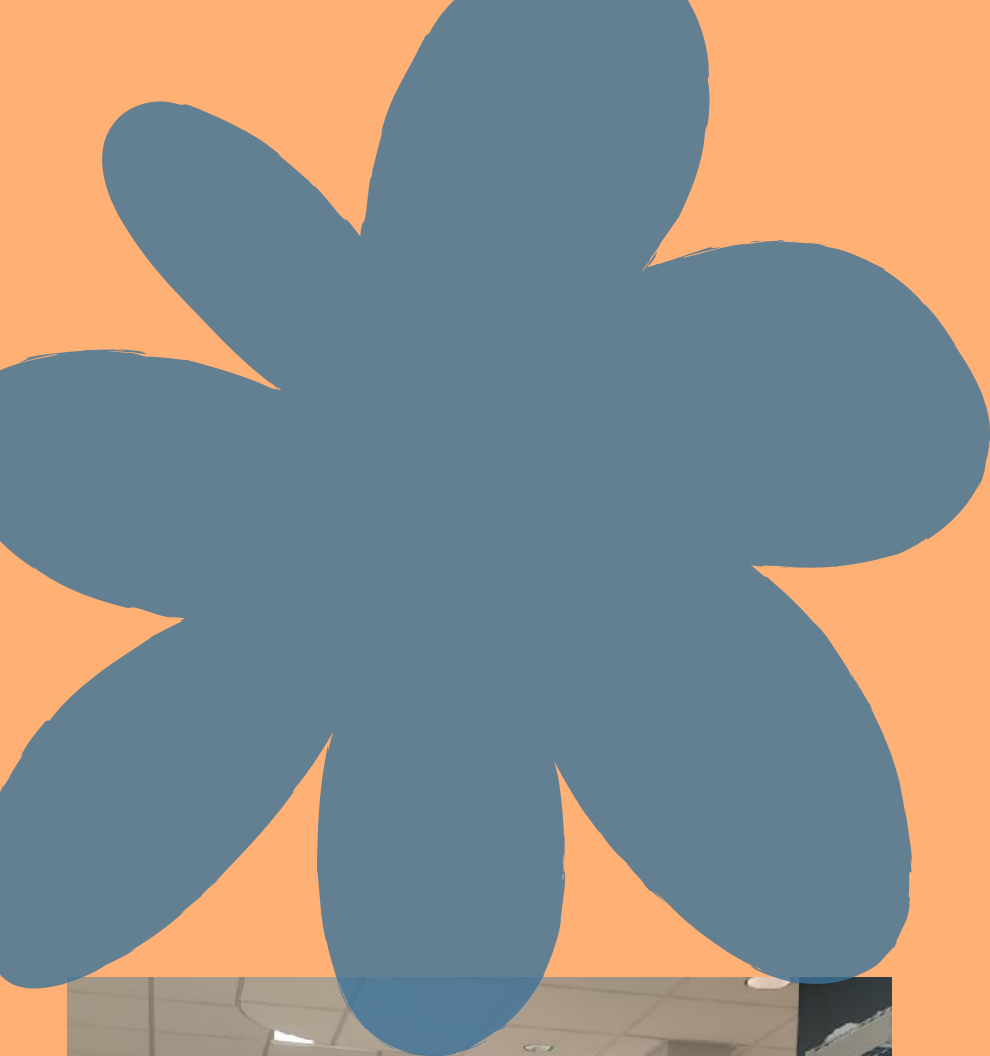
HVAC & Lighting Upgrades

The Library owes money on the JCI project, which included HVAC and lighting upgrades. The annual payment is roughly \$90,000 and the amount owed is a little over \$1 million.



Watts-Midtown Branch

Fundraising is winding down for the Watts-Midtown Branch. We continue to solicit donations, but as of the end of CY 2023, the Library still owes \$379,155. This final payment will not come due within the next two years. The RIPL Foundation is instrumental in helping us meet this fundraising goal.



STATISTICS

<u>Stat Category</u>	<u>Total</u>	<u>Percent Increase</u>
Patron Visits	119,512	32%
Registered Borrowers	15,736	14%
Print Circulation	120,686	10%
Electronic Circulation	114,220	33%
Online Resources	44,008	41%

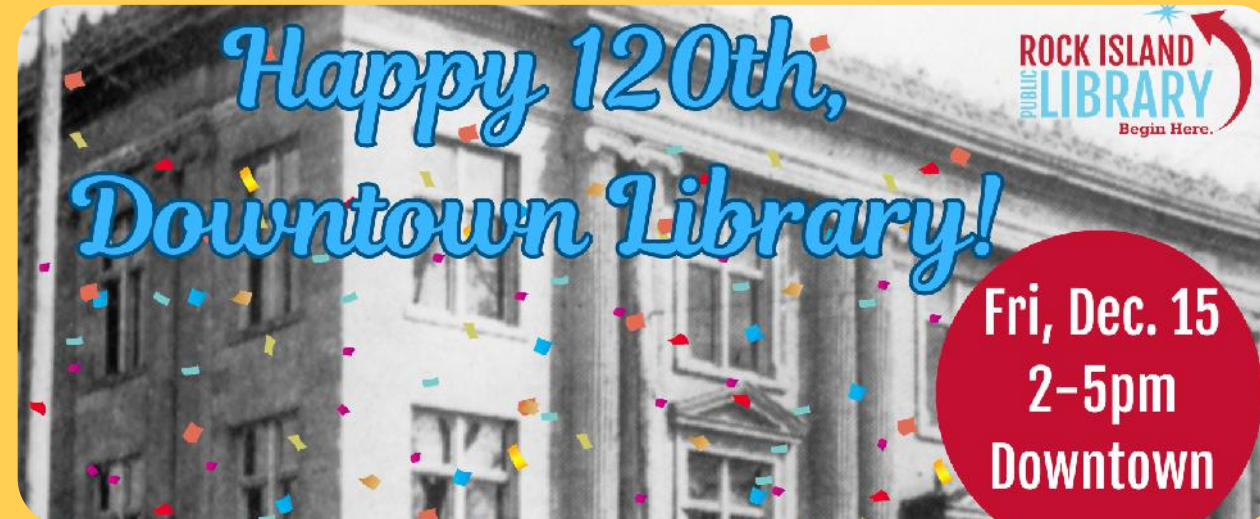
STATISTICS

<u>Stat Category.</u>	<u>Total</u>	<u>Percent Increase</u>
Reference Help	35,649	36%
Services Used	1,214,934	101%
Program Attendance	59,316	12%
Patron Contacts	261,840	14%
Volunteer Hours	338	190%



YEAR OF THE LIBRARY

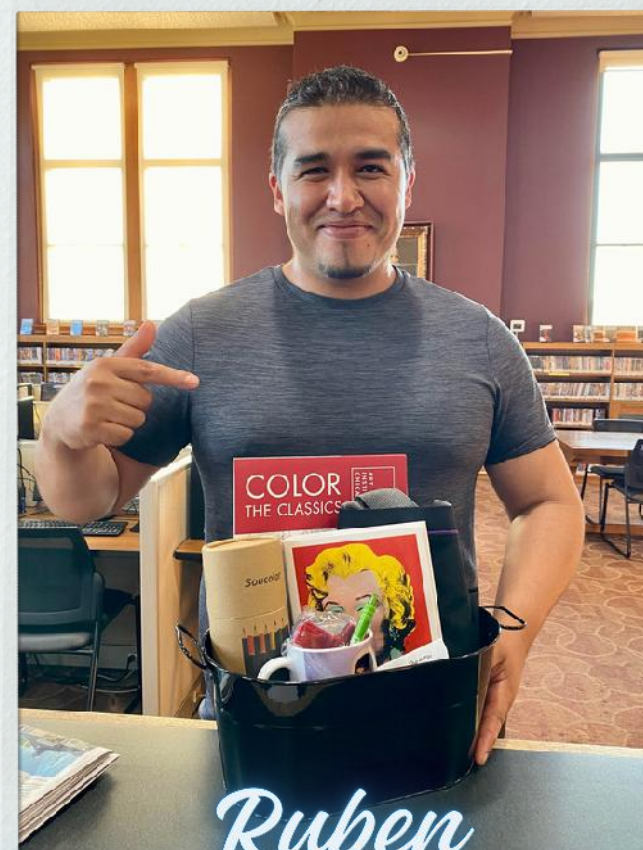
November 2022 – November 2023



PROGRAMS FOR ALL AGES AT ALL LOCATIONS



*Bringing Back the
Booksales!*



*Ruben
Wins the Summer
Reading Basket!*





Weston Goes Viral!

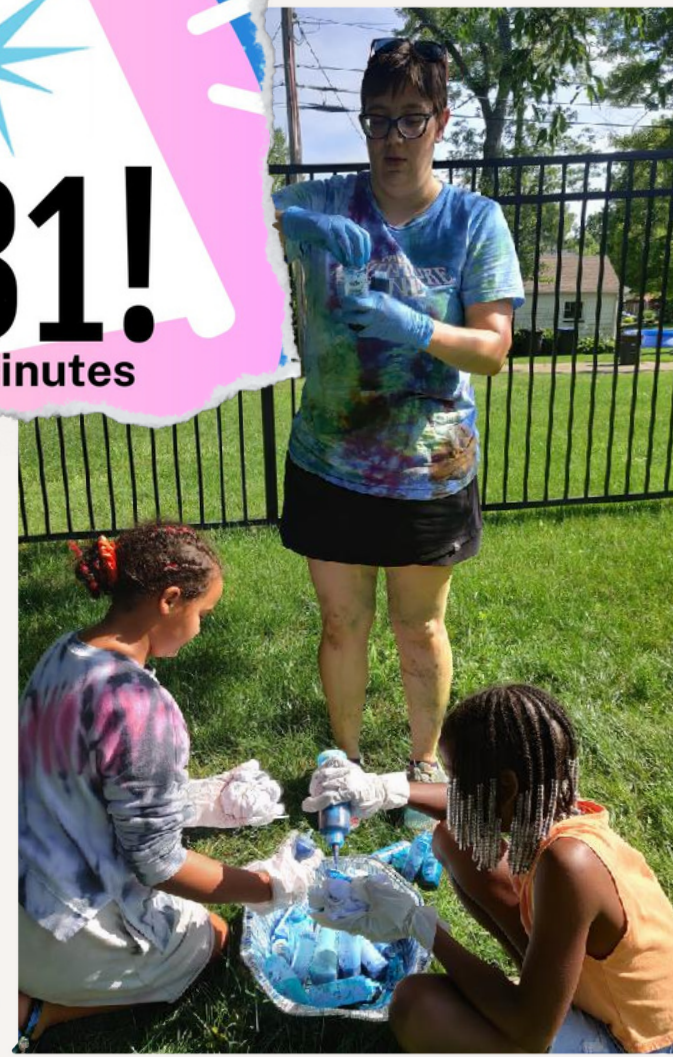


SUMMER READING KICKOFF!

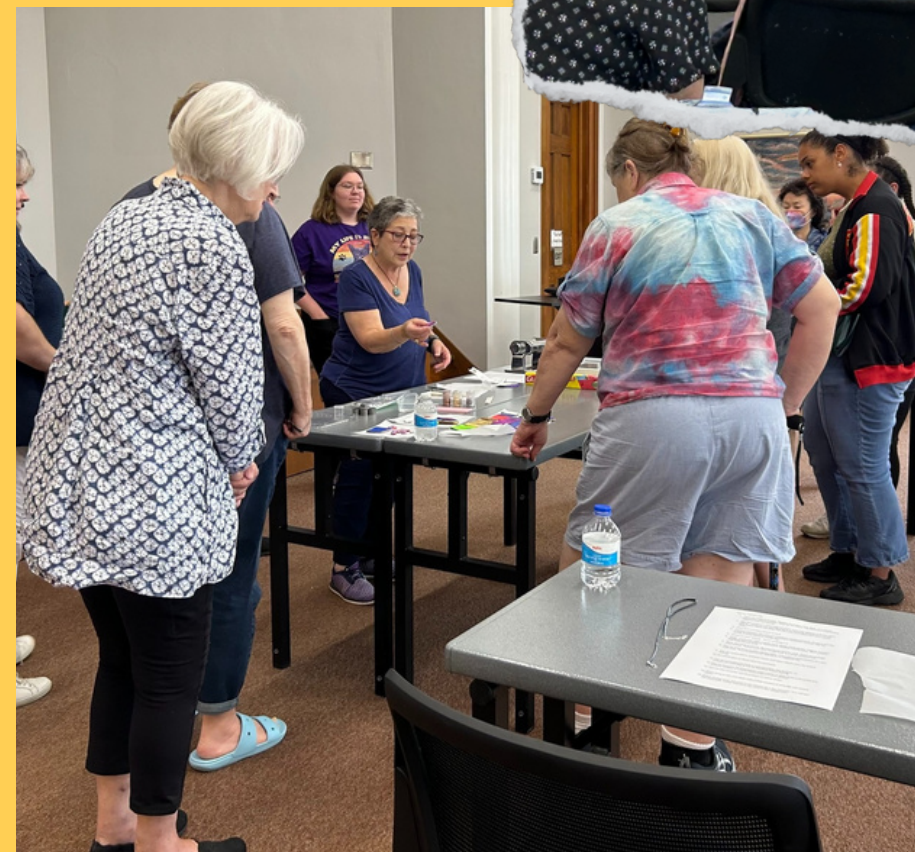


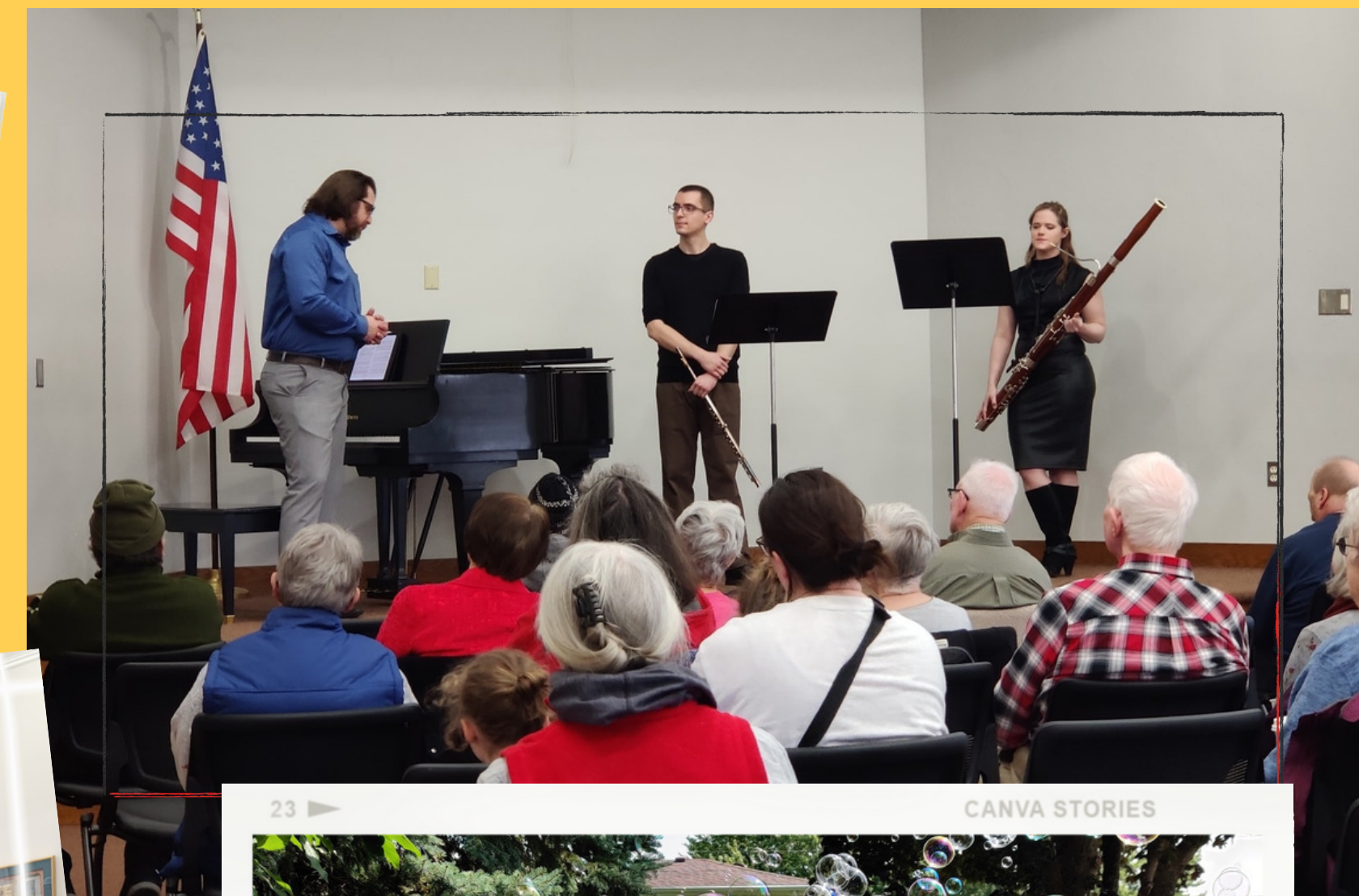
Summer Reading Total!

RIPL
455,681!
minutes



PROGRAMS FOR ALL AGES AT ALL LOCATIONS





OFFSITE OPPORTUNITIES



RIPPL & MPL
Staff Day

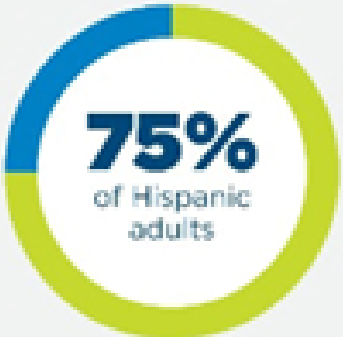
PICTURES DON'T ALWAYS TELL THE WHOLE STORY

- Referrals for people in crisis
- Parents learning from other parents
- Seniors finding companionship during library programs
- Teens feeling they belong somewhere and have a voice
- Speech pathology sessions in a judgment-free zone
- Inspiring kids through opportunity and encouragement
- Families learning and playing together
- Supervised visits in a safe, trusted area
- Bridging social isolation with homebound material delivery
- Finding jobs via library computers and resume software
- Being a safe place for the unhoused



BATTLING THE NEW HEALTH EPIDEMIC: LONELINESS

People from underrepresented racial groups are more likely to be lonely.

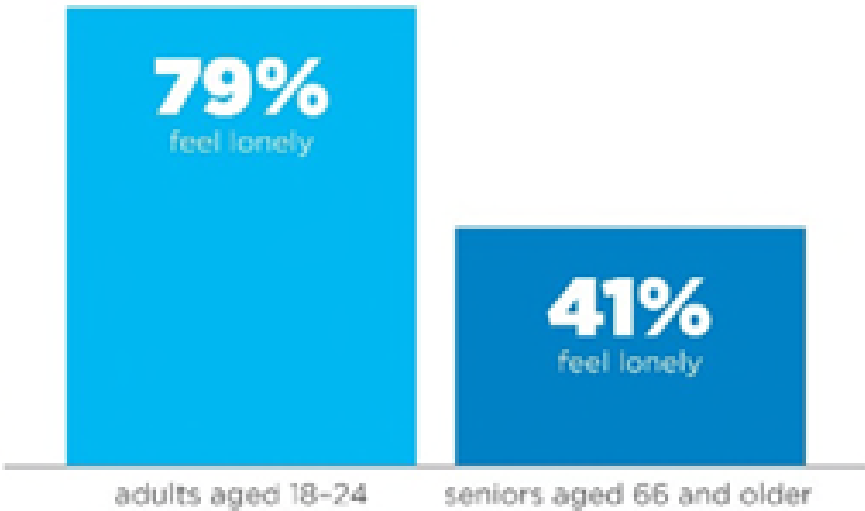


People with lower incomes are lonelier than those with higher incomes.

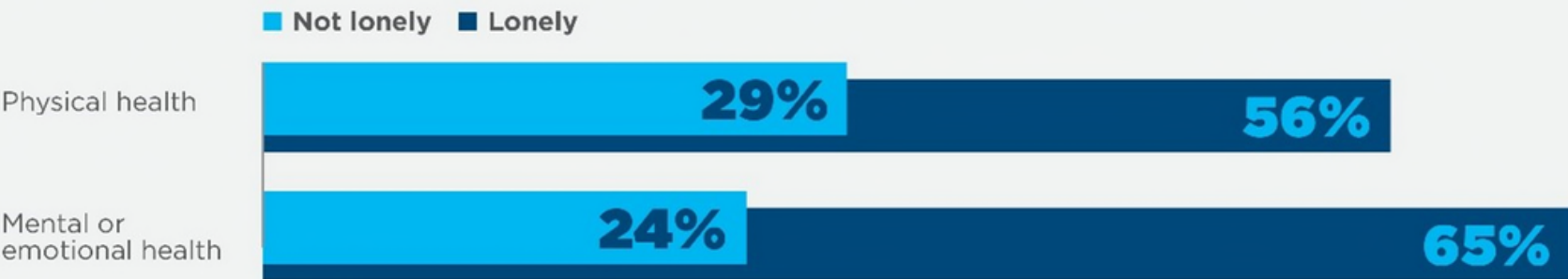
63%
Nearly two-thirds of adults earning less than \$50,000 per year are classified as lonely.

72%
Almost three in four people who receive health benefits through Medicaid are classified as lonely.

Young adults are twice as likely to be lonely than seniors.



Percentage reporting their health impacted work activities



Source: Morning Consult survey of 2,496 U.S. adults, December 13–19, 2021; commissioned by Cigna Corporation.

Loneliness costs employers more than **\$154B a year** in lost productivity due to absenteeism.

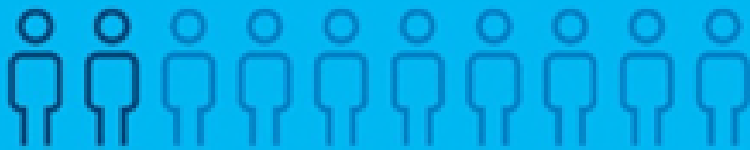


Sources: Analysis of Cigna Loneliness Index data for employed respondents (5,927 workers); productivity cost and employee population figures from U.S. Bureau of Labor Statistics, Employer Costs for Employee Compensation, 2020, and U.S. Bureau of Labor Statistics, Current Population Survey, 2020.

More than twice as many younger adults as older adults experience feeling left out.



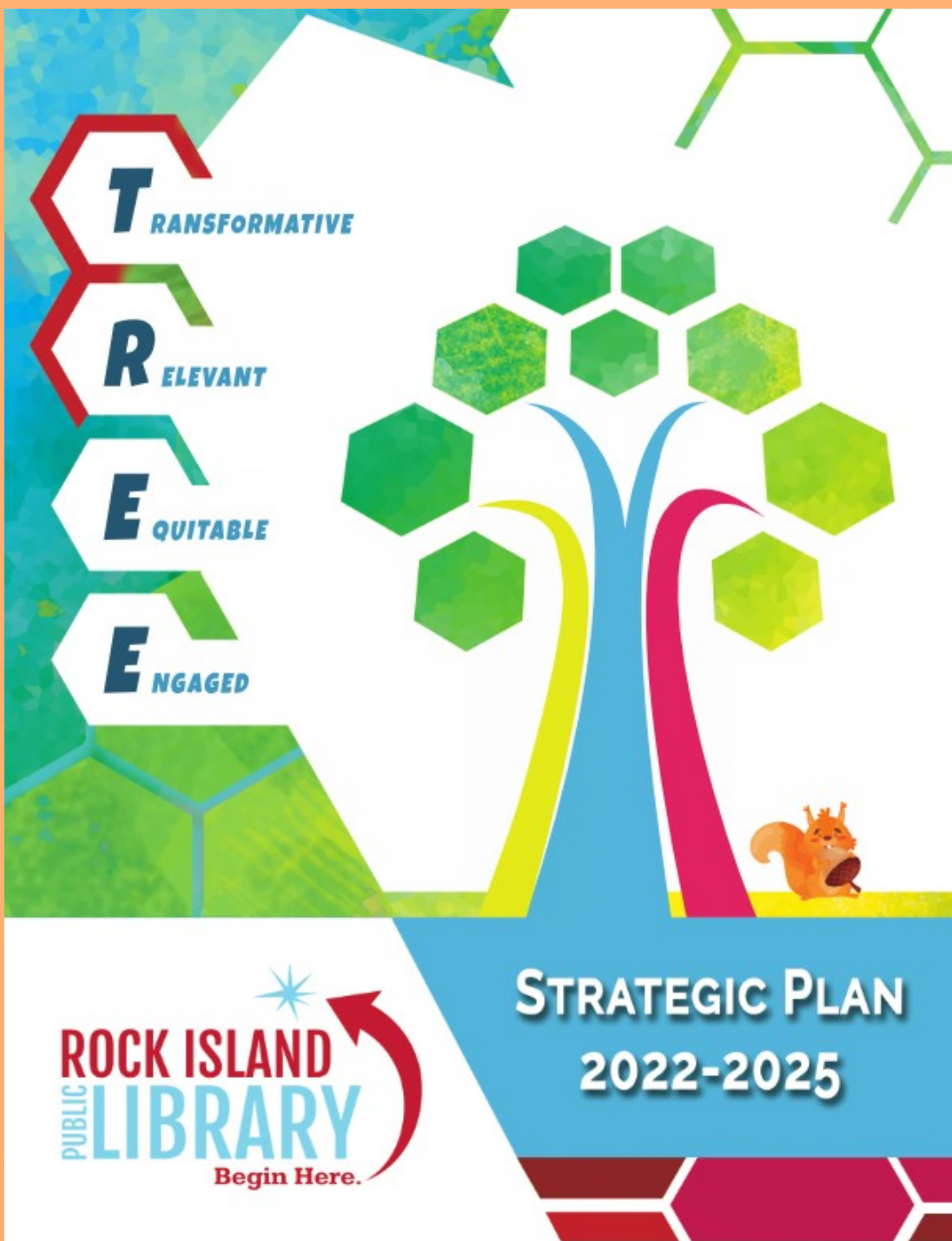
42% of people aged 18-34 report always feeling left out



16% of people aged 55 or older report always feeling left out

About this report: Commissioned by Cigna Corporation, Morning Consult conducted a survey of 2,496 U.S. adults from December 13-19, 2021. Results have an unweighted margin of error of ± 2 percentage points. Comparisons are made to the 2020 Cigna Loneliness Index survey data from an Ipsos survey of 10,400 U.S. adults in July 2019. Comparisons are also made to the 2018 Cigna Loneliness Index survey data from an Ipsos survey of 19,000 U.S. adults in February 2018.

THE FUTURE OF RIPL: STRATEGIC PLANNING IN 2024!



- Help build and reinforce social connectivity at work and in the community. Prioritize activities that bring people together.
- Bring the importance of diversity, equity, and inclusion to life. Build and reinforce an environment that is open to meaningful dialogue and understanding, an environment that is safe and welcoming for everyone, and an environment that is fair and equitable.
- Capitalizing on the library as an economic development tool.

COMING IN MARCH:

COMMUNITY SURVEY
COMMUNITY CONVERSATIONS
STAKEHOLDER DISCUSSIONS

YOUR LITERACY INVESTMENT IN DOLLARS

Value of Library Services
Used in 2023:
\$5,431,524.05



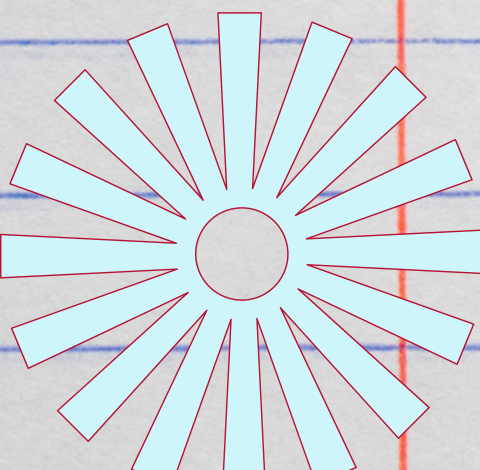
Saving our Public
\$ 2,475,820.05

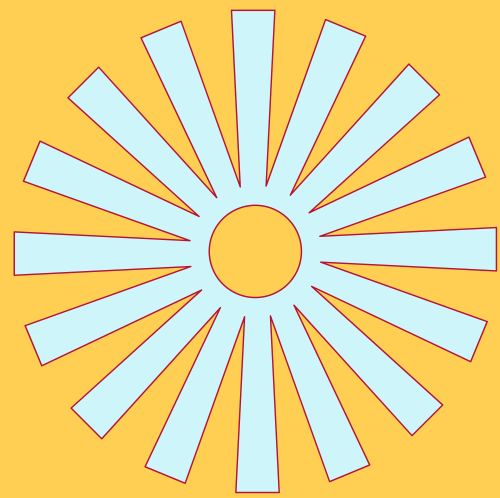
Dear Rock Island Public Library,

Or, whoever reads the emails. I just made a donation to the Foundation, not a lot and I wish it could be bigger. Though I have not been to Rock Island in quite a few years, your library has a special place in my heart. During my childhood in the 1950's and 60's, life was not good. My home was not a safe or happy place, and there was really no one I could turn to. But the Library was the safest place I knew. When I got bullied at school, or when I was afraid to go home, the library was there. The many happy times I spent at the big wooden tables in the reading room, as it was then, were like heaven to me.

I found that books gave me hope, and I got inspired with a lifelong love of books and libraries. If there is a heaven, library people will go there :).

Best wishes for the future of this and all other libraries!





THANK YOU



Investing in literacy is investing in Rock Island's future.

