



# 2020 State of the Industry Report

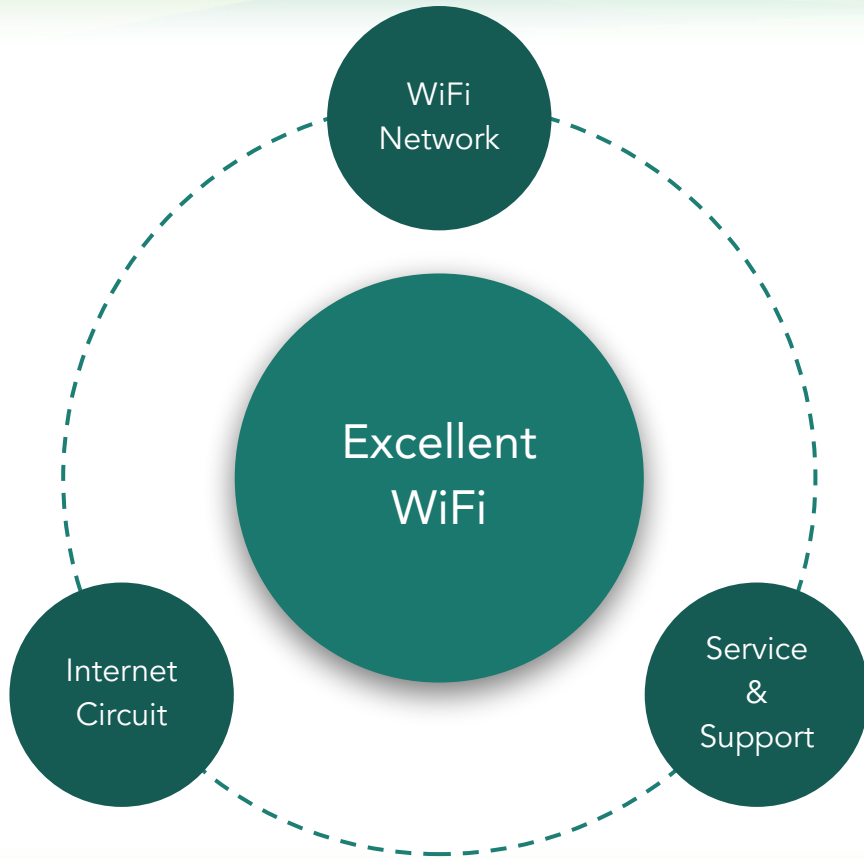
An annual assessment of campgrounds, RV parks and resorts' ability to meet consumer WiFi expectations

- Consumer Expectations Defined
- “It Takes Three”
- 2019 Findings
  - Property WiFi Ratings
  - Internet Circuit Capacity
  - WiFi Coverage
  - Network Technology and Design
  - Free or Pay
  - Honest Communication
- Summary
- Other Trends

For the consumer, “Wi-Fi” implicitly means... I can:

- Connect all my devices.
  - (smart phones, tablets, smart TV's, pet cameras, gaming consoles, etc)
- To do everything I want to do reliably.
  - (Stream music, netflix, youtube, pandora, facetime, skype, slingbox, hulu)
- Anywhere in my RV/ Cabin or the Resort.
- For free
- ....Unless you, the property owner or manager, say differently

# "It Takes Three"

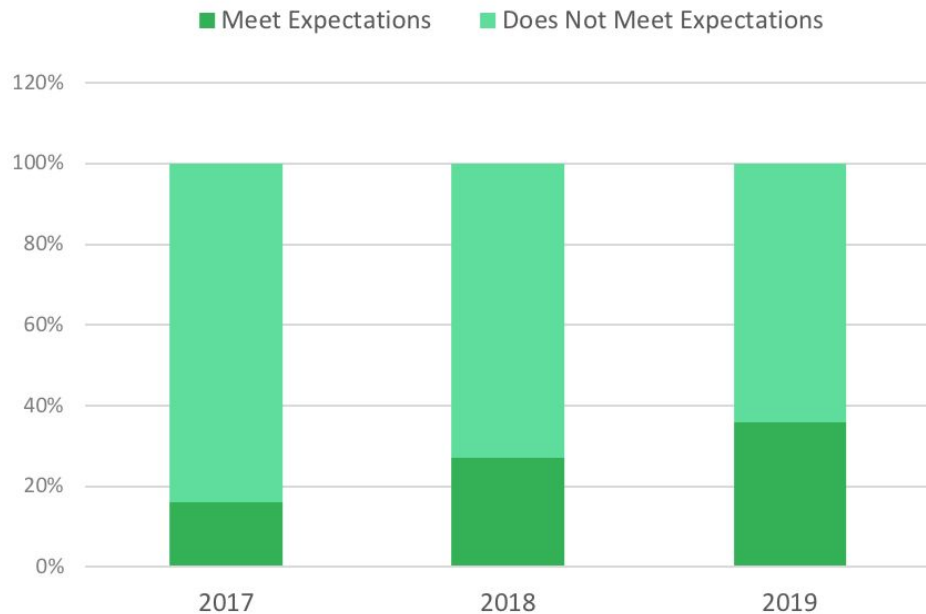


Giving your guests a great WiFi experience requires these three things:

- Internet Circuit - at least basic speeds (1Mbps/device)
- WiFi Network - full coverage for mobile devices (802.11 AC)
- Service & Support - effective circuit, network, and guest support

# One in Three Properties Meet Consumer Expectations

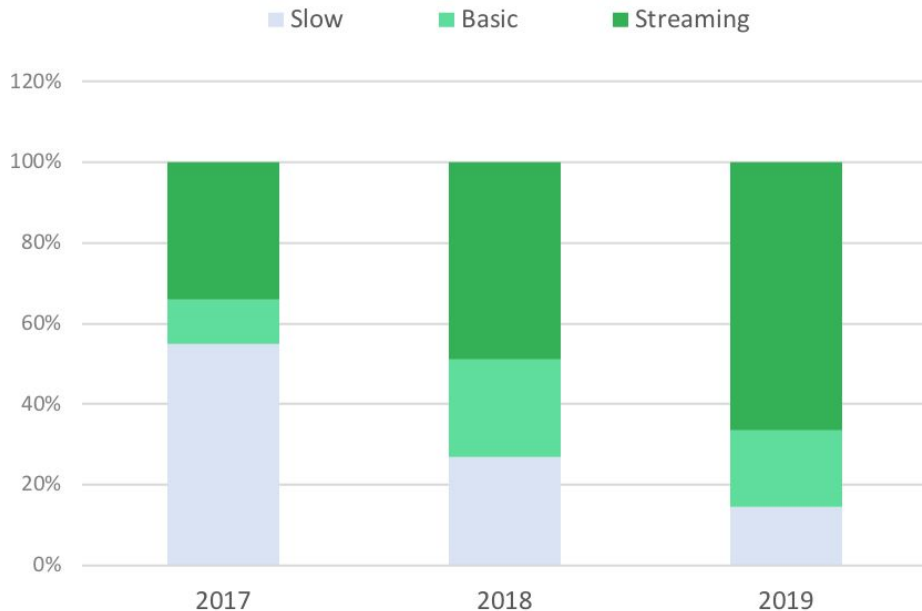
## Guest WiFi Experience



## Key Highlights:

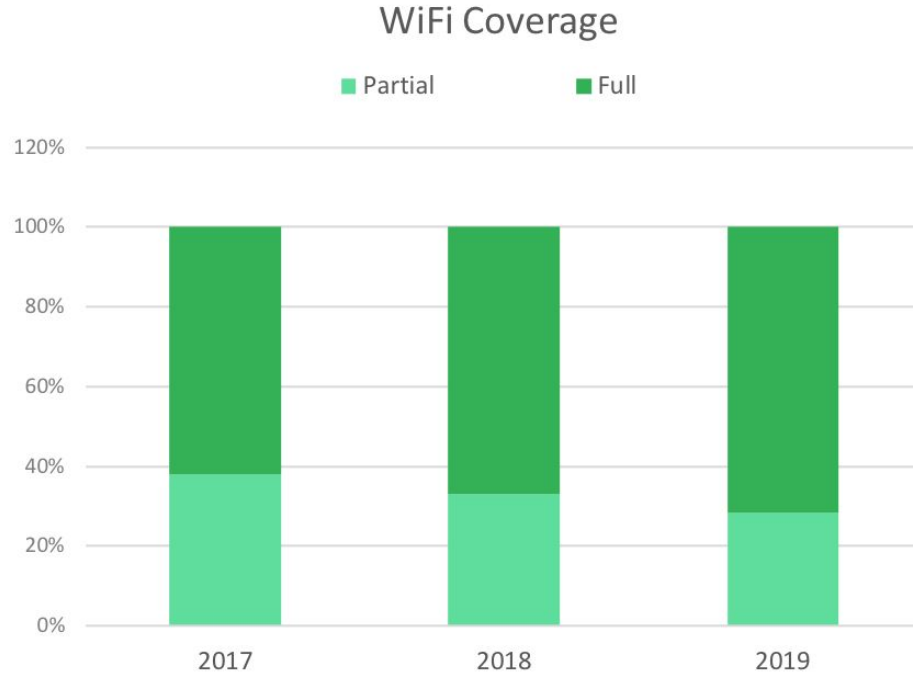
- This year, the average WiFi service rating improved to 7.4 out 10 from 6.9 in 2018. Biggest driver was faster internet circuits, followed by improved coverage and legacy equipment upgrades.
- 35.8% percent of properties had a 9 or 10 rating - meaning these can meet consumer expectations, a 22% improvement over 2018.
- Fastest Reported Consumer WiFi Plan is 20Mbps

## Internet Circuit Capacity



## Key Highlights:

- Streaming quality internet circuits for sites covered is available at 66.4% of properties up from 44% in 2018- Fiber and Coax driving
- 14.5% of properties have a "slow" internet circuit for the number of sites covered - and improvement from 20% in 2018.
- Notes:
  - Coax is 54.7% of internet circuit type
  - Fiber is now 18.5% of circuit type.
  - Properties need to upgrade their circuits to provide adequate MB per site due to multiple devices

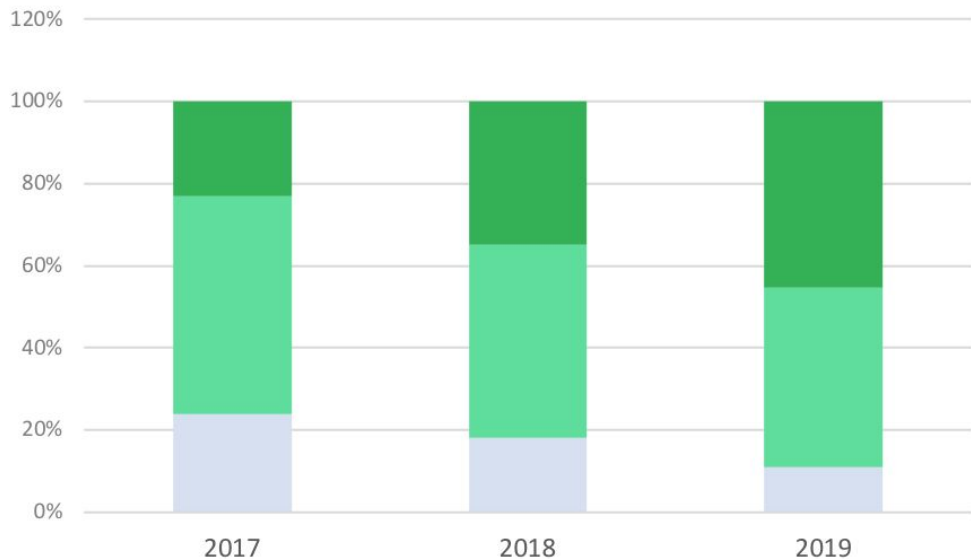


## Key Highlights:

- Coverage is the ability of WiFi to connect to mobile devices over all of a property:
  - 80+% of connected devices are mobile with weaker internal WiFi antennas -
  - Phones need more access points to deliver guaranteed connection -65dBm.
- 75% of properties reported “full coverage” slight improvement from 2018
- Coverage Trends:
  - Dedicated common area WiFi
  - Partial Coverage for hybrid MH/ RV properties
  - Dedicated Inside-the-Cabin-Experience for both vacation rentals and MH

## Equipment by Generation

Legacy (B, G)      Last (N)      Current (AC)



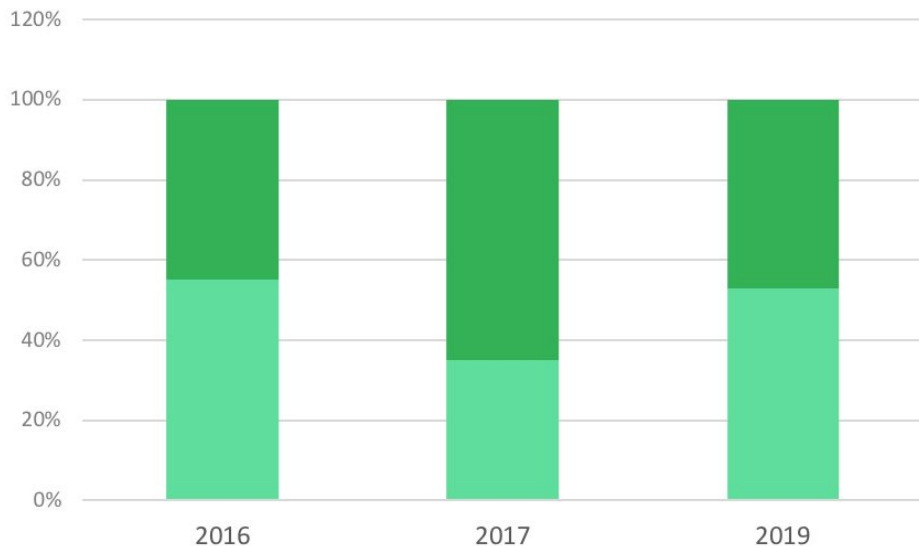
## Key Highlights:

- 85.4% had N- or AC-rated Wi-Fi networks
  - Increase in current generation networks 802.11AC to 43.4% from 35% -
  - 13.2% of parks are using severely dated, G standard or older networks using mesh design technology (improvement from 18%)
- Insights:
  - 8.3 devices per capita (Cisco)
  - More consumers have internet TV (Netflix, Hulu, etc) vs Cable TV
  - Robust WiFi connectivity required due to multiple devices + streaming
    - Buy 802.11ac Wave 2
    - WiFi6 Emerging

# Consumers will pay for Premium Service

## Free vs Paid WiFi

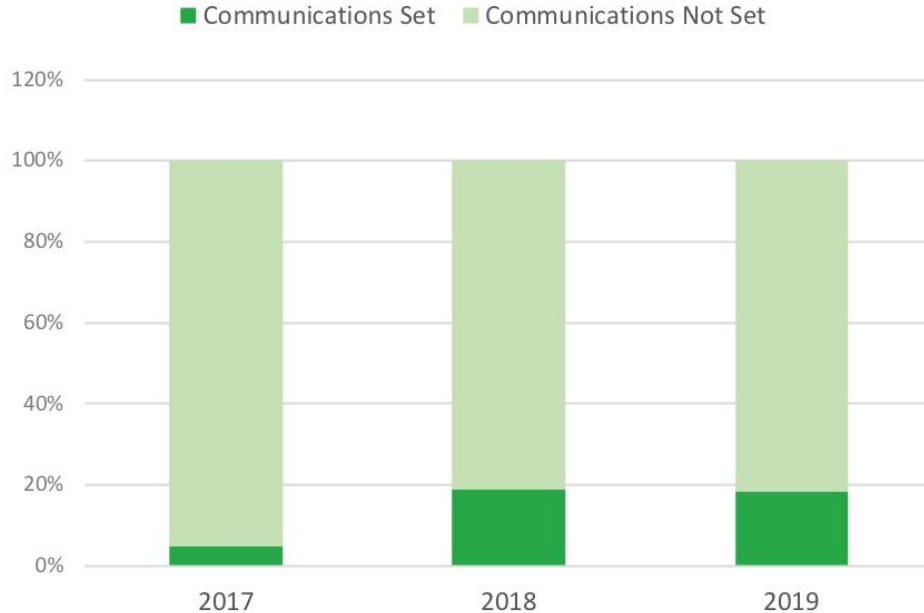
Free Freemium/Paid



## Key Highlights:

- Increase in Free-only Internet to 58% of properties from 38%
- 42% properties offer Freemium - free period and a Pay Plan - "Freemium."
- Notes:
  - Most customers with a 9-10 rating are charging for a premium plan.
  - Certain properties - mainly management groups - aim to offer some type of free, excellent WiFi at all properties

## Honest Communications



## Key Highlights:

- No change in communication gap from 2018-2019
- 65% of properties do not meet consumer expectations => only 19% of properties say something more than "Wi-Fi" or "Free Wi-Fi"
- Some sample expectations:
  - "Wi-Fi in Select Areas"
  - "Parkwide WiFi at every site"
  - "Free Parkwide WiFi"
  - "Basic WiFi Connection for browsing"
  - "Premium Wi-Fi Available"
  - Weblink with more details

1. The industry is improving WiFi services to meet guest expectations with 35.8% of properties rating 9 or 10.
2. Rating improvement is driven by investment in better internet circuits and secondarily network upgrades.
3. Honest Communication is improving, closing the expectation gap, but 81% of properties did not set WiFi expectations on their website.

- Office and WiFi Internet Circuit Consolidation
- Cable TV replacement with Private Cable, IPTV or Internet Only
- Fiber or Ethernet to the pedestal for New Construction & Expansion
- Dedicate Coverage for MH, Cabin Rentals and common areas
- Connecting Devices: ATM, Washer Dryers, Lockers, Meters, Cloud Cameras

# Thank You For Watching

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