



THE 2015

**NORTH AMERICAN
CAMPING REPORT**

TOPLINE



A general population survey conducted by Cairn Consulting Group in 2014 and 2015
Sponsored by *Kampgrounds of America*





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“THOUSANDS OF
TIRED, NERVE-SHAKEN,
OVER-CIVILIZED PEOPLE
ARE BEGINNING TO FIND
OUT THAT GOING TO
THE MOUNTAINS IS
GOING HOME.”

JOHN MUIR

INTRODUCTION

Camping reaches deep into the North American culture, with nearly 6-in-10 households reporting that someone in their household has camped. Indeed, exposure to camping even among those who do not actively engage in camping still holds a memorable place for many.

Notably, the proportion of households who camp at least occasionally stands at 44 percent – representing a large number of households who camp (46 million), and to take it one step further, 1-in-4 households engage in camping activity each year.

For the purposes of this study, it was determined that respondents should be provided with a clear definition of camping. Past research efforts have shown that when asked to define “camping,” several definitions were provided. With this in mind, the research used a clear and concise definition of camping that would allow the resident households to more easily determine if their behavior falls into the category of “camping.” For these purposes, camping is defined as “any occasion when you spent at least one night outside of your primary residence and stayed in accommodations such as a tent, trailer, RV, vehicle or cabin/cottage at a campground.”

For many North Americans, camping stands out as a vacation option for both practical and emotional benefits. First and foremost, campers are likely to cite camping as a way to reconnect with nature and, importantly, their families and loved ones. They camp because it reduces stress and enhances their relationships, allowing them to “decompress” from their everyday lives, and spend quality time with friends and family in a healthy outdoor setting.

With all of this in mind, camping is clearly embedded into the mindset of North Americans. It represents a prominent part of annual family vacations and weekend getaways. Camping serves as a way for people to connect with nature and the outdoors, ultimately reducing stress and leading to more time with friends and family in a healthy, engaging setting.



KEY FINDINGS

The 2015 North American Camping Report represents the first foray into the mindset of the North American camper addressing both the camping behaviors and the emotional ties to camping and the outdoors. The research shows that:

- *Camping reaches 6-in-10 U.S. households at some point in time, with someone in 44 percent of U.S. households camping at least occasionally. This is a stable finding when compared to similar survey work conducted in 2012.**
- *Destination camping appears to be on the rise. Even though there has been an increase in annual camping trips, the frequency of trips (those camping three or more times per year) has declined slightly since 2012, indicating a trend toward “destination camping” (i.e., longer stays versus more frequent trips).*
- *Over time, it appears that trends in camping among different ethnicities are beginning to align with overall population figures. Camping rates among nonwhites have doubled from as recently as 2012 (only 12%) to 2014 (23%). However, these figures still fall below the overall U.S. population of nonwhite residents (36%).*
- *Technology and access to technology is important to campers. Eighty-three percent of campers say that they bring along their cell phones while camping and 70 percent go online at some point while camping. Access to free Wi-Fi ranks among the top three most important camping amenities.*
- *Camping appears to represent a form of escapism for many, allowing them to reconnect with nature and the outdoors, reducing stress while spending more time with family and friends. This is a critical consideration in why people camp, given the greatest barrier to camping more often is being able to carve out the time for camping.*
- *Campers are likely to say that camping improves family relationships – in fact, 41 percent “completely agree” with this. Additionally, 39 percent say that camping has a “great deal of impact” on spending more time with their family, and 36 percent say that camping has a positive impact on their emotional well-being.*
- *Campers who bring children are highly likely to say that the children are enthused about camping (83% are “somewhat” or “very enthused”). Additionally, more than a third of campers overall (36%) say that kids today are more interested in camping than they were when younger and fully half of campers under the age of 35 are likely to suggest that there are higher levels of interest within the younger set of campers.*
- *2015 Season Forecast: Looking at the year ahead, a majority of campers plan to spend more nights camping this year, and almost half plan to take more trips. Spending more time with family and friends, exploring new areas, and decreased gas prices are among the most impactful factors driving these decisions.*

28%



Younger campers say having a smartphone (28%) is almost as important as toilet paper (34%)!”



34%

CAMPING NECESSITY: SMARTPHONE OR TOILET PAPER?

* Results based on a poll of 2,104 U.S. households, October 2012 (MoE +/- 2.13%)

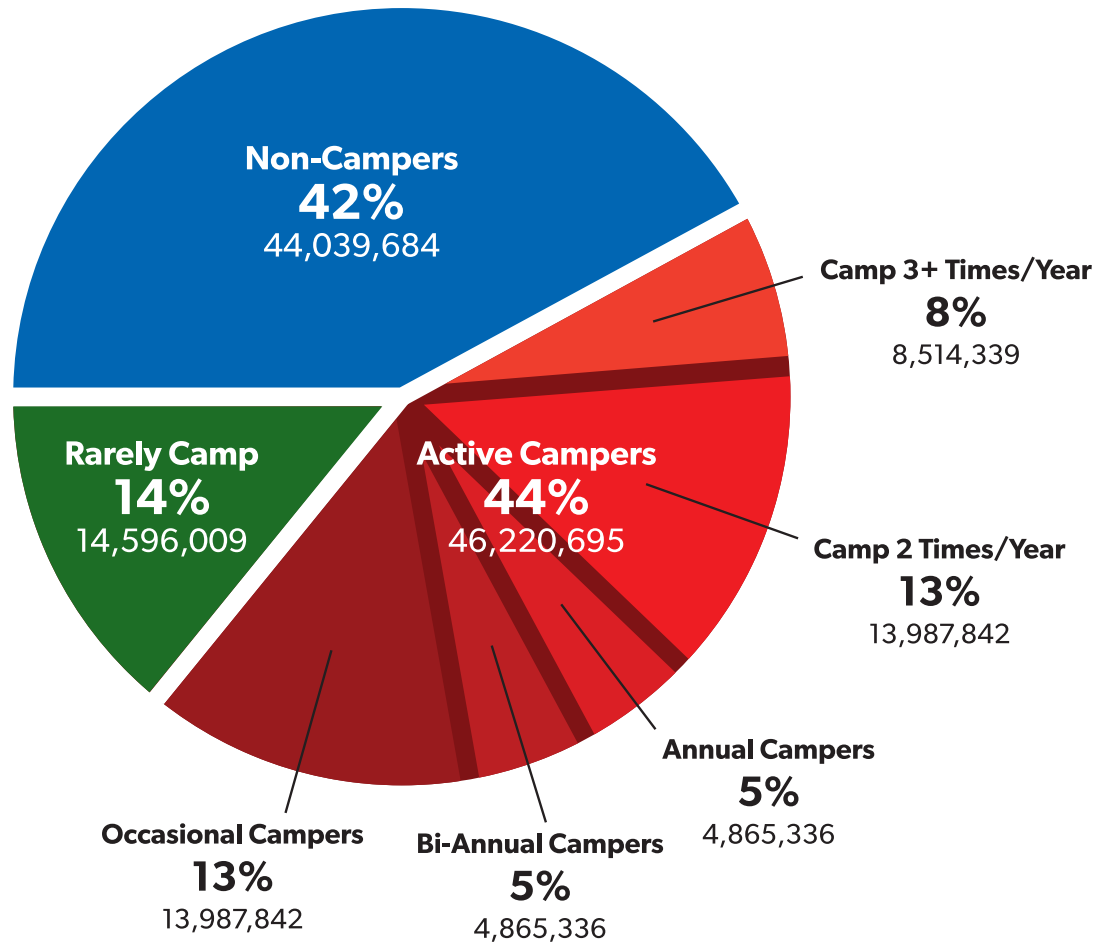
SUMMARY OF SURVEY RESULTS

WHO IS CAMPING

Active Camper Households

The proportion of "active camper" households – meaning they camp at least occasionally – currently stands at 44 percent, representing a large number of households (46 million). Overall this proportion of households who camp at least occasionally has risen by six percentage points over the past two years (from 38% to 44%) based on a similar study conducted in 2012. There is also an increase in the campers who camp bi-annually.

CAMPING AMONG U.S. HOUSEHOLDS*
Total Eligible Households** = 104,856,390



* Note: Results based on a poll of 2,420 U.S. households, July 2014 (MoE +/- 1.99 percent).

** Household eligibility is based on estimated automobile ownership (91% of U.S. households), from a base of 115,226,802 households according to the U.S. Census Bureau estimates for 2013.

Annual Camping Households

Still, the proportion of campers who camp each year is relatively constant and stands in the 26 percent range (up from 24% in 2012). Considering a fluctuation of +/- five percentage points on a year-to-year basis depending on external factors such as the economy, weather, access and/or individual situations (e.g., household finances, change in marital status), on any given year, it is estimated that between 21 percent and 31 percent of all U.S. households have at least one family member go camping.

Most Frequent Camping Households

The percentage of households who camp most frequently (three or more camping trips per year) has remained relatively consistent since 2012 (8% versus 9% respectively).



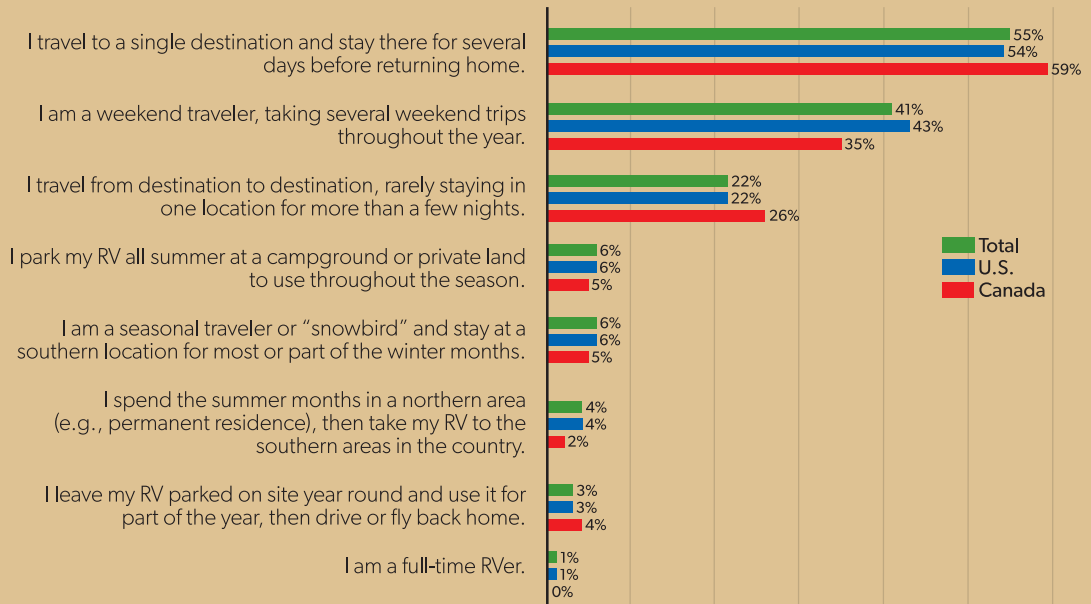
Destination Camping

In particular, more than half of campers overall (55%) are destination campers, and 1-in-5 RVers and a similar proportion of younger campers are switching to destination camping (i.e., staying longer versus more frequent trips).

WHAT TYPES OF TRIPS ARE PEOPLE TYPICALLY TAKING?

A majority of campers are destination campers; 4-in-10 are weekend campers.

TYPES OF TRIPS

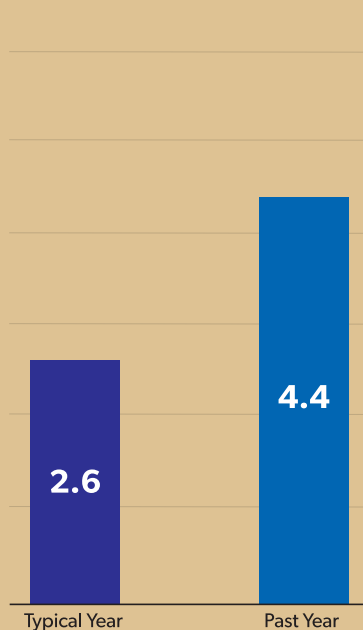


WHAT TYPES OF TRIPS DID PEOPLE TAKE IN 2014?

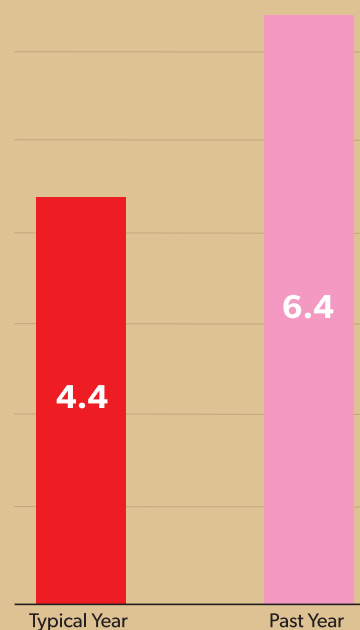
When compared to a typical year, this past year campers increased both the number of trips taken by almost two full trips and a corresponding increase in the number of nights.

These results show that even though there may be an overall uptick in destination camping, when campers increase their trips, it typically only results in a minor increase in the nights spent camping (suggesting that the extra trips are shorter stays).

AVERAGE NUMBER OF CAMPING TRIPS



AVERAGE NUMBER OF NIGHTS CAMPING

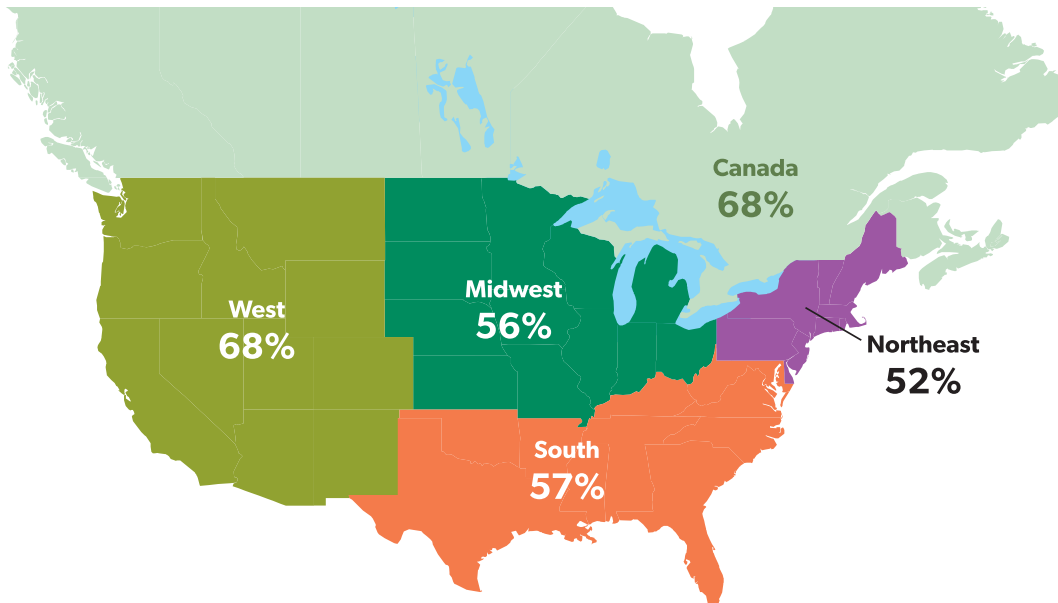


Demographics

CAMPING INCIDENCE BY REGION

Camping incidence is highest in the western region of the U.S. and lowest in the Northeast. Indeed, fully two-thirds of the residents polled in the Western states claim that they go camping at least occasionally. Among Canadian residents surveyed, two-thirds also claim to be at least occasional campers.

RESIDENTS WHO CAMP AT LEAST OCCASIONALLY



A CLOSER LOOK AT CANADA

In many ways, the profile of the Canadian camper is similar to the U.S. camper. This is most apparent in the motivators for camping (e.g., connecting with nature, stress reduction, spending time with family/friends) and the way both U.S. and Canadian campers choose to camp.

Still, there are some key differences between U.S. and Canadian campers that are worth noting, including:

- Canadians appear to be somewhat more avid campers. They:
 - Start camping at a younger age
 - Are somewhat more connected to the outdoors
 - Are more likely to spend time in the wilderness, and
 - Importantly, are twice as likely as U.S. campers to spend two weeks or more camping
- They are also more likely to be destination campers, yet travel further from home when compared to those in U.S.
- Canadians are also more oriented toward their peers, and are more likely to be influenced by their friends (versus family). They are also more likely than U.S. campers to travel with and visit their friends while camping.
- Even though U.S. campers have an affinity for their national parks (58% intend to visit one in the near future), Canadian campers have an even stronger tie to their provincial parks with 72 percent intending to visit a location in the coming months.
- Canadian campers are least likely to bring their pets while camping.
- And finally, Canadian campers are less likely to gravitate toward digital technologies and stay connected while camping.
 - Fewer Canadian campers bring their cell phones camping (74% versus 84% of U.S. campers)
 - They are significantly less likely to go online while camping
 - They place less importance on access to and usage of technology while camping





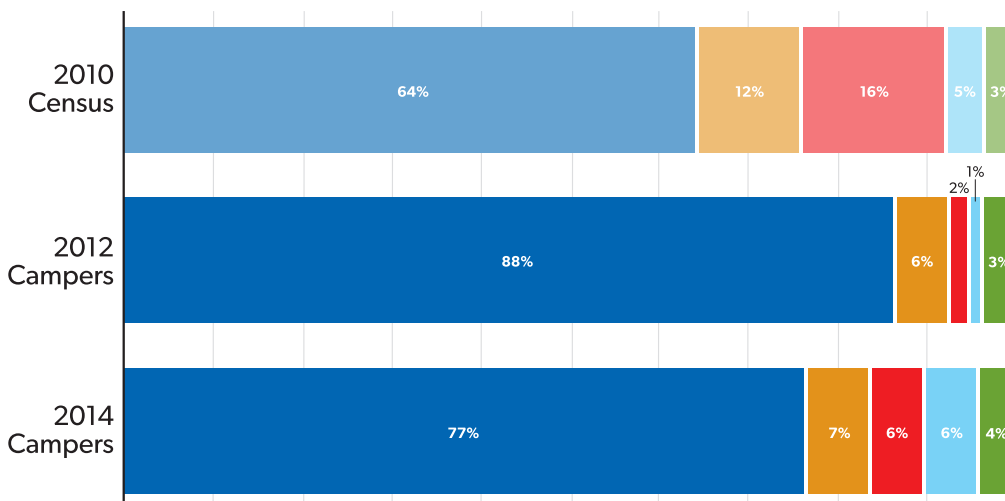
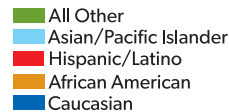
INCIDENCE BY ETHNICITY

Past research efforts have suggested that overall, camping incidence is substantially lower within nonwhite ethnic groups. The National Park Service conducted research in 2003* that indicated about 2-in-10 park visitors are nonwhite, while the Outdoor Foundation** estimates minority representation in all outdoor activities at around 3-in-10. Comparatively, the 2012 study*** showed only about 1-in-10 campers was nonwhite. The 2014/2015 survey showed that currently almost 1-in-4 campers are nonwhite.

Latinos are the most under-represented among campers (16% of the population versus 6% of campers), while white residents are the most over-represented (64% of the population, yet 77% of campers).

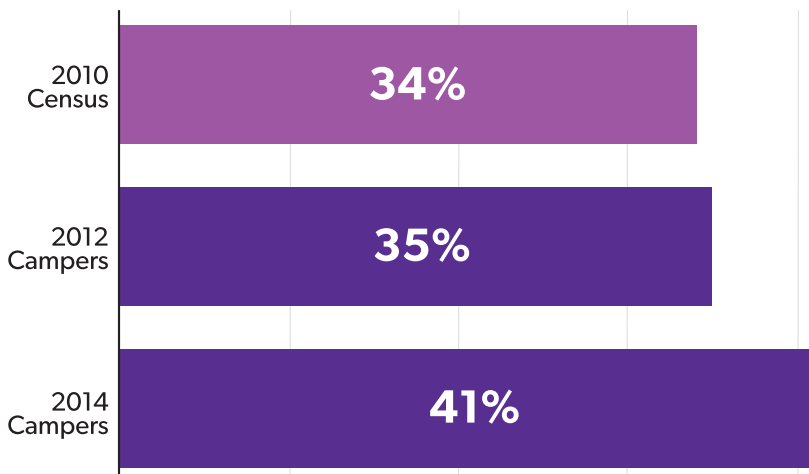
However, it appears that minority representation has made headway since 2012, primarily among Asian residents whose camping activity closely mirrors the overall population (5% of the population, 6% of campers).

Ethnicity



CHILDREN IN HOUSEHOLD

Campers are much more likely to have children living their households than are U.S. residents overall.



For more information on Campers with Children in the Household, see pages 27-29.

*Solop, Frederic I., Kristi K. Hagen, and David Ostergren. Ethnic and Racial Diversity of National Park System Visitors and Non-Visitors Technical Report. Rep. NPS Social Science Program, Dec. 2003. Web. nature.nps.gov/socialscience/docs/archive/EthnicAndRacialDiversity.pdf

**Outdoor Recreation Participation Topline Report 2014. Rep. Outdoor Foundation, 2014. Web. outdoorindustry.org/images/researchfiles/ResearchParticipation2014Topline.pdf?207

***2012 Camper Survey, October 2012

Overview

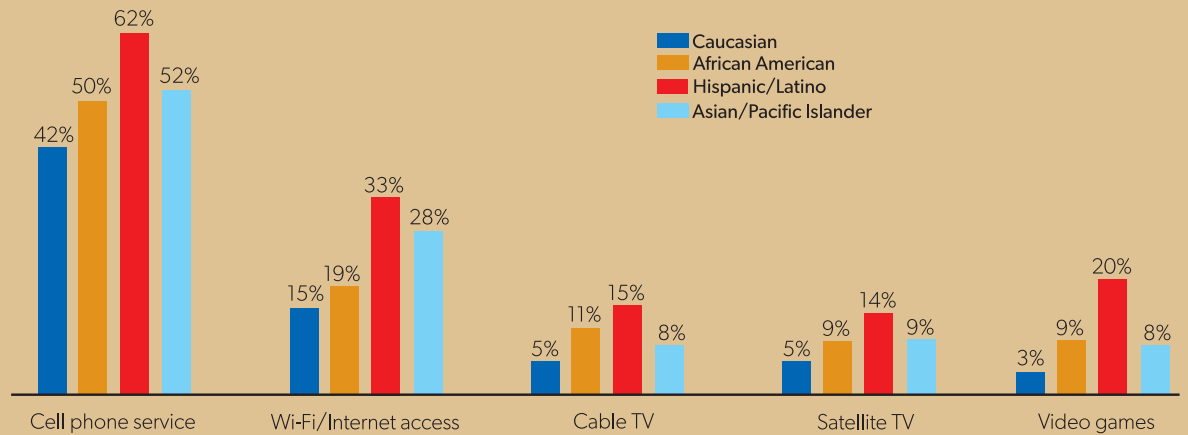
A review of attitudes and behaviors toward camping suggests that multicultural campers tend to be much more connected and reliant on technology.

Latinos are much more likely to be driven by family factors, and most likely to include multiple generations.

African Americans are introduced to camping via groups like church groups and other organized youth groups. They stay in cabins and motorhomes more often, and like organized activities at campgrounds. Many of these attitudes and behaviors may be due to a later introduction to camping. African Americans are also more likely to aspire to upgrade equipment such as RVs.

Asian Americans are often introduced to camping through friends and tend to camp with their friends. They also value technology access.

WHAT TYPES OF TECHNOLOGY DO PEOPLE USE WHILE CAMPING?



Profile of African American Campers

African Americans are:

- 12 percent of the population, 7 percent of campers
- Least likely to camp in a tent, and most likely to camp in a full-service cabin or motorhome; they are also most likely to say that they plan on purchasing a motorhome in the future.
- Most likely to be introduced to camping via an organized group such as scouting or a church group, as well as currently camp with a church/city group that may well include their extended families.
- Significantly less likely to camp at a state or national park, confirming the results of research conducted by the NPS.
- More likely to report increases in spending for campground fees and gear.
- Most likely to say that they are physically active while camping, say that outdoor cooking is one of their passions, and say that camping allows them to let loose and blow off steam.
- More likely to have started camping at an older age (38% said that their first camping experience was as an adult).
- Much more likely than other campers to note the positive impacts of camping on childhood obesity, interpersonal relationships, work performance and academic performance.
- More likely to use technology more often than other campers, in particular they stress the importance of having cell phone service, free Wi-Fi, and are most likely to use a GPS for travel planning.

Profile of Latino Campers

Latinos are:

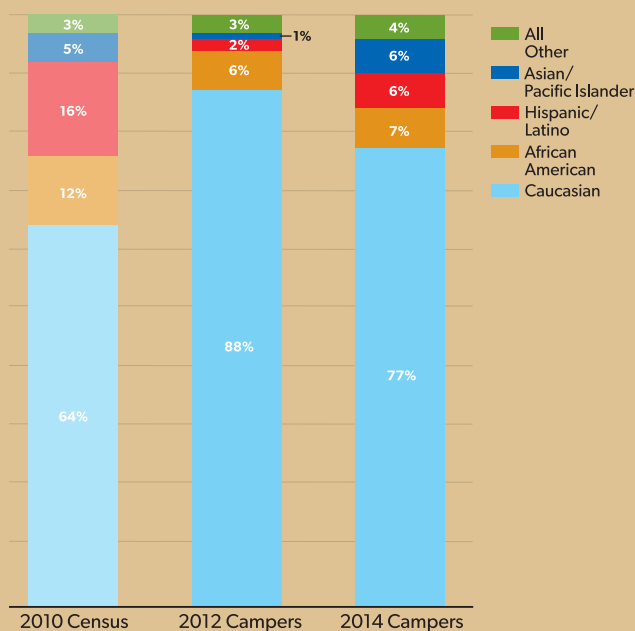
- 16 percent of the population, 6 percent of campers
- More likely to camp in tents and are significantly more likely to camp as part of a family vacation. Also more likely to like camping with groups of friends or family, and with their children because it allows them to be worry free.
- Least likely to camp in privately owned campgrounds.
- Most likely to camp with family members, including their siblings as well as multiple generations (fully 70%).
- More likely to report increases in spending on park fees and gear.
- Likely to become interested in camping through family vacations.
- Prevented from camping more often because of economic barriers.

Profile of Asian American Campers

Asian Americans are:

- 5 percent of the population, 6 percent of campers
- Likely to indicate they camp in tents (two-thirds).
- Less likely to camp for a weekend getaway, yet more likely to camp as a way to visit family and friends, for recreation, or shopping.
- Most likely to spend only a few nights camping each year (62% camp three or fewer nights), yet are most likely to camp in a state or national park.
- Least likely to be a destination camper, and most likely to travel from destination to destination, rarely staying in one location. Indeed, Asian Americans appear to be going against the trend toward destination camping, being significantly more likely to report that their camping trips are getting shorter, yet they are taking more trips each year.
- Most likely to camp with friends, be introduced to camping by their friends, and be influenced by their friends in making camping decisions.
- More likely to have started camping in a tent, yet at a much older age than other campers, with close to half (47%) being introduced to camping as an adult.
- Representative of the highest rates of hiking/backpacking while camping, as well as canoeing/kayaking and mountain biking.
- Most likely to consider free Wi-Fi when choosing a place to camp, and are also most concerned about safety.
- Least likely to cite the emotional and relationship benefits of camping.

INCIDENCE BY ETHNICITY

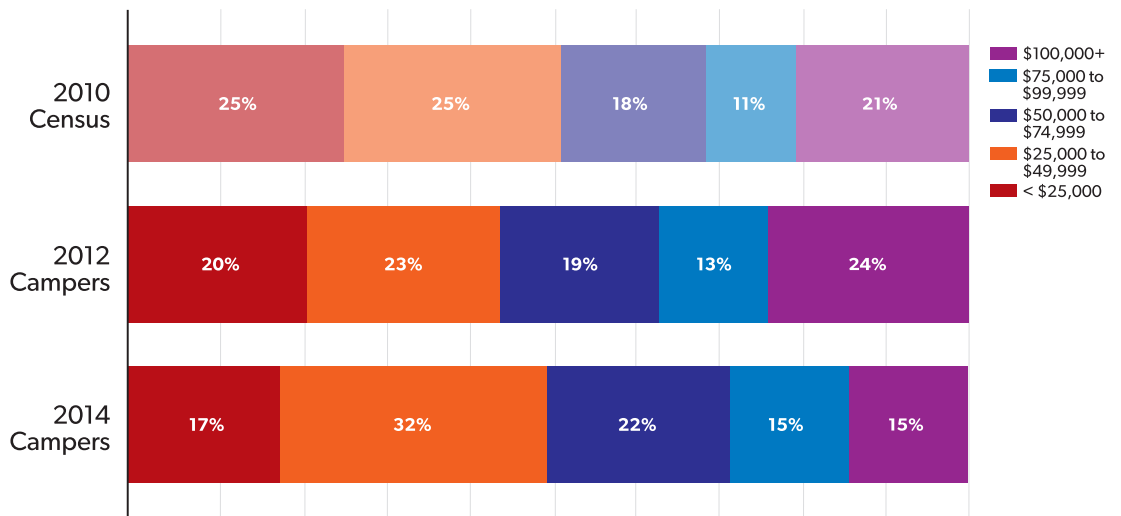


INCOME

Overall, there is a direct relationship between household income and frequency of camping, with higher income households much more likely to camp three or more times each year. Higher income households are also more likely to report that they travel longer distances from their homes. Lower income households are likely to camp the fewest nights, with a majority in the lower income brackets saying they spend one to three nights camping.

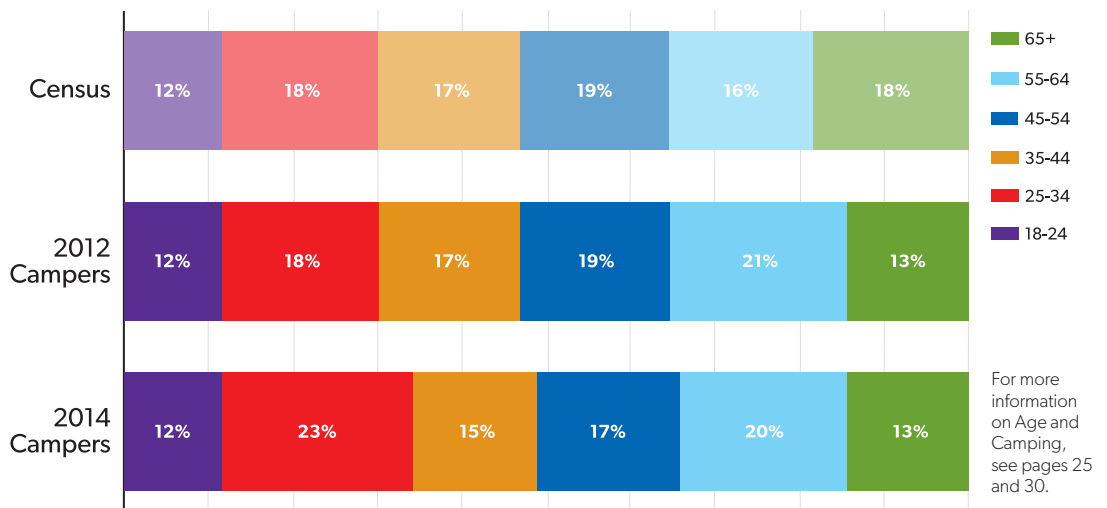
The type of primary camping accommodation is also related to household income, with lower income households seeking more affordable types of accommodations. Indeed, nearly two-thirds of campers who come from the lower income bands camp in tents; by comparison, about one-fourth of higher income campers stay in a deluxe cabin as their primary form of camping accommodation.

Also, across the board, there are only minor differences in household income based on the ethnicity of the camper, with the exception of Asian American campers who tend to come from a somewhat more affluent demographic when compared to all other campers. Indeed, 40 percent of Asian American campers report a household income of \$75,000 or more, compared to only one-fourth of campers from all other ethnic categories who report a household income of \$75,000 or more.



INCIDENCE BY AGE

Overall, campers tend to be somewhat younger than the overall population, with recent results showing a slight uptick in camping by 25 to 34 year olds.

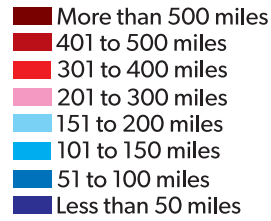


WHERE PEOPLE ARE CAMPING

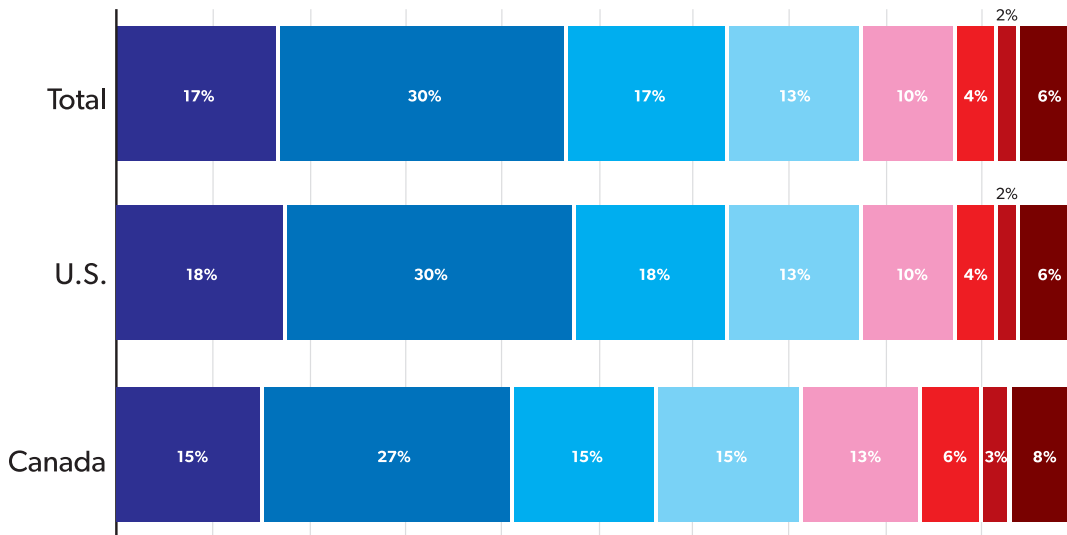
Distance from Home

Campers are relatively split, with about half traveling less than 100 miles from home and the remainder traveling more than 100 miles.

Overall, about three-fourths of campers stay within 200 miles of their homes.



HOW FAR DO PEOPLE TYPICALLY TRAVEL TO CAMP?



Campers are Traveling Farther to Camp

Based on the results of the 2015 survey, in which campers were asked how far they actually traveled to camp in 2014 and how far they plan to camp in 2015, it seems campers are starting to travel slightly further to camp.

Over the past 2014 camping season, and even though the change is relatively minor, it appears that campers expanded outside the boundaries of their typical camping destinations.

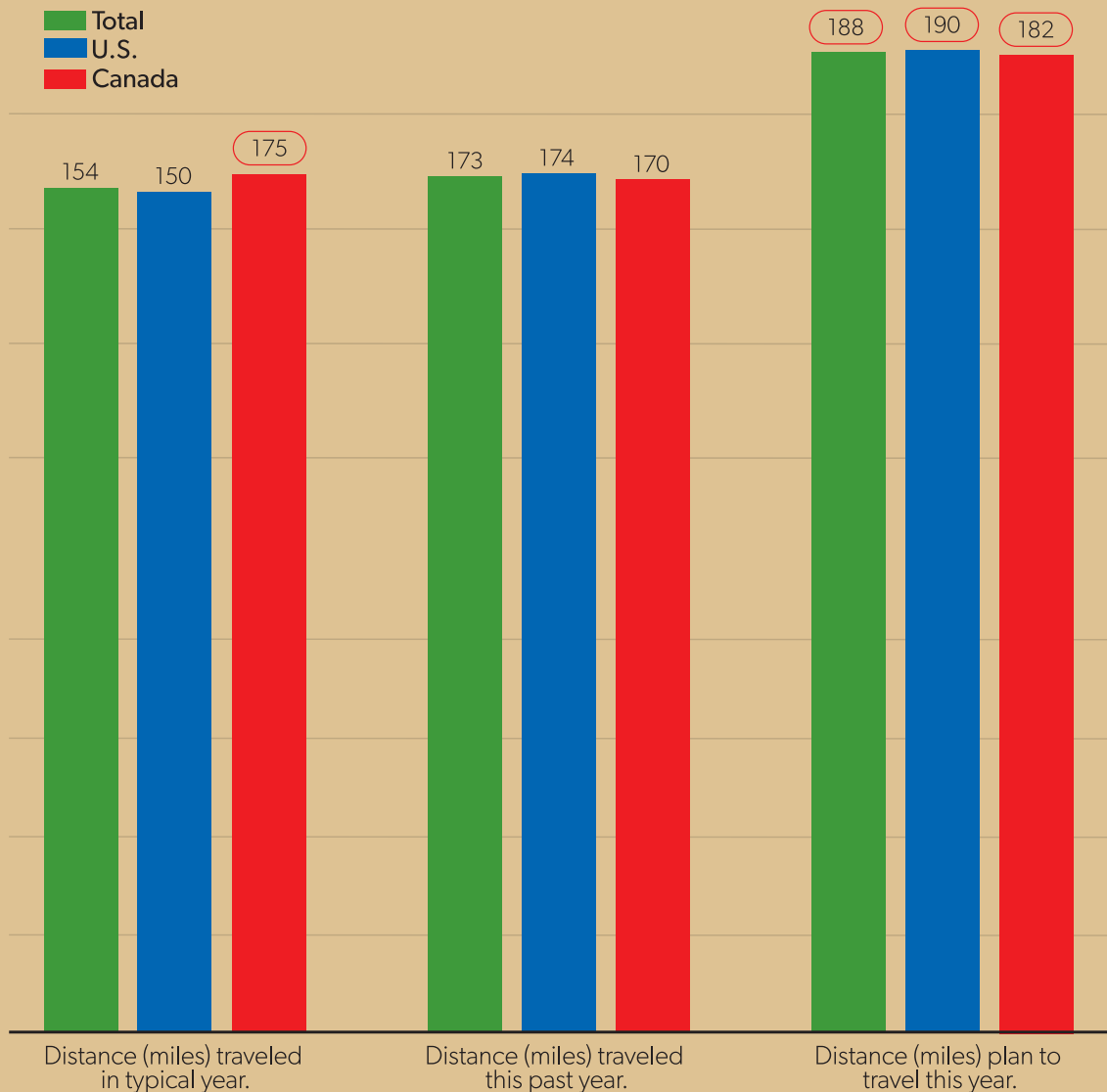
For the upcoming 2015 camping season, it appears that campers may be expanding their reach with a much greater proportion of campers who say that they intend to venture farther from home.

U.S. campers are expanding their reach much further than Canadian campers, especially considering in a typical year Canadians travel further, but this past year U.S. campers reached out further, and intend to go even further. By contrast, this past year Canadians stayed closer to home, but it seems they intend to venture further this coming year.

UPDATE

ON AVERAGE, HOW FAR DID PEOPLE TRAVEL TO CAMP IN 2014?

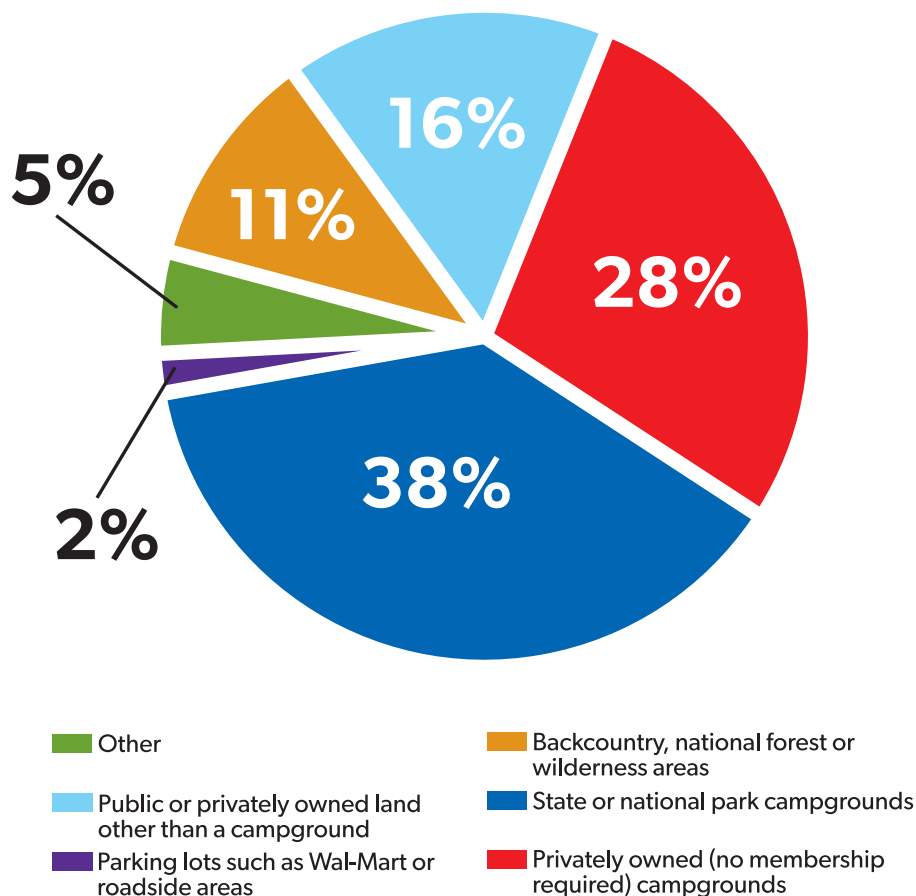
ON AVERAGE, HOW FAR DO PEOPLE PLAN TO TRAVEL IN 2015?



Camper Nights

About four out of every 10 camper nights are spent in state or national park campgrounds. Though a substantial block of camper nights (almost three out of every 10) are spent in privately owned campgrounds.

WHERE ARE CAMPER NIGHTS SPENT?



REGIONAL DIFFERENCES IN HOW PEOPLE CAMP



Campers from the western U.S. represent a different type of camping behavior, with campers from this region much more likely to camp in tents (73%), and least likely to camp in a campground cabin (11%). They are also substantially more likely to camp in national or state parks (45% of this group's camper nights), compared to campers from the Midwest or Northeast who are most likely to camp at private campgrounds (almost one-third of these groups' camper nights).

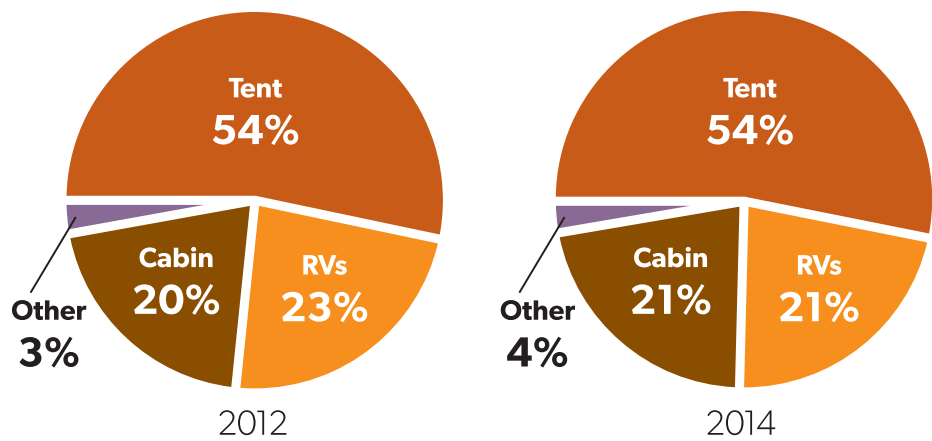
HOW PEOPLE ARE CAMPING

Accommodations

Over time, there have been few changes in the types of accommodations campers are staying in during their trips. However, of particular note is that 1-in-5 households claim that they camp in cabins located in campgrounds.

In terms of demographics, RVers and cabin campers are more likely to be comprised of a somewhat older demographic. In particular, 4-in-10 RVers are 55 years of age or older, compared to 3-in-10 tenters. Conversely, tent campers are much more likely to be from the younger age cohorts.

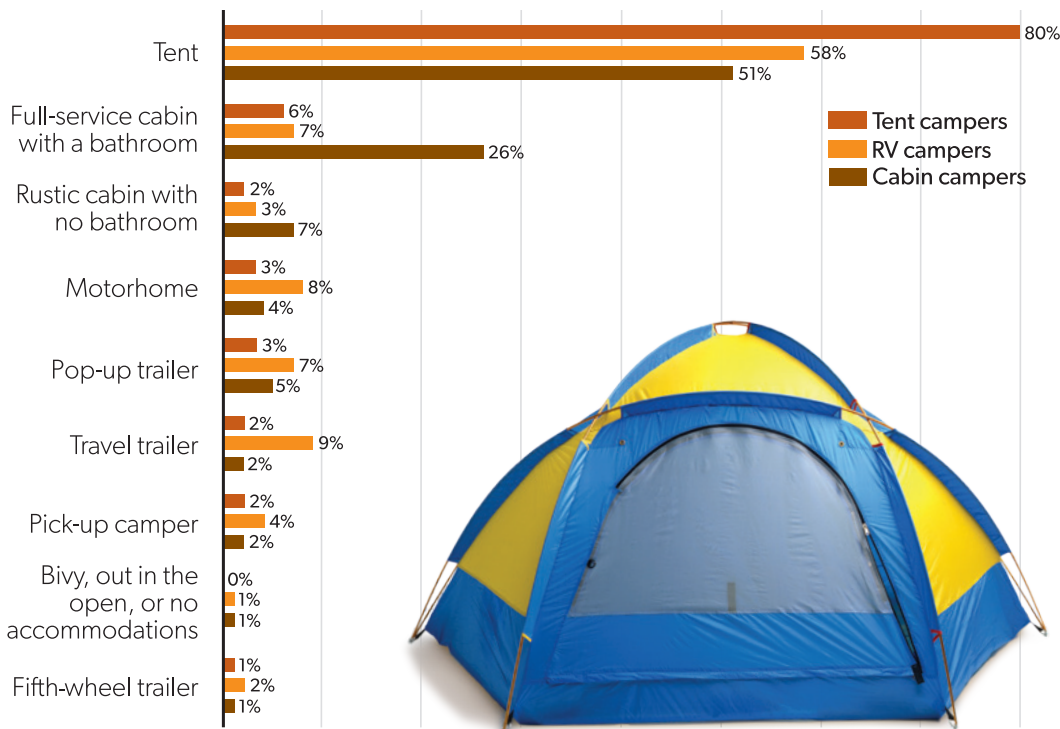
PRIMARY ACCOMMODATIONS



Introductory Accommodations

While it is not surprising that nearly all tent campers claim to have started camping in tents, RVers are significantly less likely to do so, and much more likely to list a variety of different types of accommodations included in their introduction to camping (e.g., pop-up campers, pick-up campers, etc.). Additionally, with 1-in-5 campers staying in cabins, it is interesting to note that these campers are significantly more likely to have also started their camping adventures in a cabin.

WHAT DID THEY CAMP IN FIRST?



PROFILE OF A TYPICAL NORTH AMERICAN CAMPER

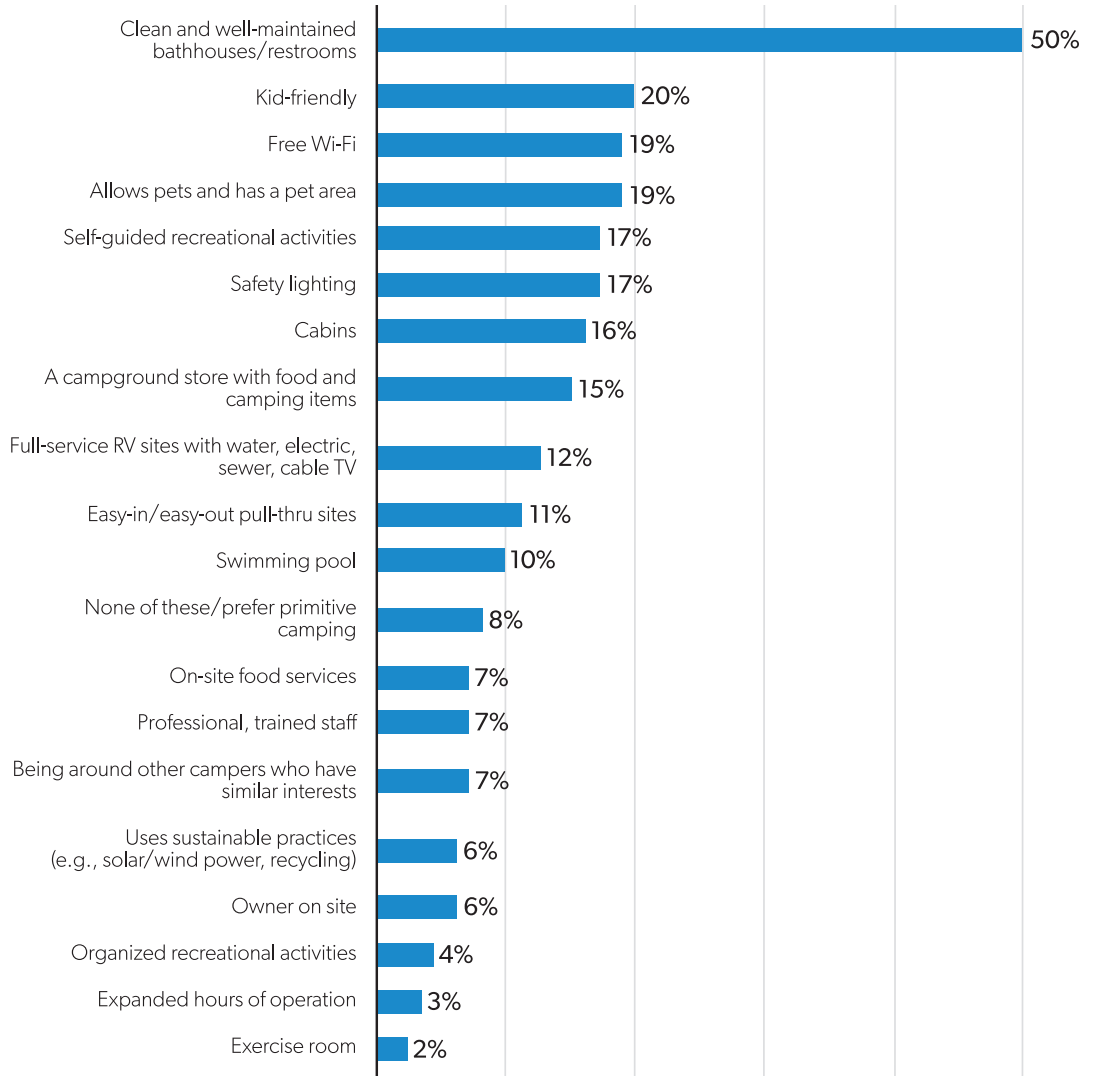
The typical North American camper is likely to...

- Have started camping with their parents when they were younger than 18, and likely to have camped in a tent;
- Take their camping trips as a family vacation with their spouse/significant other (as well as kids and other family members or friends);
- Stay at state/national/provincial parks and most likely to be “destination campers”;
- Travel less than 150 miles from home;
- Seek at least basic services and amenities at a campground; and
- Bring along their cell phones, going online at least occasionally to check emails.

Campground Offerings

Clean bathrooms are the most important part of staying at campgrounds, followed by being kid-friendly, offering free Wi-Fi and being pet-friendly.

WHAT DO CAMPERS VALUE MOST IN A CAMPGROUND



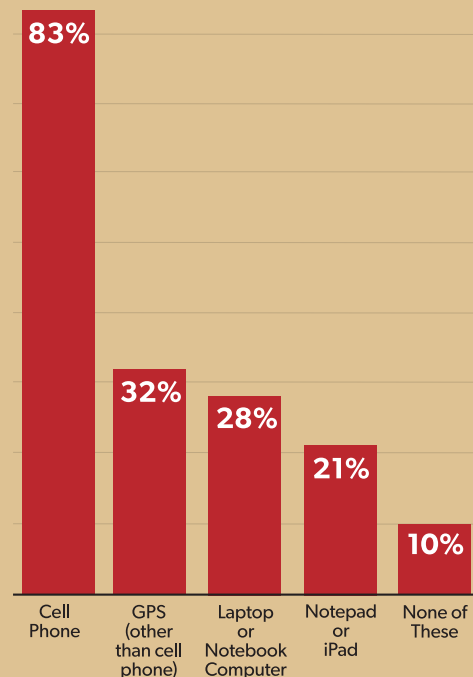


THE ROLE OF TECHNOLOGY IN CAMPING

Having access to technology is now the norm for campers, and continues to grow in usage, and importantly, reliance for campers of all ages. Cell phones, many with advanced capabilities and a broad spectrum of applications, are at the forefront of this trend.

- Nearly all campers (83%) state that they bring their cell phones along with them when camping.
- Access to free Wi-Fi ranks in the top three most important campground amenities, before traditional amenities such as a camp store or safety lighting.
- Half of all campers claim that they go online at least once a day while camping. 70 percent go online at some point while camping.
- Fully 4-in-10 campers 55 and older say that they never go online while camping; younger campers are almost twice as likely to do so.
- Among the campers who go online (either with a computer, tablet or mobile phone) while camping, a majority say that they do so to check emails or take pictures with their phone.
- Access to Wi-Fi while camping appears to be important for reasons other than simply checking email or staying connected. Considering 31 percent of campers who are online while camping are using social media such as Facebook and Twitter, it appears that many campers are using social media to share their camping experiences during the experience versus waiting until they are home.
- The youngest campers (< 25) are more likely to bring a cell phone (86%) compared to campers age 65+ (77%). Conversely, campers 25+ are somewhat more likely to bring along a laptop or notebook compared to the youngest campers (21%).

TECHNOLOGY CAMPERS BRING WITH THEM WHILE CAMPING

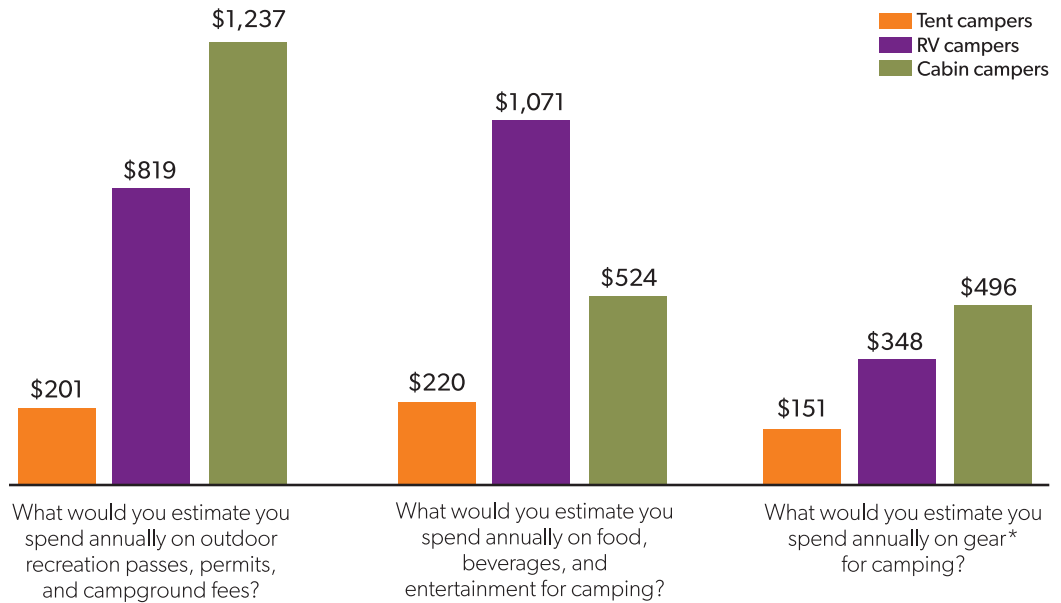


Spending by Type of Camper

RVers and cabin campers spend four times as much on camping when compared to tenters.

While cabin campers are more likely to spend their money on fees, RVers are spending significantly more on food, beverages and entertainment.

AVERAGE EXPENDITURES PER HOUSEHOLD



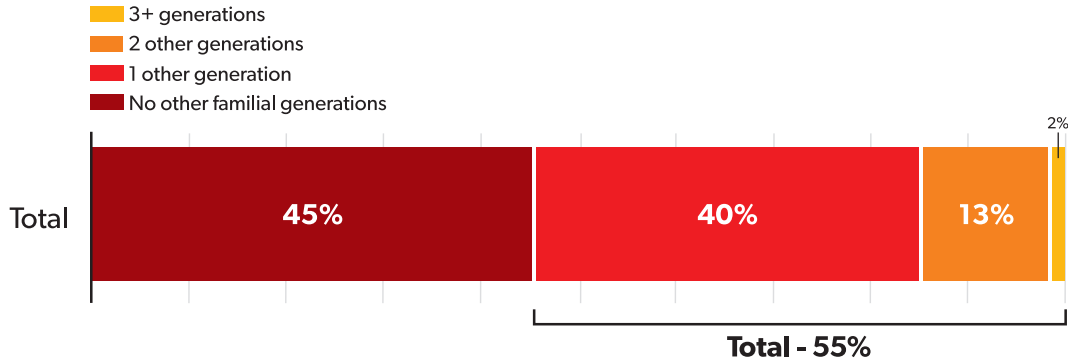
*Does not include the cost for campers' accommodations equipment (e.g., tents, motorhomes, trailers, etc.)



Who They're Camping With

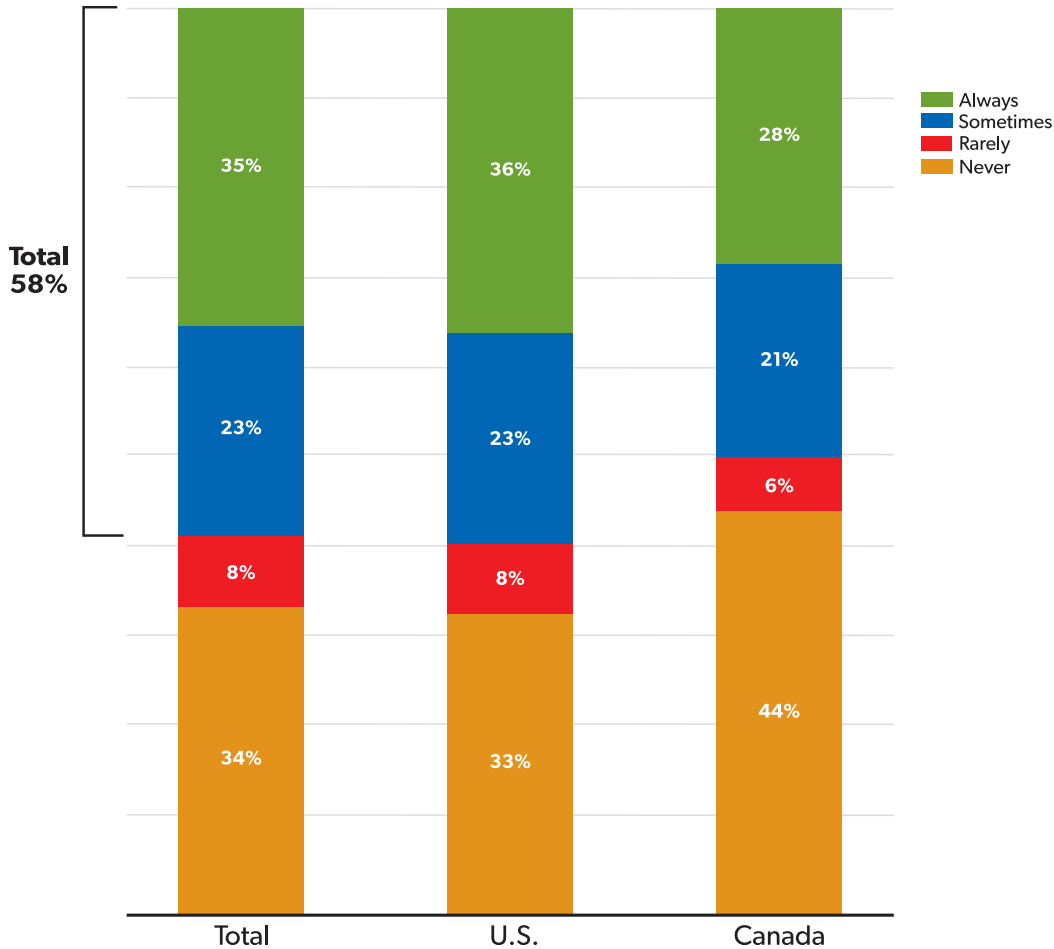
Campers are introduced to camping at a young age, typically by their parents, a youth group, scouting, or other family member. These connections appear to hold true when campers become adults, with a majority of all campers spending time in the outdoors with children, parents and/or grandparents. Indeed 55 percent of all campers indicate that they camp with multiple generations.

MULTI-GENERATIONAL CAMPING



CAMPING WITH PETS

A majority of campers bring along pets at least some of the time; only one-third never bring a pet.



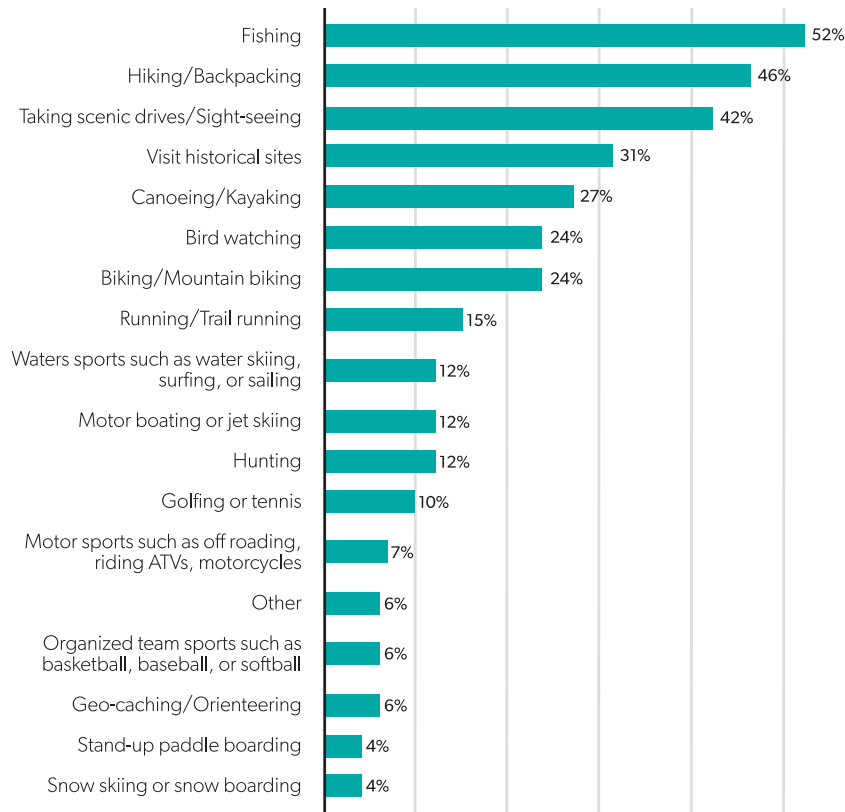


WHAT PEOPLE DO WHEN THEY'RE CAMPING

Activities

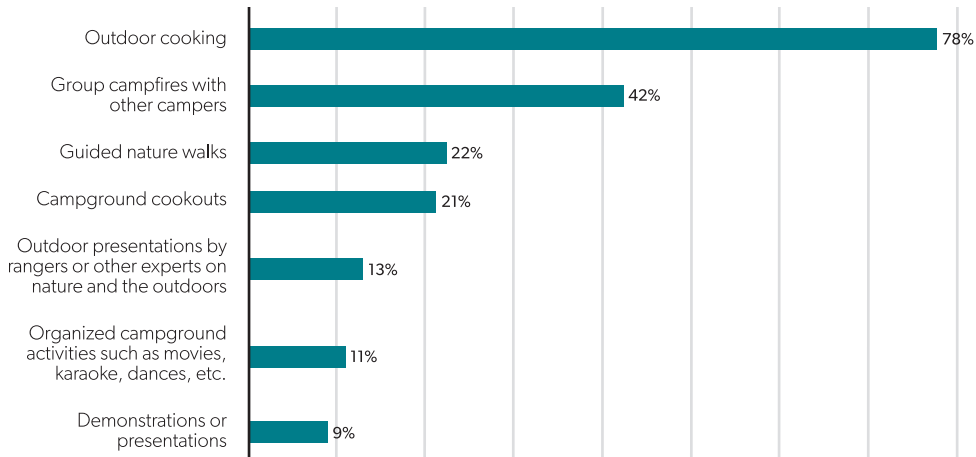
Fishing is the most common activity while camping. Younger campers tend to gravitate toward the more active recreational activities such as mountain biking, organized sports and running.

RECREATION



Not surprisingly, most campers participate in outdoor cooking, while many also participate in group campfires.

SOCIAL ACTIVITIES



WHY PEOPLE ARE CAMPING AND THE IMPACT/BENEFITS

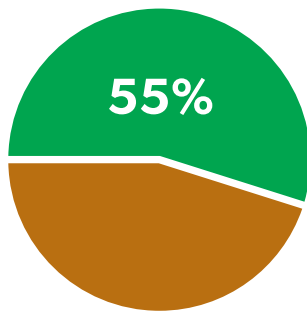
Escapism

Camping appears to represent a form of escapism for many, allowing them to **reconnect with nature and the outdoors, reducing stress while spending more time with family and friends**. This is a critical consideration in why people camp, given the greatest barrier to camping more is being able to carve out the time for camping.

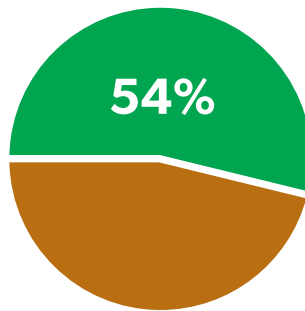
Campers are also likely to “strongly agree” that camping allows them important relaxation time, decompressing from the stresses of everyday life.

Importantly, economic and practical reasons are assigned lesser value among campers.

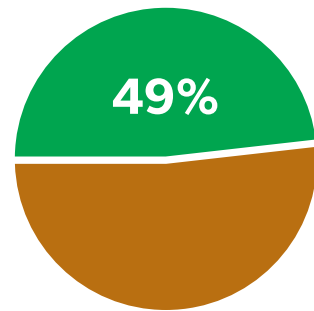
KEY REASONS FOR CAMPING



Camping allows me to reconnect with nature and the outdoors

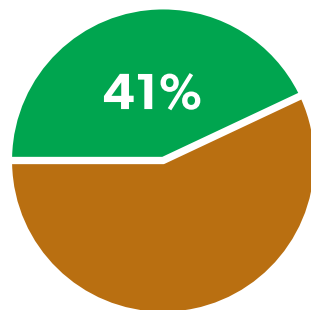


Camping reduces stress and relaxes me

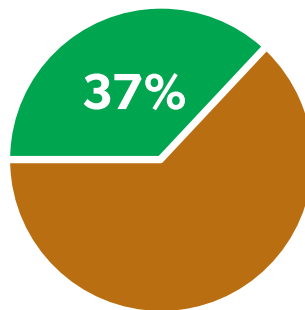


Camping allows me to spend more time with my family and friends

% STRONGLY AGREE ABOUT CAMPING



Camping is a time to just relax and not feel like I have to be somewhere or do something



Camping is a great way for me to escape the stress of everyday life

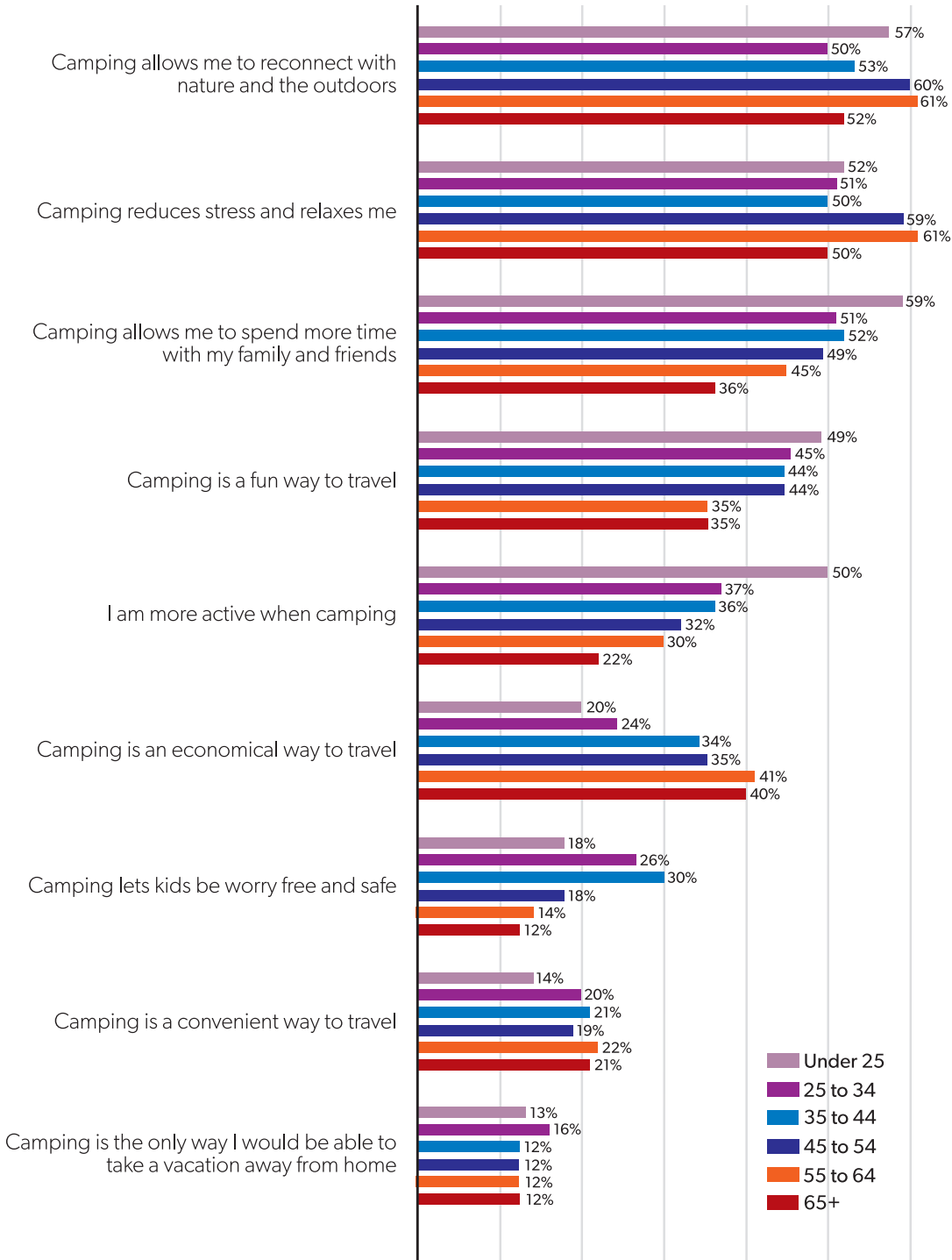
Why People Camp by Age

Campers younger than 25 years are most likely to mention that camping allows them to be more active, as well as being able to spend more time with family and friends.

Fully 6-in-10 campers in the 45 to 64 year age band say that camping reduces stress and relaxes them.

Older campers in general are more likely to mention the economics of camping as a motivator for camping, and less likely than younger campers to be impacted by the social aspects of the experience.

KEY REASONS FOR CAMPING





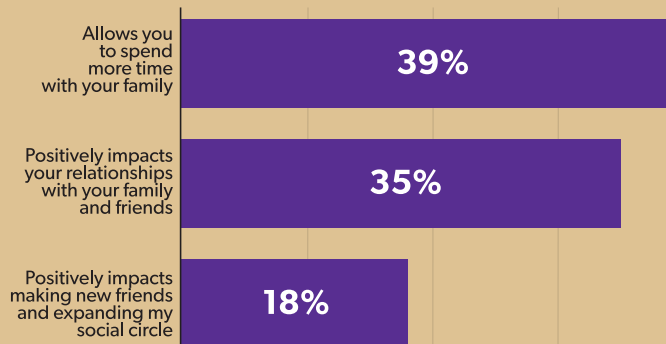
THE IMPACT OF CAMPING ON RELATIONSHIPS

Besides the finding that campers are indeed camping with their families (including multiple generations), were introduced to camping by their families, and use camping as their family vacations, there are also **strong ties in the form of directly impacting family relationships** (41% say they “completely agree” that camping improves family relationships).

Also, fully 4-in-10 campers suggest that camping has “a great deal of impact” on allowing them to spend more time with family. Another third of campers say that camping has a positive impact on their relationships with family and friends and emotional well-being.

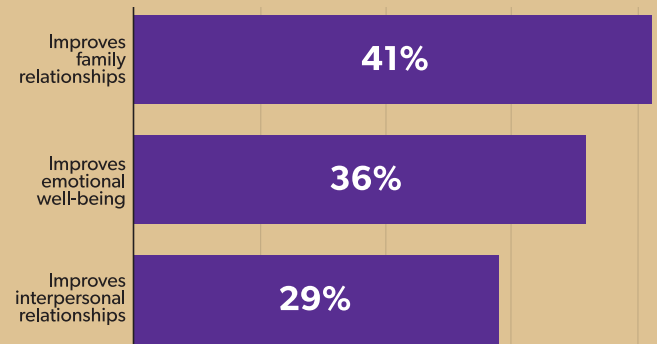
IMPACT ON CAMPERS IN GENERAL

% Completely agree about camping



IMPACT ON PERSONAL SITUATION

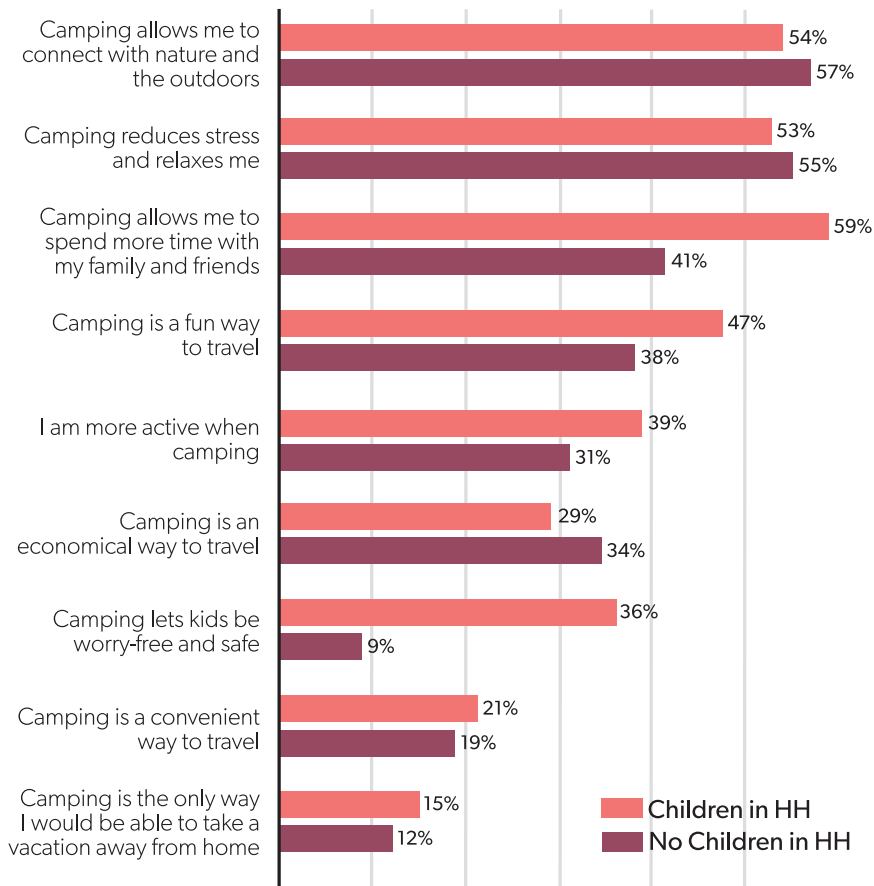
% Completely agree about camping



Campers with Children

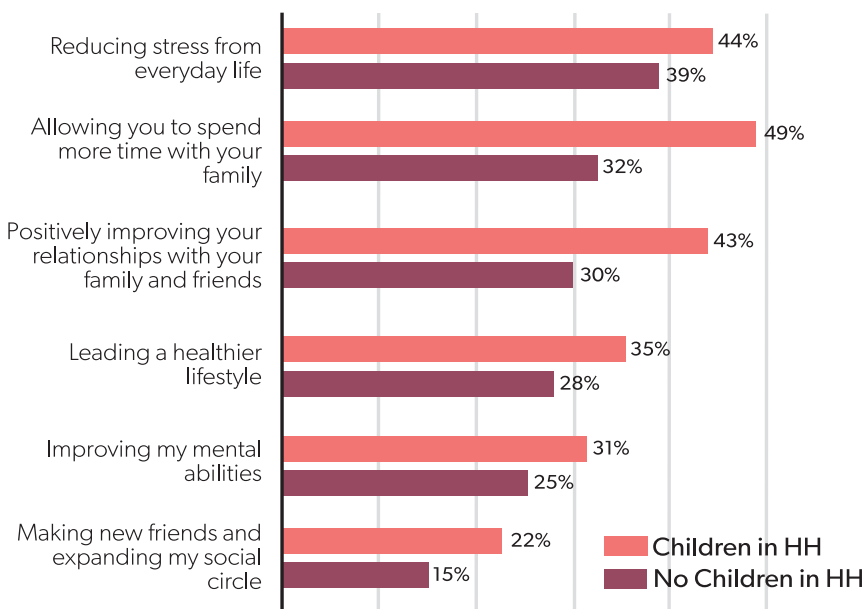
Spending time with family is a key driver for campers who have children in the household, as well as allowing their kids to have a worry-free experience.

KEY REASONS FOR CAMPING



About half of all campers with children say that camping has “a great deal of impact” on allowing people to spend more time with their family.

IMPACT OF CAMPING ON PERSONAL LIFE



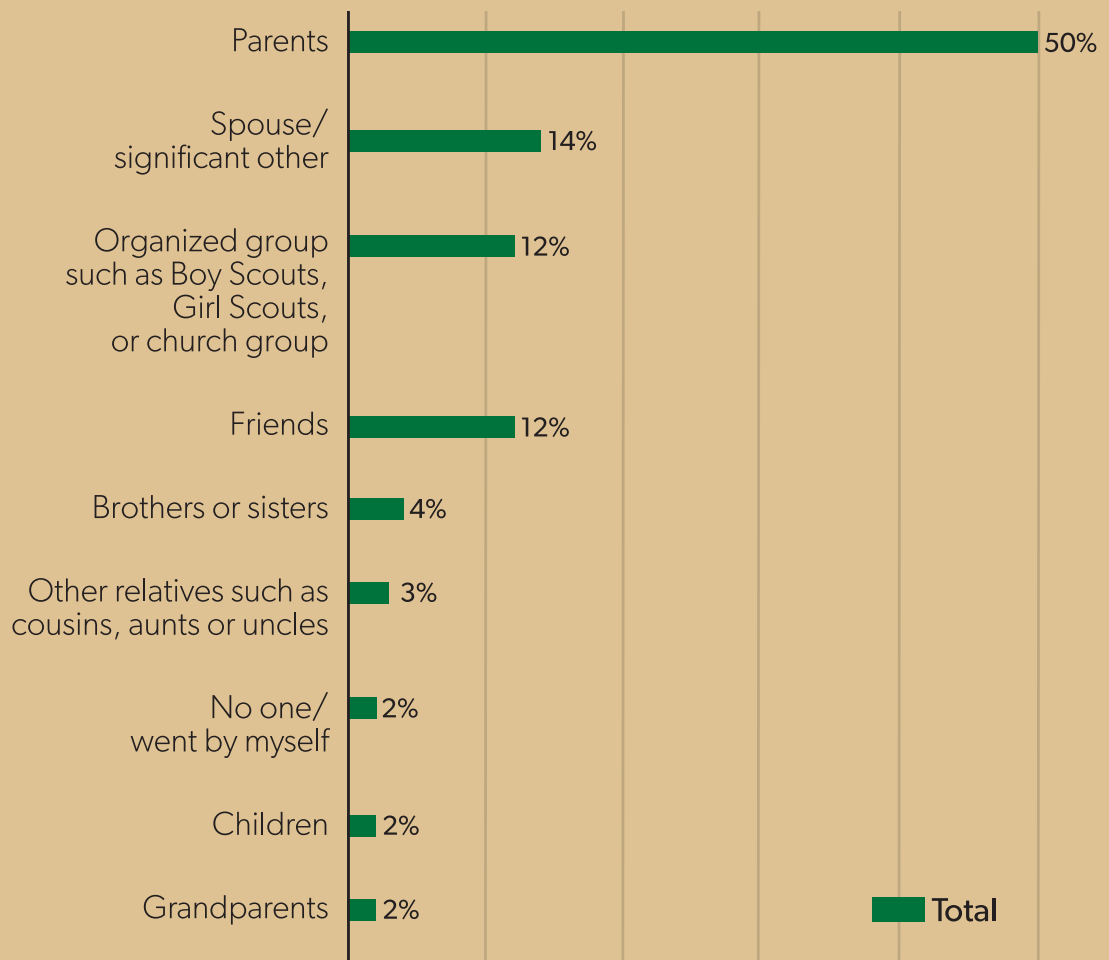
YOUTH AND THE OUTDOORS: CAMPING WITH CHILDREN

In a comparison of campers who camp with children versus those who do not, there are some noteworthy distinctions. Those who camp with children are:

- Much more socially driven.
- Seeking a healthy vacation option to take the kids on.
- More likely to relate to the healthy impacts of camping both on their kids and themselves.
- Likely to camp more often, but take shorter and more frequent trips.
- Likely to camp with other friends and family members and place a lot of importance on the family relationship aspect of camping.
- More connected, using technology more often and stressing the importance of being connected.

HOW ARE PEOPLE INTRODUCED TO CAMPING?

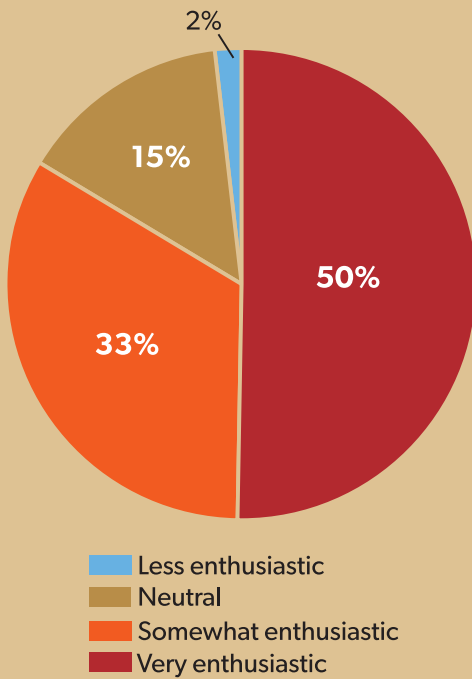
People are most likely to be introduced to camping by their parents.



Kids Today!

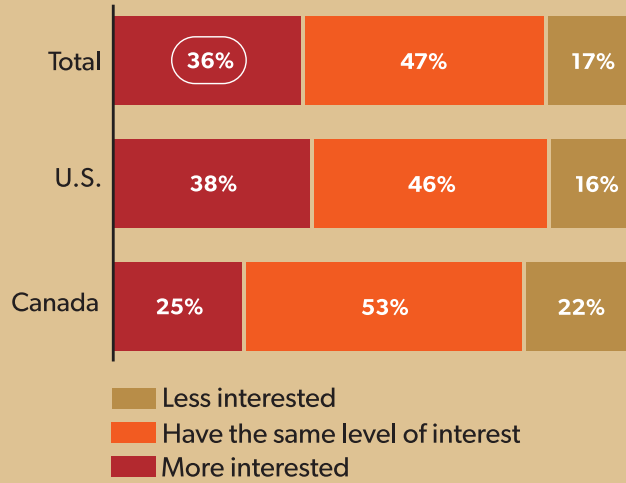
DO KIDS TODAY WANT TO CAMP?

One-half of adult campers believe that kids today are very enthusiastic about camping.



HOW ABOUT COMPARED TO OLDER GENERATIONS?

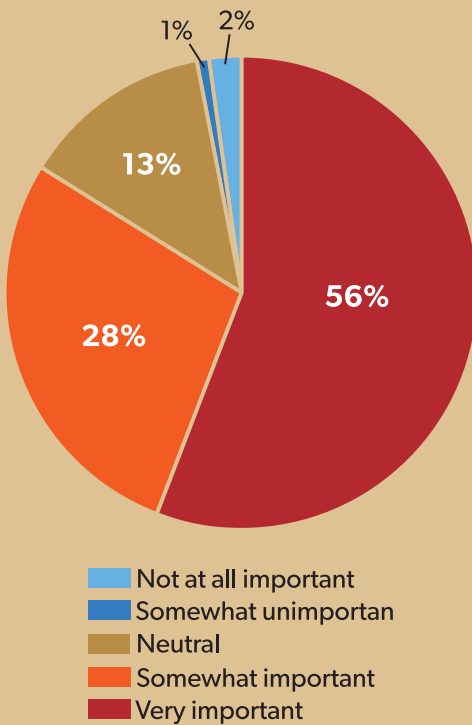
One-third of campers think that kids today have more interest in camping than their parents/older adults did when they were kids.



CAMPING WITH CHILDREN

HOW IMPORTANT IS IT FOR KIDS TO GET OUTDOORS?

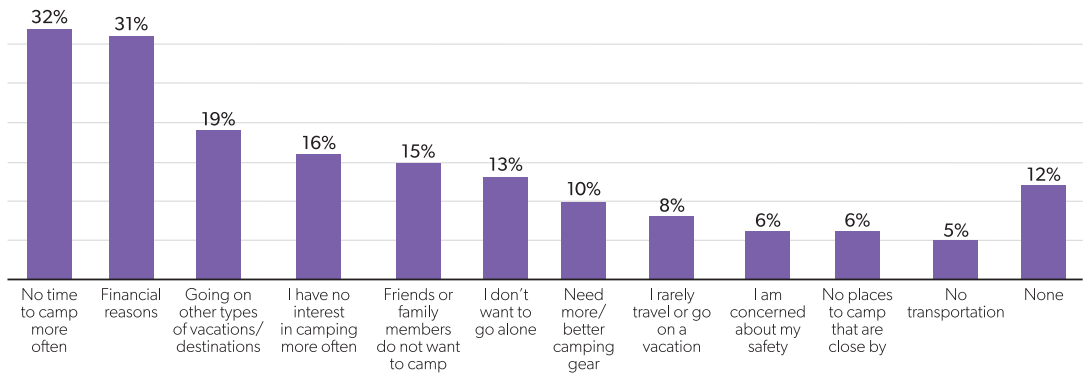
Adults are likely to assign a great deal of importance on participation by kids in outdoor activities.



Why People are Not Camping

Time and financial reasons represent the greatest barriers to camping more often.

WHAT PREVENTS CAMPER FROM CAMPING MORE OFTEN?



AGE AND CAMPING

Even though incidence of camping is relatively consistent across all age groups, and campers are generally representative of the overall U.S. population in terms of the age of campers, there are notable differences between campers of different ages when it comes to their camping preferences, behavior and intentions.

Younger campers (<35 years of age) are twice as likely as campers who are 65 years of age and older to camp in a tent. Conversely, campers 65+ are twice as likely to camp in an RV compared to younger campers.

There is a linear relationship between the age of the camper and their views on whether kids are more or less interested in camping than their parents/older adults were when they were kids. Indeed, younger campers are significantly more likely to state that kids are just as interested or more interested in camping.

Campers younger than 35 (56%) are more than twice as likely than campers 65+ (26%) to state that they plan to take more camping trips this year.

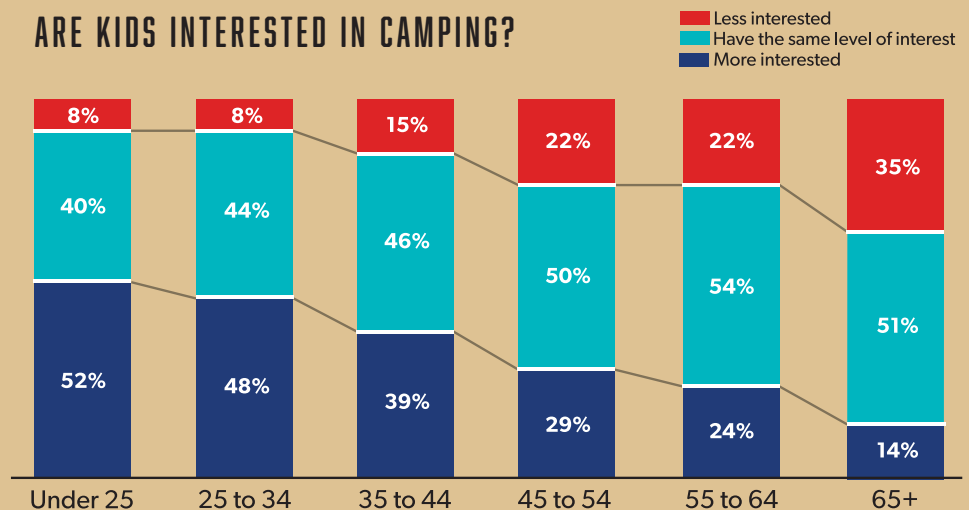
Campers in the 55+ age band are most likely to say that they intend to travel further from home (more than 200 miles) this year when compared to younger campers.

The greatest barrier to camping more often among the youngest cohort of campers (<25) is not enough time (45%), compared to only 10 percent of campers 65+. Campers 65+ are more likely to say that they have no interest in camping more often.

Campers who are 35 to 44 years of age appear to be most impacted by the upturn in the economy. This group of campers is most likely to suggest that decreased gas prices and overall improvements in the economy are positively impacting their plans for the upcoming camping season.

Younger campers also report using technology more often while camping, with about three-fourths of campers 45 years of age and younger going online while camping, compared to 56 percent of campers 65+.

ARE KIDS INTERESTED IN CAMPING?

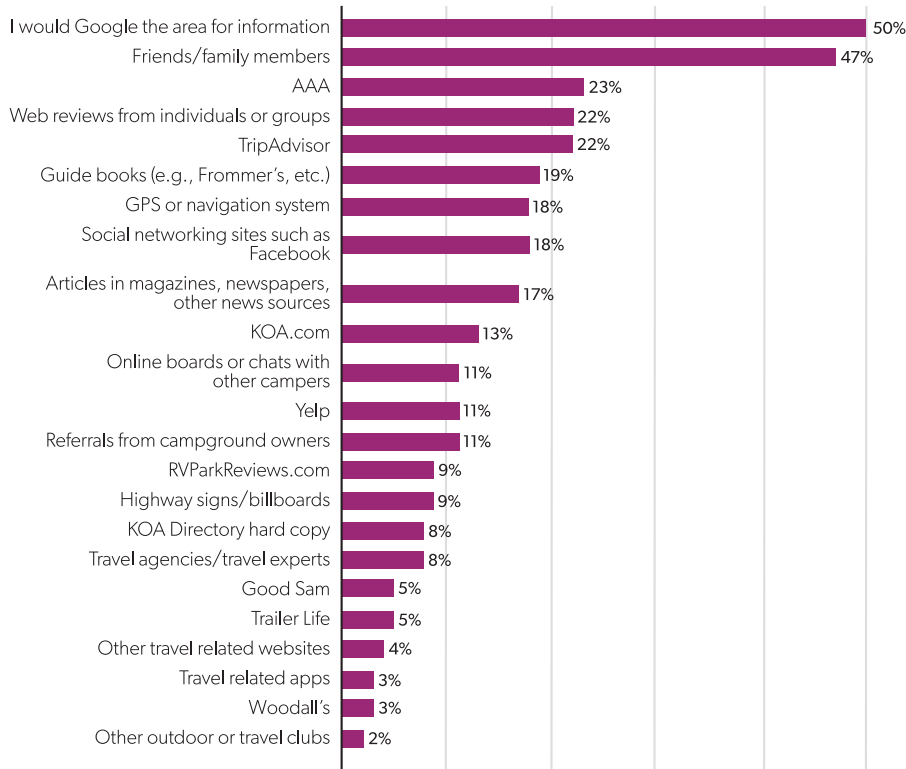


PLANNING AND BOOKING CAMPING TRIPS

Research/Resources

Google and word-of-mouth are the most common sources for information on camping.

WHAT SOURCES OF INFORMATION DO PEOPLE USE WHEN PLANNING A CAMPING TRIP TO A NEW AREA?



CAMPING CULTURE AND NETWORKS

The resources campers use for information about where they should camp, how they should camp and who they should camp with are in all likelihood directly impacted by their social and familial connections. When one considers that a majority of North Americans have not only camped at some point in their lives, but are also most likely to do so at a young age, the culture of camping is well established across North America.

The impact of these connections is that many campers shy away from the more formal sources of information such as online travel sites or other digital information sources. **When asked directly, campers are likely to say that they ask someone they know for information, or use their network of social connections for information.** It is important to consider that when asked which sources of information they are most likely to use, campers are split in whether they would ask someone or use more formal sources (or Google an area for more information). This result cuts across all age groups. The depth of campers' interpersonal networks hugely impacts campers' information sources, more so than age or comfort with technology.

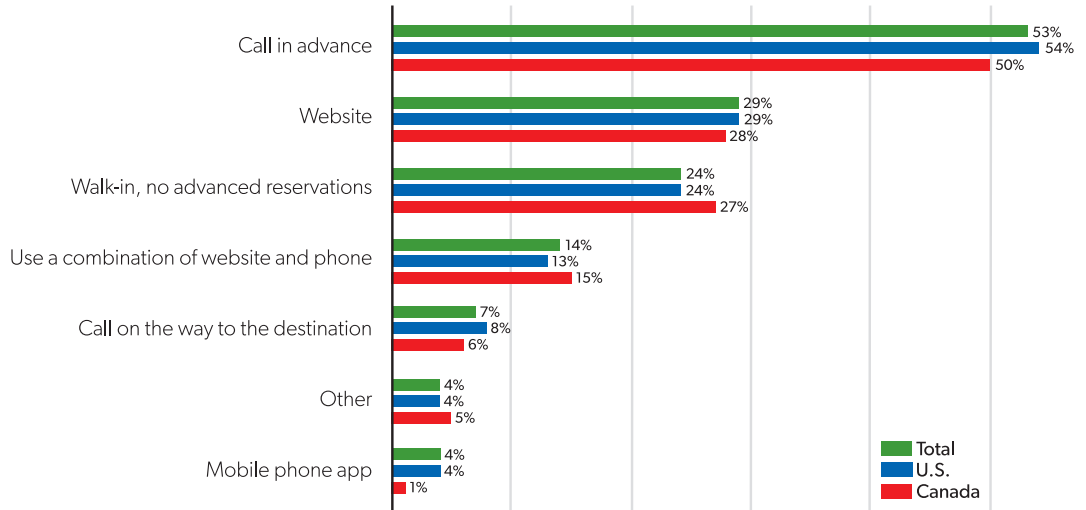
This result dovetails with the findings among nonwhite campers who report higher levels of usage and reliance on technology while camping and traveling. The incidence of camping among African American and Asian American campers has traditionally been well below population figures, so it makes sense that they rely more on technology. The study found that they tend to start camping at an older age and are likely to start camping as part of an organized group (versus a family vacation or outing).

Another consideration for campers as it relates to information sources is that for some, camping represents an idea of freedom and exploration, and the possibility of discovery and spontaneity. There is a segment of campers who not only are seeking novel places and situations and activities, but are also unlikely to put a great deal of planning into their travels. Indeed, one out of every four campers does not make advanced reservations when staying at a campground, choosing instead to simply "show up" and not be locked into any specific plans or travel arrangements.

Booking

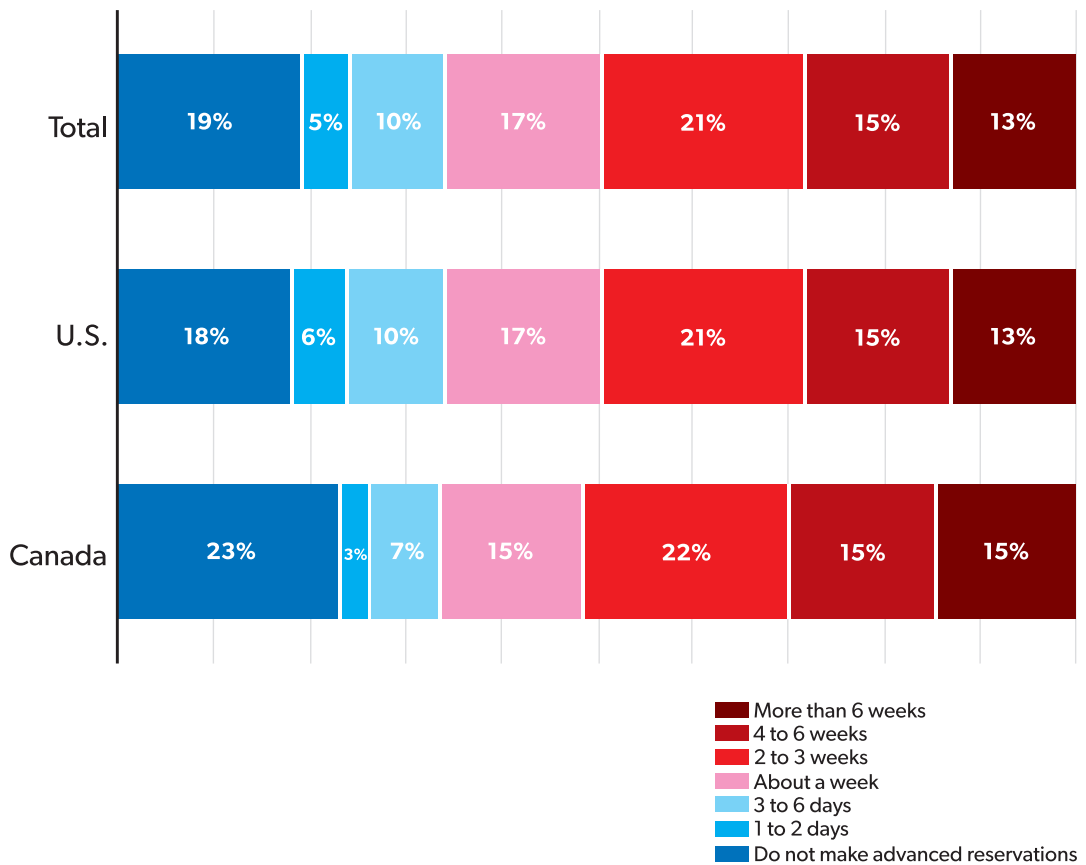
A majority of campers make their reservations by phone, though 3-in-10 use a website. One-fourth do not make advanced reservations.

HOW DO CAMPERS MAKE RESERVATIONS?



Campers are split with half making reservations within a week of their stay and half making their plans more than a week out.

HOW FAR IN ADVANCE DO THEY RESERVE?





THE FUTURE OF CAMPING

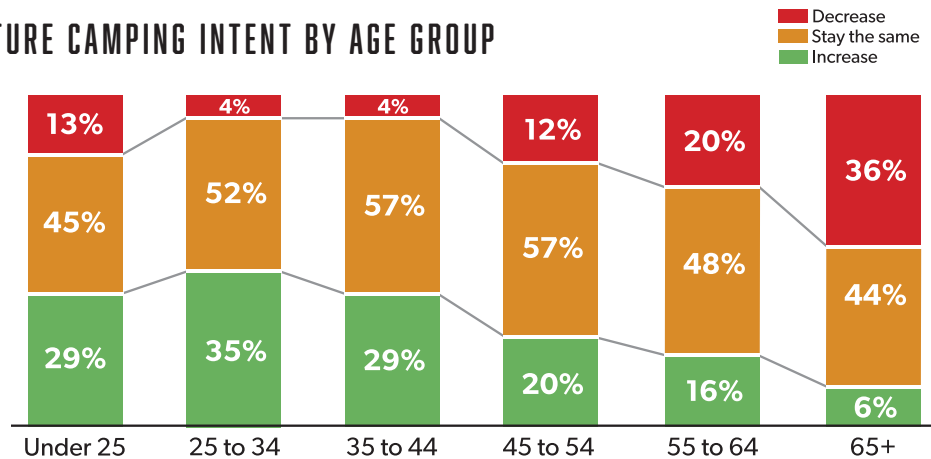
Summary

The results of this research suggest that there is an uptick in camping, with potential growing trends in previously under served segments of the population. Domestic travel, including camping, has been robust since 2001 and has shown another increase with the 2008 economic collapse. More exposure, especially among younger residents will bolster future camping numbers as well.

When asked about enthusiasm for camping among today's youth, many feel that they are enthused about spending time outdoors and are more enthusiastic than they were when younger. Also, 84 percent of adult campers state that it is important for kids to spend time outdoors, and younger campers anticipate a net increase in camping. This result bodes well for future camping because, as noted previously, campers are typically introduced when younger and carry their love of camping into adulthood.

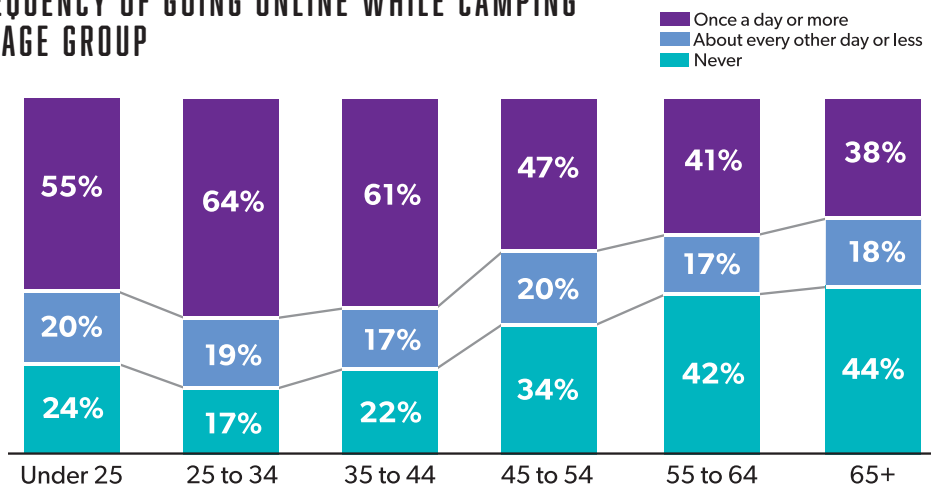
Millennials represent the group with the greatest potential for increases in camping in the coming year, with about 6-in-10 stating that they plan to spend more nights camping, compared to only about 4-in-10 Baby Boomers. Additionally, Millennials are much more likely than the Boomer generation to suggest that they intend to purchase or upgrade to an RV in the coming years.

FUTURE CAMPING INTENT BY AGE GROUP



Still, *the face of camping appears to be changing*, with more and more campers seeking accommodations/locations with Internet access, and most placing at least some reliance on technology. With 83 percent of campers indicating that they bring mobile phones when camping, the devices represent part of campers' everyday lifestyles, even in the outdoors, and the need to stay connected appears to be a factor at least in the short-term.

FREQUENCY OF GOING ONLINE WHILE CAMPING BY AGE GROUP



Notably, it appears that even among the younger set of campers, there are aspirations to upgrade equipment and/or accommodations. In particular, younger campers plan to purchase or upgrade their tents, as well as consider RV or cabin purchases.

In order for camping to remain a robust part of the North American leisure and recreation landscape, those who are involved in the camping industry (e.g., campgrounds, retailers, organized outdoors groups, etc.) will need to adapt to the changing preferences and types of campers while maintaining the “mission” of those who are seeking a camping experience.

As mentioned previously, there is a growing reliance on technology among campers due to many of these technologies being embedded into their lifestyles. With this mind, campers are likely to form into groups that are either:

- a) highly connected with cell phone service, reliable Wi-Fi and other media access;
- b) moderately connected, mostly in the form of knowing that there is digital access if needed, but it’s not a necessary part of the camping experience; and
- c) completely disconnected.

Campers are also likely to seek locations and other campers who have similar interests, with camping becoming more specialized (which dovetails with digital access). These types of experiences will in all likelihood include camping as part of a club or group, or attending or being a part of a special event. Those with families will camp where there are children’s activities and those without will seek other campers who are seeking a more quiet and serene camping experience. In other words, those serving the camping public will need to provide specialized services for the different camping markets, where a “one-size-fits-all” approach will no longer suffice.





THE YEAR AHEAD

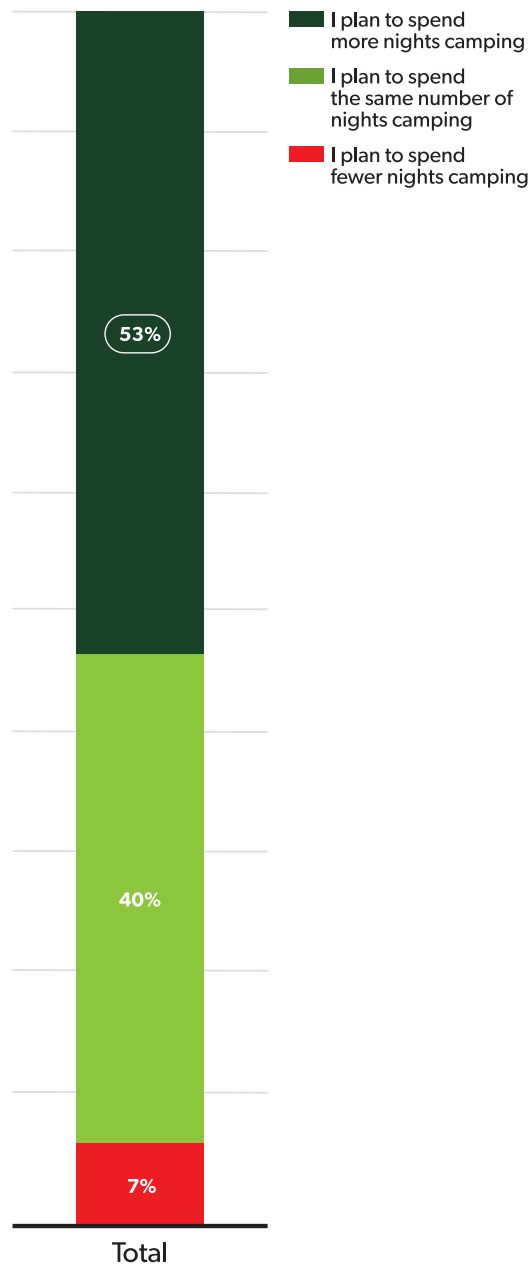
FORECAST: 2015 CAMPING SEASON PLANS

Plans for the Upcoming Year

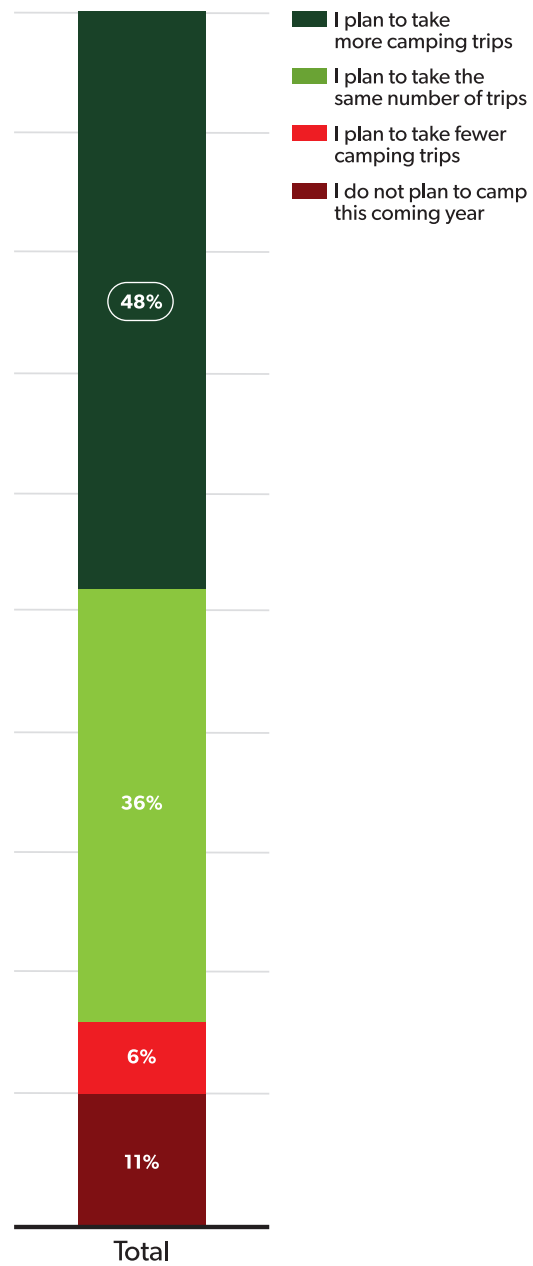
A majority of campers plan to spend more nights camping this year, and almost half plan to take more trips. One-in-10 do not plan to camp this upcoming season.

Campers who typically spend more time camping (two weeks or more each year) are most likely to report that they intend to camp more this upcoming year, both trips and nights. And campers who do not plan on camping this upcoming year are most likely to be those who typically spend less time camping (three or fewer nights camping in a typical year).

CAMPING NIGHTS PLANNED



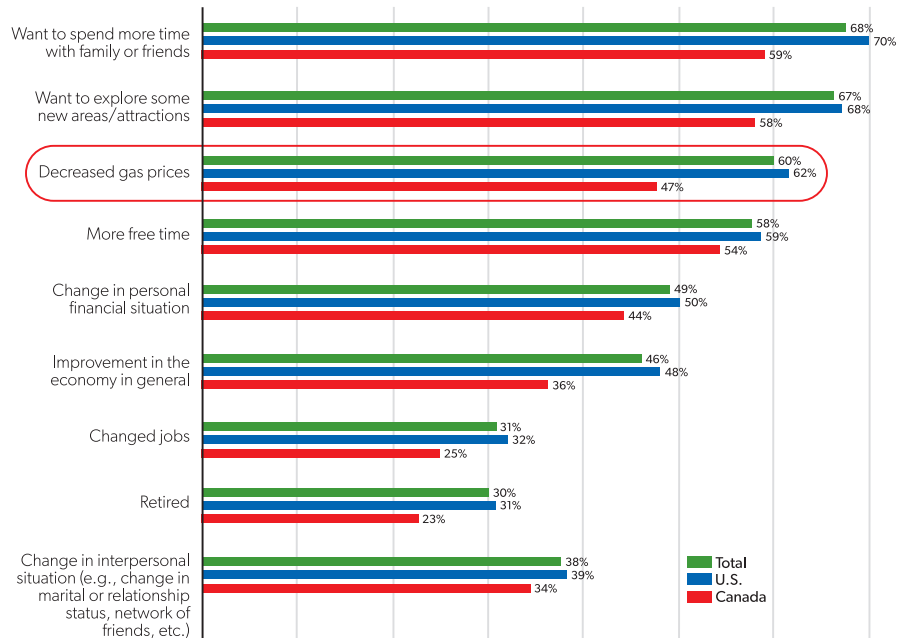
CAMPING TRIPS PLANNED



Reasons for Camping More in 2015

Among campers who intend to increase their camping trips, spending time with family and friends and exploring new areas are most impactful.

WHAT HAS THE MOST IMPACT ON THE DECISION TO CAMP MORE THIS YEAR?



GAS PRICES

Still, it is important to consider that fully 6-in-10 U.S. based campers (and about half of Canadian campers) say that gas prices are having an impact on their camping this year.

Campers who reside in the midwestern region of the U.S. are significantly more likely to say that gas prices are having a “great deal of impact” on their intentions to camp more this year.

Decreased gas prices are more likely to have an impact on middle to lower-middle income campers and least likely to impact the lowest income households. Changes in the economy in general and personal financial situations are most likely to impact the camping of upper-middle income households (\$75,000 to \$100,000).

Somewhat surprisingly, there appears to be some similarities between the lowest income and highest income camper households in terms of the impact of gas prices and the economy on camping. This result may be due at least in part to the notion that both of these groups are the least impacted by these types of economic changes, thus they are less likely to report a change in the camping intent.

It is the middle and upper middle income camper households who, at least at this point in time, are being impacted most by the decrease in gas prices as well as overall improvements in the economy. Comprising more than half of the overall camping households, this increase is likely to move overall camping nights even higher than what might be expected without these economic improvements.

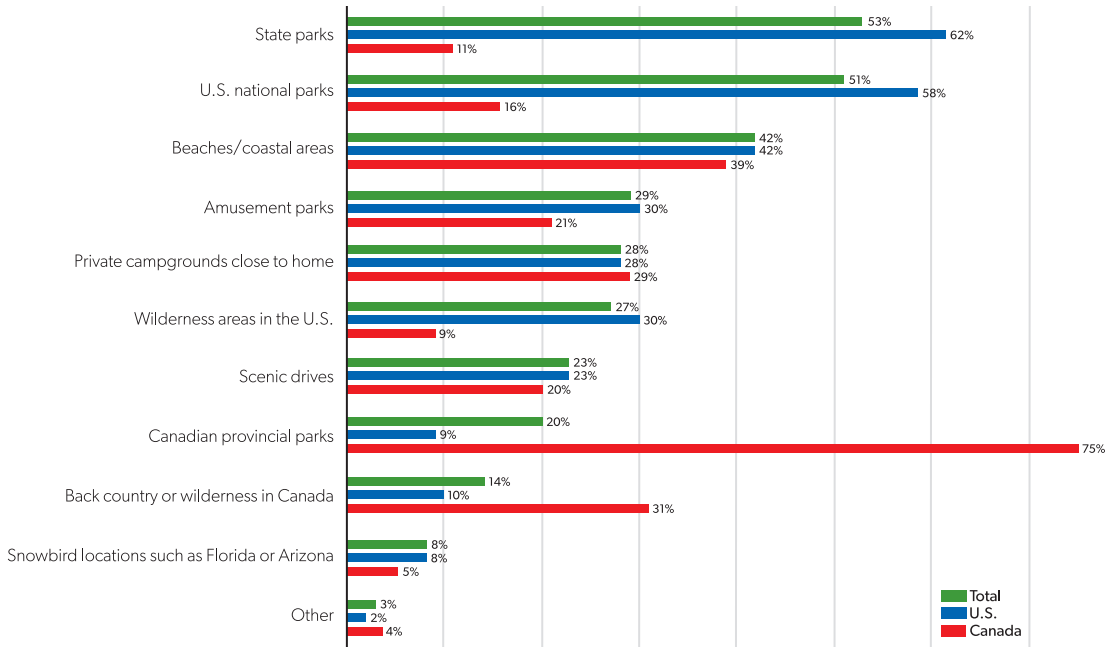
Among campers who said that decreased gas prices are impacting their travel plans for the upcoming year,

- 89 percent plan to visit areas they haven’t had a chance to visit in the past;
- 88 percent say the decrease in gas prices will allow them to camp more often;
- 86 percent plan to visit new campgrounds; and
- 84 percent of RVers say that they will be traveling further from home.

2015 Camping Destinations

About 6-in-10 U.S.-based campers intend to visit state and national parks. Four-in-10 are seeking beach vacations.

WHICH DESTINATIONS DO CAMPERS INTEND TO VISIT IN 2015?

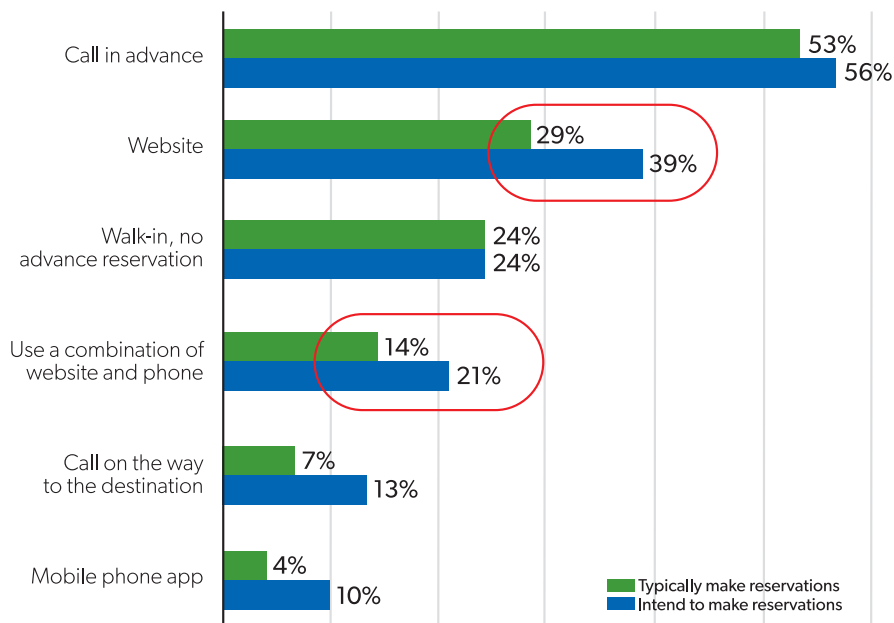


Booking 2015 Camping Reservations

A majority of campers make their reservations by phone, though 3-in-10 typically use a website. One-fourth do not make advanced reservations.

A substantially higher proportion of campers say that they intend to make reservations in 2015 via websites when compared to their typical behavior. And notably, 1-in-10 campers say that they are using a mobile phone app to make their reservations this year.

HOW DO CAMPERS TYPICALLY / INTEND TO MAKE RESERVATIONS?



METHODOLOGY

Background

The survey, commissioned by Kampgrounds of America, Inc. (KOA) and conducted by Cairn Consulting Group, an independent market research organization, is designed to provide a detailed accounting of the U.S. and Canadian camping markets. The research was designed to measure the incidence of camping overall, provide a description of who is camping in the U.S. and Canada, how they are camping, what prompted them to start camping, what keeps them camping, and other key descriptive areas such as media preferences and use of technology.

The research that is summarized in this report is a follow-up study to a benchmark camping incidence study conducted in 2012 (it should be noted that the 2012 study was conducted to measure camping incidence and camping accommodation preferences only).

Timing and Overall Objective

In order to gain insights from a cross-section of North American campers regarding their attitudes, preferences, intent and behavior, the survey was conducted via two separate iterations.

The first was conducted in July of 2014 and was designed to gauge **attitudes toward camping, historical camping behavior** and **typical camping behavior**. The second iteration, conducted in January of 2015, was designed to measure **overall camping incidence** over the past camping season, as well as identify **specific behaviors** among campers during the past year and also measure **camper intent** for the upcoming year.

Methodology

The sampling methodology used for both surveys was designed and implemented to ensure an accurate cross-section of both U.S. and Canadian households was accessed for the survey. To this end, households within both countries were selected randomly for inclusion in the survey.

Among U.S. households, for both iterations (July and January) the overall objective was to obtain completed surveys among 2,400 household representatives. And among Canadian households, the objective was to complete 500 surveys. The table below displays the final results of the sampling:

	July 2014	January 2015	Total
U.S.	n = 2,422	n = 2,400	n = 4,822
Northeast	n = 601	n = 600	n = 1,201
Midwest	n = 603	n = 600	n = 1,214
South	n = 614	n = 600	n = 1,202
West	n = 602	n = 600	n = 1,202
Canada	n = 500	n = 500	n = 1,000
Total	n = 2,922	n = 2,900	n = 5,822

The final sample of U.S. camper households includes representatives from all 50 U.S. states.

A sample of n=2,400 U.S. households is associated with a margin of error of +/- 1.99%. Among Canadian households, a sample of n=500 is associated with a margin of error of +/- 4.37%.

All surveys were completed online via an outbound solicitation sent to a randomly selected cross-section of U.S. and Canadian households.

Camping Incidence

In order to calculate overall incidence, the sample of households was statistically balanced to ensure that the results are in line with overall population figures for age, gender and ethnicity. Thus, camping estimates were extracted from the sample of all households that were included in the original sample of households based on their self-reported exposure to camping.

With the goal of the research to measure camping and views toward camping, it was important to ensure that all respondents to the survey have a clear and concise definition of camping. To obtain a sample of U.S. and Canadian households who define themselves as "campers," the question wording that was used for the study was all-inclusive to ensure that the residents who were surveyed could clearly understand the intent of the question, and determine whether they fit into the camper versus non-camper category.

GLOSSARY

Research Terms

Camping – For the purposes of this study, camping is defined as “any occasion when you spent at least one night outside of your primary residence and stayed in accommodations such as a tent, trailer, RV, vehicle or cabin/cottage at a campground.”

Destination Camping – For the purposes of this report, destination camping is an indication of campers staying at a single location for a greater number of days. (Survey respondents were not asked questions that used the term “destination camping” specifically.)

Incidence – For camping incidence, this figure is calculated by dividing the total number of households with at least one person who camps divided by the total number of eligible households

RV – Includes type A, B, or C motorhomes, travel trailers, fifth-wheels, pick-up campers and folding camper trailers (e.g., pop-ups).

Types of RVs

Fifth-Wheel Trailer – The fifth-wheel travel trailer can have the same amenities as the conventional travel trailer, but is constructed with a raised forward section that provides a spacious bi-level floor plan. These models are designed to be towed by a pickup truck equipped with a device known as a fifth-wheel hitch.



Motorhome – Motorized RVs are vehicles designed as temporary living quarters for recreational camping, travel or seasonal use that are built on a motorized chassis.



Type A Motorhome



Type B Motorhome



Type C Motorhome

Pick-up Camper / Truck Camper – The truck camper is a portable unit designed to be loaded onto, or affixed to, the bed or chassis of a pickup truck. The slide-in units are easily loaded and unloaded from the bed of the truck, freeing the truck’s bumper to tow boats, ATVs and other trailers.



Pop-up Trailer – Also known as pop-ups and tent trailers, folding camping trailers have canvas sides that extend to reveal queen size beds. The folding camping trailer stows away for easy, lightweight towing.



Travel Trailer – Conventional travel trailers offer a wide range of floor plans, sizes and conveniences.



“Types of RVs” credit: GoRVing.com

