The Commercial CAMPGROUND INDUSTRY in New Hampshire

A Report on a 1971 Campground Census

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Abstract

The findings of a 1971 census of commercial camping enterprises in New Hampshire, including the growth of commercial camping enterprises during the period 1960-71, the average per-site costs and returns for operating a campground in 1970, and the characteristics of 78 successful and 89 unsuccessful camping enterprises.

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THE GROWTH
OF COMMERCIAL CAMPGROUNDS

DURING THE summers of 1964 and 1971, attempts were made to conduct complete censuses of commercial campgrounds in New Hampshire. In 1964, 108 campgrounds were located, and their owners were interviewed. In the 1971 census we found 189 camping enterprises in business and 24 under construction--an annual increase of 8.3 percent over the 7-year period.

Between these two censuses, 44 campgrounds were found to have gone out of business. An additional 13 campgrounds, known to exist before the 1964 census, were never located, which suggested that at least this many went out of business before 1964.

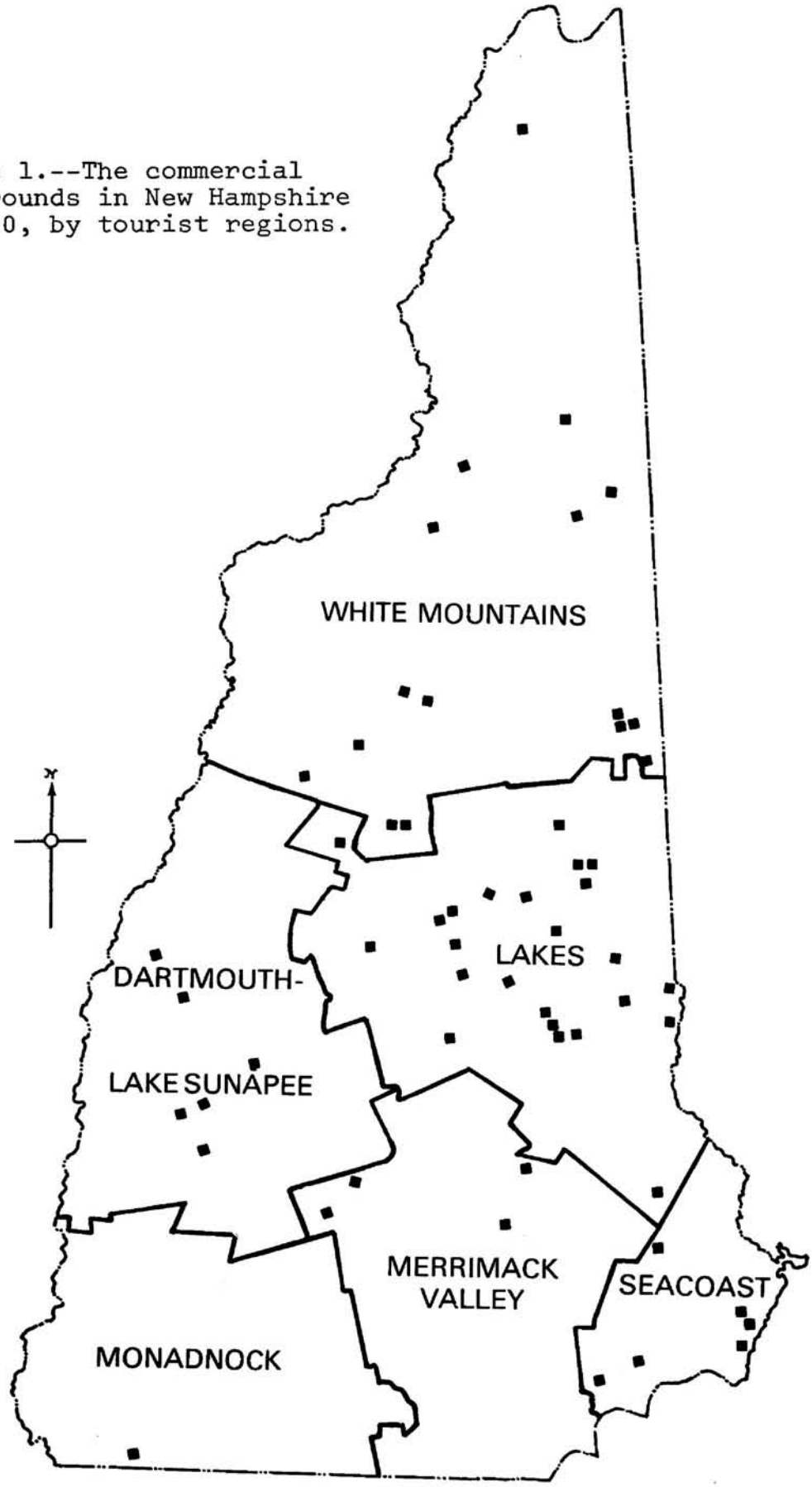
The regional distribution of commercial campground development activity revealed heavy concentration of new enterprises in the Lakes Region and White Mountain Region (table 1). The failure rate tends to be higher in these regions too. The average annual failure rate for campgrounds in New Hampshire's three northern tourist regions (Lakes, White Mountains, and Dartmouth-Lake Sunapee) for 1960-70 was 2.6 percent; while that for the three southern regions (Monadnock, Merrimack Valley, and Seacoast) was 1.0 percent (fig. 1).

Table 1.--Changes in New Hampshire camping enterprises, 1960-71, by county and region

County or region	In business 1960	Changes 1960-64		Changes 1965-70		New construction 1970-71	Total new enterprises[1/]
		Began	Failed	Began	Failed		
County:							
Belknap	10	5	1	12	3	2	29
Carroll	15	10	3	27	7	2	54
Cheshire	1	5	0	12	2	2	20
Coos	6	8	2	14	9	5	33
Grafton	9	12	2	16	14	7	44
Hillsboro	0	3	1	8	0	1	12
Merrimack	5	10	2	5	5	4	24
Rockingham	5	2	2	22	1	2	31
Strafford	2	6	0	6	1	0	14
Sullivan	4	3	0	3	2	0	10
Total	57	64	13	125	44	25	271
Region:							
White Mountains	15	26	6	24	20	10	75
Dartmouth-Lake Sunapee	7	10	1	9	8	0	26
Lakes	23	16	2	41	12	6	86
Monadnock	1	6	0	15	2	3	25
Merrimack	4	4	3	18	1	5	31
Seacoast	7	2	1	18	1	1	28
Total	57	64	13	125	44	25	271

[1/] Total of campgrounds in 1960 plus all new ones since 1960. The sum of new campgrounds and failures through 1970 is 189 campgrounds that were in business for the 1970 camping season. This report is based on 182 of those enterprises.

Figure 1.--The commercial campgrounds in New Hampshire in 1960, by tourist regions.



SOME ECONOMICS OF CAMPGROUND OWNERSHIP

In addition to identifying market entries into and exits from the campground business, the 1971 census included data on the costs and returns of commercial campground operation from 182 enterprises that had been in business for at least 1 year. (Comparable information from a sample of campgrounds was collected simultaneously in 11 other Northeastern states as part of Regional Research Project NEM-42. When all these data have been analyzed, we should be able to compare campground costs and returns in New Hampshire with those in other Northeastern states.)

A few campground operators did not have, or were reluctant to divulge, figures on their costs and returns. Usable 1970 income data were provided by 129 out of 182 operators; and partial information on costs was provided for 144 campgrounds. Consequently, our cost-and-return data cannot be considered representative of the New Hampshire campground industry or any of its regional or investment-size groupings; they simply provide an interesting insight into those enterprises with available data.

Table 2.--Average gross income per campground site in 1970, and estimated total income for small, medium, and large campgrounds in New Hampshire, 1970[1/]

Item	Fewer than 50 sites	50-99 sites	100 or more
Number of enterprises	96	51	35
Mean size, number of sites	27	67	147
Number of campgrounds providing income data	68	38	23
Mean income per site	$89.71	$112.00	$152.10
Annual income for an average enterprise	$2,422.00	$7,504.00	$22,359.00
Total income of N. H. campgrounds (est.)	$232,512.00	$382,704.00	$782,565.00

[1/] Site rental income only. More than 88 percent of all campgrounds indicated that site rentals provided 90 to 100 percent of their total income in 1970.

Table 3.--Average annual expenditures of campgrounds for operating costs

Item	Campgrounds reporting	Average cost per site	Estimated cost for average campground (62 sites)
	No.	Dollars	Dollars
Paid labor	59	21.00	1,302.00
Utilities	121	10.55	654.10
Vehicles	105	9.40	582.80
Taxes	117	14.30	886.60
Interest	61	19.13	1,186.06
Insurance	126	5.27	326.74
Maintenance	117	14.70	911.40
Advertising	144	5.45	337.90
Dues	68	1.75	108.50
Office supplies	111	1.38	85.56
Depreciation	64	29.10	1,680.20
Firewood	42	2.67	165.54
All costs	--	132.70	8,227.40

The size structure of the industry revealed a strong imbalance in favor of smaller and less economic units (table 2). Most of New Hampshire's campgrounds are small. Those having fewer than 50 tent or trailer units constitute 53 percent of the total and reported an average gross 1970 income from site rentals of less than $2,500. Another 28 percent of New Hampshire's campgrounds had between 50 and 99 campsites--averaging 67 units--and reported an average 1970 gross income of less than $7,500.

Campgrounds having more than 99 sites included 19 percent of the total, averaging 147 sites, and had an average gross income of nearly $22,500 from campsite rentals in 1970.

A complete accounting of the costs of operating a campground was provided by relatively few owners. However, enough data were collected on major cost items to produce a partial picture of net revenues from site rentals (table 3).

Of 23 small campgrounds (fewer than 50 sites) that provided complete records, 10 reported losses ranging from $24 to $147 per site. The mean net income for the group responding was $4.60 per site or $124.20 for an average small campground of 27 sites.

Of 10 medium-size campgrounds reporting costs and income, 3 had per-site losses of $83 to $90. And the average net income for the 10 campgrounds was $15.80 per site or $1,058.60 for an average medium-size campground of 67 sites.

Three of the 13 largest campgrounds (more than 99 sites) reported losses ranging from $14 to $88 per site. The average net income for these 13 campgrounds was $47.90 per site or $7,041.30 for an average large campground of 147 sites.

An overall average of $9.50 net per site from store sales and other sources of campground income could be added to the above figures. However, not all campgrounds have these additional incomes; and for those that do, these figures tend to exaggerate the relationships between campground size and net income. For example, only 29 percent of the small campgrounds had sources of campground income other than site rentals. At medium-size campgrounds and large campgrounds those having store income were 49 and 54 percent respectively.

The average operating expenses (table 3) provided a way of estimating the operating costs for any size of campground by multiplying item costs by number of sites in the campground. Item costs and total estimated costs were calculated for an average campground (in 1970) of 62 sites. For purposes of comparison, the average gross income per site for a campground of this size was approximately $112.

A simple comparison of costs and returns revealed that the average campground will not break even unless: (1) the owner can avoid paying for labor and ignore depreciation, which is probably what a great many campground owners have done in order to stay in business; or (2) the campsite rental income can be supplemented by additional revenues that will net at least 19¢ for every $1 of campsite rentals.

The relationship between large campgrounds and more income per site may be in part a function of the regional distribution of campgrounds. Campgrounds of more than 50 sites were in the minority in every region except the Seacoast (table 4).

Table 4.--Regional size distribution of campgrounds and mean gross site-rental incomes of responding campgrounds[1/]

Region	Small campgrounds[2/]			Medium and large campgrounds		
	Proportion of regional total	Mean size (sites)	Mean gross income	Proportion of regional total	Mean size (sites)	Mean gross income
	Percent	No.	Dollars	Percent	No.	Dollars
1. White Mountains	62	24	2,184	38	103	17,716
2. Dartmouth-Lake Sunapee	71	22	1,430	29	61	6,710
3. Lakes	51	28	2,418	49	115	14,950
4. Monadnock	55	32	2,240	45	74	8,436
5. Merrimack	59	28	2,464	41	90	9,270
6. Seacoast	22	29	2,668	78	97	10,864
All regions	53	27	2,430	47	99	12,573

[1/] Average incomes are based on 19 of 24 small and 10 of 15 large campgrounds in region 1. The corresponding ratios for the other regions are: region 2, 9/12 and 4/5; region 3, 19/31 and 21/30; region 4, 10/11 and 6/9; region 5, 9/13 and 8/9; region 6, 2/5 and 12/18.

[2/] Fewer than 50 sites.

MANAGEMENT PRACTICES

A major objective of the 1971 census was to identify and evaluate the marketing and pricing practices of commercial campgrounds. This part of the study included three broad classes of management activity: pricing, promotion, and facilities and services offered to the camping public.

Pricing and Charging Practices

The most common daily rates charged at New Hampshire campgrounds in 1970 were:

Tent sites; no utility hookups	$3.00
Campsite with electricity or water connections	$3.50
Campsite with electricity, water, and sewage connections	$4.00

Approximately one-third of all managers raised their rates by 50¢ for the 1971 season. Twenty-one percent planned to raise their rates in 1972 and another 28 percent were considering an increase for the 1972 season.

The comparison of average per-site fees did not imply that most campgrounds charged on a per-site basis. In fact, most had a per-family charge, although there was no uniform definition of a family, and a few charged on a per-person basis. In 1970 the basic units for charging at 182 commercial campgrounds in New Hampshire were:

Basis	Campgrounds
Per site	30
Per family--	
of 2	7
of 3	1
of 4	35
of 5	38
of unlimited size	60
Per person--	
over 12 years old	10
over 18 years old	1

The 1964 census did not include comparable data on methods of charging. However, most managers indicated that the trend has been away from per-site fees and toward more complex fee systems. For example, a campground may have fee zones and charge higher rates for sites near the waterfront. Size of family, type of utility connections, and length of visit can all influence the fee. And a few campgrounds have off-season rates. Most campgrounds also charge $1 to $2 for visitors to the campsite.

Seasonal camping rates ranged from $80 to $330. Of the 126 campgrounds that had seasonal rates, one-half were in the $150 to $200 range. About 40 percent of the campgrounds allowed campers to store their equipment on sites during the off-season. Most of these had no extra charge for this service, and did it as a courtesy for their seasonal campers.

A minority of campgrounds (42 percent) allowed large groups to camp in their areas and about two-thirds of these offered special group rates. These rates were usually negotiated individually, depending on the size of the group and the time of year.

A majority of campgrounds (75 percent) did not allow picnicking or other forms of day use in the campground. Relatively few had separate picnic and day-use areas.

Only 13 campgrounds were found to accept credit-card payments for campsite rentals.

Promotional Practices

The average per-site expenditure for advertising varied with the campgrounds' size and location (table 5). The average in the three northern regions was more than twice that of the three southern regions. Variations by size within region were substantial but followed no consistent pattern from one region to another. The differences in mean advertising expense also had no consistent relationship with age or size of camping enterprise (table 6).

Table 5.--Average per-site expenditures for advertising, by region and size of campground

[Ratio of responding campgrounds is shown in parentheses]

Region	Small campgrounds[1/]	Large campgrounds	All campgrounds
White Mountain	$9.00 (23/24)	$5.90 (10/15)	$8.06
Dartmouth-Lake Sunapee	5.50 (10/12)	4.30 (3/5)	5.22
Lakes	3.70 (21/31)	8.30 (24/30)	6.15
Monadnock	3.80 (8/11)	3.30 (7/9)	3.57
Merrimack Valley	3.60 (10/13)	2.20 (9/9)	2.94
Seacoast	2.80 (4/5)	3.50 (15/18)	3.35
All regions	$5.49	$5.39	$5.45

[1/] Small campgrounds have fewer than 50 campsites, large campgrounds have 50 or more.

Table 6.--Average per-site expenditures for advertising in 1970, by campground age and size

Years in business	Small campgrounds	Large campgrounds
At least 6	$4.60	$6.10
5 or less	6.10	4.70

Most of the reported expenditure went for two types of advertising: (1) printing and distribution of brochures; and (2) advertisements in camping magazines and directories. Eighteen campgrounds bought advertising space in newspapers. Five campgrounds advertised on local radio and television stations. Fifty-five campground owners had evaluated the effectiveness of specific advertising outlets in the past, and 42 of these felt that ads in directories and camping magazines were their best buy.

The number and variety of promotional activities seemed to be severely limited. Two campgrounds provided a day's free camping--at the beginning of the season; and 28 campgrounds featured a campground supper at some time during the season. Thirty-eight campgrounds had no printed brochures; and only 14 campgrounds distributed their brochures through four or more outlets, such as camping shows, equipment dealers, tourist booths, and direct mail.

Facilities and Services Provided

Several of the services and some of the facilities provided by campgrounds had distinct promotional value. For example, 124 campgrounds had an informal referral arrangement with neighboring campgrounds on peak-use days.

Nine of ten campgrounds accepted reservations, and 90 percent of these would reserve a specific numbered campsite on request. Campsites reserved in advance accounted for more than one-half of the business at one of every two campgrounds. Relatively few (11) campgrounds had policies of not accepting reservations on holiday weekends. And a minimum length of visit--usually 1 week--was required by only two campgrounds. The off-season storage of recreational vehicles, discount rates for groups, and restrictions on pets were other examples of services with promotional value.

An abundance of available campsites is both a service and a facility for camping tourists. The 182 campgrounds in operation in 1970 had a developed capacity of 11,123 campsites, not including overflow capacity and undeveloped campsites. This was an increase of 171 percent over the estimated 4,100 developed sites reported in the 1964 census.

All but 11 of the 182 campgrounds had some campsites with utility connections for electricity or water and sewage. Seventy percent of the 11,123 campsites had at least an electrical connection. The average campground of 62 sites had 19 tent sites (no hookups) and 43 sites with some combination of utility connections. In 1964, the average commercial campground in New Hampshire had about 40 campsites evenly split for tents and trailers. The majority of commercial campgrounds in 1970 offered hot showers (76 percent); flush toilets (89 percent); dumping stations for trailer holding tanks (57 percent); firewood, but generally not free (75 percent); fishing (78 percent); and swimming beaches (61 percent).

A minority offered organized activities and rentals of recreational equipment. Other facilities and services offered included:

	(Percent)
Playground	73
Camp store	42
Boat-launching area	28
Recreation hall	26
Rental boats	26
Gas or propane service	20
Washers, dryers	19
Dock space	18
Juke box or record player	16
Marked nature trails	13
Snack bar or restaurant	9
Swimming pool	5
Baby-sitting	5
Rental tents	5
Rental trailers	3
Riding horses	2

VOLUME OF BUSINESS

The average attendance at commercial campgrounds in New Hampshire doubled between 1963 and 1970. The number of camping parties (families) averaged 800 per campground in 1970. However, one-half of the campgrounds had fewer than 375 parties. By comparison, 34 of 71 campgrounds in 1963 had fewer than 100 camping parties. The average occupancy rates were significantly higher at large campgrounds and at campgrounds in the Lakes Region (table 7).

The average occupancy (June, July, and August) for all campgrounds was about 50 percent. Weekdays averaged about 40 percent and weekends about 65 percent. On holiday weekends in 1970, the average occupancy level was 80 percent. The most common visit to New Hampshire campgrounds was for a weekend:

Length of visit	Campgrounds (No.)
1 day	27
Weekend	77
4 to 7 days	24
Over 1 week	22
Seasonal	12

Table 7.--Average 1970 summer occupancy of New Hampshire campgrounds, by regions and size of campground

[In percent of occupancy]

Region	Small campgrounds	Large campgrounds
White Mountain	47	72
Dartmouth-Lake Sunapee	35	55
Lakes	61	70
Monadnock	38	55
Merrimack Valley	45	70
Seacoast	25	80

This distribution tends to de-emphasize the importance of long visits. Almost all campgrounds rented some sites to season-long campers and 16 percent rented at least one-half of their campsites to campers who stayed for the full season. Full-season rentals are most common in the Lakes Region and Seacoast Region, accounting for more than 1/8 of the business in these regions. In 1970, managers reported that, on the average, about 60 percent of their visitors were repeat customers. Most managers reported that this percentage of repeat business has remained fairly constant since 1968.

Throughout the State, commercial campgrounds were located, on the average, only about 14 miles from a federal, state, or county-operated campground. Most campground owners (60 percent) felt that the public campgrounds had no effect on their business. Smaller campgrounds and those situated in regions having large public campground developments were more likely to report that public developments hurt their business (table 8).

Table 8.--Percent of commercial campgrounds reporting a business reduction due to their location near public campgrounds, by size of enterprise and region

Region	Small campgrounds	Large campgrounds
White Mountains	54	15
Dartmouth-Lake Sunapee	20	10
Lakes	11	21
Monadnock	18	0
Merrimack Valley	17	25
Seacoast	0	12

CHARACTERISTICS
OF SUCCESSFUL CAMPGROUNDS

Success in any business is equated with profitability. Profitability in the campground business is difficult to determine for a variety of reasons--most commonly, inadequate cost records. Many campground owners have other sources of income and apparently feel that they can afford to put more money into the campground than they can get out of it in the short run. Of the 182 campgrounds surveyed, only 46 could supply complete records on both costs and returns; and 16 of these showed a net loss in 1970. Consequently, an examination of enterprise success must be based on some arbitrary definition of the term.

An alternative criterion of success is whether or not the campground has the volume of business it needs to succeed. The average (median) daily summer occupancy in 1970 for New Hampshire campgrounds was 60 percent. The average (mean) gross income per site was $107 (excluding store sales).

Campgrounds that exceeded the average in either or both of these measures could logically be considered to have the potential for success. And campgrounds with below-average attendance but higher-than-average gross income per site should also be considered successful because their pricing practices may be more realistic than the average. The distribution of 182 campgrounds in 1970 according to these two criteria was:

	No.
Successful:	
1. Above-average occupancy, over $107/site:	48
2. Above-average occupancy, income unknown:	21
3. Below-average occupancy, over $107/site:	8
4. Occupancy unknown, over $107/site:	1
Total	78
Unsuccessful:	
1. Below-average occupancy and income:	46
2. Below-average occupancy, income unknown:	17
3. Above-average occupancy, under $107/site:	19
4. Occupancy unknown, under $107/site:	7
Total	89
Unknown:	
1. Occupancy unknown, income unknown:	15

A comparison of the 78 successful and 89 unsuccessful campgrounds revealed a number of significant differences in their operations (table 9). The successful enterprises were larger, and more than two-thirds of their sites had complete or partial utility connections for travel trailers. The market value of the successful enterprises and the average cost per site of operating them were about twice that of unsuccessful campgrounds. And the average number of camping parties served was almost four times greater at successful campgrounds.

Years of operation seems to be associated with success. Eighty-one percent of the successful enterprises and 59 percent of the unsuccessful enterprises had been in business for at least 5 years. Years of operation is probably also related to the number of repeat visitors and the average length of a camping visit. The modal length of visit at 83 percent of the unsuccessful campgrounds was only 1 to 2 nights. Such short visits were the rule at only 44 percent of the successful enterprises.

Table 9.--A comparison of 78 successful and 89 unsuccessful commercial campground operations in New Hampshire in 1970

Factor	Successful	Unsuccessful
Size:		
Tent sites in 1964[1/].....number....	20	15
Trailer sites in 1964[1/]...number....	20	15
Tent sites in 1970.....number....	21	17
Trailer sites in 1970.....number....	50	32
Volume of business:		
Mean number of parties....number....	1,361	362
Seasonal visitors[2/].....percent....	31	10
Repeat business increasing..percent.	40	26
Costs per developed campsite:		
Total.....dollars....	144.30	67.50
Taxes .....dollars....	17.60	10.80
Interest on loans.....dollars....	12.30	7.30
Maintenance.....dollars....	20.90	9.20
Advertising.....dollars....	6.30	4.70
Depreciation.....dollars....	36.70	18.70
Paid labor.....dollars....	23.00	10.90
Average fair market value (1970)		
(estimated).....dollars.....	145,000.00	86,000.00

[1/] Average for those campgrounds in business in 1964.

[2/] At least 10 percent of sites were rented at seasonal rate.

A number of other differences suggested that the successful enterprises have a more businesslike management. For example, 66 percent of the successful operators had a charge for campers' visitors, averaging $1.75 per car. At unsuccessful operations, the figures were 49 percent and $1.25. The proportion of campgrounds that had store sales to supplement their campsite rental income was 1 out of 5 for both categories of campgrounds. However, the successful ones averaged $11.40 (net) per site versus $7.80 for the unsuccessful ones. Membership in campground owner associations was more common (60 percent versus 38 percent) among the successful campgrounds.

The range in net incomes (per site, excluding store sales) among successful campgrounds was far greater than it was for the unsuccessful ones. The latter ranged from -$88 per site to +$57 per site. Successful enterprises ranged from -$147 to +$251 per site, a mean of $36 net income per site.

Unsuccessful operators were more likely to have developed land that had been in their family rather than to have selected the land because it seemed to have campground potential (40 percent versus 6 percent "in the family" among successful operators). The importance of carefully selecting the location for a camping enterprise is most apparent when comparing success ratios by county (fig. 2):

County	1970 campgrounds (No.)	Successful (percent)
Belknap	22	36
Carroll	37	57
Cheshire	16	56
Coos	16	44
Grafton	22	9
Hillsboro	9	22
Merrimack	14	43
Rockingham	25	60
Strafford	12	31
Sullivan	9	44

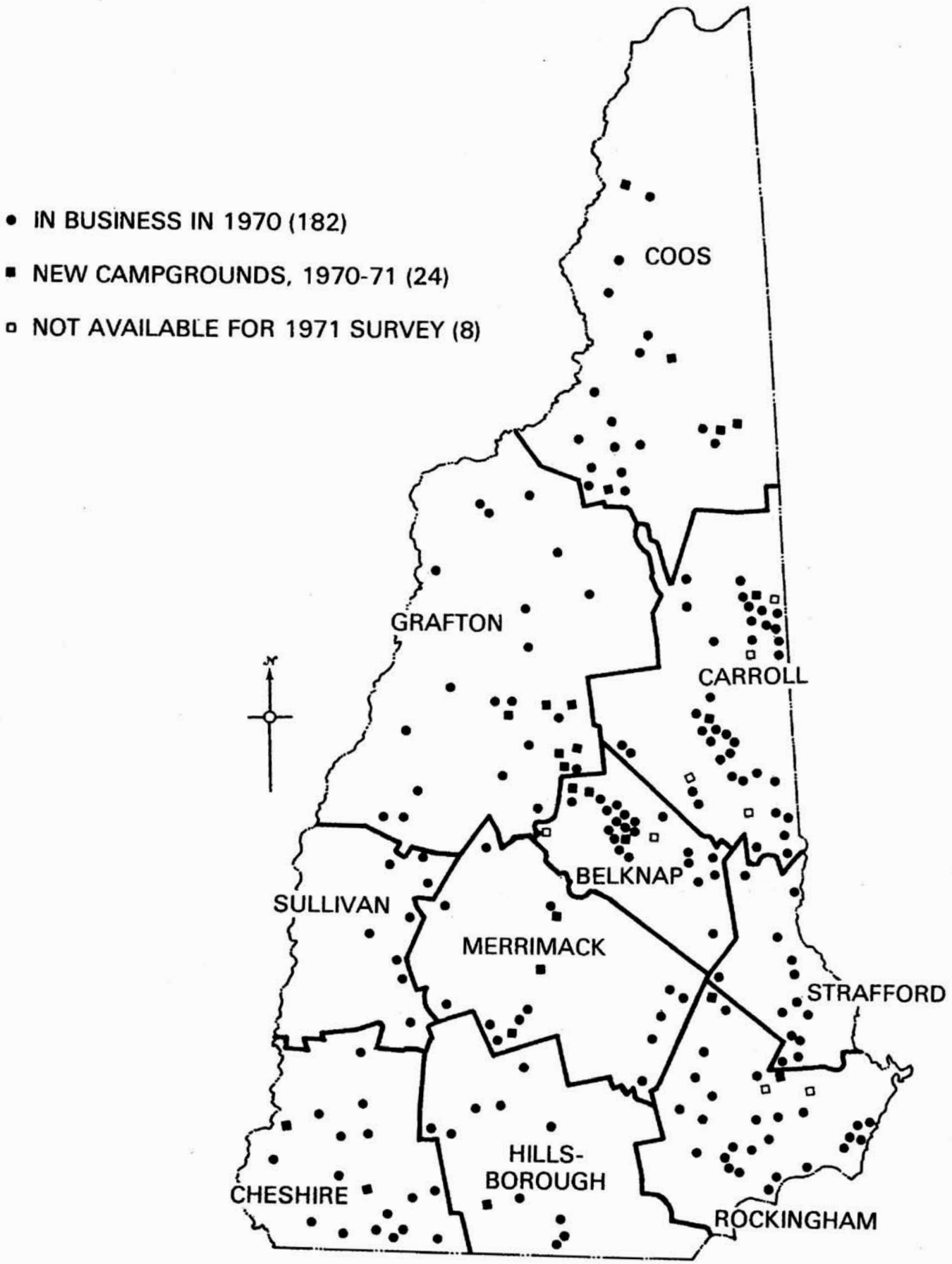


Figure 2.--The commercial campgrounds in New Hampshire in 1971, by counties.

SUMMARY AND CONCLUSIONS

The size, growth, and geographic distribution (figs. 1 and 2) of the campground industry in New Hampshire is impressive. Through private investment, the state has acquired a major developed resource that provides outdoor recreation and helps to generate tourist expenditures. It is a resource that emphatically contributes answers to the 1962 Outdoor Recreation Resources Review Commission's recommendations of providing, through private investment, outdoor recreation opportunities nearer to our major centers of population. And it is a resource that could never have been duplicated through public acquisition and agency growth. Yet it is an industry in trouble. Its growth, in terms of enterprises and capacity to serve the camping public, has been good. But its growth in terms of earnings has been a disappointment to many investors. Despite an incomplete and not totally representative census in 1971, it is clear that returns and costs are out of balance--particularly among small enterprises of fewer than 100 tent and trailer sites.

The strong relationship between campground size and net return is alarming on two counts: (1) most (8 out of 10) of New Hampshire's commercial campgrounds have fewer than 100 developed sites; and (2) the trend toward larger campground developments seems to be at odds with the needs for variety, personal service, and well-distributed camping opportunities for a vigorous tourist economy.

As a further result of poor earnings, campground owners are sometimes forced to develop supplemental campground income through the sale of souvenirs, firewood, and ice, and through other activities that may, in the long run, detract from the business of providing enjoyable experiences that will draw campers back to New Hampshire for future visits.

The finding that a relatively large number of campground enterprises were developed as a means of earning income from land already owned, and that very few such enterprises were successful, is an important one. Lacking a careful site selection, many of these enterprises have little potential for success. Consequently, their earnings and volume-of-business statistics tend to dampen the outlook for the industry as a whole.

In part, the poor earning record of commercial campgrounds must be due to the owners' reluctance to raise their rates. The more impressive earnings of large campgrounds are not entirely due to their size. Larger campgrounds are more likely to have income sources other than site rentals, and their site rentals tend to be higher as well. Because of the density of commercial campgrounds in parts of the State, there may be a feeling that rates must be raised collectively or not at all. And in some tourist regions, particularly the White Mountains, there is probably a feeling that it is necessary to set rates that will be comparable with those at the State Parks and National Forest campgrounds.

The assumptions that rates should be raised collectively, and that they should be comparable with those at public parks, reflect a poor understanding of the camping product. An independent increase of 50¢ or even $1 per night will probably not send campers flocking to the cheapest competition--particularly if the fees reflect quality development and service. Those campgrounds that have raised their rates in the past have apparently not lost any appreciable number of campers. And there seems to be some evidence to support the idea that public and private campgrounds are increasingly less competitive. Relatively few campgrounds developed at public expense are designed and managed at the level required by today's sophisticated recreational vehicles.

Raising camping fees to a level that more accurately reflects costs seem to be the top-priority order of business for the industry as a whole. Many New Hampshire campgrounds have apparently been losing money for years; and unless this trend is reversed, we may shortly be faced with a period of many campground failures at a time when the number of campers in the market continues to increase.

More realistic camping-fee levels must be accompanied by a stronger emphasis on quality and public recognition of the camping enterprise as an economic resource. Relatively modest property-tax relief, which communities commonly have used to attract industries--and less clean industries than camping--could easily be justified on a local and broader basis. Locally, the campground generates jobs and income. But on a broader scale, if camping enterprises do not meet the demands of the camping public, then resource agencies will be forced to fill the gap at a considerable taxpayer expense.

Along with a failure to establish cost-based fees, campground owners in general seem to be guilty of unimaginative marketing and poor product identification. The product being offered to the camping public, at destination campgrounds at least, is daytime recreation. But the fee is always based on night-time accommodation. A $3.50 average for a day's recreation for a family is an outstanding bargain! In fact it is such a good bargain that it is equivalent to an industry-wide loss-leader that encourages sales of expensive camping equipment and vehicles.

When the campground industry begins to market and sell outdoor fun--rather than tent and trailer spaces--it will probably become a significant contributor to the State's economy. It is already a significant part of New Hampshire's total recreation resource.

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APPENDIX

Table 10.--A comparison of campground volume of business statistics according to enterprise size and regional location

Region and size of campground	Campgrounds	100-day season or shorter	Reservations are 1/2 or more of business	Gross income per site (less store sales)	
				Range	Mean
	No.	Percent	Percent	Dollars	Dollars
White Mountains:					
Small[1/]	24	78	26	6-250	91
Large	15	60	50	6-333	172
Dartmouth-Lake Sunapee:					
Small	12	83	40	16-146	65
Large	5	60	80	77-177	110
Lakes:					
Small	31	87	50	10-293	111
Large	30	73	50	13-425	130
Monadnock:					
Small	11	55	38	4-170	70
Large	9	33	68	20-324	114
Merrimack Valley:					
Small	13	77	60	3-177	88
Large	9	78	25	40-171	103
Seacoast:					
Small	5	100	25	30-155	93
Large	18	61	59	8-265	112

[1/] Small campgrounds have fewer than 50 campsites.

Table 11.--A comparison of selected characteristics of camping enterprises in New Hampshire, based upon age and size of campground

Characteristic	Old campgrounds[1]		New campgrounds	
	Small[2]	Large	Small	Large
Enterprises ..... No. ..	42	41	54	45
Average size ..... No. sites ..	29	100	26	99
Sites per acre ..... No. ..	4.9	6.1	4.7	5.5
1970 attendance ..... families ..	428	1,108	362	1,422
Average weekly rate ..... dollars ..	18	21	19	21
Average seasonal rate ... dollars ..	150	170	180	200
Over 1/2 full, 1970 ..... percent ..	58	90	49	61
Over 1/2 repeat visits .. percent ..	81	90	53	79
Over 1/2 reserved business ..... percent ..	53	59	33	47
Average market value .... dollars ..	46,600	158,600	45,200	155,600
Average income per site (excluding store sales).. dollars ..	90.70	142.80	89.30	110.90
Average net income per site from store sales ... dollars ..	6.50	9.30	14.40	8.60
Average costs per site (excluding store costs).. dollars ..	90.80	106.00	118.20	114.30
Average costs per site (without store):				
Labor ..... dollars ..	8.60	18.60	3.90	20.20
Taxes ..... dollars ..	19.80	10.00	17.00	12.50
Interest ..... dollars ..	5.90	6.20	9.60	15.80
Advertising ..... dollars ..	4.60	6.10	6.10	4.70
Depreciation ..... dollars ..	15.90	28.70	30.70	30.50
Regional distribution:				
White Mountains ..... percent ..	28	15	34	23
Dartmouth-Lake Sunapee. percent ..	35	6	35	24
Lakes ..... percent ..	23	23	28	26
Monadnock ..... percent ..	20	20	35	25
Merrimack Valley ..... percent ..	27	23	32	18
Seacoast ..... percent ..	4	48	17	31

[1] Older campgrounds in business before 1966; new campgrounds since 1966.

[2] Smaller campgrounds have fewer than 50 sites.

LIBRARY CARD

LaPage, Wilbur F., Paula L. Cormier, and Steven C. Maurice. 1972. THE COMMERCIAL CAMPGROUND INDUSTRY IN NEW HAMPSHIRE. NE. Forest Exp. Sta., Upper Darby, Pa. 41 p., illus. (USDA Forest Serv. Res. Pap. NE-255)

The findings of a 1971 census of commercial camping enterprises in New Hampshire, including the growth of commercial camping enterprises during the period 1960-71, the average per-site costs and returns for operating a campground in 1970, and the characteristics of 78 successful and 89 unsuccessful camping enterprises.

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