



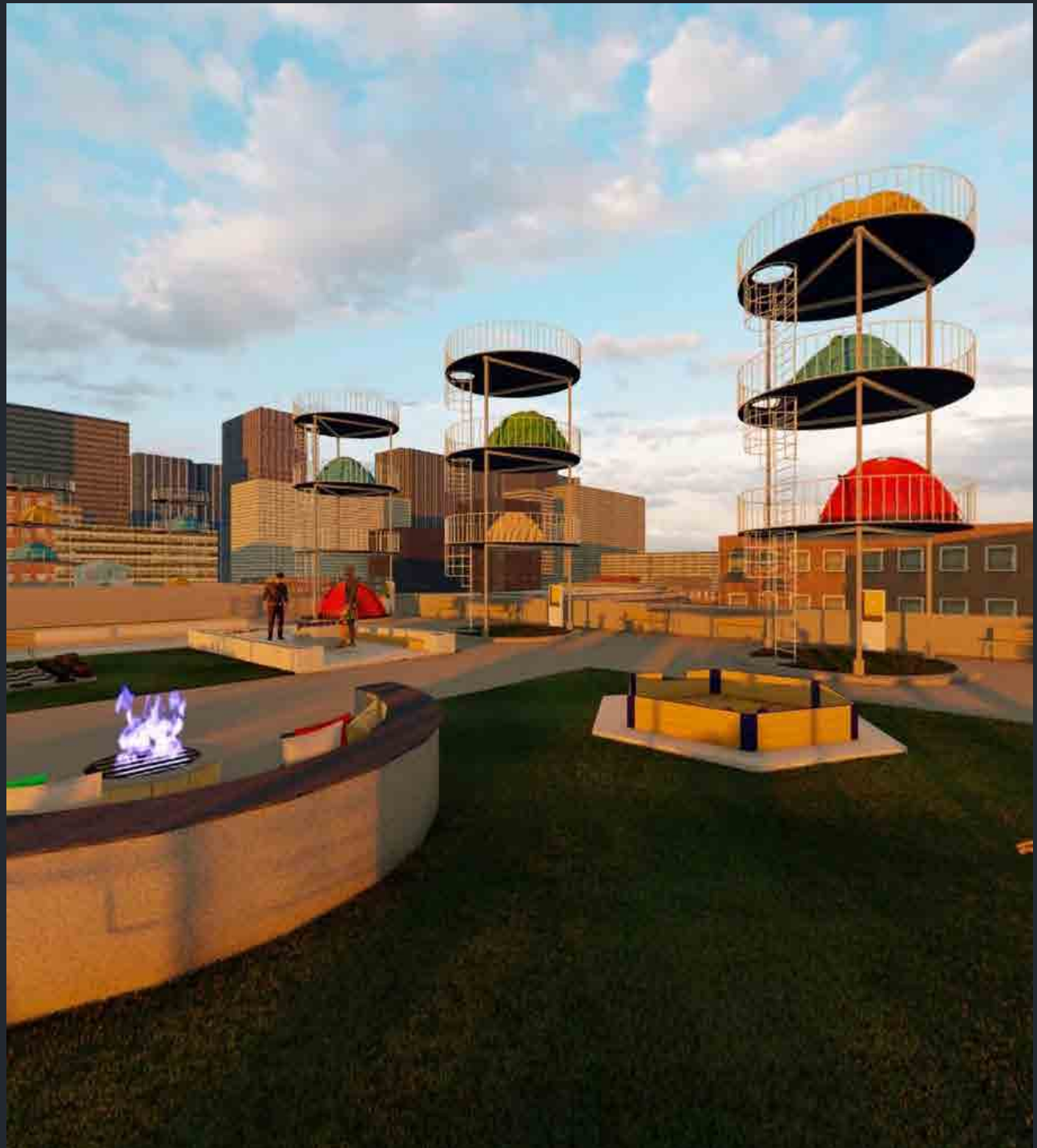
# Camping Reimagined

Innovation, Technology and  
Trends in Outdoor Hospitality

Darin Uselman, COO











# About KOA





# Our Mission

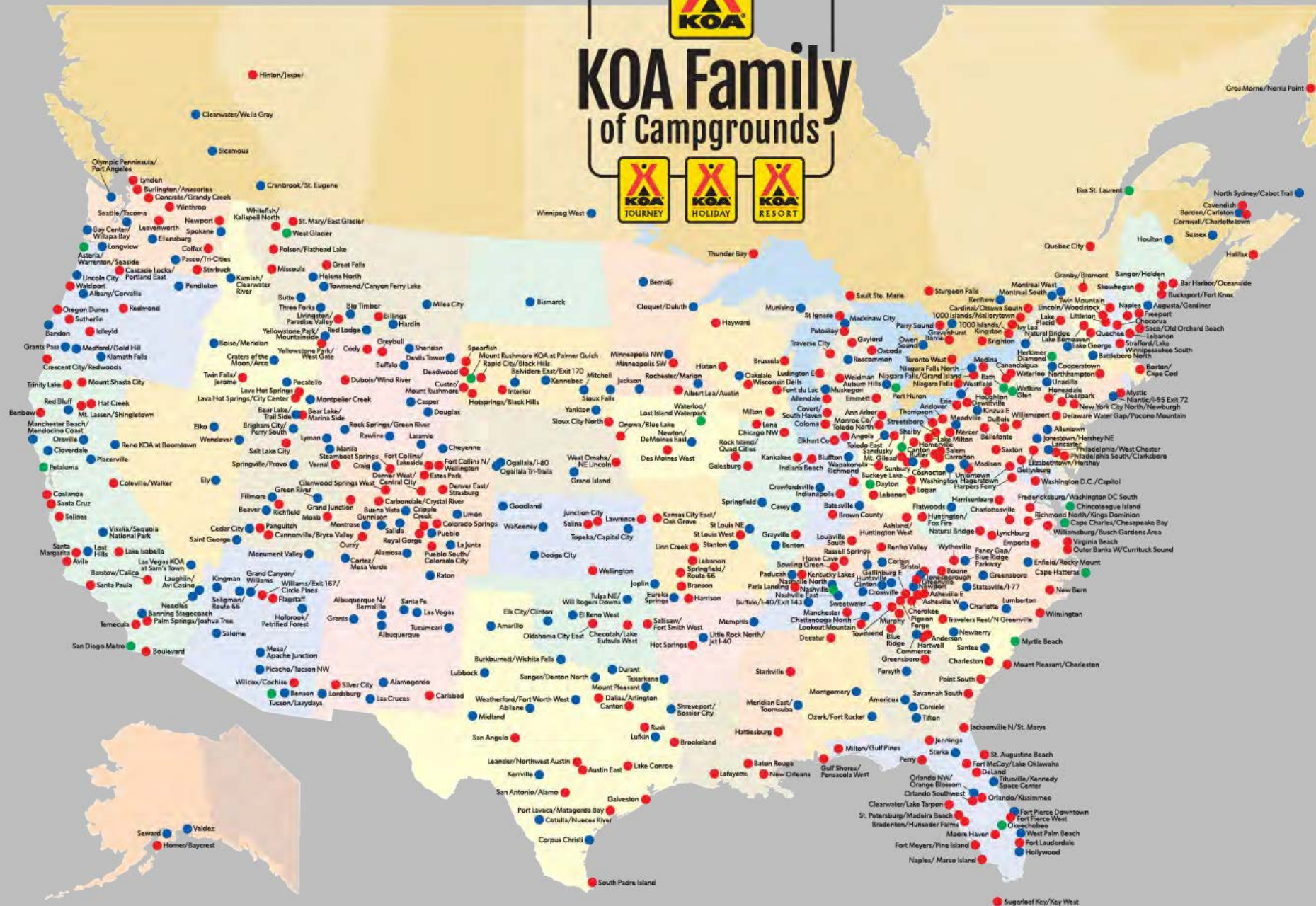
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Connecting people to the outdoors and each other.



# KOA Family of Campgrounds



Sugarloaf Key/Key West



# KOA Family of Campgrounds





RV Sites



Tent Sites



Cabins



Unique Accommodations







TERRAMOR®

OUTDOOR RESORT // BAR HARBOR





# KOA, Inc. Vision

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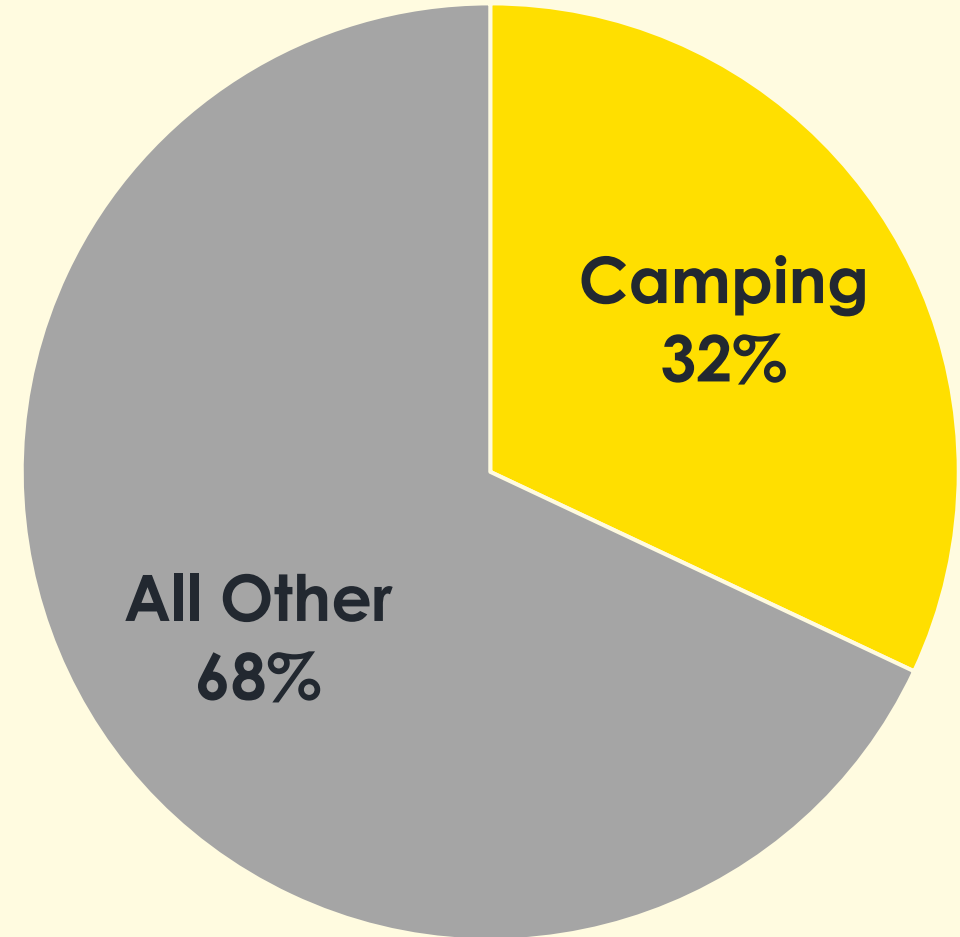
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World leader in defining and advancing the business of Outdoor Hospitality.





# Leisure Trips in 2022



*Among campers, 58% of leisure travel was camping.*



# 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

# 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



# Camping Population



**58.5** million people  
camped in 2022

**+40% vs. 2019**

Source: KOA, Inc. Research



# Camping Population



44%

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

Source: KOA, Inc. Research



# How People Camp



**52%** Tents



**26%** RV



**21%** Cabins/Glamping





# Changing Demographics

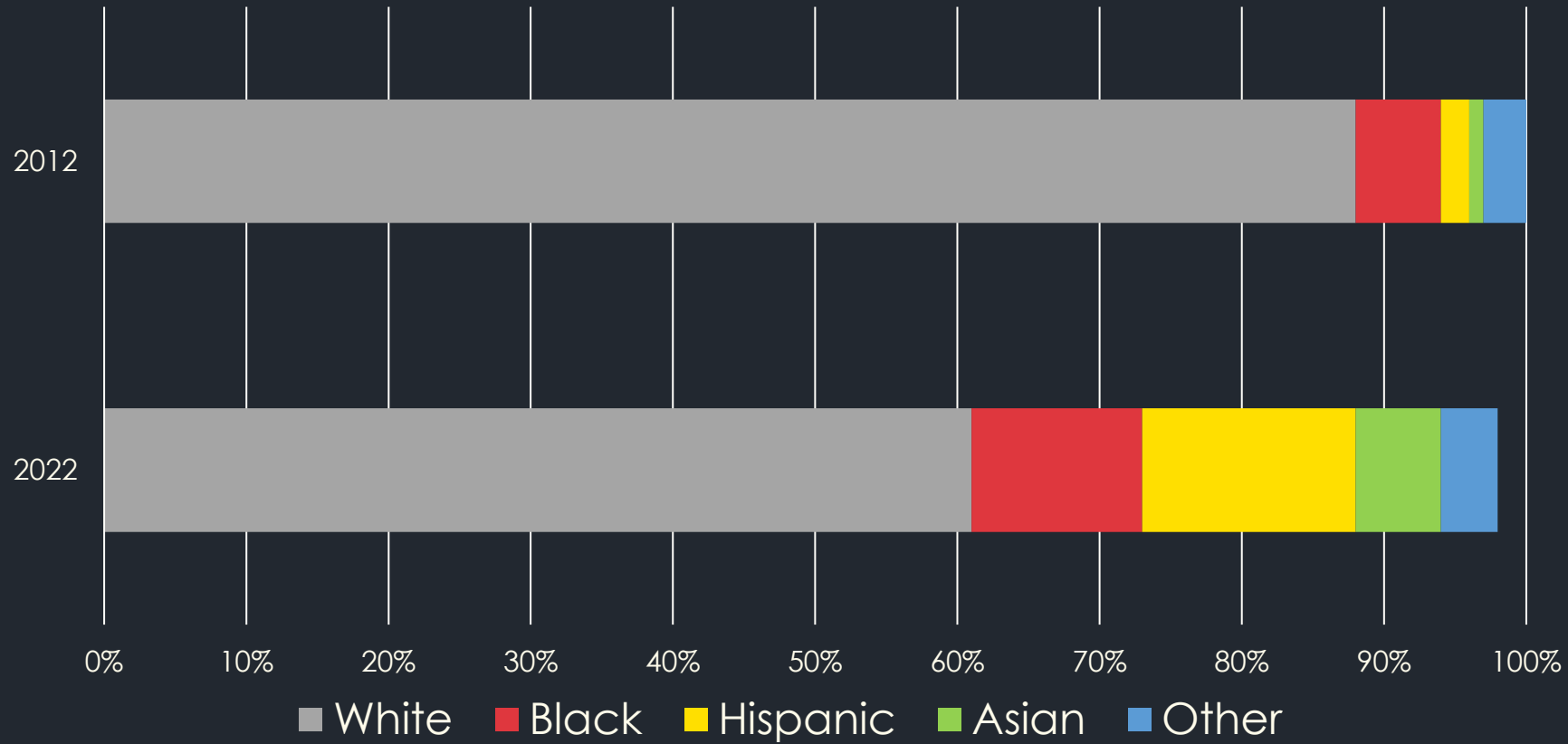
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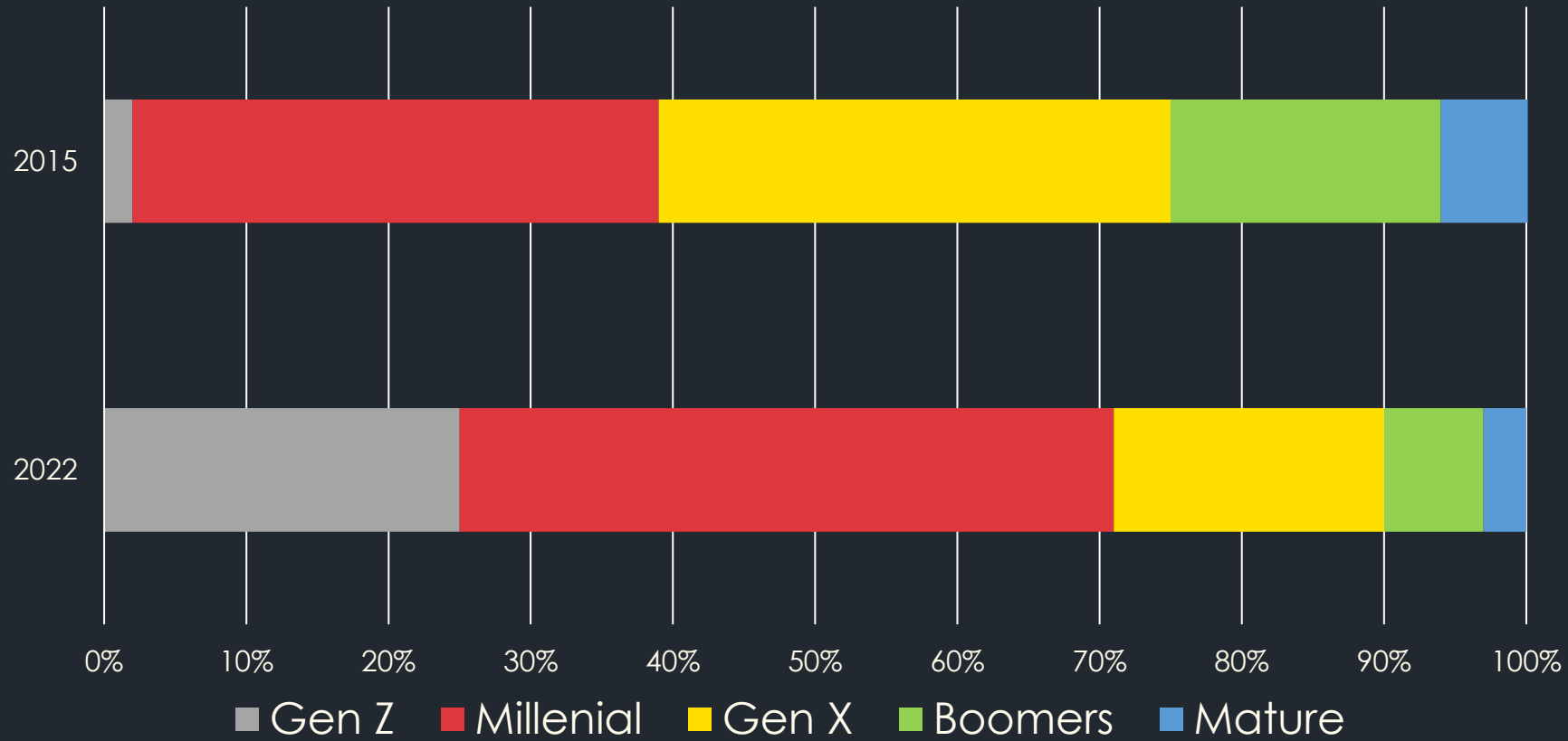


## Demographics by Race

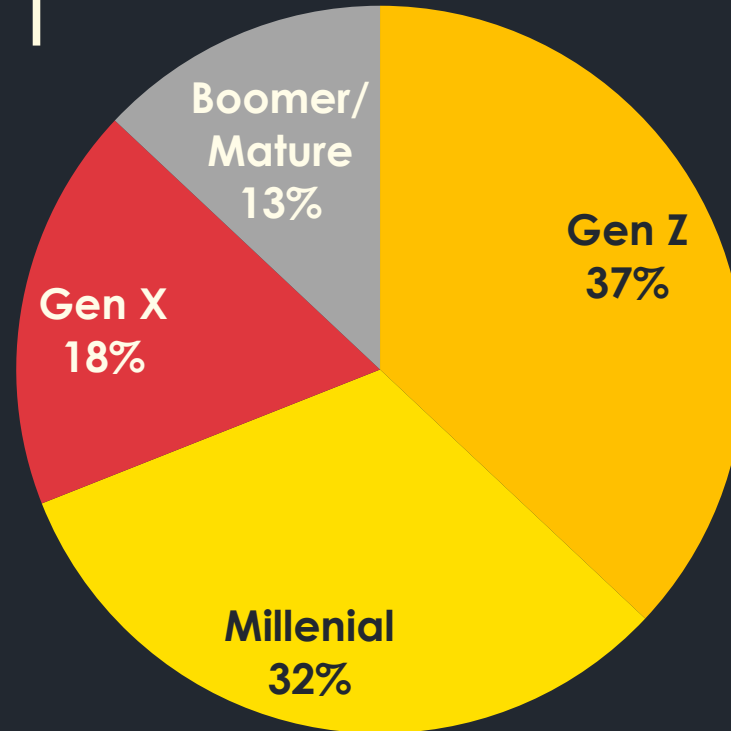
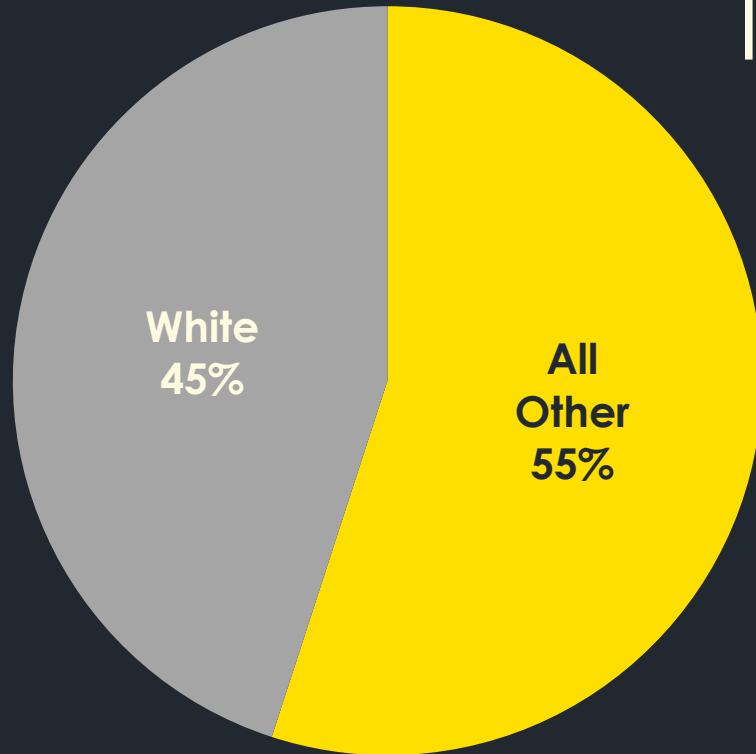




## Demographics by Age



# Spotlight on a New Camper



# Camping Families



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

**46%** of new campers camp with kids







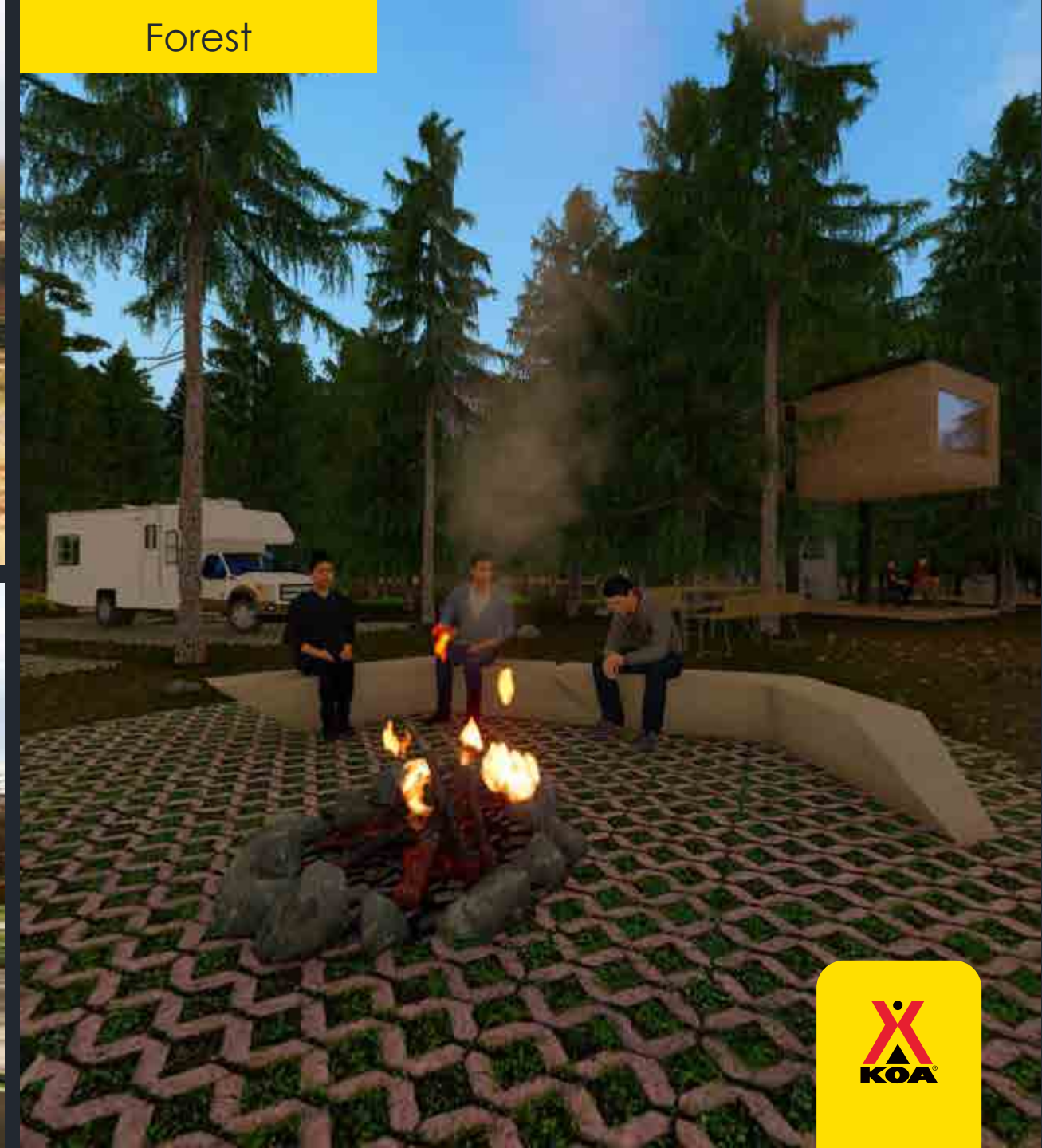


CAMPGROUND  
OF THE  
FUTURE  
KOA®

Desert



Forest



Urban

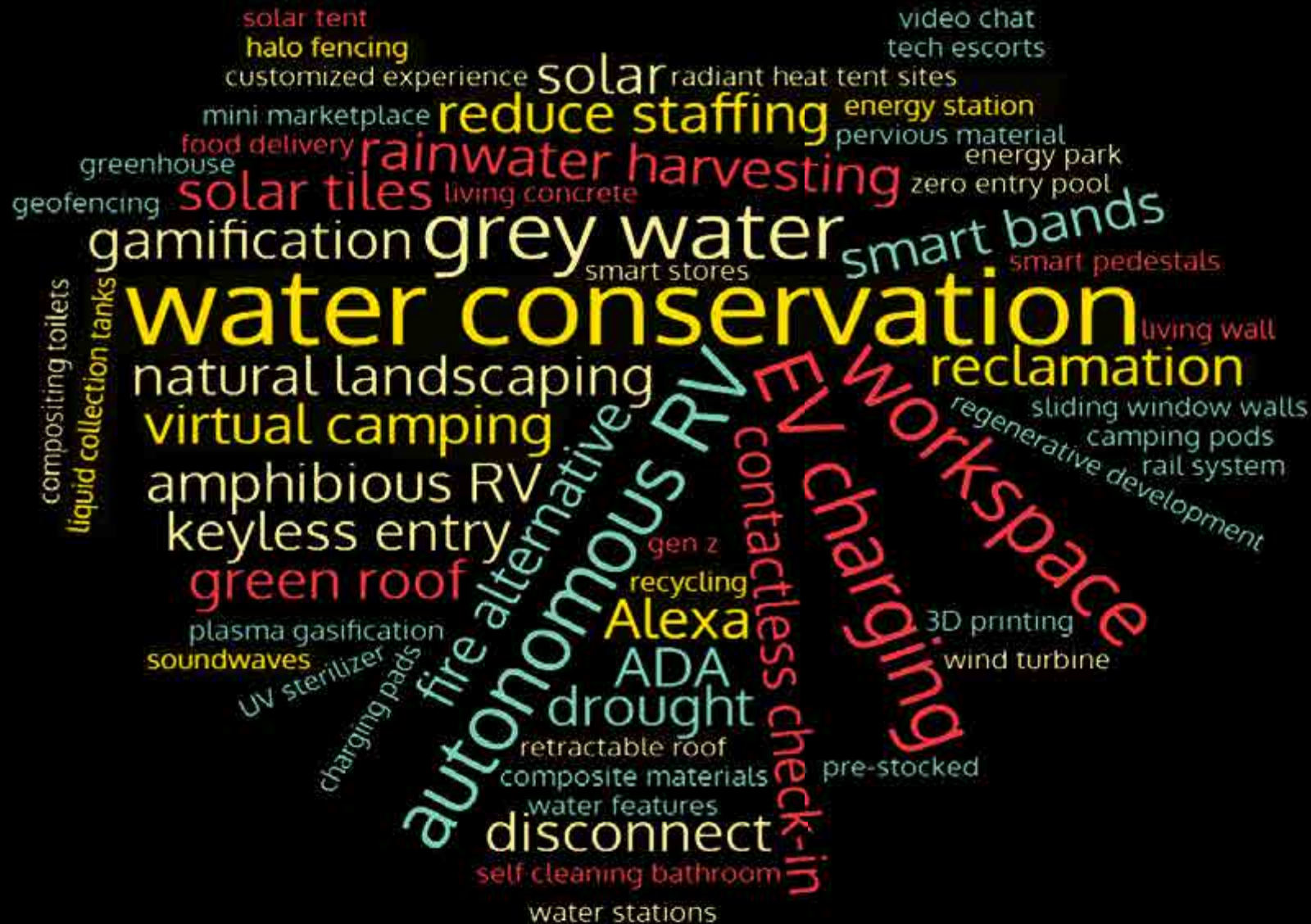


Mountain



Coastal







# Energy Cost Savings

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# Guest Priority

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- **50%** consider the environmental impact while booking leisure trips
- **45%** feel a business's eco-friendliness will have an impact on their likelihood to stay





# Of Most Importance to Our Base:

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- Land preservation
- Elimination of plastics (**46% boomers**)
- Low use electricity/renewable energy (**41% millennials**)
- Water reclamation/regulated use of water (**42% gen-z**)





# High Utility Expenses

- \$4 PCN (per camper night) attributed to electricity
- +15% in electricity costs on owned parks last year (25-50% in some markets)





# Energy Savings

- Energy Costs: from \$351K to \$61K
- PCN: from \$5.37 to \$1.61

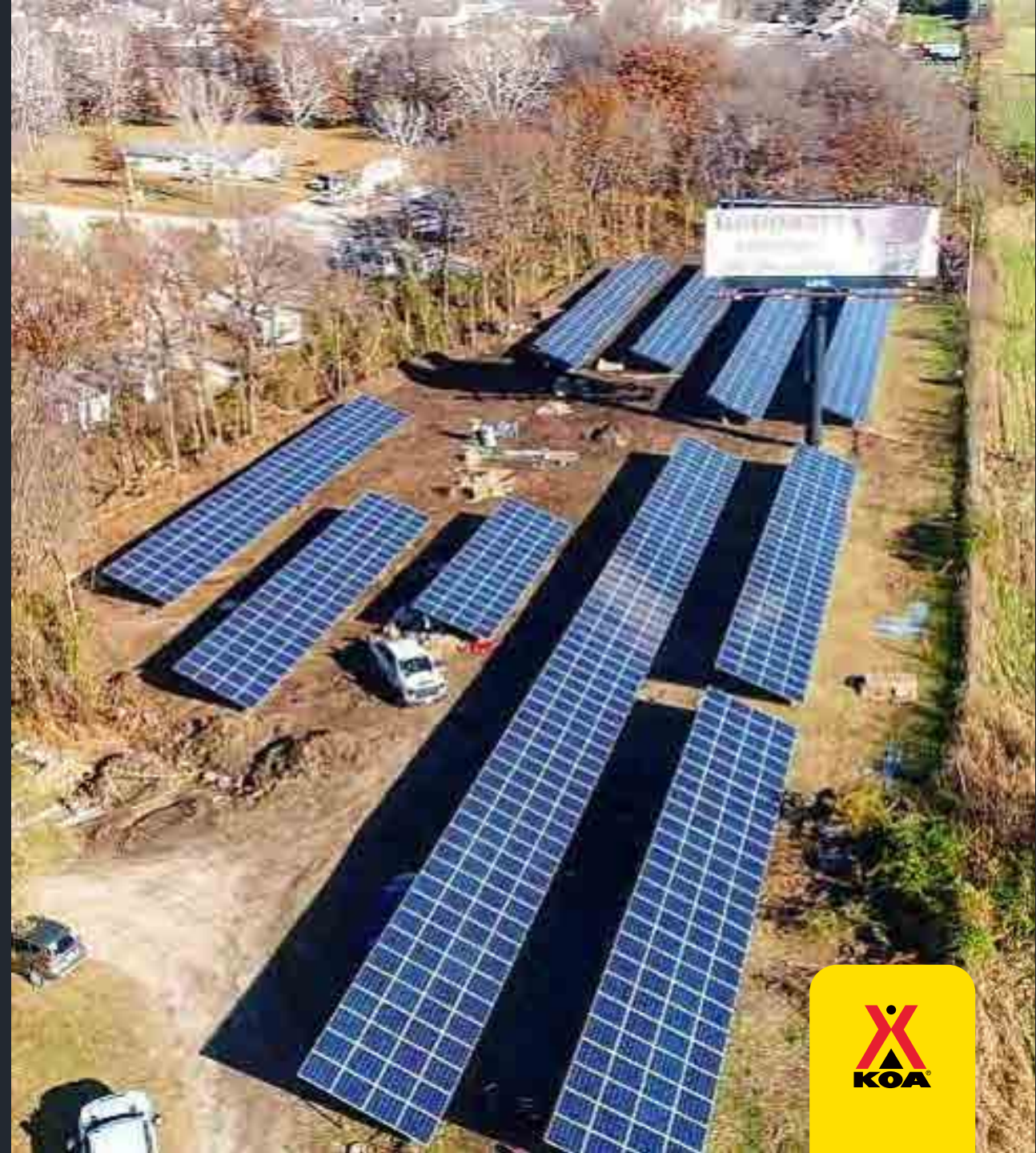
Source: KOA, Inc.



# Site Level Concept

- 32.4 kW solar system at each site
- 41' x 41'
- 42,000 kWhs of electricity per year generated per site





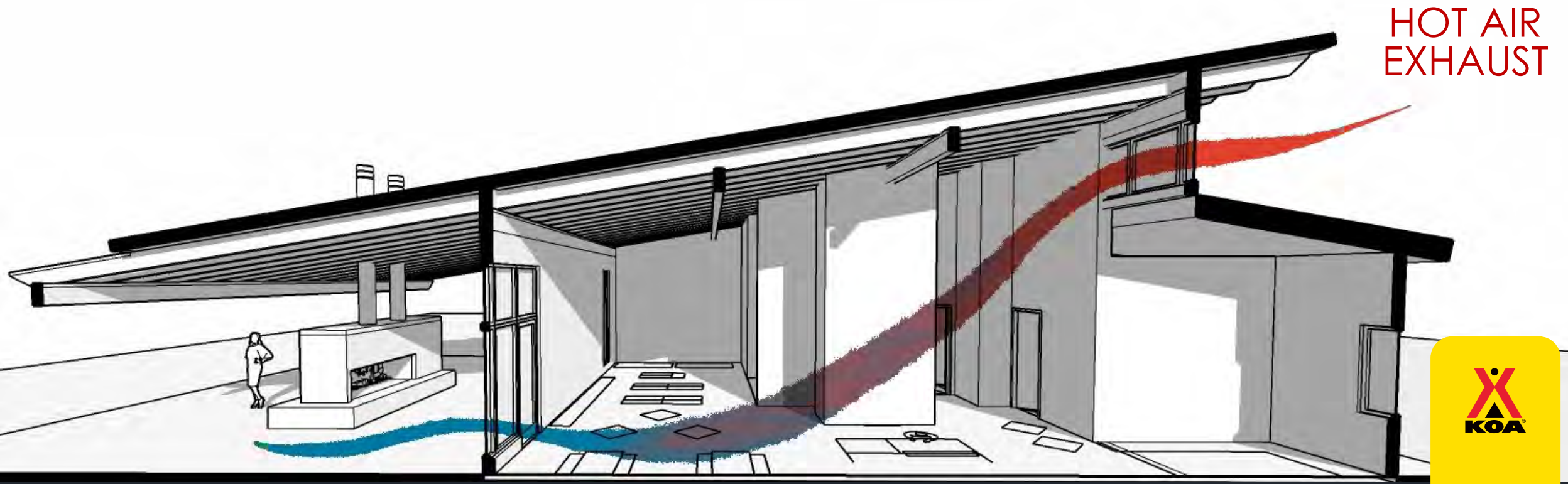


KOA





# Passive Cooling Design Features

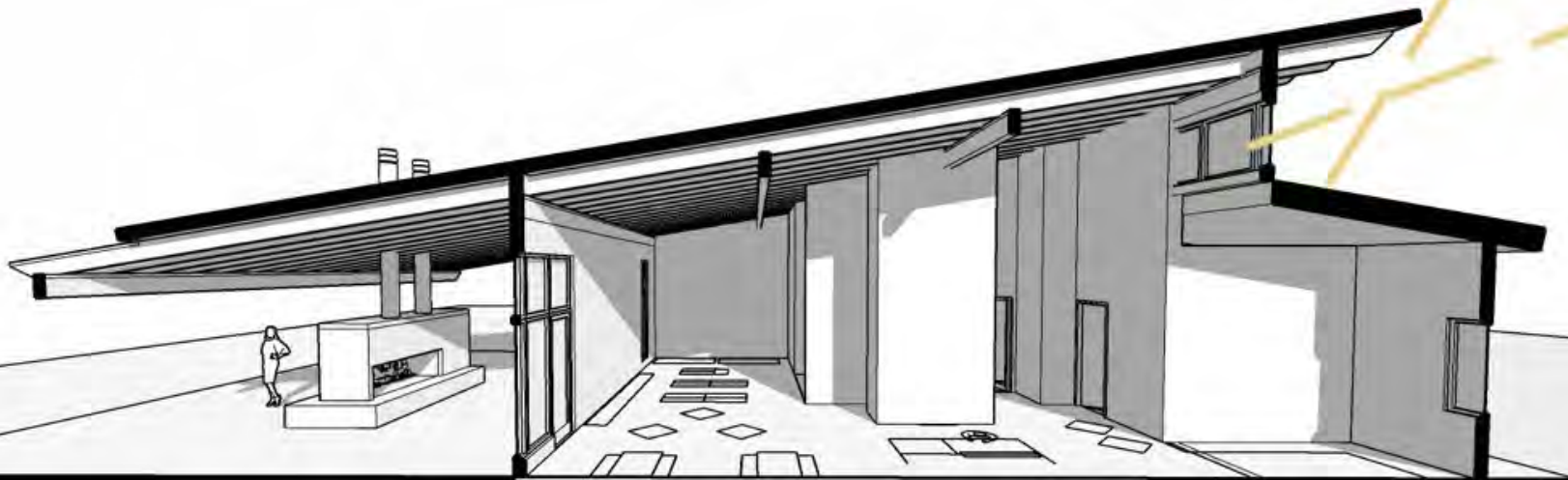




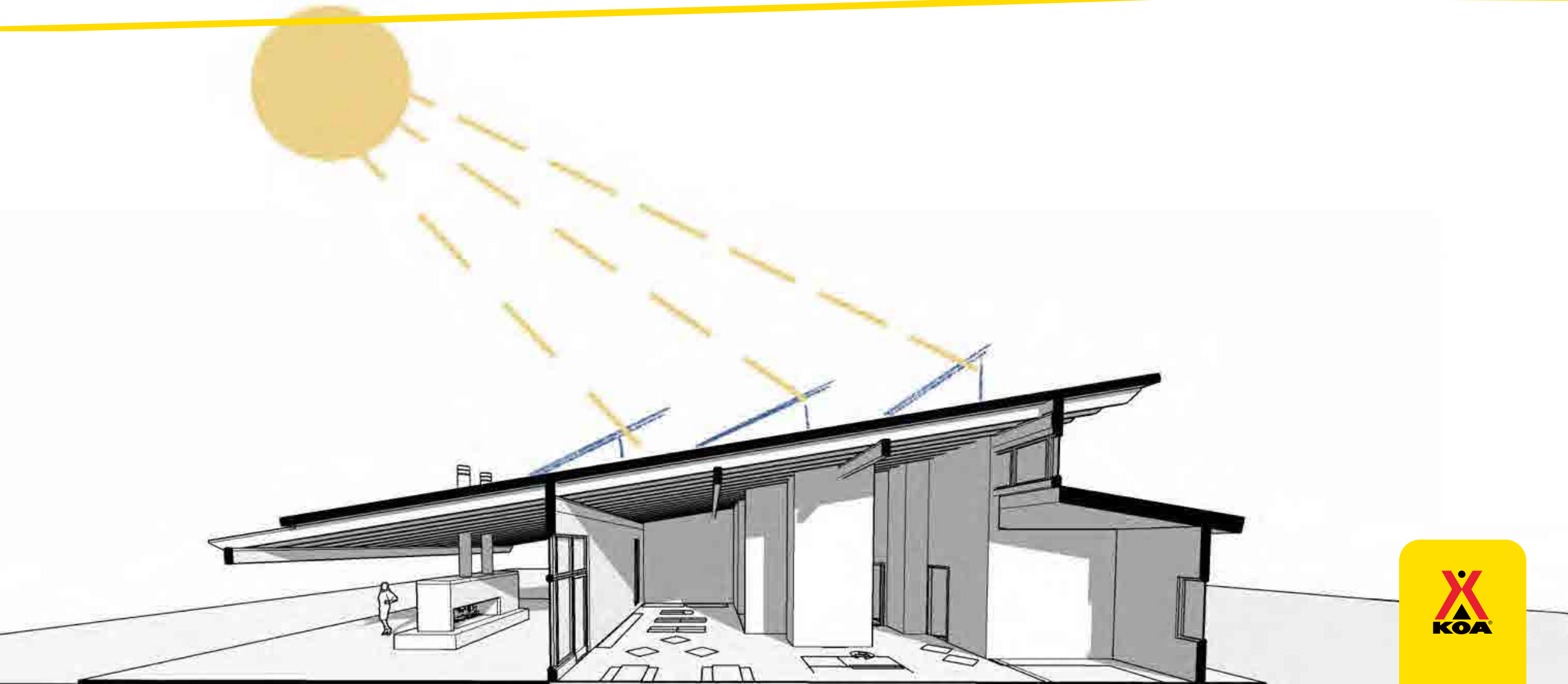
# Passive Solar Design

SUMMER SUN

WINTER SUN



# PV Arrays Potential



Xeriscaping



Porous Pavement



Living Wall





# Reducing Points of Friction

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# Booking Experience

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- Calendars showing site availability
- Multi-reservation functionality
- Dynamic optimization

*Interested in:*

- *Interactive digital campground maps*
- *Increased customization*
- *AI Chatbot functionality*





# On-Site Engagement

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- Text messaging platform
- On-line check-ins

## *Interested In:*

- *Kiosks*
- *Automated check-in*
- *Smart site functionality*
- *RFID bands*
- *Amazon store concept*



# Meeting Guest Expectations

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# WiFi

**45%**

of campers **feel WiFi is important** while camping

- **52%** among millennials
- **49%** among those camping with kids







# WiFi

**33%**

feel WiFi has a great deal of impact on them camping more

- Those who says it has a great deal if impact, spend **10.8 additional days** camping
- **44%** of Americans sometimes/always **work while camping** (*55% of millennials*)







# Quality

28%

rate the **quality of WiFi** they've experienced as **Excellent**



# EV Charging



# EV Interest

**28%**

Likely to buy an EV  
in the next 2-3 years

**43%**

Of campers are  
interested in buying  
**E-RVs**





**AIRSTREAM®**

**WINNEBAGO®**











# Elevated Experience

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# Patio RV Site

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# Paw Pen







# Signature Sites





*Signature*  
SITE





*Signature*<sup>SM</sup>  
SITE









# Sky Decks









# Glamping













# Accessibility

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# Accessibility

**38%**

Have difficulty walking or climbing stairs themselves

**27%**

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:

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





# Natural Disaster Mitigation

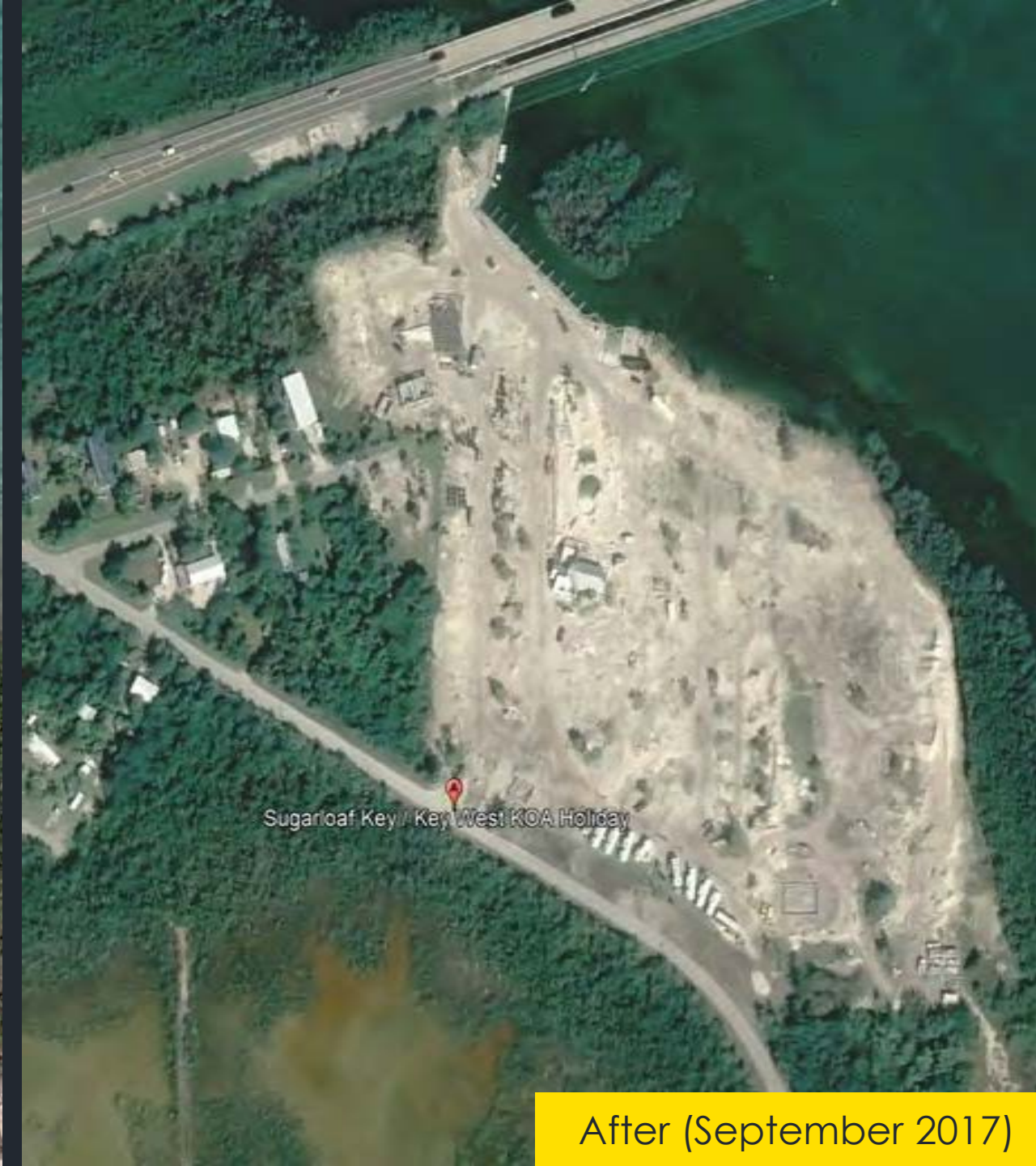
**CASE STUDY:**  
Sugarloaf Key / Key West KOA



Before Hurricane Irma



Sugarloaf Key / Key West KOA Holiday



Sugarloaf Key / Key West KOA Holiday

After (September 2017)







# Disaster Mitigation

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- Concrete reinforced construction
- Built to highest wind load specifications



# Disaster Mitigation

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- Hotels elevated above the base floodplain
- Flood panels installed on all buildings





# Disaster Mitigation

- Electrical transformers underground two feet below coral rock
- Electric pedestals elevated five feet



# Disaster Mitigation

- Riprap seawall at high waterline on beach
- Gravity septic system built to withstand saltwater infiltration



NO LIFEGUARD ON DUTY  
Swim at Your Own Risk

NO DIVING



# Bioswales

- Contains and filters stormwater run-off
- Added 22 large and 39 small bioswales throughout the park
- Filled with ballast rock and limestone







# Bioswales







# Darin Uselman

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Learn More: [KOA.com](http://KOA.com)

Research: [KOAPressRoom.com](http://KOAPressRoom.com)