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Evaluating RV Campground Attributes Using IPA Analysis

Kimberly Severt

The University of Alabama, ksevert@ches.ua.edu

Jill Fjelstul

University of Central Florida, jill.fjelstul@ucf.edu

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Cover Page Footnote

Special acknowledgement to the Good Sam's Club RV Association for their support of this study.

Evaluating RV Campground Attributes Using Importance-Performance Analysis

1.0 Introduction

The recreational vehicle (RV) industry is unique to leisure travel and tourism because the recreational vehicle itself serves a dual role for the traveler as the mode of transportation and the lodging accommodation. This uniqueness plays a huge part in the overall leisure experience. In fact, freedom, flexibility, and fun are utilized as the three pillars of the “RV Difference” campaign by GoRVing, a coalition sponsored by major stakeholders of the RV industry (GoRVing, 2014). Complementing the recreational vehicle as an integral component to the overall RV experience is the campground. There are over 16,000 RV parks and campgrounds in the United States (U.S.), approximately 440 campgrounds within the U.S. national park service, 7,800 state park campgrounds, and 4,300 campgrounds in the U.S. national forests (GoRVing, 2014). The plethora of campgrounds advances the question of factors influencing campground selection and subsequent level of satisfaction by the RV traveler.

Travel and tourism literature is replete with studies exploring motivation of the traveler (Cha, McCleary, and Uysal, 1995; Crompton, 1979; Jang and Wu, 2006; Sirakaya and Woodside, 2005). Ainscough (2005) argued increased competition in the travel and tourism industry intensifies knowing influences, cues, and customer perceptions of travel services. RV related literature, however, has limited contribution in this dimension. Fjelstul (2013), for example, explored pull factors specific to RV campground attributes by members of a RV association. RV travelers’ satisfaction of campground attributes in relation to importance and performance had yet to be studied. Therefore, the objectives of the current study were to:

- 1) investigate the perceived importance of campground attributes and the satisfaction of the performance of campground attributes at campgrounds affiliated with a large membership based RV association,
- 2) compare the importance performance of campground attributes based on the perceptions of motorized (Class A, Class B, Class C, and Semi-Truck RV’s) vehicle owner members and non-motorized (Travel Trailer, 5th Wheel, Toy Hauler, Folding Camping Trailer) vehicle owner members of a large membership based RV Association, and
- 3) compare the importance performance of campground attributes based on the perceptions by gender of a large membership based RV association.

As indicated previously, the recreational vehicle serves the traveler as a mode of transportation and as a lodging accommodation. For enhanced readership understanding of the present study, a brief overview of recreational vehicle classification type has been included. Thereafter, a general overview of campgrounds has also been included since campgrounds are integral to the overall RV experience, and more specifically, to the present study.

The recreational vehicle has evolved tremendously from the early notables, the 1916 folding camper with buggy wheels and the 1929 covered wagon trailer extending less than 6 feet long (RV Hall of Fame, 2014). Classifications of present day recreational vehicles include Class A, B, and C’s, semi-trucks, towable travel trailers, fifth wheels, and toy haulers. Class A, B, and C and semi-trucks are motorized vehicles and can tow another vehicle or trailer. The owner of a Class A, B, C or semi-truck not only maintains the amenities inside the coach but also the engine and structural components of the vehicle. In other words, the motor home owner takes care of

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household appliances such as refrigerators, microwaves, plumbing, furniture, entertainment units, air conditioners and furnaces in addition to the motor home's main engine, multiple batteries, and generator routine maintenance. Class A motor homes are either a gas or diesel engine and are typically equipped with a kitchen, living area, bathroom(s), entertainment amenities, heating, and air conditioning. Class B motor homes are smaller than a Class A but larger than a full size van. Class B's have a raised roof and are commonly equipped with a small kitchen, bedroom, bathroom, and shower. Amenities for a Class C are comparable to a Class A, with one distinguishing feature. A Class C has a truck cab with a bunk extension overhead. Semi-trucks are diesel and have a variety of floor plan options.

A travel trailer is towed by a vehicle, commonly a truck or full-sized SUV. The travel trailer is equipped comparably to a motor home but is not drivable. The "fifth wheel" RV has become an established towable of choice when more space and luxury is desired. The fifth wheel is a towable unit attached to the bed of a truck. A distinguishable characteristic of the fifth wheel is that of two levels, one elevated above the bed of the truck that traditionally includes the master suite and one as the main level including the living room and kitchen amenities. The toy hauler is manufactured as either a motor home or as a towable vehicle. The toy hauler has options similar to motor homes and trailers. Their uniqueness, however, is with their built in garage section at the back of the unit. Toy haulers are equipped to carry small vehicles, motor cycles, or ATV's.

Campgrounds, like the recreational vehicle, have also evolved through the years. Historically, camping areas were simply designed to accommodate the traveler as an overnight venue. Access to electricity and water was limited. Campgrounds are transforming to become compatible to today's recreational vehicle demands and corresponding RV lifestyle. Full hookups are common, which includes water, electrical, and sewer even though RVs of today allow the RV traveler to utilize all on board amenities and services without external service providers. Campgrounds offer cement pads, wireless Internet, gazebos for additional outdoor living space, built in fireplaces, gated access, club houses, pools, and laundry facilities.

2.0 Literature Review

Satisfaction

Satisfaction has been defined as a comparison between expectations and outcomes. Expectations derive from needs, objectives, and personal experiences (Pizam and Ellis, 1999, p. 330). Literature has further defined satisfaction as a comprehensive reaction after a product or service has been consumed or experienced (Josiam, Huang, Spears, Kennon, and Bahulkar, 2009). Lee, Graefe, and Burns (2004) identified satisfaction, service quality, and behavioral intentions as critical concepts of measuring success in an organization. Studies have linked consumer satisfaction with business profitability. Crotts, Mason, and Davis (2009) suggested the economic viability of a hospitality organization is directly impacted by guest satisfaction while McMullan and Gilmore (2003) stressed maximizing satisfaction allows the organization to remain competitive and profitable. Consumer satisfaction, however, may be hard to predict based on the timing and variation of such evaluation. Rigall and Fluvia (2011) argued tourism products must be consumed where they are produced, so consequently, the host physical environment

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influences satisfaction. Conversely, Gundersen, Heide, and Olsson (1996) claimed guest satisfaction is a post consumption evaluative judgment of a product or service. According to Pine and Gilmore (1998), product and/or service characteristics are difficult to observe prior to consumption. Furthermore, Hanai, Oguchi, Kiyoshi, and Yamaguchi (2008) claimed tourism products are sometimes difficult to compare because their consumption is occasional and infrequent and not every consumer receives the same satisfaction out of the same experience (Pizam and Ellis, 1999). Qu and Ping (1999) concurred, adding tourist's travel for varied reasons, thus, their satisfaction level may vary as well.

Campgrounds to the RV traveler are the counterpart of motels, hotels, and resorts to the traditional traveler. Since the present study sought to better understand the importance and performance of variables influencing satisfaction of an RV traveler at their chosen campground, relevant literature regarding satisfaction of hotel amenities have also been included to strengthen the foundation of the current study. To begin, amenities define a hotel/resort and are often the competitive tool that differentiates properties (Kandampully, Mok, and Sparks, 2001). Wuest, Tas, and Emenheiser (1996) correlated the following amenities to satisfaction; cleanliness, location, room rate, guest rooms, service quality, security, employee attitudes, and reputation/brand name of the hotel or chain (p. 123). Lockyear (2005) also reported cleanliness as the most important attribute to guest satisfaction in lodging. Choi and Chu (2001) reported the infrastructure of the host site and quality of amenities are key factors affecting guest satisfaction. Likewise, Chi and Qu (2008) identified the surrounding area infrastructure contributing to guest satisfaction.

Additional influences of satisfaction at motels, hotels, and resorts included the availability of technology (Beldona and Cobanoglu, 2007) while Bernstein (1999) found satisfaction correlated with varied amenities. Torres, Fu, and Lehto (2014) revealed guest delight with a cultural cross section review examining varied hotel services and amenities. Enz, Potter, and Sigwaw (1999), however, found the number of amenities did not always correlate with satisfaction and value. Satisfaction and value were found when the increased number of amenities was of interest and of value to the consumer. Bilgihan, Cobanoglu, and Miller (2010) studied the importance and performance of in-room technology as related to guest expectation, satisfaction, and brand loyalty. Amenities geared toward children have become a common offering in hotels (Gaines, Hubbard, Witte, and O'Neill, 2004) with kid-friendly recreational and other entertainment offerings, whether onsite or nearby, correlating to satisfaction (Lawton, Weaver, and Faulkner, 1998).

RV Specific

RV specific studies are gaining presence in the literature but still minimal to date as compared to other travel and tourism sectors. Thus, dated studies have been added for historical value and talking points, and studies representing a global platform have been added for breadth of the RV industry. Early studies linked camper satisfaction to the degree of solitude experienced, the natural surroundings, and the facility offerings (Connelly, 1987). Ouellette and Wood (1998) found prior experience was directly related to consumer choice, selection, and satisfaction. McFarlane (2004), moreover, identified attachment constructs when choosing recreational settings and sites. Van Heerden (2011) found paved roads, close proximity to area attractions,

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and a perceived comfortable and safe environment as choice attributes. In a case study by McClymont, Thompson, and Prideaux (2011), park rules, ease of access, and grassy sites were of great importance.

Fjelstul, Wang, and Li (2012) examined RV travelers' camping experiences by analyzing online campground review website postings. Campground attributes with most reported topics included on-site conveniences, kid-friendly and pet-friendly environments, property upkeep, ease of access, and overall value. Respective to campsite attributes, hookups, layout, features, and value received significant attention. More recently, Fjelstul (2013) explored campground pull factors by age cohort, revealing overall cleanliness, safety and security, friendliness of staff, full hookups, and clean bath houses differed slightly by age. Fjelstul (2014) contributed to the greater understanding of the RV travel experience by investigating lifestyle travel patterns. Two distinct clusters of RV travelers were identified, the destination RV traveler and the touring RV traveler. Destination travelers were most active on weekends, were fully employed, and chose a campground prior to their destination. Touring travelers, conversely, were mostly retired and traveled consecutive months out of a year.

The RV Industry

RV industry generated reports are of limited access to the general public, thus a comprehensive and current profile of today's RVer is absent in the literature. The most recent industry sponsored survey published by the Recreational Vehicle Industry Association (RVIA, 2012), however, revealed an average age of 48 with an income of \$62,000. With regards to travel intentions, approximately 58% indicated fuel prices would affect their plans by choosing closer destinations. Furthermore, 18% intended to leave their RV at a destination based campground and travel back and forth by family car.

In summary, the present study's framework resulted from the thorough review of literature presented and the collaboration with the leadership of the large RV membership association. The study's aim was to explore the importance and satisfaction with the performance of campground attributes as perceived by RV travelers. Given the uniqueness of the dual role the recreational vehicle serves the traveler, the present study furthered the investigation to compare RV travelers' perceptions based upon RV classification type and gender, resulting in more thorough analyses for respective stakeholders. Classification type was explored because of the unique dual role of the recreational vehicle in the traveler experience. Gender had not been extensively explored in previous studies (Fjelstul, 2013, 2014; Fjelstul, Wang, and Li, 2012). In totality, findings from the current study will provide insight of RV travel behavior and will guide campground owners/operators in the future management and marketing of their respective property.

3.0 Research Methodology

The present study was a collaborative effort with leadership from a large membership based RV association within the U.S. The study commenced in 2012 when the RV association randomly selected 100,000 members to receive an electronic based survey respective to their RV travel experiences. The survey population represented approximately 10% of the total membership.

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Out of the 100,000 members, 30,539 members responded to the survey. Once the data was reviewed and cleaned, there were 26,613 useable surveys for multiple analyses. A special disclosure regarding the slightly dated data collected for this study is necessitated. The data collected and analyzed in the present study mirrors the collection dates of the published reports by the RVIA (2012). More specifically, their published data was collected in 2011. The present study is slightly more recent, with data collected from 2012.

The survey was relatively lengthy. The survey included 54 questions with some questions including sub-questions. The researchers completed a thorough literature review and subsequently worked closely with the RV association leadership to develop the survey instrument. Although the survey included such things as travel decision-making processes, spending patterns and preferences of campground types to favorite RV destinations, the current study focused on the importance of campground attributes and the performance of those attributes at affiliated campgrounds of a large member based RV association. The importance performance survey questions were presented on a 5 point Likert scale. More specifically, the importance indicators for each campground attribute employed a 5 point Likert scale, ranging from 1 = not at all important to 5 = extremely important. For example, how important is safety and/or security at our affiliated campgrounds? Likewise, the performance indicators factor for each campground attribute employed a 5 point Likert scale, ranging from 1 = extremely dissatisfied to 5 = extremely satisfied. For example, how satisfied have you been with safety and/or security at our affiliated campgrounds?

For the current study, 4929 surveys were analyzed. Since one of the major objectives in this study was to compare the importance of campground attributes with the performance of affiliated RV association's campgrounds attributes, the researchers chose to only use the responses that were 100% completed for these two questions. Although this reduced the size of the sample, the sample still represented a more than adequate large sample size to complete the analysis.

Three importance performance analyses were conducted to meet the study objectives. Although Importance Performance Analysis (IPA) has been frequently used in hospitality and tourism research (Park, O., Lehto, X. and Houston, C., 2013; Rood, A. and Dziadkowiec, J., 2013; Caber, M., Albayrak, T. and Matzler, K., 2012; Kuo, Y., Chen, J., and Deng, W., 2012; Rail, A., Rail, J. Varela, J. and Real, E., 2008), it has not been used in RV industry research. IPA was first used in the research of Martilla and James (1977) as a way to identify strengths and weakness of services provided. IPA is presented graphically using the Y axis 'importance' and the X axis 'performance'. Respondents first indicate the importance of specified attributes. In the current study, campground attributes were used. Next, respondents report how the company or service provider has performed and provided their level of satisfaction per attribute. In the present study, the service providers were the RV association's affiliate campgrounds and the respondents were members of the respective RV association. The 4 quadrants were labeled with the following identifiers for future reference and ease of discussion; quadrant 1- areas to improve, quadrant 2 - keep up the good work, quadrant 3 - low priority, and quadrant 4 - possible waste of resources.

The mean values of each attribute depicted from the 5 point Likert scale were plotted on the IPA graph and dispensed into one of 4 quadrants. More specifically, the mean values of the

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importance of campground attributes and the mean values of the performance attributes transferred and subsequently plotted collectively created the 4 quadrant 2 axis IPA graph as denoted in Figure 1. Figure 1 also denotes the respective 22 campground attributes from the RV association's affiliated campgrounds. The 22 campground attributes were identified from attributes revealed in previous studies and from the industry professionals who were part of the RV association. Further analysis was performed on the importance performance of the 22 identified campground attributes as depicted by RV classification group. As previously noted, the motorized vehicle group refers to those RV travelers owning a Class A, Class B, Class C, and Semi-truck RV while the non-motorized vehicle group refers to those RV travelers owning travel trailers, 5th wheels, toy haulers, and folding camping trailers. Figure 2 reveals the above analyses. Lastly, differences by gender were analyzed respective to their perceived importance and performance of the 22 identified campground attributes. Figure 3 reveals the findings by gender.

4.0 Results

Demographics

The respondents were predominately male, representing 4098 (83.1%) of the total 4929 respondents. There were 831 (16.9%) female respondents. Age was also noted. The largest representation were respondents ages 65-74 (47%) followed by ages 55-64 (34%). Additional demographics revealed marital status and educational background, depicted in Table 1.

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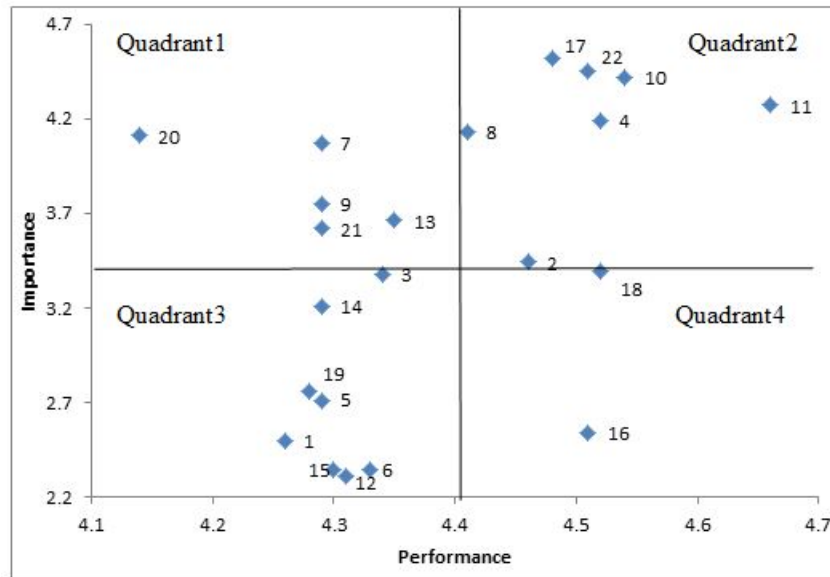
| Table 1. Demographics of Study Respondents | | |
|---|------------------|-------------------|
| Age | Frequency | Percentage |
| 25-34 | 8 | .2 |
| 35-44 | 114 | 2.3 |
| 45-54 | 457 | 9.3 |
| 55-64 | 1659 | 33.6 |
| 65-74 | 2300 | 46.6 |
| 75-84 | 381 | 7.7 |
| 85 years + | 10 | .2 |
| | 4929 | 100% |
| Gender | | |
| Male | 4098 | 83.1 |
| Women | 831 | 16.9 |
| | 4929 | 100% |
| Marital Status | | |
| Single | 120 | 2.4 |
| Married | 4414 | 89.6 |
| Separated | 11 | .2 |
| Divorced | 112 | 2.3 |
| Widowed | 129 | 2.6 |
| Unmarried couple living together | 131 | 2.7 |
| Never married | 12 | .2 |
| | 4929 | 100% |
| Education | | |
| Did not graduate high school | 964 | 19.6 |
| High school diploma | 199 | 4.0 |
| Attended college but did not receive a degree | 33 | .7 |
| Associate's degree | 227 | 4.6 |
| Bachelor's degree | 37 | .8 |
| Post bachelor's course work but did not receive additional degree | 3402 | 69.0 |
| Master's degree | 67 | 1.4 |
| Doctoral degree | 0 | 0 |
| | 4929 | 100% |

N=4929

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Importance Performance of Campground Attributes

The majority of campground attributes, 12 of the 22, fell in Quadrant 2 (see Figure 1). These attributes were highly important to the RVer and the RVer identified each attributed as high on performance. Seven attributes fell in quadrant 3. These attributes were reported low in importance and low in performance. Quadrant 4 included the 2 attributes of an on-site camp store and as pet-friendly. One attribute, loyalty programs, fell into Quadrant 1 which represented high in importance yet was perceived low in performance.



| Legend | | | |
|--------------------------------|--------------------------------------|------------------------------|------------------------------|
| Quadrant I Highest priority | Quadrant II Keep up the good work | Quadrant III Low priority | Quadrant IV May be excess |
| 21 | Upgraded sites | 22 | Safety and Security |
| 9 | Free Wi-Fi | 10 | Friendliness of staff |
| 20 | Price | 4 | Clean bathhouse |
| 7 | Discounts offered | 17 | Overall cleanliness |
| 13 | Loyalty programs | 8 | Ease of access |
| | | 11 | Full hookups |
| | | 2 | Big-Rig Friendly |
| | | 14 | On-site camp store |
| | | 16 | On-site restaurant |
| | | 3 | Cable |
| | | 18 | Pet Friendly |
| | | 1 | Activity/event oriented |
| | | 12 | Kid-friendly |
| | | 19 | Pool |
| | | 5 | Clubhouse |
| | | 15 | On site fitness |
| | | 6 | Concierge services |

Figure 1. Perceived Importance of Campgrounds/Parks Attributes and Performance of GSC Campground/Parks Attributes

Importance Performance of Campground Attributes by Motorized/Non-Motorized Ownership

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The second importance performance analysis performed was with regards to the classification type the RVer owned. The importance performance findings revealed only a slight difference in the perceptions of owners of motorized vehicles and non-motorized vehicles in regards to the attributes for the affiliated RV association’s campgrounds. More specifically, the campground attributes of cable and big-rig friendly are located in the 4th quadrant for non-motorized reflecting the perception of a possible waste of resources while the same attributes fell in the 2nd quadrant for motorized travelers, reflecting high satisfaction of performance and a high importance of each. There was, however, one attribute that fell into quadrant 1 for both groups; loyalty programs. Loyalty programs were depicted as high in importance but performed low in satisfaction with performance.

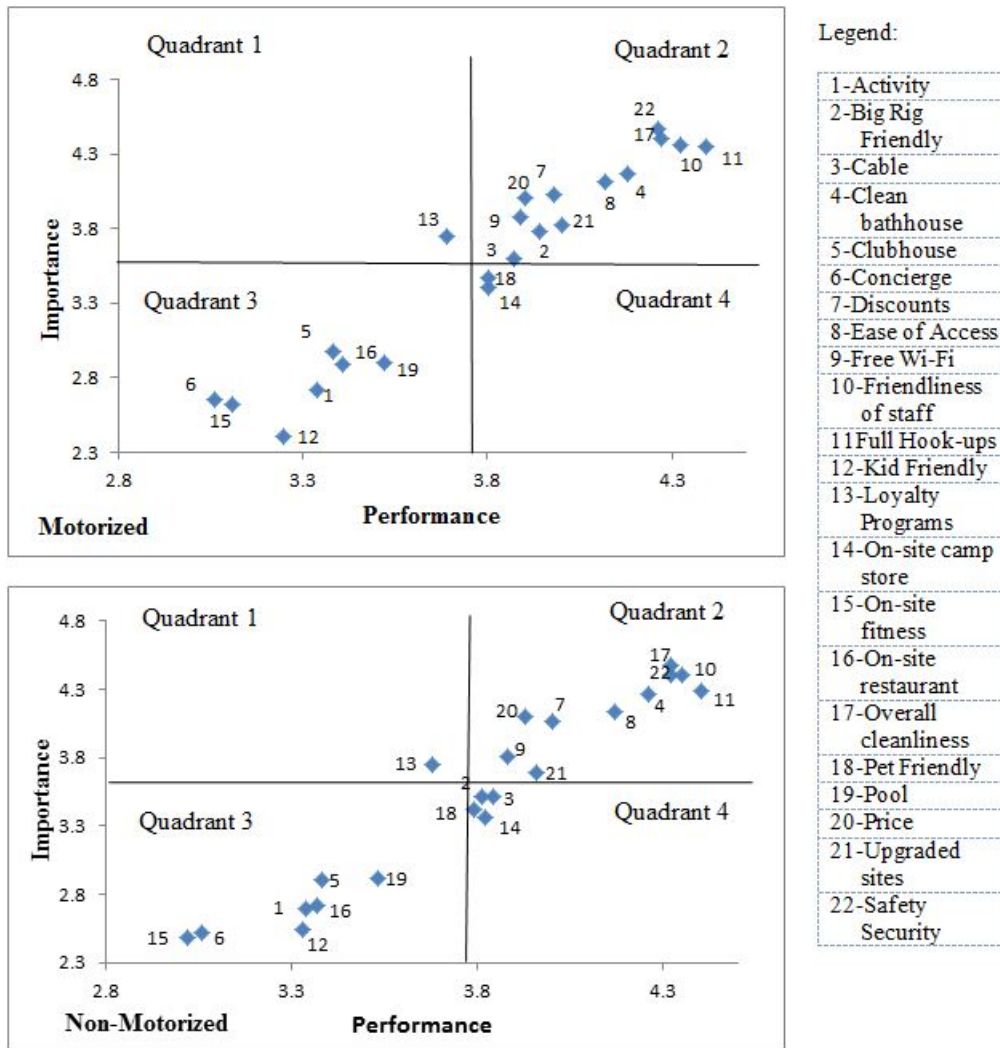


Figure 2. Perceived Importance of Campground Attributes and Performance of Affiliated RV Association’s Campgrounds for Motorized and Non-Motorized RV/Camper

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Importance Performance of Campground attributes by Gender

The third importance performance analysis performed was with regards to gender. There were minimal differences in the perceptions of males and females towards attributes of the affiliated RV association’s campgrounds (Figure 3). The two differences appeared in quadrants 2 & 4. Males identified the attributes of cable and pet-friendly as low in importance and high in performance. Conversely, females reported cable and pet friendly attributes as high on importance and high on performance. The loyalty attribute was the only attribute that fell into quadrant 3 by both genders, reflecting high in importance but low in performance. The majority of the attributes, 19 of the 22 listed, were similar by gender and quadrant.

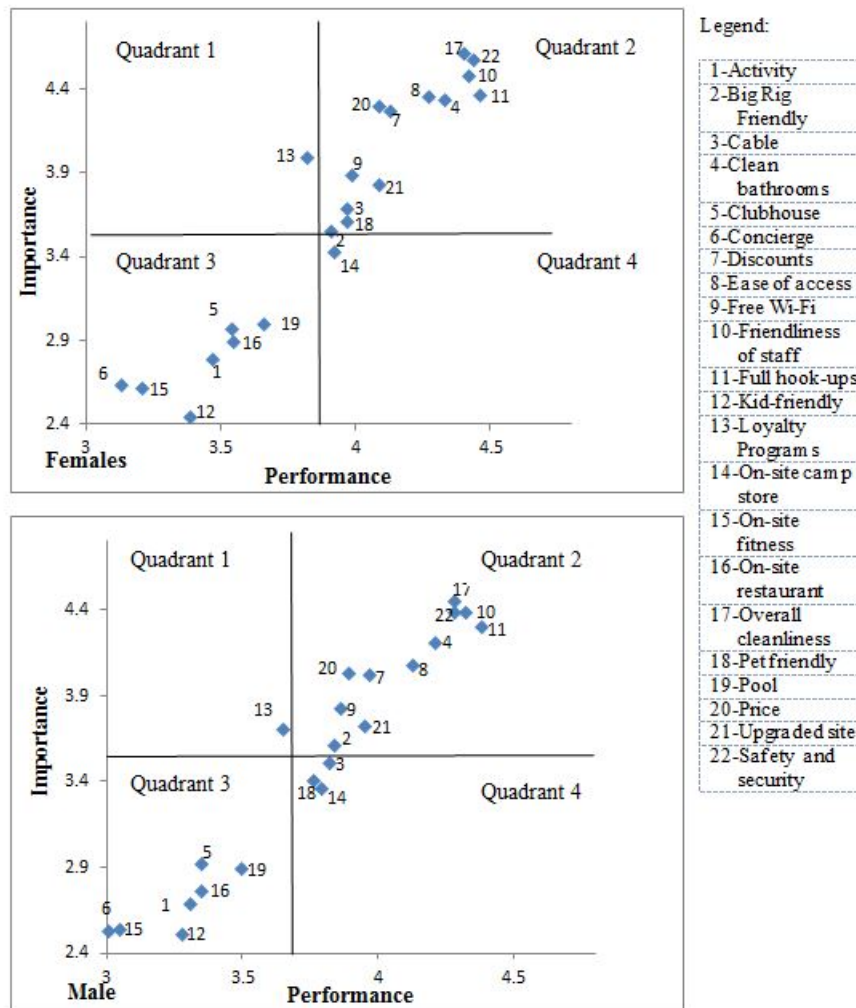


Figure 3. Perceived Importance of Campground Attributes and Performance of Affiliated RV Association’s Campgrounds for Females and Males

Means for 3 Importance Performance Analyses

The means and standard deviations of each campground attribute were tabulated for both importance and performance, as depicted in Table 2. A comparison of motorized and non-

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motorized RV owner's perceptions of campground attributes is presented in Table 3. Whereas Table 4 presents a comparison of males and females perceptions of campground attributes. The shaded cells indicate where the performance mean is lower than the means for campground attributes based on the importance. The six attributes of safety and security, friendliness of staff, overall cleanliness, price, discounts offered, and loyalty programs had higher importance means with lower performance, respectively.

Table 2. Importance Performance Means and Standard Deviation for Park/Campground Attributes and Association's Park Performance

| RV Campground Attribute | Importance | | Performance | |
|--------------------------------|------------|-------|-------------|-------|
| | Mean | SD | Mean | SD |
| Activity/event oriented | 2.71 | 1.06 | 3.34 | .960 |
| Big-Rig Friendly | 3.60 | 1.25 | 3.85 | .999 |
| Cable | 3.54 | 1.18 | 3.85 | .987 |
| Clean bathrooms and/or showers | 4.23 | .966 | 4.23 | .778 |
| Clubhouse/lodge on site | 2.93 | 1.061 | 3.38 | .956 |
| Concierge-like services | 2.55 | 1.065 | 3.03 | .996 |
| Discounts offered | 4.06 | .856 | 4.00 | .912 |
| Ease of access to campground | 4.12 | .801 | 4.15 | .774 |
| Free Wi-Fi | 3.83 | 1.15 | 3.88 | 1.015 |
| Friendliness of staff | 4.39 | .685 | 4.34 | .719 |
| Full hookups | 4.31 | .859 | 4.39 | .745 |
| Kid-friendly | 2.50 | 1.18 | 3.30 | 1.06 |
| Loyalty programs | 3.75 | 1.01 | 3.68 | .991 |
| On-site camp store | 3.37 | 1.02 | 3.81 | .859 |
| On site fitness | 2.55 | 1.11 | 3.08 | 1.03 |
| On-site restaurant | 2.78 | 1.03 | 3.39 | .915 |
| Overall cleanliness | 4.47 | .644 | 4.30 | .717 |
| Pet Friendly | 3.44 | 1.54 | 3.79 | 1.17 |
| Pool | 2.91 | 1.22 | 3.53 | 1.02 |
| Price | 4.07 | .842 | 3.92 | .911 |
| Upgraded sites | 3.74 | .936 | 3.98 | .850 |
| Safety and Security | 4.41 | .749 | 4.30 | .729 |

N=4929

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Table 3. . Comparison of Importance Performance Means and Standard Deviation for Park/Campground Attributes (Motorized and Non-Motorized RV Owners)

| RV Campground Attribute | Motorized (N=1596) | | | | Non-Motorized (N=2918) | | | |
|--------------------------------|--------------------|------|-------------|------|------------------------|------|-------------|------|
| | Importance | | Performance | | Importance | | Performance | |
| | Mean | SD | Mean | SD | Mean | SD | Mean | SD |
| Activity/event oriented | 2.72 | 1.04 | 3.34 | .947 | 2.73 | 1.07 | 3.36 | .961 |
| Big-Rig Friendly | 3.78 | 1.20 | 3.94 | .951 | 3.52 | 1.26 | 3.81 | 1.01 |
| Cable | 3.60 | 1.16 | 3.87 | .964 | 3.53 | 1.19 | 3.84 | .993 |
| Clean bathrooms and/or showers | 4.17 | 1.00 | 4.18 | .813 | 4.25 | .945 | 4.26 | .760 |
| Clubhouse/lodge on site | 2.98 | 1.06 | 3.38 | .952 | 2.93 | 1.05 | 3.39 | .956 |
| Concierge-like services | 2.62 | 1.89 | 3.11 | .999 | 2.54 | 1.04 | 3.08 | .989 |
| Discounts offered | 4.03 | .866 | 3.98 | .921 | 4.07 | .852 | 4.01 | .899 |
| Ease of access to campground | 4.12 | .814 | 4.12 | .787 | 4.14 | .795 | 4.17 | .762 |
| Free Wi-Fi | 3.88 | 1.12 | 3.89 | .990 | 3.83 | 1.15 | 3.89 | 1.02 |
| Friendliness of staff | 4.36 | .701 | 4.32 | .729 | 4.42 | .675 | 4.36 | .708 |
| Full hookups | 4.35 | .835 | 4.39 | .756 | 4.32 | .853 | 4.41 | .727 |
| Kid-friendly | 2.41 | 1.15 | 3.25 | 1.05 | 2.57 | 1.20 | 3.34 | 1.06 |
| Loyalty programs | 3.75 | 1.00 | 3.69 | .999 | 3.76 | 1.01 | 3.69 | .983 |
| On-site camp store | 3.41 | 1.03 | 3.80 | .860 | 3.37 | 1.01 | 3.83 | .859 |
| On site fitness | 2.66 | 1.13 | 3.10 | 1.00 | 2.51 | 1.10 | 3.06 | .998 |
| On-site restaurant | 2.89 | 1.05 | 3.41 | .913 | 2.72 | 1.01 | 3.37 | .917 |
| Overall cleanliness | 4.47 | .647 | 4.26 | .744 | 4.48 | .637 | 4.32 | .704 |
| Pet Friendly | 3.47 | 1.55 | 3.80 | 1.17 | 3.42 | 1.53 | 3.80 | 1.16 |
| Pool | 2.90 | 1.21 | 3.52 | 1.00 | 2.95 | 1.23 | 3.55 | 1.04 |
| Price | 4.01 | .850 | 3.90 | .911 | 4.10 | .833 | 3.94 | .897 |
| Upgraded sites | 3.83 | .929 | 4.00 | .827 | 3.71 | .946 | 3.96 | .859 |
| Safety and Security | 4.41 | .763 | 4.27 | .762 | 4.42 | .733 | 4.32 | .710 |

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Table 4. Comparison of Importance Performance Means and Standard Deviation for Park/Campground Attributes (Females and Males)

| RV Campground Attribute | Males (N=4098) | | | | Females (N=831) | | | |
|--------------------------------|----------------|------|-------------|------|-----------------|------|-------------|------|
| | Importance | | Performance | | Importance | | Performance | |
| | Mean | SD | Mean | SD | Mean | SD | Mean | SD |
| Activity/event oriented | 2.69 | 1.04 | 3.31 | .946 | 2.79 | 1.16 | 3.47 | 1.01 |
| Big-Rig Friendly | 3.61 | 1.24 | 3.84 | .996 | 3.55 | 1.32 | 3.91 | 1.01 |
| Cable | 3.51 | 1.17 | 3.82 | .988 | 3.68 | 1.23 | 3.97 | .973 |
| Clean bathrooms and/or showers | 4.21 | .964 | 4.21 | .774 | 4.33 | .967 | 4.33 | .786 |
| Clubhouse/lodge on site | 2.92 | 1.05 | 3.35 | .944 | 2.97 | 1.11 | 3.54 | 1.00 |
| Concierge-like services | 2.54 | 1.04 | 3.05 | .976 | 2.61 | 1.15 | 3.21 | 1.08 |
| Discounts offered | 4.02 | .857 | 3.97 | .909 | 4.27 | .818 | 4.13 | .914 |
| Ease of access to campground | 4.08 | .802 | 4.13 | .772 | 4.35 | .755 | 4.27 | .775 |
| Free Wi-Fi | 3.82 | 1.14 | 3.86 | 1.01 | 3.88 | 1.17 | 3.99 | 1.01 |
| Friendliness of staff | 4.38 | .685 | 4.32 | .720 | 4.48 | .680 | 4.42 | .709 |
| Full hookups | 4.30 | .857 | 4.38 | .746 | 4.36 | .866 | 4.46 | .733 |
| Kid-friendly | 2.51 | 1.16 | 3.28 | 1.04 | 2.44 | 1.26 | 3.39 | 1.13 |
| Loyalty programs | 3.70 | 1.00 | 3.65 | .981 | 3.99 | .994 | 3.82 | 1.02 |
| On-site camp store | 3.36 | 1.01 | 3.79 | .847 | 3.43 | 1.04 | 3.92 | .908 |
| On site fitness | 2.53 | 1.01 | 3.05 | .987 | 2.63 | 1.17 | 3.21 | .986 |
| On-site restaurant | 2.76 | 1.01 | 3.35 | .897 | 2.89 | 1.11 | 3.55 | .980 |
| Overall cleanliness | 4.45 | .645 | 4.28 | .715 | 4.61 | .623 | 4.40 | .716 |
| Pet Friendly | 3.40 | 1.53 | 3.76 | 1.17 | 3.61 | 1.57 | 3.97 | 1.12 |
| Pool | 2.89 | 1.20 | 3.50 | 1.01 | 3.00 | 1.31 | 3.66 | 1.08 |
| Price | 4.03 | .839 | 3.89 | .911 | 4.29 | .821 | 4.09 | .893 |
| Upgraded sites | 3.72 | .937 | 3.95 | .848 | 3.83 | .924 | 4.09 | .854 |
| Safety and Security | 4.38 | .757 | 4.28 | .731 | 4.57 | 6.91 | 4.44 | .702 |

Significant Differences between Motorized and Non-motorized

The six attributes (safety and security, friendliness of staff, overall cleanliness, price, discounts offered, and loyalty programs) that had higher importance means with lower performance were investigated further for the motorized and non-motorized comparison. Cross-tabs with Pearson chi-square test of significance were conducted to determine if there were differences between motorized and non-motorized owner's perceptions for these 6 attributes. Of the 6 attributes, 2 were significant. A chi-square test was performed and a relationship was found between RV classification type and importance of friendliness of staff, $X^2(4, N=4514) = 16.71, p=.002$ and RV classification type and price, $X^2(4, N=4514) = 16.44, p=.002$. Since the chi-square statistic is less than 0.10, there is a difference between how motorized RV owners and non-motorized RV owners view these two attributes and the variation not being by chance.

5.0 Conclusions

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There were limitations to the study. First, the participants for the present study were members of a large RV membership association. General demographics of the association were unknown. Second, the study respondents were paying members of an RV association. There could be a difference in perceptions of people who are not RV association members and those who are. Investing in an RV association membership may bias the perceptions of the performance of RV association affiliated campgrounds. Third, the present study was predominantly supported by participants age 55+. For comparison purposes, it is unknown how many members of the association were younger than age 55. Fourth, the present study utilized campgrounds that were affiliated with the RV membership association. Thus, respective findings cannot be generalized for all RVers and all campgrounds in the RV industry. Nevertheless, the present study contributes to the literature and to the RV industry in several dimensions, providing empirical evidence in evaluating the importance and performance of campground attributes as perceived by members of a large RV association.

First, age, gender, and marital status had the most variation when investigating the demographic profile of a large RV membership association. More specifically, 81% of the RV respondents were age 55+, 83% were male, and 90% were married. Age may be of most concern with regards to sustainability of the RV industry if in fact the respondents in the present study were reflective with the age demographics of the membership association as a whole. As noted previously, a limitation of the present is that demographics of the 1+ million membership association were not available for comparison. But assuming the age demographic noted was reflective, efforts in attracting the younger generation to the RV lifestyle let alone becoming paying members of the membership association would be highly suggested. A targeted marketing effort of the attributes identified in the current study specific to the younger generation would position the campground owners/operators in potentially satisfying younger guests.

In addition to age, marketing efforts and sustainability initiatives need to be explored for the female RVer and the non-married RV traveler. For instance, the present study outlined the importance performance measures by gender. Only one attribute differed between male and female with regards to importance outweighing actual performance: ease of access to a campground. This finding should be noted and addressed by campground owners/operators to improve satisfaction amongst female RVers. This finding was also consistent with McClymont, Thompson, and Prideaux (2011) where ease of access was also of great importance.

The current study also analyzed the importance performance of 22 campground attributes. Findings were encouraging as 12 of the 22 were of high importance and performed with high satisfaction. More specifically, results revealed the RV Association's campgrounds were doing a good job concerning these attributes and should keep up the good work. Findings from this study were similar to numerous studies (Fjelstul, Wang, and Li, 2012; Rigall and Fluvia, 2011; Van Heerden, 2011; Lockyear, 2005; Choi and Chu, 2001; Wuest, Tas, and Emenheiser, 1996) where cleanliness, location, and security correlated with guest satisfaction. Findings from the current study were also consistent with the literature (Bilgiham, Cobanoglu, and Miller, 2010; Beldona and Cobanoglu, 2007) with technology rated as an important attribute at RV campgrounds.

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Two additional attributes were low in importance but performed well; having an onsite camp store and pet friendliness. A more thorough analysis specific to each campground may identify financial outlays for onsite camp stores and pet friendly services. Maintaining prudence without diminishing satisfaction with each attribute would be advised. It would also be suggested that campground owners/operators stay cognizant of the 14 attributes listed as high performers to maintain satisfaction. On notice, however, are the 8 campground attributes identified in the present study as low performers, regardless of importance. Low performance in one service area may lend negative influence to other aspects of the RV experience. Of course, each campground attributes are unique to their particular campground.

A finding of noted concern is that of loyalty programs. A loyalty program was the only attribute with a high level of importance and a low performance (Quadrant 1). There should be a thorough investigation to determine the number of campgrounds who offer loyalty programs, what types of loyalty programs are available, and which types of loyalty programs are more likely to attract repeat visitors. The results of the study provide strong evidence of the importance of loyalty programs to RV travelers. These results give campground owners and operators a good indication as to where additional resources and focus on improvements should be observed.

The IPA results provide the RV industry with empirical support that shows there was minimal variability in perceptions of campground attributes between motorized RV travelers and non-motorized RV travelers. Thus, regardless of the classification type that frequents a particular campground, attributes of campgrounds identified by high importance should remain the focus. However, loyalty programs were again the only attribute highlighted as high in importance and low in performance. Loyalty programs, as spotlighted previously, should be an immediate focus for campground owners/operators, regardless of the classification type they attract. However, the cross tabulation and chi-square statistic revealed there is a difference in the way motorized and non-motorized RV owners perceive the attributes (friendliness of staff and price). Future research should address this difference to determine why this is the case.

Important to note, loyalty programs by gender were of biggest concern but has been discussed at length. Beyond loyalty programs, investigation into the difference in preferences of campground attributes between males and females did offer slight variability. Females considered the attributes camp store and big-rig friendly lower in importance yet very high in performance (Quadrant 4) while males considered the attributes camp store, pet-friendly and cable with lower importance yet high in performance (Quadrant 4). The attributes that fell into Quadrant 4 provide campground owners and operators with the knowledge of which attributes they may be providing too many resources to for the dividends actually received and/or acknowledged by the guest. Campground owners and operators should consider the location of attributes within each of the quadrants since each quadrant reveals useful information not only for the RV industry in general but for specific campgrounds.

Table 2 depicts the means for all campground attributes. As a whole, the campground affiliates in the current study were performing well as indicated by the satisfaction ratings of the RV respondents. Areas of improvement have been noted and should be addressed by campground owners/operators, in particular, loyalty programs. Additional investigation is needed to identify

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ways in which loyalty programs can be implemented, improved, and managed to gain the highest return on the investment.

In conclusion, the primary benefit for using IPA is to determine if a company or service provider has allocated resources in the areas that will most improve their performance based upon their customer's perceptions. Continued monitoring is required to ensure performance does not drop too low. The current study offered empirical evidence regarding importance performance attributes of RV campgrounds. Owners/operators of RV campgrounds should maximize the satisfaction of these attributes with attention to infrastructure, training, maintenance, and pricing strategies. Furthermore, the findings from this study filled a void in the current RV literature and have provided benchmarks in numerous areas. Future research should examine, for example, which campground attributes impact intent to return to a campground and how campground attributes contribute to the overall satisfaction of their campground experience. Additional recommendations have been identified throughout the discussions. The RV traveler is a tremendous market share offering boundless research opportunities and should be investigated in future studies.

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