



Outdoor Hospitality Trends:

Insights from the Camping and
Outdoor Hospitality Report

Presented by:
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KOA Inc.'s Vision

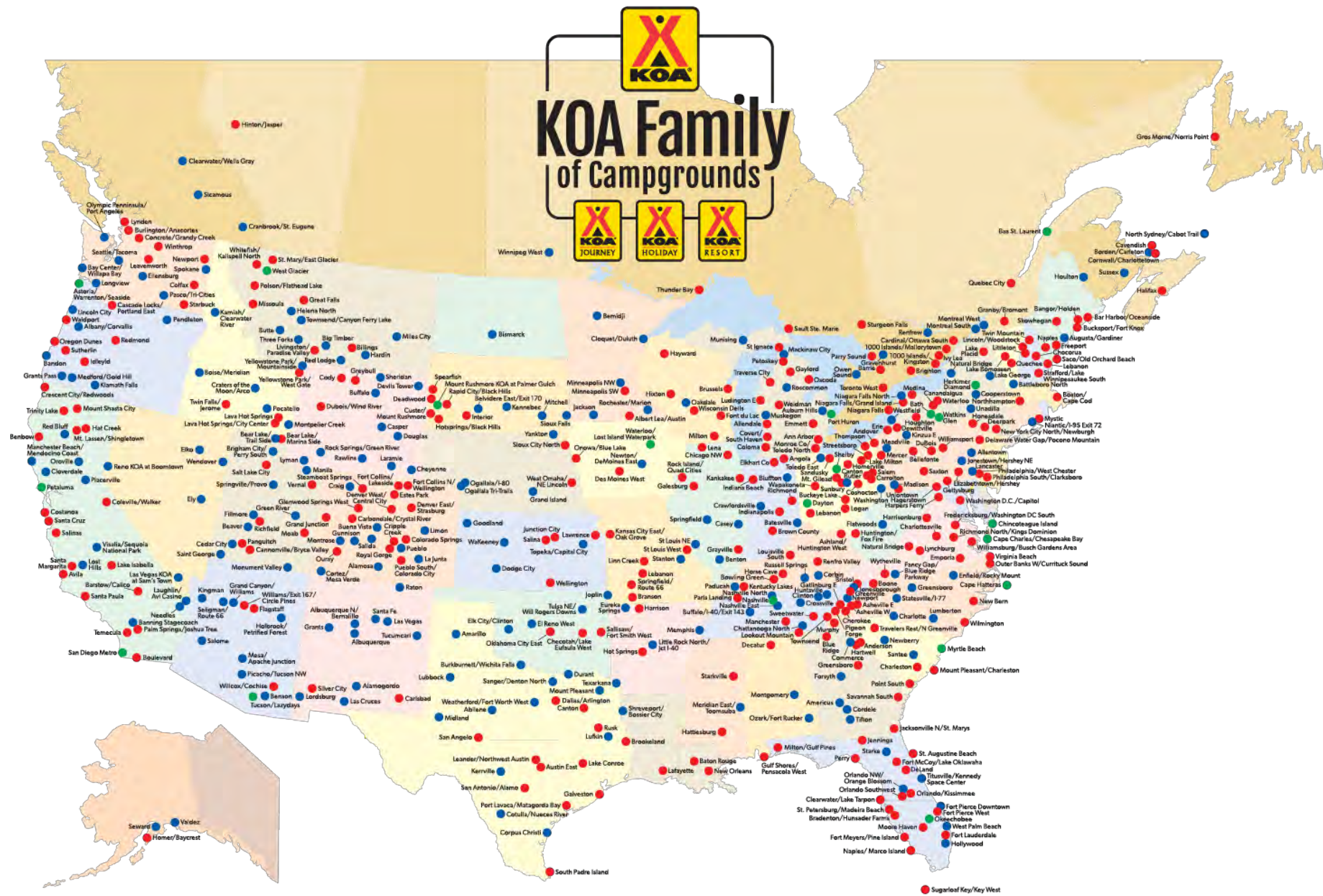
World leader in defining and advancing the business of Outdoor Hospitality.



A white KOA Raptor RV is parked in a wooded area at dusk. The RV's interior lights are on, and its exterior lights are also illuminated. It is parked on a gravel or dirt area. In the foreground, a river flows over rocks, creating a white-water effect. The background is filled with dense green trees. The sky is a deep blue, indicating twilight. The overall scene is peaceful and scenic.

Connecting People to the
Outdoors and Each Other







KOA Family of Campgrounds



RV Sites



Tent Sites



Cabins



Unique Accommodations





TERRAMOR®

OUTDOOR RESORT // BAR HARBOR



14 Campgrounds in South Dakota

Badlands/White River KOA Holiday
Interior, South Dakota

Belvidere East/Exit 170 KOA Journey
Midland, South Dakota

Custer/Mount Rushmore/Black Hills KOA Holiday
Custer, South Dakota

Deadwood/Black Hills KOA Holiday
Lead, South Dakota

Hill City KOA Holiday
Hill City, South Dakota

Hot Springs SD/Black Hills KOA Holiday
Hot Springs, South Dakota

Kennebec KOA Journey
Kennebec, South Dakota

Mitchell KOA Journey
Mitchell, South Dakota

Mount Rushmore KOA Resort at Palmer Gulch
Hill City, South Dakota

Rapid City/Black Hills KOA Holiday
Rapid City, South Dakota

Sioux City North KOA Holiday
North Sioux City, South Dakota

Sioux Falls KOA Journey
Sioux Falls, South Dakota

Spearfish/Black Hills KOA Holiday
Spearfish, South Dakota

Yankton/Missouri River KOA Journey
Yankton, South Dakota





 **Mount Rushmore KOA at
Palmer Gulch Resort**





 ***Rapid City/Black Hills KOA
Holiday***





Camping and Outdoor Hospitality Report

> Camping and Outdoor Hospitality Report

- 10th year in publication
- Industry-leading camping and outdoor hospitality research
- koa.com/north-american-camping-report



2024 Camping & Outdoor Hospitality Report TOP LEVEL OVERVIEW

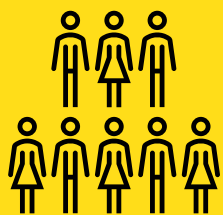
Tenth Annual Survey | Conducted by Cairn Consulting Group | Sponsored by Kampgrounds of America, Inc.

Leisure Trips in 2024

*Among travelers,
1/3 of all leisure travel was camping.*



Camping Population



53.6 million people
camped in 2023

+28% vs. 2019

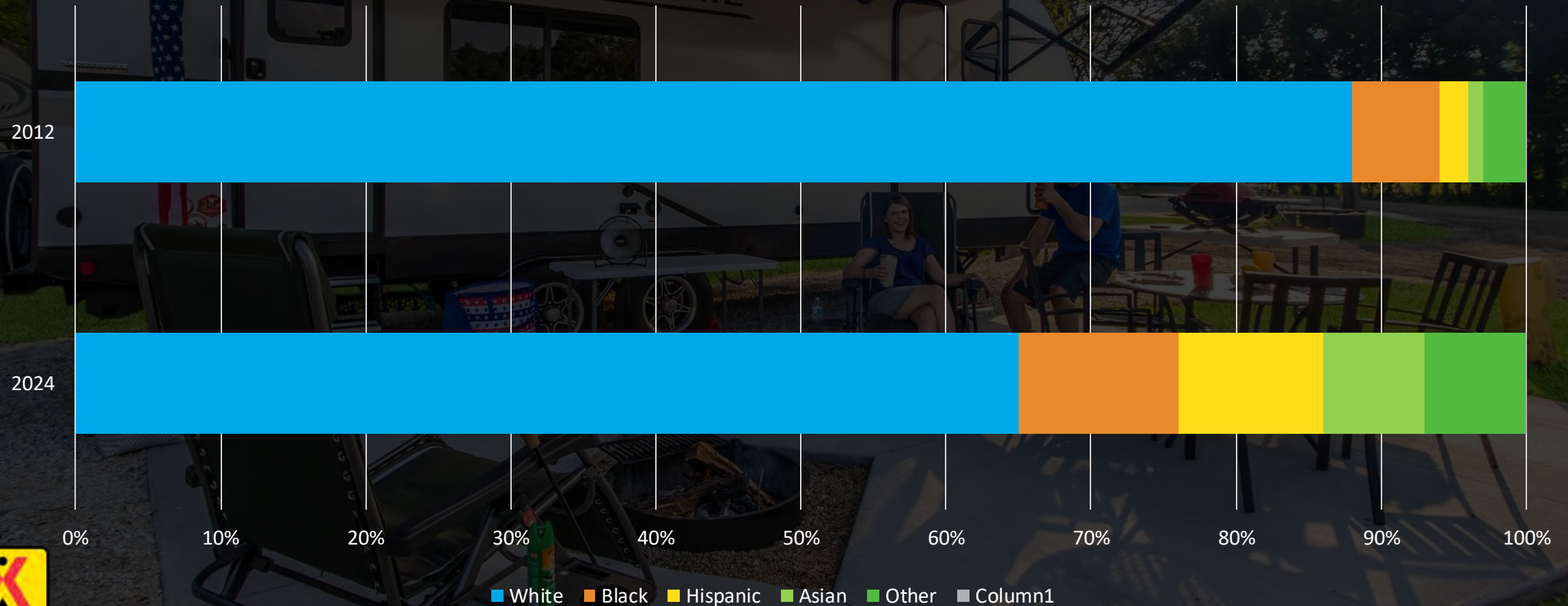
Source: KOA, Inc. Research



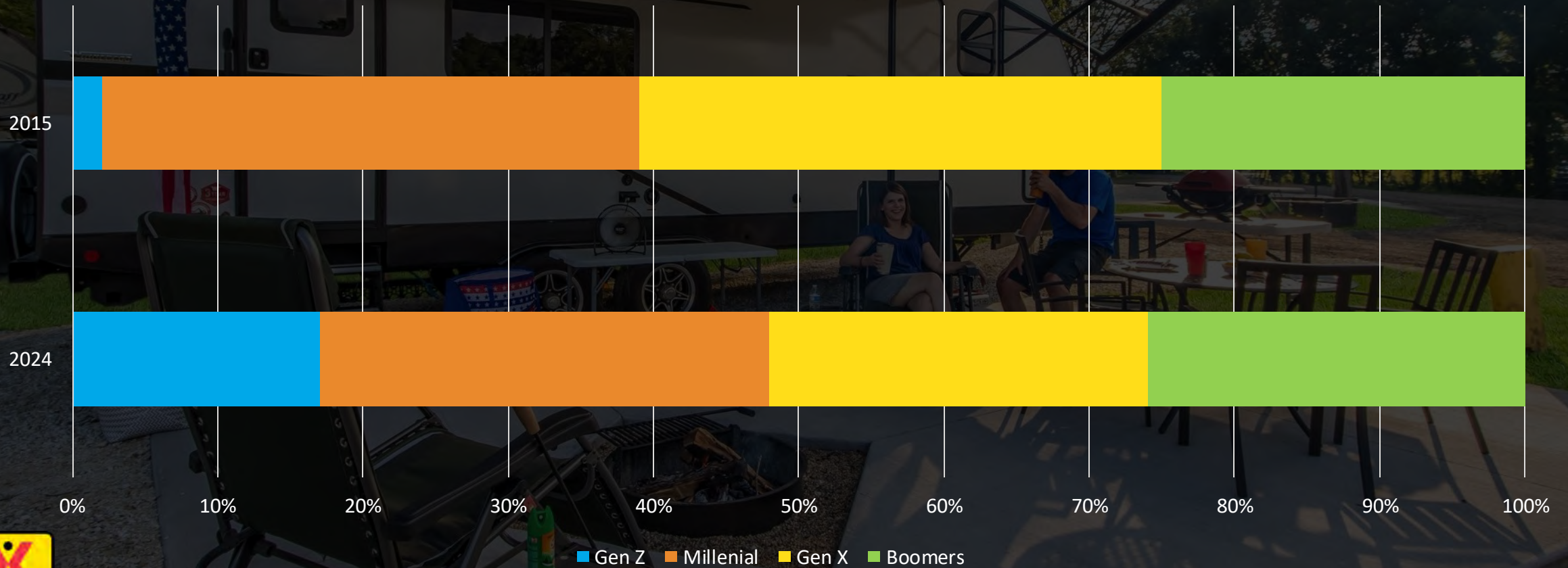


Changing Demographics

Demographics by Race



Demographics by Age



> Who Camps



58%

camp with a
spouse or partner



41% HHI \$50k or less

26% HHI \$100k+



69%

prefer locations
with full-service
amenities



How People Camp



52% Tents



26% RV

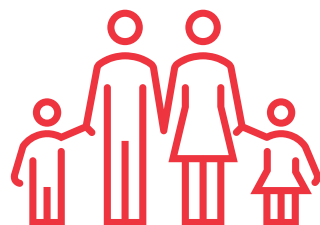


21% Cabins/Glamping



Source: KOA, Inc. Research

> Camping Families



52% camp with kids (vs. 35% in 2012)



Source: KOA, Inc. Research





New
Campers

Camping Population



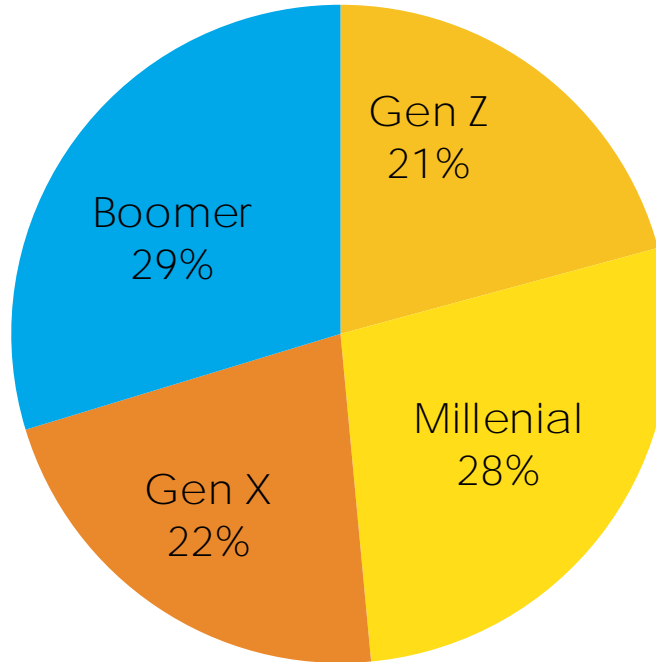
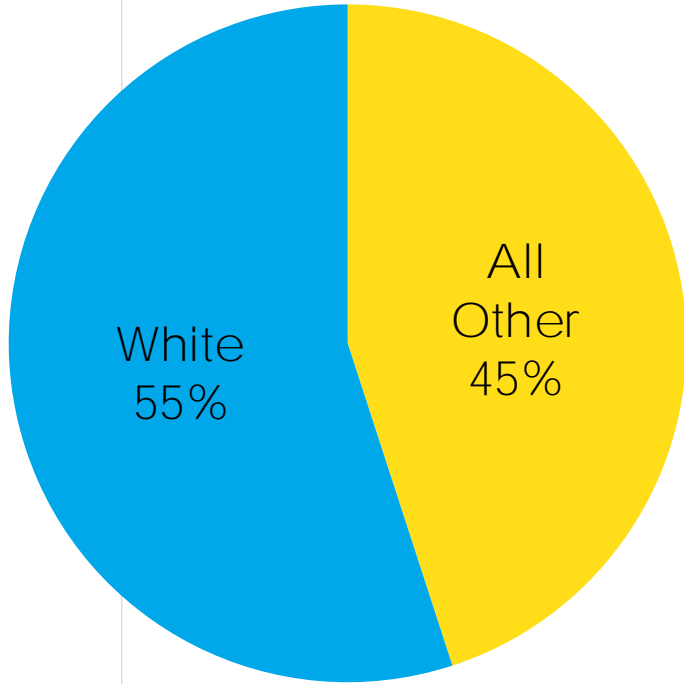
44%

of campers are **new to camping** in the past few years

Source: KOA, Inc. Research



> Spotlight on the New Camper





New Campers: Diverse, Suburban, No Kids

64%

Do not have
children in the
household

1 in 4

Have household
income of \$100k
or higher

67%

Are from
suburban or
rural areas

45%

Are from diverse
backgrounds





New Campers: Why Retention Matters

- Spend more in local communities
- Most satisfied campers
- Participate in “blended travel”
- Travel farther from home
- Amenity-driven
- Travel in groups





Economic Impact



High Economic Contribution

The RV and camping industry has a
\$140 billion
economic impact (+23% in past 3 years)

Campers spent
\$52 billion
in communities last year while camping



Source: KOA, Inc. Research



> Outdoor Hospitality Economics

\$156

Average daily
spend in local
communities

40%

of travel spending
goes to dining at
local restaurants

\$1.2T

Output generated from outdoor
hospitality/recreation



Source: 2024 KOA Camping and Outdoor Hospitality Report + ORR

> The South Dakota Camper

30%

are boomers –
SD leans older;
only 13% is
GenZ

+10%

Larger RV
population
than other
states

\$132

Daily spend per person in communities
outside of accommodations



Source: KOA, Inc. Research



During Times of Economic Uncertainty

55%

Feel camping is a more affordable way to travel

44%

Will take fewer trips of other types and replace with camping



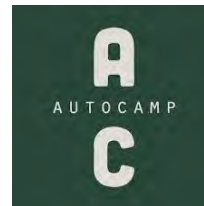
Source: KOA, Inc. Research

> Hotels Investment in Outdoor/Camping

Marriott
INTERNATIONAL

Postcard
CABINS


Hilton
HOTELS & RESORTS



HYATT®



Source: KOA, Inc. Research



Experiences

Top 5 Travel Goals: All Leisure Travelers

Slowing Down

simply being in the moment & enjoying the experiences

Recharge

feeling better after vacation, than before

Variety

having a variety of experience offerings

Bucket List

ability to check-off several items from the list

Spontaneous

not over planning, allowing time for spontaneity



Drivers to a Destination - Campers



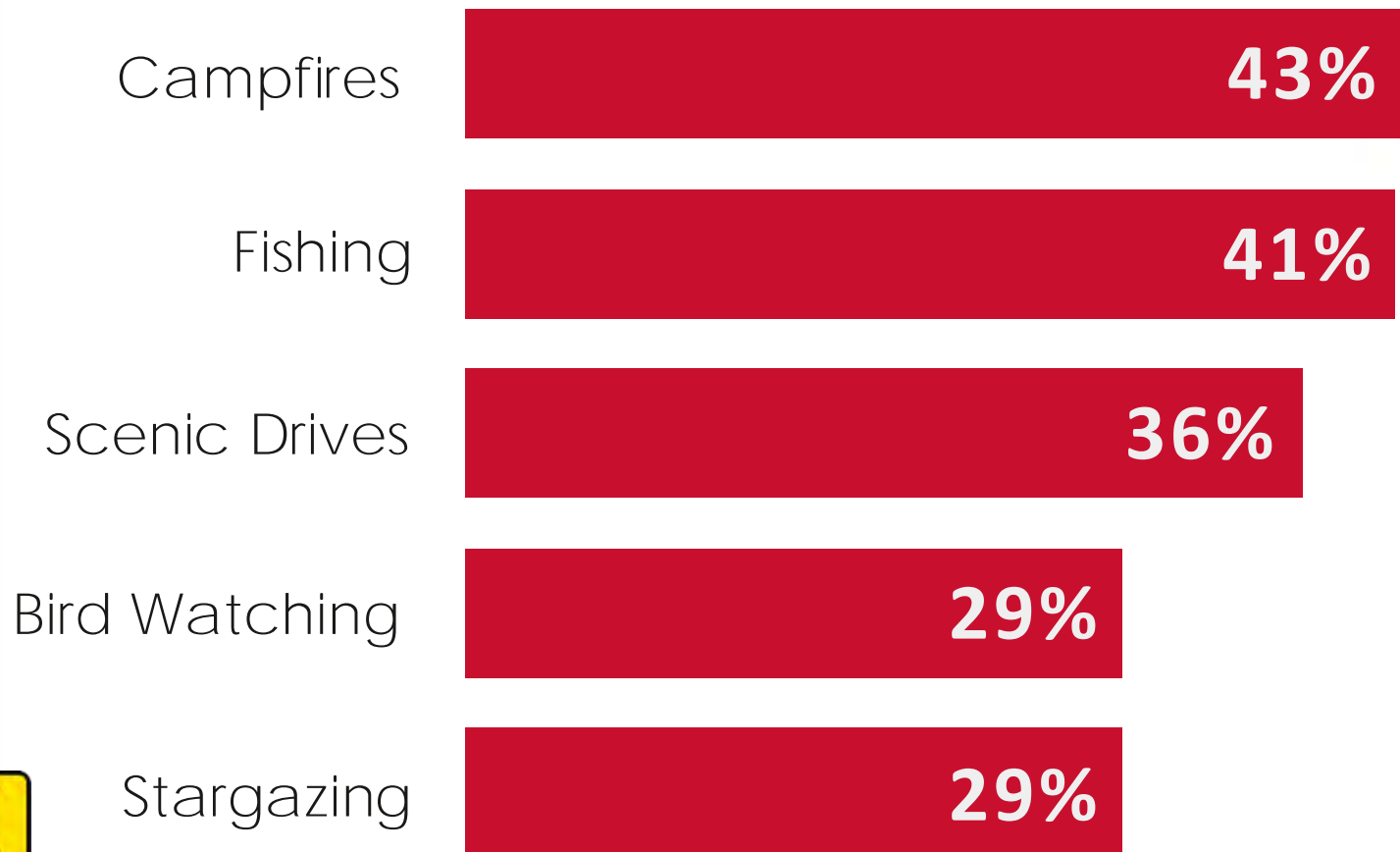
> Blended Travel for Campers



80% of campers integrated camping with other forms of travel



Top Activities While Camping



> 2025 Travel and Hospitality Key Experiences – Opportunities for S. Dakota



Destinations



Occasions



Wellness



Outdoors



> It's All About the "Vibes"

90% Identify an accommodations "mood" and "feel" as an important factor

1,090% Increase in reviews that mention "vibe"

Industrial

Modern

Vintage

Chill

FUNKY

PARTY

Historic

Artsy

cozy

Hip

BEACHY

Retro

peaceful



> Destinations: Set Jetting

- Booking a trip after seeing it on a show
- TV shows influence travel more than social media
- Longer Shelf Life: TV shows and films have enduring appeal, with episodes or movies inspiring travel for years after release.



Source: Expedia & BBC





Set Jetting - Opportunities for South Dakota

Capitalize on Film and TV Locations

- Promote locations featured in films and shows, such as the Black Hills and Badlands, which have appeared in productions like *Dances with Wolves* and *National Treasure: Book of Secrets*.

Collaborate with Film and TV Productions

- Work with producers to feature South Dakota in future shows, creating opportunities for iconic landmarks like Mount Rushmore or Custer State Park to gain exposure.



Source: Expedia & BBC





Set Jetting - Opportunities for South Dakota

Develop Themed Experiences

- Create itineraries or tours around movies or shows filmed in South Dakota, offering behind-the-scenes stories and unique photo opportunities.

Leverage Marketing Campaigns

- Highlight “on-screen” destinations through digital campaigns, emphasizing the real-life beauty and adventure behind the productions.
- Use content that recreates famous scenes or experiences, appealing to fans eager to follow in their favorite characters' footsteps.



Source: Expedia & BBC





Destinations: Dupes

- Affordable alternatives to popular locations
- Less crowded, unexpected
- 1-in-3 travelers book dupes



Source: Expedia & BBC



> Dupe – Opportunities for South Dakota

Promote South Dakota as an affordable, uncrowded alternative to over-touristed destinations. For example:

- Mount Rushmore vs. Overcrowded Historic Landmarks: Highlight its iconic status without the overwhelming crowds.
- Badlands National Park vs. Grand Canyon
Market the dramatic landscapes of the Badlands as a less-commercialized natural wonder.
- Deadwood vs. Other Wild West Towns
Showcase Deadwood's rich history and unique charm as a Wild West experience.



Source: Expedia & BBC



> DupeS – Opportunities for South Dakota

Focus on Tranquility and Space

- Emphasize the vast open spaces, serene landscapes, and opportunities for quiet, nature-based activities like hiking, stargazing, and fishing.

Promote Affordability

- Highlight South Dakota as a budget-friendly destination.

Offer Unexpected Experiences:

- Market unique, less-known attractions such as:
Palisades State Park: An alternative to over-visited rock formations.
Wind Cave National Park: A distinctive underground adventure compared to more famous caves.



Source: Expedia & BBC



➤ Destinations: Local Immersion

- Engage with local communities, cultures & customs
- Local markets, farm visits, cultural festivals, etc.



Source: Expedia & BBC





Local Immersion – Opportunities for South Dakota

Promote Cultural Festivals and Events

- Highlight annual events like the Black Hills Powwow, rodeos, or seasonal festivals that showcase your unique heritage.

Develop Local Experiences

- Create itineraries to local markets, farm-to-table restaurants, and working ranches where travelers can learn about agricultural roots.

Support Local Artisans and Markets

- Promote shopping at local craft fairs, farmers' markets, and artisan shops, where travelers can interact with creators.



Source: Expedia & BBC



> Local Immersion – Opportunities for South Dakota

Farm and Ranch Tourism

- Offer experiences such as horseback riding, farm tours, or overnight stays on working ranches to appeal to travelers seeking a closer connection to the land.



Source: Expedia & BBC





Occasions: Go-Casion

- Work-related celebrations
- Pet adoptions
- Baby moons
- Divorce parties



Source: Expedia & BBC





Go-Casion – Opportunities for South Dakota

Work-Related Celebrations

- Offer scenic, team-building retreats featuring activities such as hiking, wellness workshops, and group adventures.
- Highlight South Dakota as a peaceful yet inspiring destination for corporate reward trips.

Pet-Friendly Getaways

- Market South Dakota's campgrounds, trails, and pet-friendly accommodations to travelers celebrating pet adoptions.
- Organize pet-centered events, such as hiking challenges or photoshoots at iconic locations.



Source: Expedia & BBC





Go-Casion – Opportunities for South Dakota

Baby Moons

- Promote quiet and romantic escapes for expecting couples, such as glamping or cozy cabin stays in the Black Hills, with amenities like spa packages and stargazing.

Divorce Parties

- Highlight group-oriented, celebratory experiences like Deadwood's nightlife, wine-tasting tours, or adventurous activities like zip-lining and horseback riding.



Source: Expedia & BBC



> Occasions: Foodie Tourism

- Tasting the culture
- Food events & bucket list restaurants
- Agritourism & cooking classes



Source: Expedia & BBC





Foodie Tourism – Opportunities for South Dakota

Tasting the Culture

- Highlight unique dishes such as bison burgers and fry bread, connecting these foods to local traditions and history.
- Promote local breweries, wineries, and distilleries.

Food Events & Bucket List Restaurants

- Market iconic restaurants and chef-led experiences in cities like Sioux Falls or Rapid City as must-visit foodie destinations.



Source: Expedia & BBC



Foodie Tourism – Opportunities for South Dakota

Agritourism & Cooking Classes

- Offer tours of local farms and ranches, allowing visitors to learn about sustainable agriculture and taste fresh, local produce.
- Create opportunities for travelers to participate in cooking classes featuring traditional South Dakotan recipes or ingredients.



Source: Expedia & BBC





Outdoors: Nostalgia

- Evoke past memories, connect with simpler times
- Pop culture or pilgrimages & time periods
- Heritage travel



Source: Expedia & BBC





Nostalgia – Opportunities for South Dakota

Evoke Past Memories

- Highlight classic outdoor activities like camping, fishing, and campfire storytelling in iconic South Dakota locations.
- Promote scenic drives, like the Needles Highway, as reminiscent of family road trips.

Pop Culture & Pilgrimages

- Market locations featured in films or popular Westerns, encouraging visitors to relive their favorite cinematic moments.
- Create themed tours around historic events or eras, such as the Wild West history of Deadwood.



Source: Expedia & BBC





Nostalgia – Opportunities for South Dakota

Heritage Travel

- Promote Native American cultural sites like Bear Butte and the Crazy Horse Memorial as opportunities to connect with South Dakota's rich history.
- Highlight genealogy resources or tours that allow visitors to trace family roots connected to the region.



Source: Expedia & BBC



Outdoors: Natural Events

- Unique experiences in nature - natural phenomena
- Solar / lunar eclipses, celestial events
- Wildlife migrations



Source: Expedia & BBC





Natural Events – Opportunities for South Dakota

- Highlight Unique Natural Phenomena
 - Promote opportunities to witness stunning South Dakota landscapes during rare events, such as the interplay of light in the Badlands during sunrises and sunsets.
- Celestial Events
 - Leverage South Dakota's low light pollution areas to promote stargazing and viewing of celestial events.
 - Host events or guided tours for astronomical enthusiasts during peak celestial happenings.



Source: Expedia & BBC





Natural Events – Opportunities for South Dakota

Wildlife Migrations

- Feature South Dakota's bison and bird migrations in state parks like Custer State Park or Sand Lake National Wildlife Refuge.
- Create guided wildlife tours for visitors to safely and educationally observe these migrations.



Source: Expedia & BBC



> Outdoors: Nature Immersions

- Forest bathing
- Wild swimming / nature sound baths
- Grounding experiences



Source: Expedia & BBC





Nature Immersions – Opportunities for South Dakota

Forest Bathing

- Promote areas as ideal spots for guided or self-led forest bathing sessions.
- Create programs or trails designed to enhance mindfulness, such as meditation spots or quiet zones.

Wild Swimming / Nature Sound Baths

- Highlight serene lakes, rivers, and streams, such as Sylvan Lake or the Missouri River, for wild swimming experiences.
- Offer sound bath events in outdoor spaces, combining natural acoustics with curated audio for a meditative experience.



Source: Expedia & BBC



> Nature Immersions – Opportunities for South Dakota

Grounding Experiences

- Develop programs encouraging activities like barefoot trails, yoga on natural terrains, or sensory nature walks in places like Custer State Park.



Source: Expedia & BBC



> Outdoors: Adventure Travel

- Pushing out of the comfort zones & into present-moment focus
- Kayaking, hiking, cycling, zip lining, etc.



Source: Expedia & BBC



Adventure Travel – Opportunities for South Dakota

Kayaking and Water Adventures

- Highlight locations like the Missouri River, Pactola Lake, and Spearfish Creek for kayaking, canoeing, and paddleboarding opportunities.

Hiking and Scenic Trails

- Promote South Dakota's iconic trails, such as the Black Elk Peak Trail, Notch Trail and the Mickelson Trail for both beginner and advanced hikers.
- Incorporate themed hikes, such as wildlife spotting, photography tours, or historical explorations.



Source: Expedia & BBC



Adventure Travel – Opportunities for South Dakota

Cycling

- Emphasize the George S. Mickelson Trail as a premier cycling destination, suitable for long-distance rides through South Dakota's stunning landscapes.

Zip-Lining and Aerial Adventures

- Develop or promote zip-lining opportunities in the Black Hills region, offering adrenaline-pumping views of forests and canyons.
- Pair zip-lining with other activities to create adventure packages..



Source: Expedia & BBC





Wellness: Sleep Tourism

- Prioritize sleep & relaxation as the center piece of the trip
- Sleep coaching & tracking
- Hurkle-durkle: This concept encourages leisurely mornings spent resting and relaxing, emphasizing a slow pace without the pressure of a strict itinerary.



Source: Expedia & BBC



Sleep Tourism – Opportunities for South Dakota

Sleep-Centric Accommodations

- Highlight lodging options like cozy cabins, luxury tents, or secluded retreats designed to minimize noise and light pollution.
- Include amenities like blackout curtains, calming décor, and high-quality bedding.

Wellness Retreats with Sleep Programs

- Develop retreats that incorporate sleep coaching, relaxation techniques, and tracking tools to help guests improve their sleep habits.
- Partner with sleep specialists or wellness experts to create signature programs.



Source: Expedia & BBC





Sleep Tourism – Opportunities for South Dakota

Promote Natural Serenity

- Market South Dakota's quiet, wide-open spaces as ideal for escaping noise and stress, making it easier for travelers to rest and relax.
- Highlight opportunities for stargazing, forest walks, or peaceful lakeside mornings as part of the sleep tourism appeal.

Hurkle-Durkle Experiences

- Offer flexible itineraries and encourage guests to embrace slower mornings, with breakfast-in-bed options or leisurely morning activities like yoga or meditation.



Source: Expedia & BBC





Wellness: Digital Detox

- Unplugging from technology and reducing screen time
- Silent seekers
- Timed – time away



Source: Expedia & BBC





Digital Detox – Opportunities for South Dakota

Unplugging from Technology

- Market South Dakota as a tech-free haven with limited cell service in serene locations like Badlands National Park and the Black Hills.
- Encourage visitors to participate in device-free activities like hiking, fishing, and stargazing.

Silent Seekers

- Offer silent retreats at cabins or lodges surrounded by nature, emphasizing quiet spaces for meditation, journaling, or self-reflection.
- Develop programs featuring guided mindfulness walks or yoga in noise-free zones.



Source: Expedia & BBC





Digital Detox – Opportunities for South Dakota

Timed Digital Detox Experiences

- Create structured "unplugged" programs that encourage guests to hand over their devices for a set period in exchange for curated experiences, such as guided tours, hands-on workshops, or outdoor adventures.
- Promote these programs as a way to reset and recharge while reconnecting with nature and loved ones.



Source: Expedia & BBC





Wellness: Well-being

- Solo and private yoga
- Breathing exercises
- Connection with nature



Source: Expedia & BBC



Wellness – Opportunities for South Dakota

Solo and Private Yoga

- Offer yoga retreats or private sessions in locations where participants can enjoy serenity and focus.
- Incorporate themes like sunrise or forest yoga.

Breathing Exercises

- Integrate breathing workshops as part of wellness retreats, held in quiet, natural spaces where participants can fully relax and focus.
- Pair with other calming activities, such as meditation walks or guided mindfulness sessions.



Source: Expedia & BBC



Wellness – Opportunities for South Dakota

Nature Immersion

- Highlight pristine natural settings as ideal backdrops for wellness practices, from expansive prairies to tranquil forests and serene lakes.
- Promote outdoor experiences that encourage mindful connection with nature, such as guided nature walks or stargazing paired with wellness practices.



Source: Expedia & BBC





Elevated
Experiences

Patio RV Sites











*Signature*SM
SITE





*Signature*SM
SITE





*Signature*SM
SITE





*Signature*SM
SITE



Sky Decks



Sky Decks



Tree Houses/Unique Accommodations





Glamping



Glamping Stats

- In 2023, 20% of all campers identified as glampers
- Millennials and Gen Z make up 60% of the glamping audience, driven by their desire for unique, Instagram-worthy experiences with modern comforts.
- Glampers are more likely to take additional trips, with an average of 3.7 trips per year, compared to traditional campers' 2–3 trips annually.



Source: KOA, Inc. Research





Glamping Stats

- 45% of glampers choose glamping for its luxury amenities.
- Glamping market is projected to grow to over \$5 billion annually by 2028
- 56% of glampers value eco-friendly accommodations
- 30% of glampers are new to camping, making it an effective way to introduce people to outdoor travel who might not otherwise camp.



Source: KOA, Inc. Research























Accessibility



Accessibility

42%

Have difficulty walking
or climbing stairs
themselves

30%

Have difficulties with social interactions and
communications that impact ability to be
exposed to crowds, loud noises, too much visual
or auditory stimulation



Greatest Barriers:

- Restrooms or bath house accessibility (46%)
- Level or smooth pathways (37%)
- Knowing in advance which campsites are accessible (36%)





KOA

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Learn More: KOA.com

Research: KOAPressRoom.com