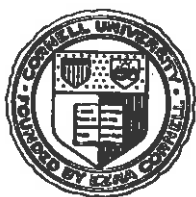


# THE 1979 CONY-CORNELL CAMPGROUND SURVEY

by

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## Introduction and Purpose

Cornell University, through its extension service and research programs, has maintained an active interest in many phases of campground management over the years. Annual conferences for existing and prospective private campground owners were sponsored by Cooperative Extension from 1967 through 1974. The Department of Natural Resources conducted camping research projects via federal Hatch funds from 1970 through 1974. Although a combination of staff and budget cuts forced the curtailing of Cornell's annual campground conference, those faculty and staff who remain at Cornell continue to have strong interest in camping as a form of outdoor leisure and as an important use of our natural resources.

As the commercial Campground Operators of New York (CONY) has grown and matured, its leadership has recognized the value of research data related to the industry as it exists and operates in New York, and sought help in obtaining such data from the author. Cornell's position was that it no longer has research funds allocated specifically to camping, but that it nevertheless maintains an interest in camping. The author indicated a willingness to survey a sample of the industry, analyze the data, and issue a report of findings if the CONY membership would willingly provide the requested data by mail, thus eliminating interviewing costs. Upon agreement of the CONY leadership to strongly seek support, a study was initiated.

The 1979 study has three major purposes:

1. To obtain an estimate of the economic importance of the industry to New York.
2. To monitor occupancy data for comparison over time as a measure of (1) the health of the industry, and (2) how camping is impacted by energy shortages, higher fuel prices, and other factors.
3. To monitor camping origin-destination patterns and how they are affected by the above factors.

### Methods

Because the request for this study, and the promise of cooperation came from CONY, only CONY campgrounds were included in the sample. However, we wished to estimate selected economic values related to camping not just for CONY campgrounds, but for all commercial campgrounds in the state. To choose a sample as representative as possible, a quota sample of CONY campgrounds was chosen which was representative of all New York campgrounds (as listed in the 1979 Woodall's Campground Directory) with respect to geographic location and size (number of sites).

A sample of 60 campgrounds was so chosen initially, and a subsequent sample of 12 campgrounds was chosen to bolster the sample size. Complete occupancy data were obtained from 36 campgrounds and partial data were obtained from 49 campgrounds. Economic data on taxes and employees were obtained from 39 campgrounds.

Data on origin-destination patterns are not included in this report because this is the first year in which they were obtained, and their primary purpose is for year to year comparison. They will be examined in a subsequent report.

### Profile of Responding Campgrounds

The approximate location of responding campgrounds is shown in Figure 1. For purposes of occupancy analysis, we have divided the state into 3 regions - Western, Northern, and Eastern.

Responding campgrounds averaged 119 total developed sites, with space for an additional 63 overflow sites. Of the 119 developed sites, an average of 16 had no hookups, while 40 had full three-way hook-ups. The remainder had combinations of one or two electric, water, or sewer hook-ups.

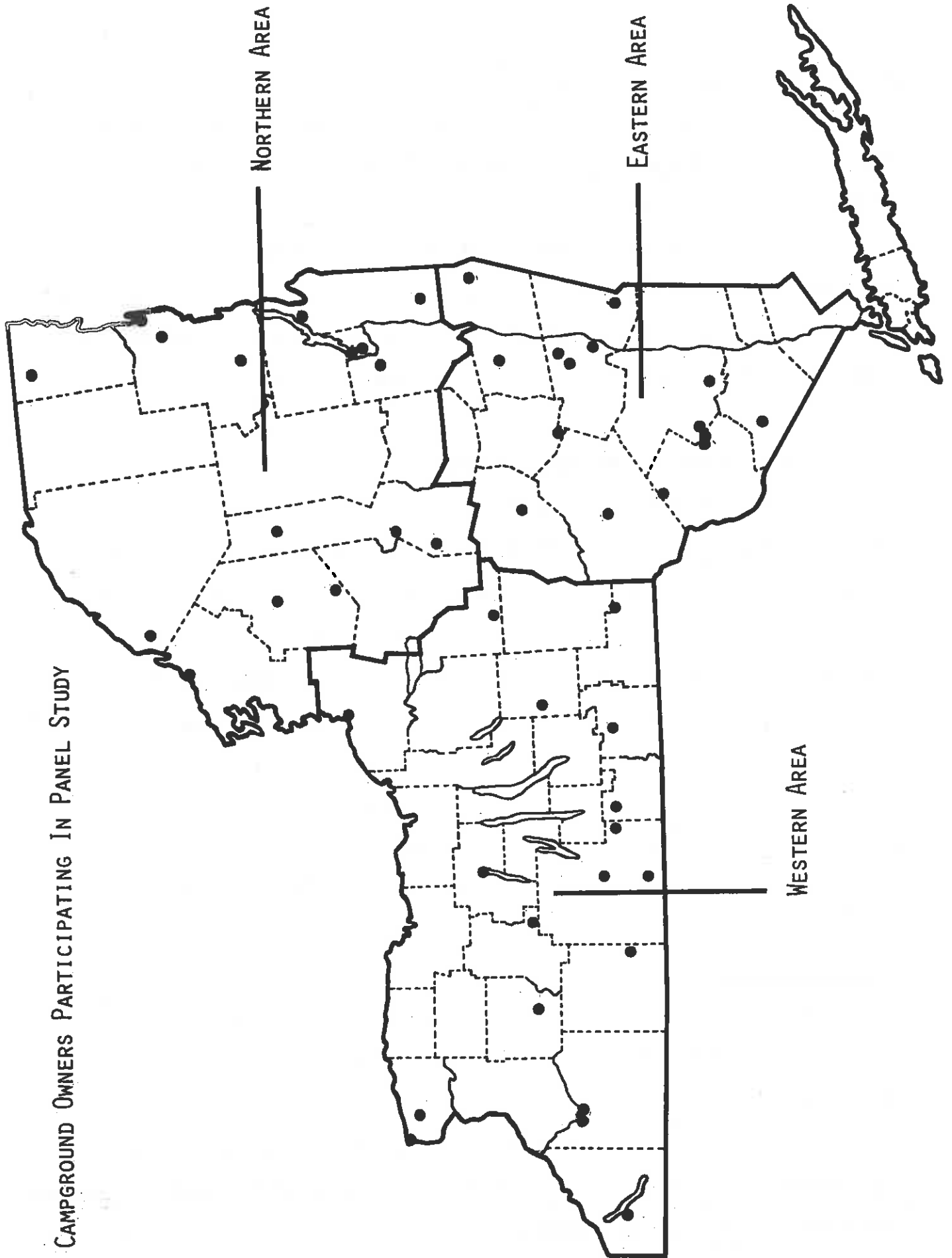
### Economic Contribution of New York Campgrounds

Responding campgrounds estimated their fair market value, on average, to be about \$316,000, or about \$2,655 per site. In attempt to arrive at a non-inflated but realistic estimate, respondents were asked to assume that they had to sell, but that a willing buyer could be located. These campgrounds paid an average of \$2,151 in local property and school taxes, and \$580 in state sales taxes. They employed an average of 2.3 full-time seasonal employees, and 1.8 part-time paid employees.

Good data on the number of campgrounds in New York does not exist. The 1979 New York State Health Department lists 955 firms. However, some state and local public campgrounds may be included in this list, and numerous mobile home parks are included. Rand McNally and Woodall 1979 editions list about 400 campgrounds. Based upon previous experience of comparing guidebooks and state Health Department lists, it is the author's belief that an estimate of 600 commercial campgrounds is defensible as being a reasonable, non-inflated estimate.

If the estimate of 600 campgrounds is accepted, and the above averages are expanded by a factor of 600, the economic importance of New York's commercial campground industry becomes apparent:

CAMPGROUND OWNERS PARTICIPATING IN PANEL STUDY



NORTHERN AREA

EASTERN AREA

WESTERN AREA

Total estimated fair market value		\$190 million
Estimated local taxes paid		\$1.3 million
Estimated state sales tax paid		\$348,000
Total full-time seasonal employees	1,380	
Total part-time seasonal employees	1,080	

### Occupancy

There are at least two useful ways to measure occupancy. The nonseasonal occupancy rate is the percent of sites not rented on a seasonal basis which are occupied at a given time. The total occupancy rate includes seasonals, and treats them as if they were constantly occupied sites. Most previous occupancy data have used the total occupancy rate. When using this rate, however, one must remember that seasonal camping sites are typically discounted from the daily rate, and that these occupants are frequently not at the campground and therefore can not make other purchases in the same manner as those who truly occupy a site. On the other hand, the nonseasonal occupancy rate indicates the proportion of nonseasonal sites rented, but ignores business gained from seasonal sites.

Tables 1-3 show nonseasonal occupancy on a weekly basis. The average overall nonseasonal occupancy rate statewide for the Memorial Day through Labor Day period was 25%. This figure ranged from 21% in the eastern region and 23% in the western region, to 30 percent in Northern New York. The statewide rate of 25% was the result of an 19% weekday rate (Sunday through Thursday evenings) and a 39% weekend rate (Friday and Saturday evenings).

Tables 4-6 show comparable total occupancy data, including seasonals. The statewide average total occupancy rate for the Memorial Day through Labor Day period was 45%, resulting from a weekday average of 41% and a weekend average of 55%. The total occupancy rate was highest in the western region (51%), and ranged downward to 45% in the northern region and 36% in the eastern region.

With the exception of fluctuations caused by holiday weekends, camping in 1979 peaked latest in the eastern region, during the week of July 29 - August 4. In the western and northern regions, the peak was one week earlier, July 22 - 28 (see Table 4).

Table 1 1979 Nonseasonal Weekly Occupancy

<u>Week</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
May 27 - June 2	20	17	16	18
June 3 - 9	7	9	7	8
10 - 16	9	11	10	10
17 - 23	9	9	12	10
24 - 30	15	16	30	21
July 1 - 7	25	36	47	37
8 - 14	21	23	31	25
15 - 21	26	26	34	29
22 - 28	28	31	38	33
29 - Aug 4	33	27	37	32
Aug 5 - 11	23	25	36	29
12 - 18	20	23	34	26
19 - 25	18	18	30	23
26 - Sept 1	29	33	36	33
Season Totals*	21	23	30	25

\*Adjusted to include Labor Day weekend



Table 2 1979 Nonseasonal Weekday Occupancy

<u>Week</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
May 27 - May 31	22	17	17	18
June 3 - 7	2	4	4	3
10 - 14	2	4	5	4
17 - 21	4	5	9	6
24 - 28	7	7	21	12
July 1 - 5	21	30	45	33
8 - 12	13	14	28	19
15 - 19	18	17	28	21
22 - 26	21	24	33	27
29 - Aug 2	19	21	32	24
Aug 5 - 9	18	19	33	23
12 - 16	15	17	30	21
19 - 23	15	14	28	20
26 - 30	16	14	25	19
Season Totals*	14	16	26	19

\*Adjusted to include Labor Day weekend

Table 3 1979 Nonseasonal Weekend Occupancy

<u>Weekend</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
June 1 - 2	17	18	13	16
8 - 9	21	21	14	13
15 - 16	26	29	22	26
22 - 23	20	17	19	19
29 - 30	34	37	51	41
July 6 - 7	33	51	53	47
13 - 14	39	43	38	40
20 - 21	46	49	49	48
27 - 28	47	48	48	48
Aug 3 - 4	67	42	49	51
10 - 11	38	42	46	42
17 - 18	32	38	42	38
24 - 25	26	29	35	31
31 - Sept 1	59	81	65	69
Season Totals*	35	40	40	39

\*Adjusted to include Labor Day weekend

Table 4 1979 Total Weekly Occupancy

<u>Week</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
May 27 - June 2	36	45	33	38
June 3 - 9	27	40	25	31
10 - 16	28	41	27	32
17 - 23	29	40	29	33
24 - 30	33	46	45	42
July 1 - 7	40	57	58	53
8 - 14	38	49	46	45
15 - 21	42	51	48	47
22 - 28	43	54	51	50
29 - Aug 4	45	52	51	50
5 - 11	39	51	50	48
12 - 18	37	50	48	45
19 - 25	35	49	45	44
26 - Sept 1	42	57	49	51
Season Totals*	36	51	45	45

\*Adjusted to include Labor Day weekend

Table 5 1979 Total Weekday Occupancy

<u>Week</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
May 27 - 31	37	44	34	38
June 3 - 7	23	37	23	28
10 - 14	23	37	24	28
17 - 21	26	38	27	31
24 - 28	29	41	38	37
July 1 - 5	38	54	57	50
8 - 12	33	45	43	41
15 - 19	37	46	44	42
22 - 26	38	50	48	46
29 - Aug 2	36	49	47	45
Aug 5 - 9	35	47	48	44
12 - 16	34	46	45	42
19 - 23	33	47	44	42
26 - 30	34	46	41	41
Season Totals*	32	48	42	41

\*Adjusted to include Labor Day weekend.

Table 6 1979 Total Weekend Occupancy

<u>Weekend</u>	<u>East</u>	<u>West</u>	<u>North</u>	<u>Total</u>
June 1 - 2	34	45	30	36
8 - 9	36	48	30	38
15 - 16	41	51	36	43
22 - 23	36	46	34	39
29 - 30	45	58	62	56
July 6 - 7	46	66	63	59
13 - 14	52	60	51	55
20 - 21	57	64	59	60
27 - 28	57	65	60	61
Aug 3 - 4	68	62	60	63
10 - 11	50	62	57	57
17 - 18	46	58	53	53
24 - 25	41	55	49	49
31 - Sept 1	65	85	71	75
Season Totals*	47	62	53	55

\*Adjusted to include Labor Day weekend.

1978 - 79 Comparisons

Fourteen CONY campgrounds agreed to an optional survey request to provide total occupancy data for 1978 for comparison with 1979 data they were providing. From these 14 campgrounds, we can gain a broad perspective of how camping in the summer of 1979 compared with the previous year.

For these 14 campgrounds, nonseasonal site rentals declined by 8.2%. However, their nonseasonal occupancy rate rose from 23.9% to 25.6% because of increased seasonal site rentals which left fewer nonseasonal sites available in 1979. Seasonal site rentals were up by 30.5%, increasing from an average of 41 seasonal sites rented in 1978 to 54 in 1979.

Total 1979 occupancy for these 14 campgrounds in 1979 was up by 13.2% from 1978. Assuming a typical discount of about one-third the daily rate over a 100 day period for seasonal sites, and also assuming equal site rental rates in 1978 and 1979, site revenues for these 14 campgrounds would have increased by about 9% in 1979.

