

THE 2018
NORTH AMERICAN
CAMPING REPORT
TOPLINE



The fourth annual survey of the general population conducted by Cairn Consulting Group
Sponsored by Kampgrounds of America

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INTRODUCTION

The draw of the outdoors is inescapable. It's that feeling when the screen door slams behind you, and the gentle warmth of the sun hits your face as you take that first, huge gulp of fresh air. Nature is just good for us.

It's been proven that without walls, our attention spans increase, energy levels rise and stress melts away. No wonder North Americans continue to flock to camping as the best means possible to connect to the real world, away from the stress of their indoor lives.

The 2018 North American Camping Report, an annual independent study supported by Kampgrounds of America, Inc. (KOA), finds that more than 6 million new North American households have adopted the camping lifestyle since 2014.

Previous editions of the North American Camping Report shared how the number of active campers was exploding across all age groups and ethnicities.

This year's report shows that the camping lifestyle has taken hold in these new campers – especially millennials – who intend to increase their camping trips in 2018. In fact, new campers and experienced camping families alike say they intend to spend more time sleeping under the stars.

Camping has increasingly become a cultural melting pot. Campers of African American/Black, Hispanic and/or Asian descent now turn to camping in numbers that more closely match the general U.S. Census. The connections made on campgrounds can't be duplicated by any other recreational activity. New friendships are forged and family bonds are strengthened.

Truly, it's no surprise that the percentage of campers who report they camp more than three times each year has grown by 64 percent since 2014.

All of this growth has caught the attention of those in the outdoor industry, as well as those in other industries not traditionally associated with camping, such as tech start-ups. It appears everyone wants in on the action. Park owners are adding new accommodations and amenities that, in turn, attract a fresh camping audience. Meanwhile, the explosion of interest in camping has led to the near overnight creation of a "peer-to-peer" RV rental community, designed to match campers with RV owners interested in renting out their own RVs when they aren't otherwise in use.

Yet, at its core, camping isn't growing because there are more RVs, more campgrounds or more accommodations. Camping is growing because of the basic desire of North Americans to better their lives and "fix what ails them" by connecting with nature and with each other.

It's the perfect cure.

“ I GO TO NATURE TO BE SOOTHED AND HEALED, AND TO HAVE MY SENSES PUT IN TUNE ONCE MORE. ”

JOHN BURROUGHS



KEY FINDINGS

The total number of camping households in the U.S. is now estimated at more than 77 million households, having grown by more than 6 million since 2014. And those households are camping more than ever before.

At the same time, millions of baby boomers continue to enter retirement. Add to that the influx of younger and more diverse campers, and the result is a significant rise in camping in the North American lifestyle.

Fourteen percent of non-white millennials reported that they were new to camping in 2017. More than a third of non-white millennials (34 percent) say they only started camping in the past few years, compared to 18 percent of white millennials. This group is also more open to trying different types of accommodations.

Campers continue to express a desire to increase the amount of time they spend camping. This is especially true among millennials.

More campers are increasing the amount of time they camp each year.

African American/Black campers are most likely to report an increase in camping, while campers of Asian descent are most likely to say that the amount of time they camp will remain consistent.

New campers appear eager to camp more in the future. New campers also seem determined to stick with the camping lifestyle. Thirty-nine percent plan to camp more often in 2018.





New campers are now more diverse than the overall U.S. population.

There has been a dramatic shift in overall camper demographics, including ethnicity. Half of the newest campers were from non-white groups in 2017.

The largest growth is among campers of Asian descent, who comprise 17 percent of new camper households, up from 14 percent in 2016. That rate is three times what would be expected in the general population.

Hispanics and African American/Black campers are represented at rates nearly equal to those seen in the general population.

Campers continue to bring mobile devices on their trips (93 percent), but fewer feel technology enhances their camping experience.

Millennials are most likely to say technology detracts from their overall enjoyment while camping (52 percent, up from 38 percent last year).

This suggests that many campers think the use of technology is an often unwelcome – yet necessary – part of the camping experience. Yet, campers who say cell service and Wi-Fi are important also say they are able to enjoy an average of four additional days of camping each year, thanks to technology.

One-fourth of all campers say it is important to them to share their experiences on social media.

Millennials and Gen Xers are more likely to say sharing their experiences on social media is important, and 4-in-10 camper households overall say access to cell service or Wi-Fi impacts the amount they camp.

Recreational vehicle usage remains strong, as is the desire among non-RV owners to try RVing. Many who are RVing say they are borrowing RVs from friends or family rather than owning their own or renting from a company.

One-fourth of all campers use an RV. About 44 percent of that group does not own the RV they use. One-fourth say they borrow an RV, while 1-in-5 say they rent. Borrowing an RV is most common among Gen Xers.

African American/Black campers are the fastest growing group of RV users.

Among African American/Black campers, 27 percent say an RV is their primary accommodation. That is up from 19 percent last year.

A full 40 percent of African American/Black campers say they tried an RV for the first time in 2017. Also, nearly 40 percent of all African American/Black campers who do not own an RV said they would consider an RV purchase.

Campers continue to rely on public lands.

Six-in-10 camping nights are spent on public lands and campgrounds. Public lands remain part of campers' desires to seek a variety of outdoor experiences.

Hispanic campers and campers of Asian descent spent the greatest percentage of their camping nights on public lands and campgrounds last year. Hispanic campers, for example, increased the number of camping nights they spent on public lands by 7 percentage points, to 62 percent.

Generation Z campers continue to be enthusiastic about camping.

Gen Z teens share their parents' views on the benefits of camping, but appear to be even more passionate about those benefits.

In fact, 96 percent of teens say they appreciate that the adults in their lives are more relaxed while camping. This desire to spend more quality time with family and friends drives their desire to camp more.



SUMMARY OF SURVEY RESULTS

WHO IS CAMPING?

Active Camper Households

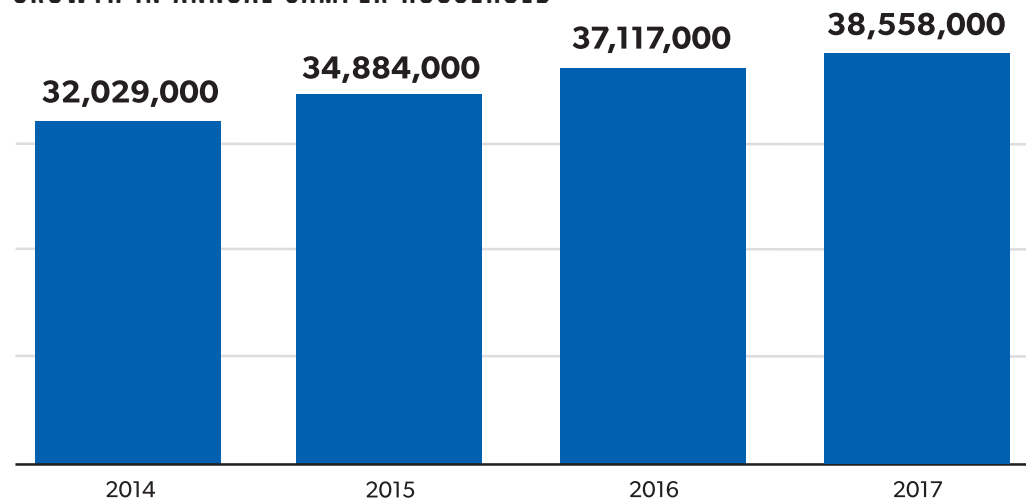
Overall, camping incidence remains stable with a minor increase over last year. In the U.S., 61 percent of U.S. households (77 million) include someone who camps at least occasionally.

Frequency of Camping

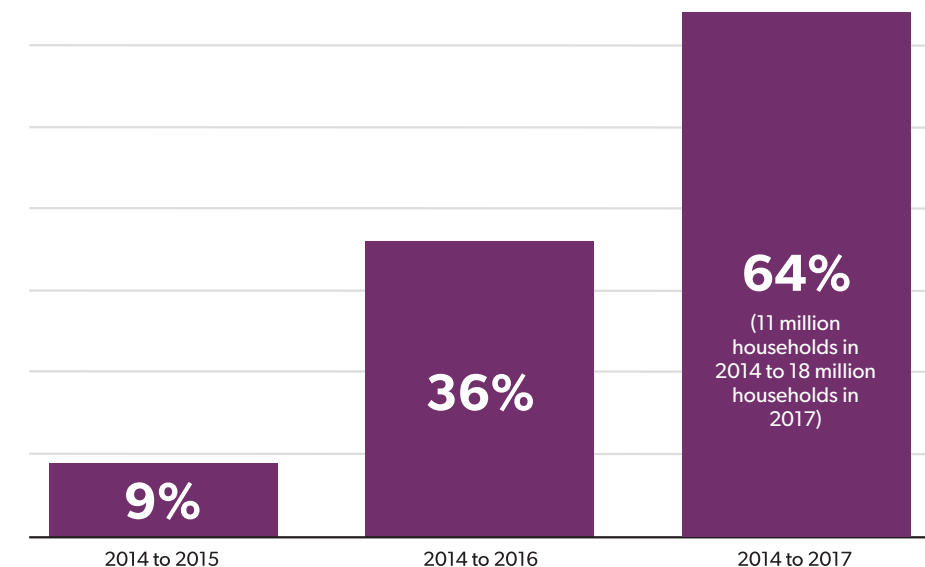
Year-over-year, there is continued growth in **annual** camper households – those who camp at least once a year. Between 2014 and 2017, the number of camping households who camp at least once a year has increased 20 percent.

The number of campers who camp **three times or more each year** – the most avid campers – has increased by 64 percent since 2014.

GROWTH IN ANNUAL CAMPER HOUSEHOLD



GROWTH IN CAMPERS WHO CAMP THREE OR MORE TIMES PER YEAR (2014 TO 2017)

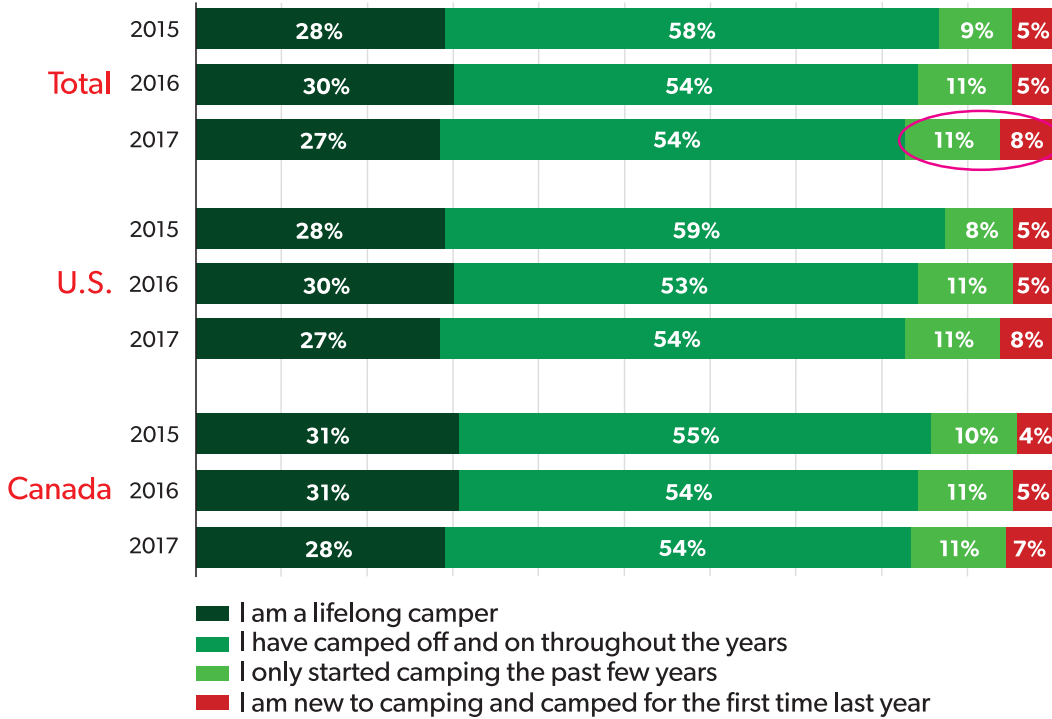


New Campers

In the U.S., there was an increase of 2.6 million new camper households in 2017. Since 2014, 6 million new households have started camping.

In total, close to 1-in-5 camper households report they only started camping in the past few years.

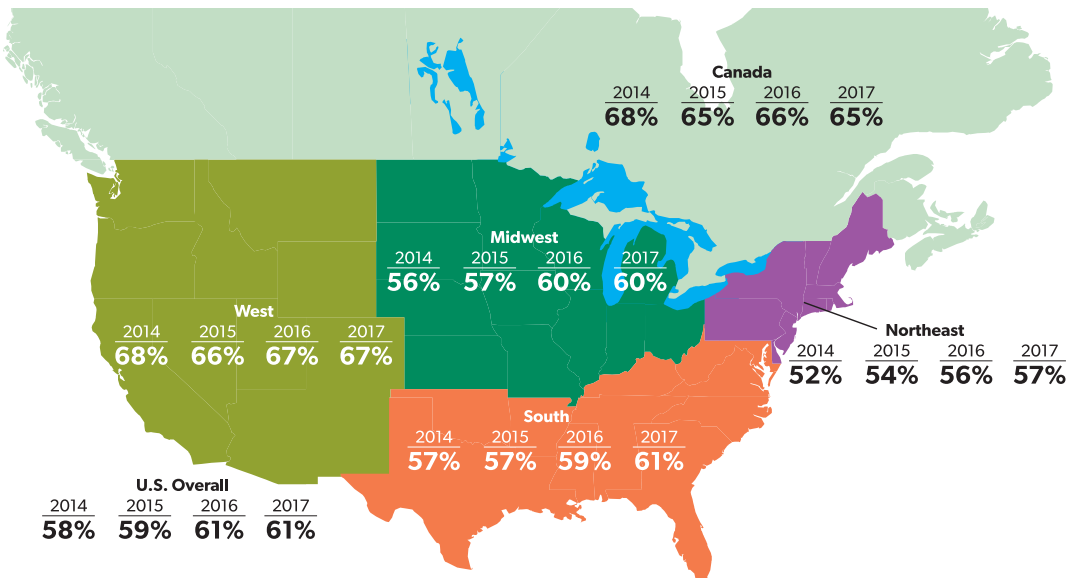
CAMPING BEHAVIOR



Demographics

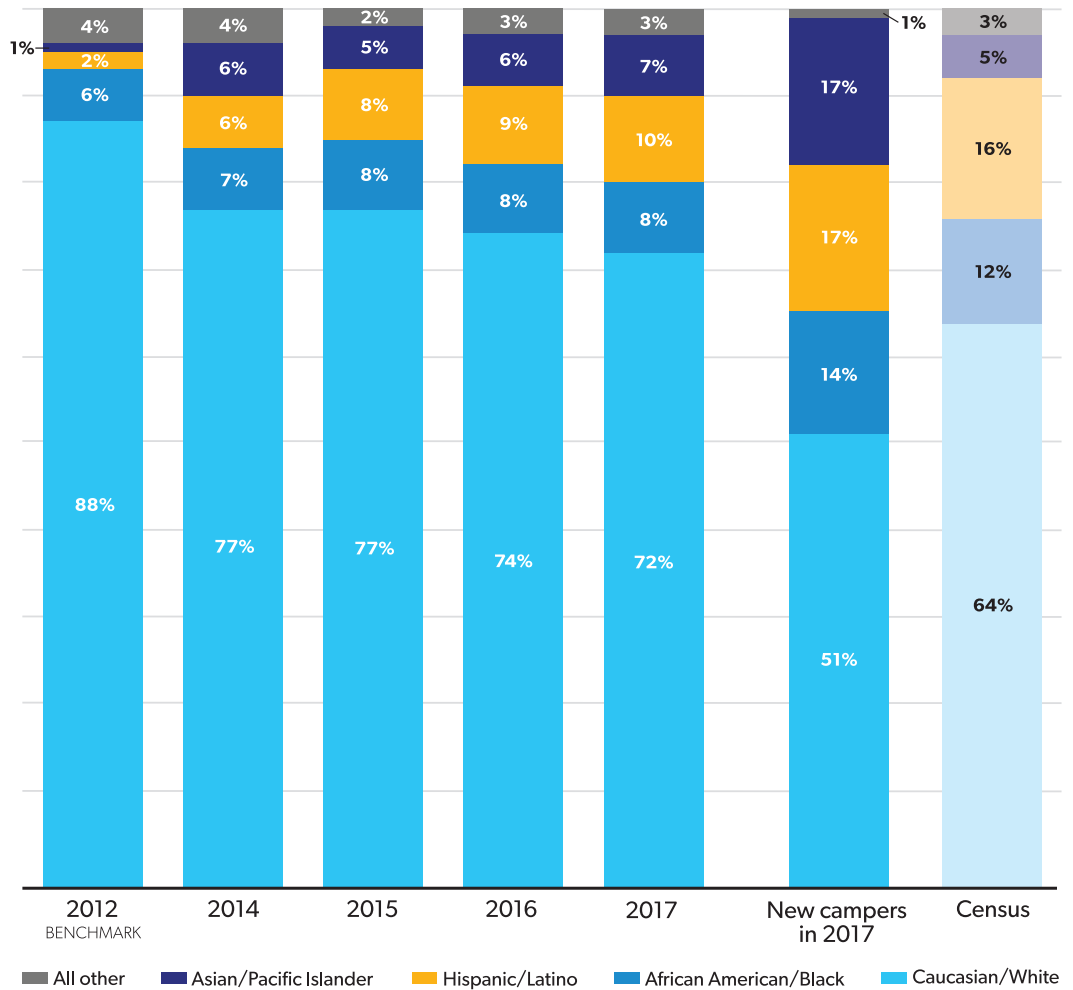
The incidence of camping by region overall remains stable. The largest increase since 2014 (5 percentage points) was in the Northeast U.S.

RESIDENTS WHO CAMP AT LEAST OCCASIONALLY, BY REGION



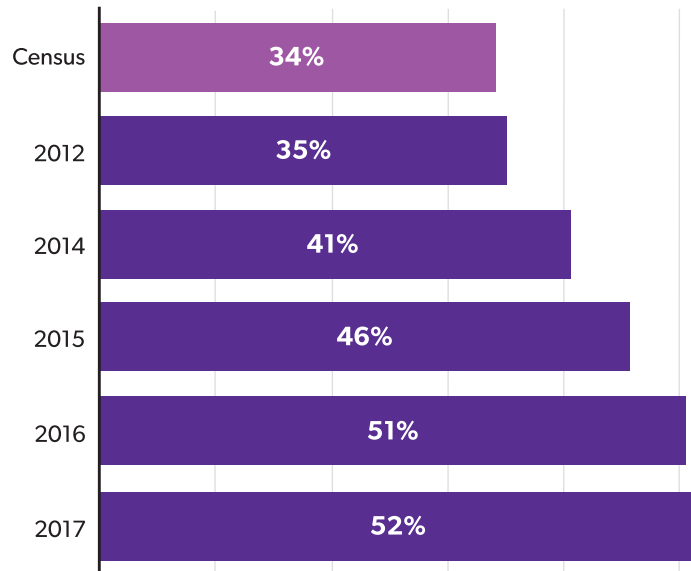
INCIDENCE BY ETHNICITY

Camping continues to be an experience recognized by all U.S. residents, with representation among all ethnicities beginning to appear more and more like the overall population.



CHILDREN IN HOUSEHOLD

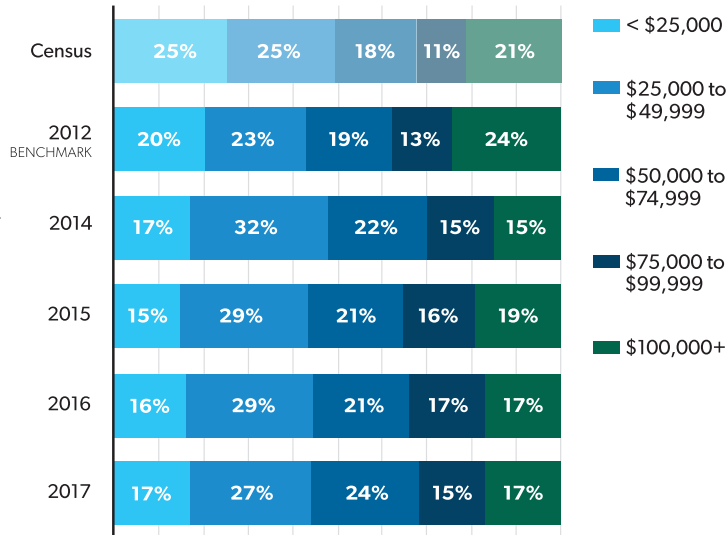
The majority of camper households now include those with minor children in the household. This is due to millennials and Gen Xers now comprising three-fourths of all camper households.



INCOME

Over the past three years there has been little change in the household income among campers. In general, campers tend to be solidly middle income.

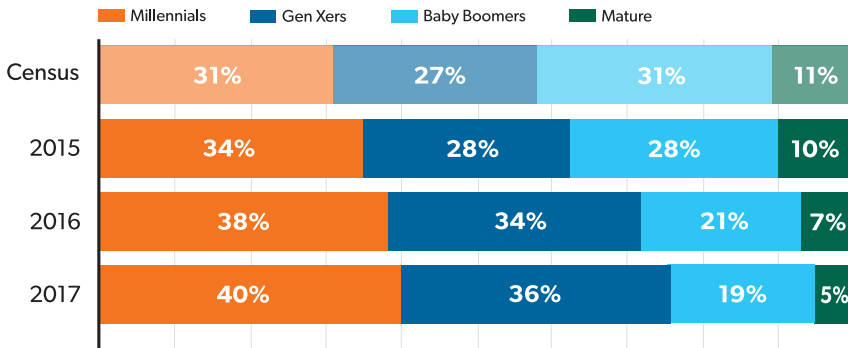
The influx of new and younger campers is resulting in a more stable income profile among camper households.



AGE

Participation in camping among millennial and Gen Xer households has grown steadily over time and exceeds what is observed in the general population.

As campers from older age groups begin to drop out of active camping, they are being replaced – and then some – by those in younger generations.

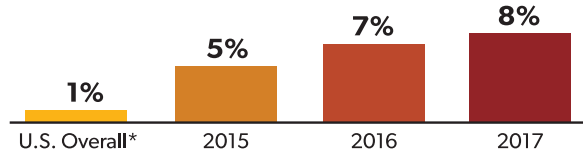


CAMPING AND SAME-SEX HOUSEHOLDS

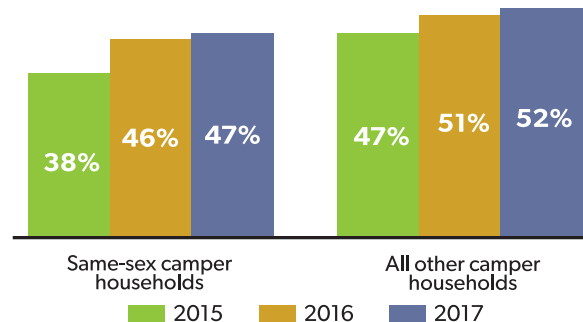
Growth in same-sex households who camp has grown moderately since 2015, but continues to hover well above the overall rate for same-sex households in the U.S.

Among same-sex households, those who camp with children has also remained constant, with close to half sharing their camping trips with children.

PERCENTAGE OF SAME-SEX HOUSEHOLDS



HOUSEHOLDS WHO CAMP WITH CHILDREN



*Results for this Gallup poll are based on telephone interviews conducted May 6-10, 2015, with a random sample of 1,024 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

Young Campers and The Camping Lifestyle

Camping is fulfilling the younger, more diverse generation’s desire for a different type of vacation experience.

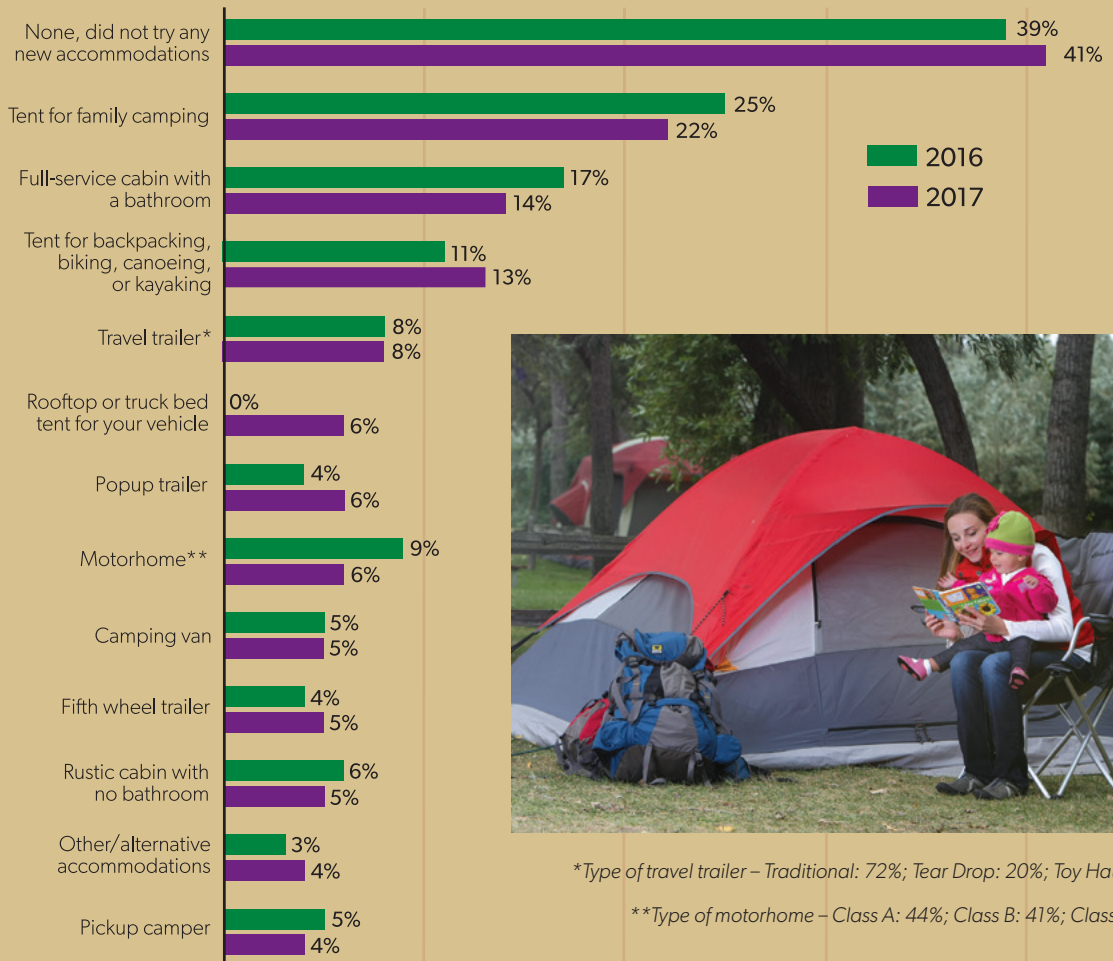
Younger campers, as well as non-white campers, desire a different outdoor experience compared to their older counterparts. They are more open to trying different accommodations or types of camping, including unique accommodations or a “glamping” experience.

Six of every ten millennial households tried a new type of camping accommodation in 2017. Overall, Hispanic (71 percent) and African American/Black (78 percent) campers are most likely to experiment with different types of camping.

Nearly all millennials and Gen Xers (93 percent) say they would like to try a new type of accommodation in 2018.

Younger campers enjoy the social aspects of camping.

NEW CAMPING ACCOMMODATIONS TRIED BY MILLENNIALS



*Type of travel trailer – Traditional: 72%; Tear Drop: 20%; Toy Hauler: 9%

**Type of motorhome – Class A: 44%; Class B: 41%; Class C: 14%

Camping in groups and with multiple generations is popular among younger campers.

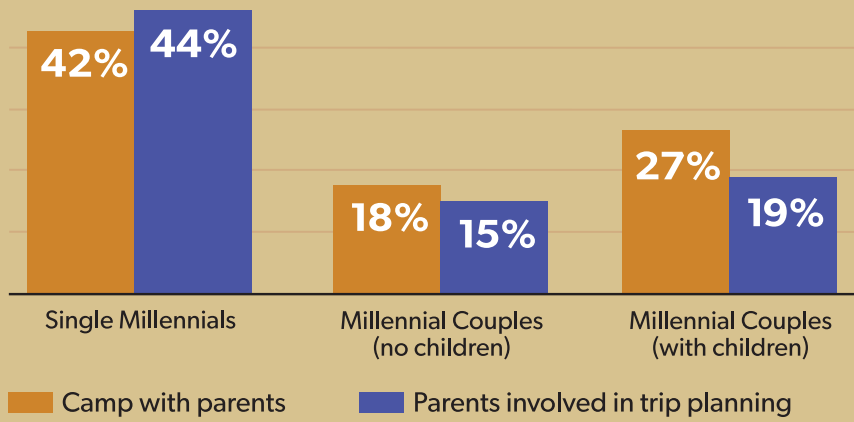
Millennials are significantly more likely to include their parents in their trips and trip planning, with more than one-fourth of millennial campers saying they camp with their parents.

This “parental inclusion” is most prominent among single millennials, with 42 percent of that group camping with their parents. Millennial couples without children are the least likely to include parents in their trips (just 18 percent). That number rebounds to 27 percent for millennial couples with children.

This all suggests that single millennials may be “tagging along” with their parents on camping trips – and that millennials who have children are including their children’s grandparents (that is, their parents) in camping trips.

Ninety-six percent of teen campers appreciate that camping relaxes the adults around them, which adds to the teens’ enjoyment of camping.

MILLENNIALS, PARENTS AND CAMPING



Changing Behaviors of Millennial Campers as They Age

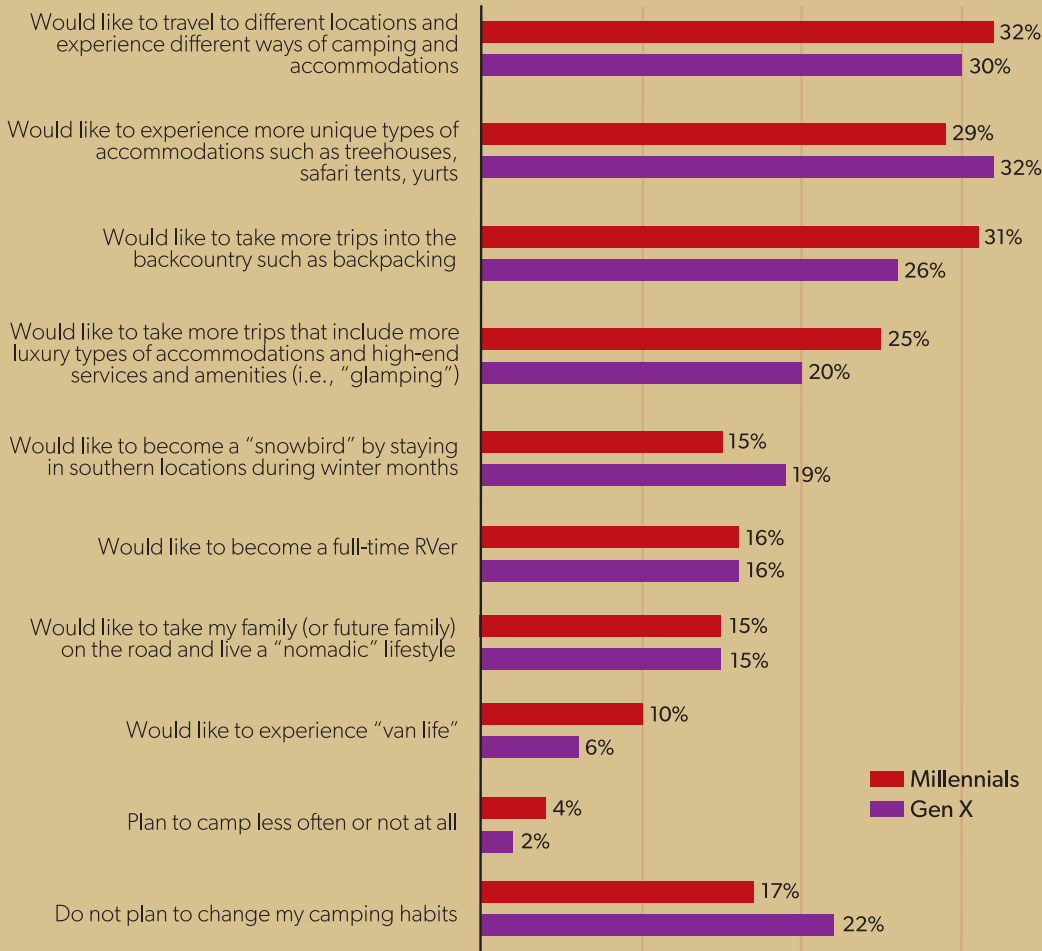
As millennials age, they are beginning to take on the characteristics of Gen X.

Differences between millennials and Gen Xers are fading as the groups experience the outdoors in greater numbers, and millennials start families and accumulate wealth.

Millennials and Gen Xers are identical when it comes to preferred accommodations and their desire to try new types of camping. Millennials and Gen Xers equally like to camp in tents, RVs and cabins. Both groups also value a campground’s atmosphere when selecting a place to camp.

While Gen Xers are more likely to camp with children and stress the importance of a kid-friendly campground, millennials are also seeing the value of kid-friendly campgrounds as they begin their own families.

HOW CAMPING TRIPS MIGHT CHANGE





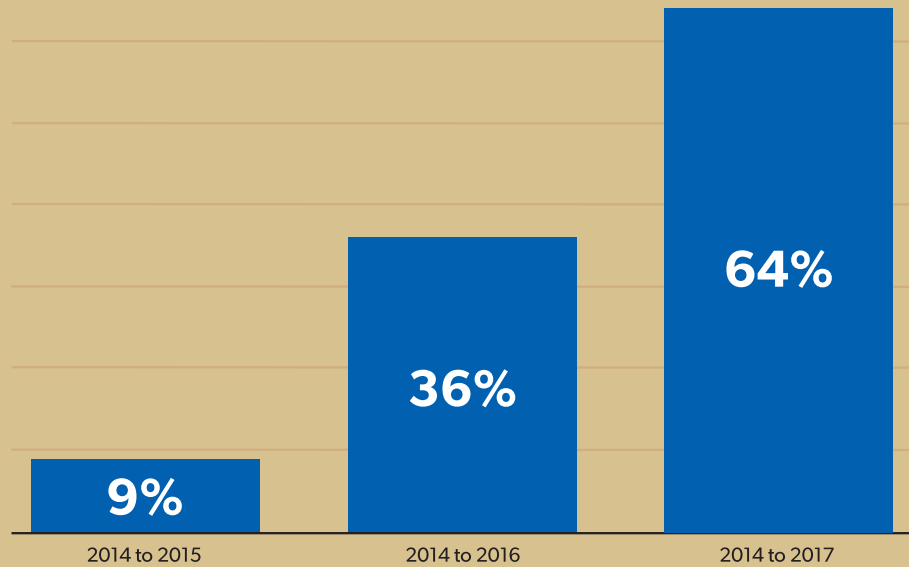
Camping as a Lifestyle

North American campers are taking more trips and spending more nights camping than in the past.

There has been a 64 percent increase in those who camp three or more times per year since 2014. Campers are also showing an increase in intent to camp more in 2018.

Families are recognizing the role of camping as a healthy lifestyle choice, which is motivating them to spend more time outdoors.

GROWTH IN CAMPERS WHO CAMP THREE OR MORE TIMES PER YEAR (2014 TO 2017)



Previously held beliefs and barriers to camping are breaking down, making camping more accessible to more people.

Previously, concerns about safety or not knowing anyone who camps were bigger barriers for those who hadn't camped before but wanted to try it.

As camper numbers increase across all ethnic and age groups, it's now more likely that an individual who is considering trying camping for the first time knows someone else who is already a camper. These experienced campers can be a resource and/or a camping companion to those wanting to try it.



Access to technology while camping, along with the use of social media, is helping to eliminate barriers to camping.

Access to technology brings information to a prospective camper's fingertips. Answers to their questions are as close as a Google search and help, should they need it, is often just a call away. Easy access to technology, and especially mobile devices, also puts their minds at ease regarding safety, allowing them to more fully enjoy their outdoor experience.

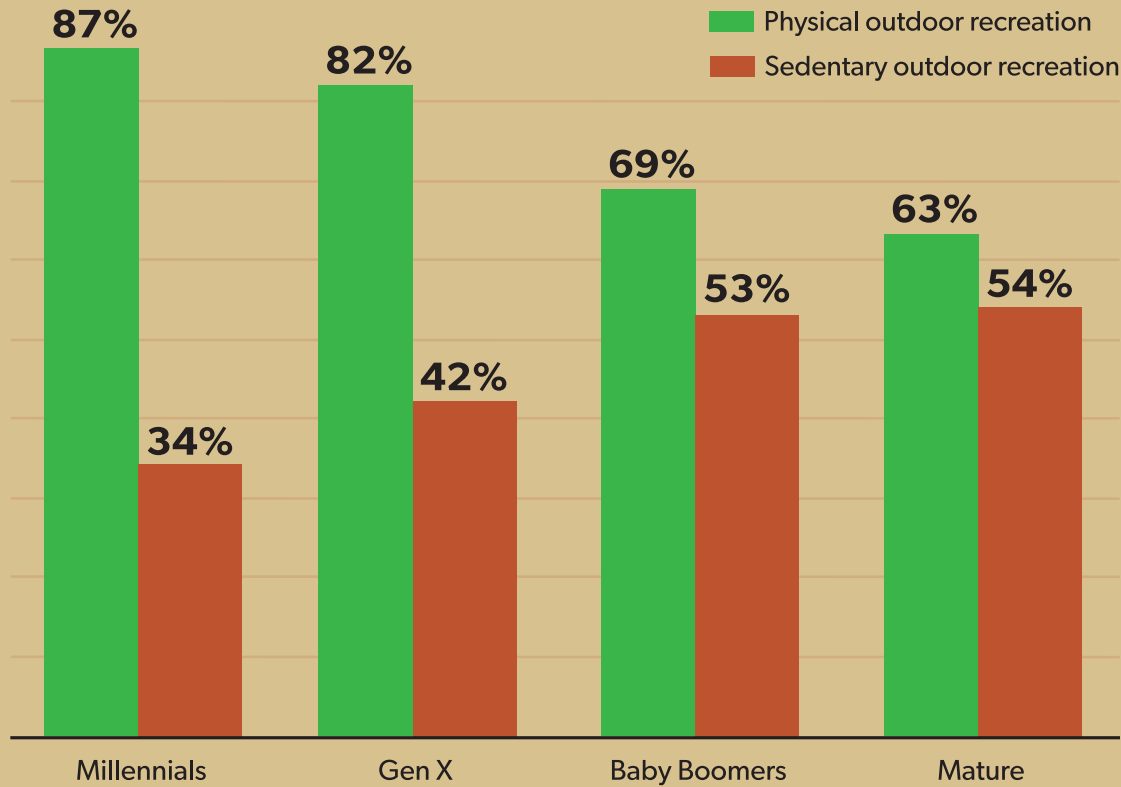
Seeing their friends, or others with whom they relate, posting photos and videos on social media while camping can also help break down mental barriers among those who want to try it. Previously, those who were "camping curious" may have been prevented from trying it due to the fears associated with trying something new for the first time. But seeing others they know camping – and enjoying it – can help shift their mindset to one of greater confidence ("if they're doing it, so can I"). This in turn spurs them to share their own camping adventures on social media.

Camping is also affordable and access to gear is becoming easier. As more and more new campers venture into the outdoors, the opportunity to rent or borrow the needed gear only adds to camping's accessibility.



The Relationship Between Camping and Recreation

TYPES OF RECREATION WHILE CAMPING, BY AGE



In the past, camping was camping. People camped as the primary activity, and may have participated in outdoor recreation while camping. **Now, a new generation of campers is changing that dynamic, melding camping and other outdoor activities into a singular activity.**

This results in campers who want to integrate all types of recreation into their camping trips. Overall, nearly all campers (93 percent) participate in some type of recreation while camping.

Today's camper is seeking recreational opportunities both on and off the campground. One-in-5 millennial or Gen X campers places recreation in the top three determinants when selecting a campground.





WHERE CAMPERS ARE CAMPING

Distance from Home

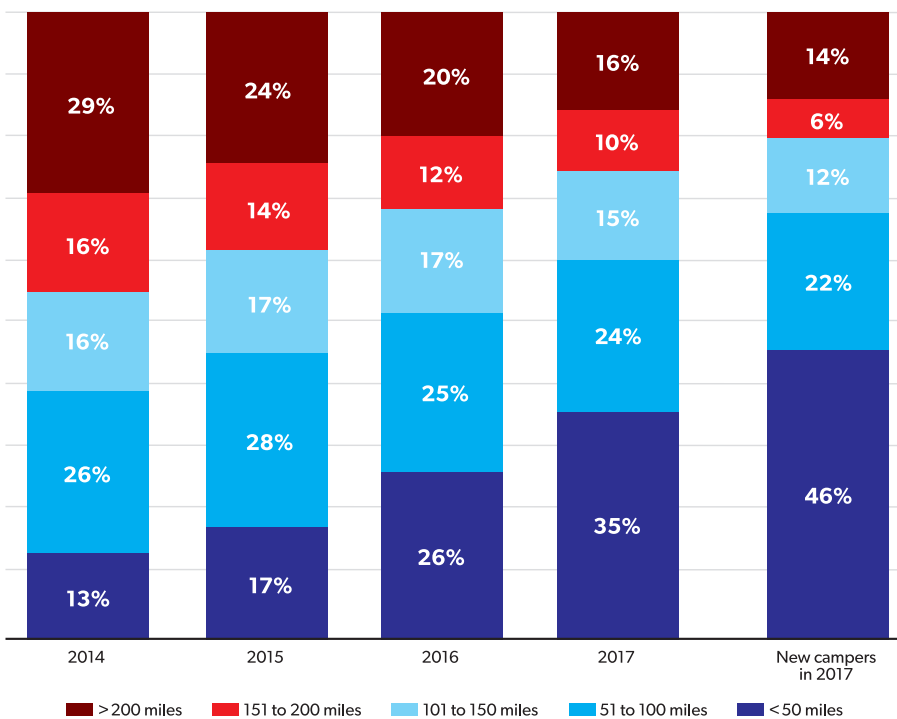
Over time, campers are becoming significantly more likely to camp closer to home (within 50 miles) and less likely to travel longer distances (more than 150 miles).

Overall, campers of all demographic groups show a propensity to camp closer to home. The trend of campers camping close to home can be attributed in large part to new and younger campers (nearly half of new campers in 2017 traveled less than 50 miles to camp).

The change is likely driven by the fact that newer campers are the most likely to camp close to home, and there are more new campers. Camping closer to home may also be contributing to the increase in frequency of camping trips each year.

Campers in the western U.S. and western Canada are the most likely to travel longer distances to camp.

TRAVEL DISTANCES FOR CAMPING



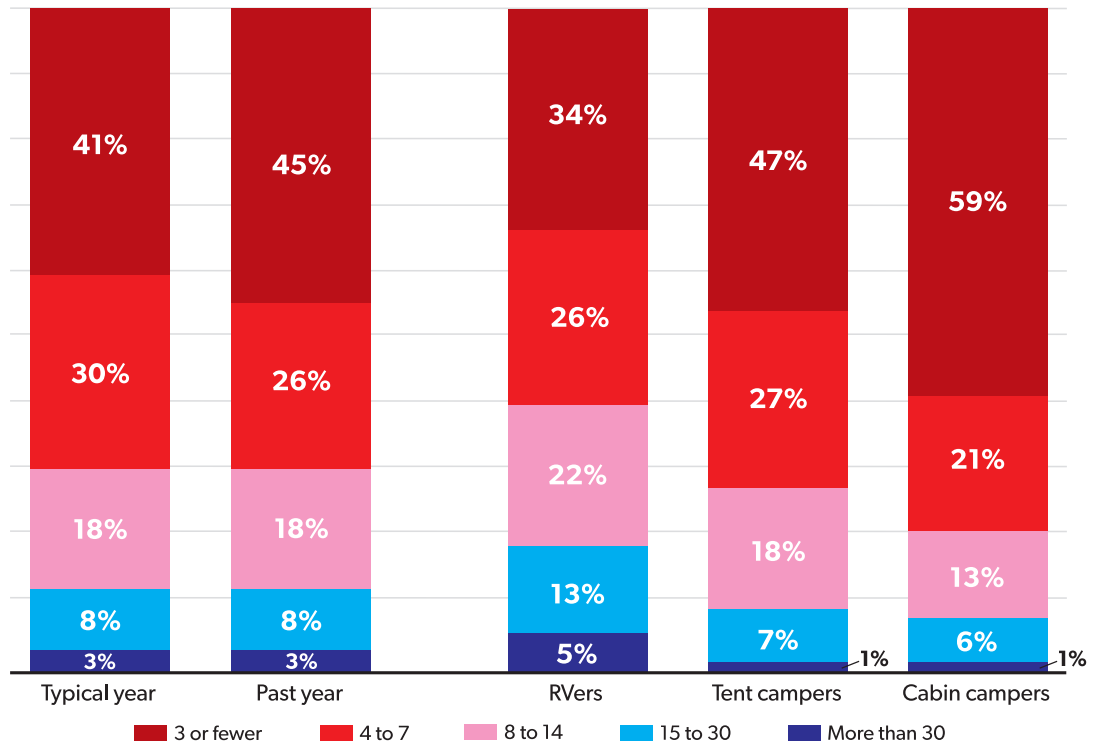
Camping Nights

Camping has become a habit, with campers expecting to camp as much in the year ahead as they did in the past year. Most campers camped as much or more last year than in a typical year.

RVers spent the most nights camping in 2017, followed by tent campers and then cabin campers.

NIGHTS SPENT CAMPING (ALL CAMPERS)

NIGHTS BY CAMPER TYPE (2017)

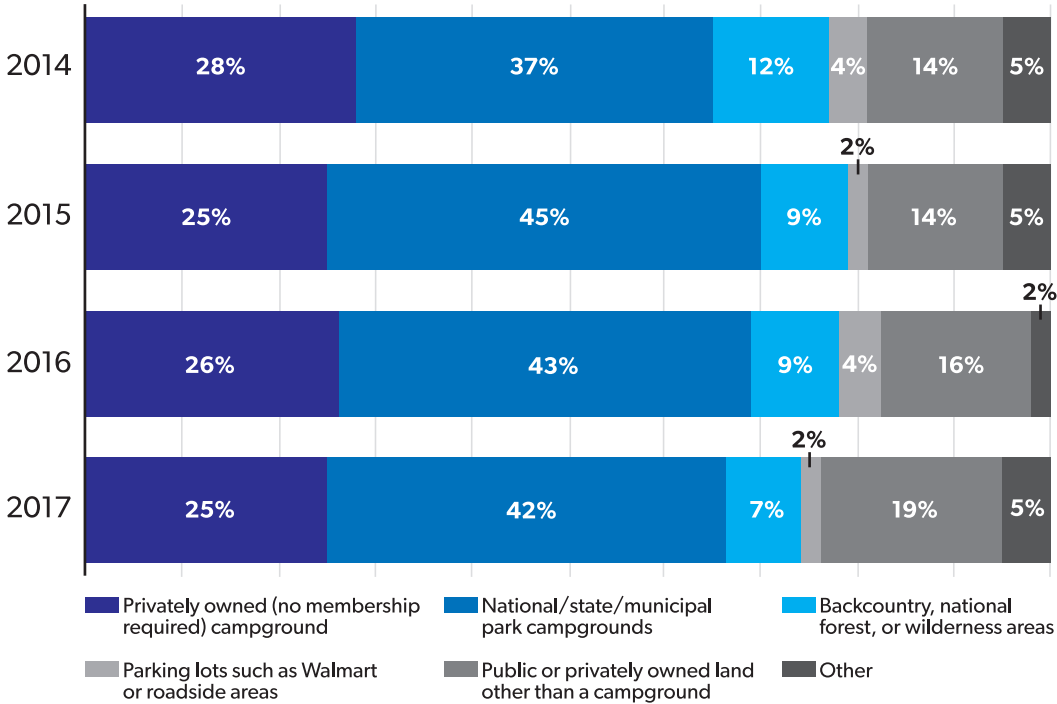


One out of five camping nights is spent on some type of public or private land.

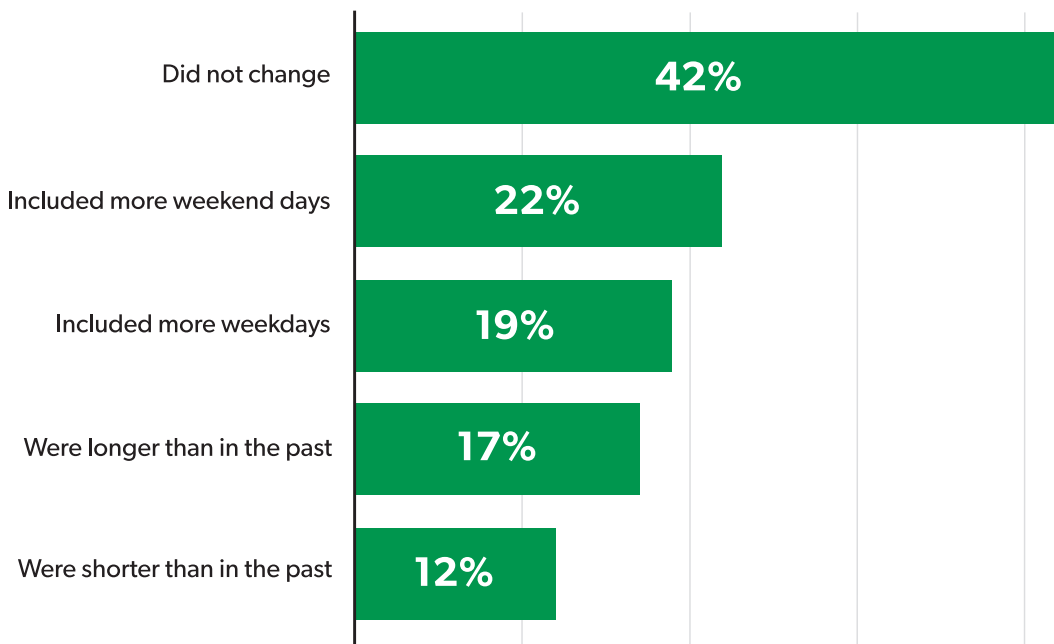
Camping in state or national parks is consistent with 2016 data. But, over time, it appears campers are spending more nights camping on public or privately owned land.

More than half of all campers (58 percent) report a change in their 2017 camping trips. Those changes include more extended weekend and weekday trips, and longer trips overall.

WHERE CAMPING NIGHTS ARE SPENT



HOW CAMPING TRIPS CHANGED IN 2017





HOW CAMPERS ARE CAMPING

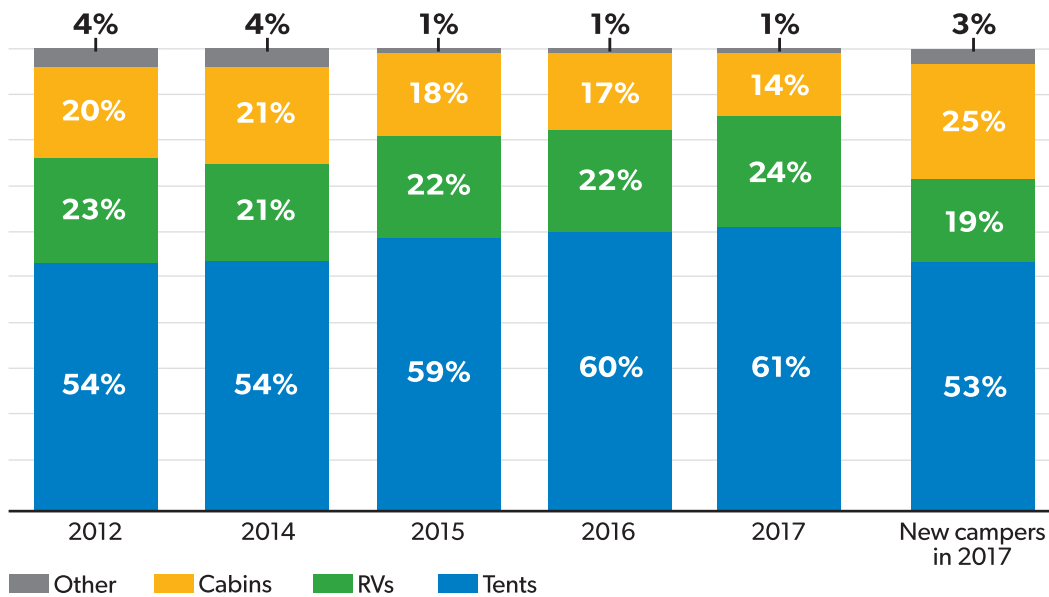
Accommodations

Tent usage remains consistent. Younger campers like tents, and the growing numbers of younger campers will likely add to the stability (or growth) of tent use over time, including different types of tents (e.g., vehicle rooftop or truck bed tents).

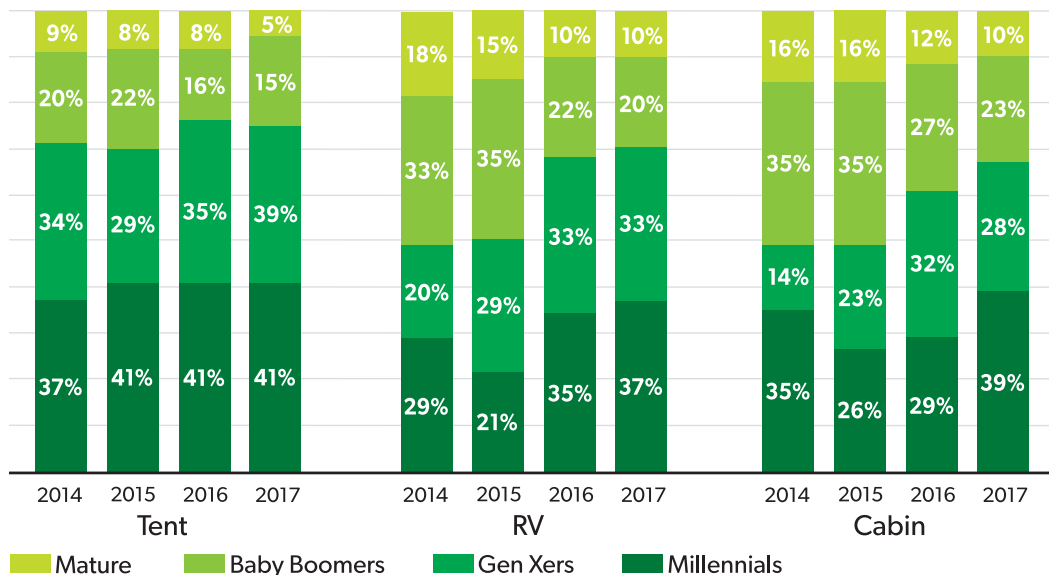
And, as campers age, they begin to camp more using RVs. The proliferation of renting and peer-to-peer services will likely drive RV use in the future. About 7-in-10 RVers are millennials or Gen Xers.

New campers in 2017 liked cabins (25 percent). That's a much higher rate than the previous year and is likely due to the large increase in first-time, non-white campers who express a preference for cabins. Cabin campers are mostly likely to be millennials.

PRIMARY ACCOMMODATIONS



AGE DISTRIBUTION BY PRIMARY ACCOMMODATION



Campground Offerings

Clean bathrooms, being kid-friendly and pet-friendly, recreation, and free Wi-Fi are all important considerations for campers when selecting a campground.

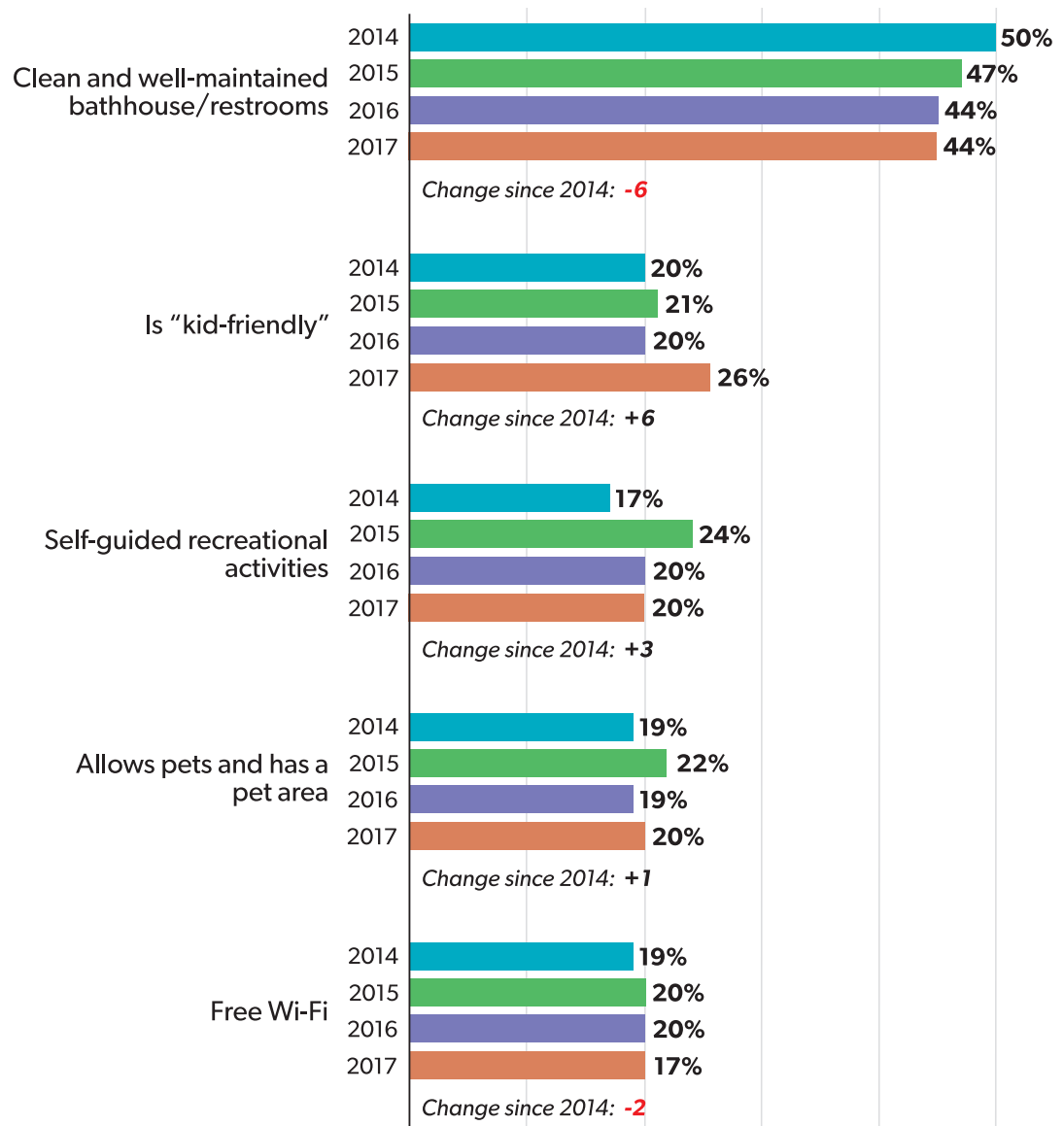
As more young families start camping, campgrounds that are kid-friendly have become increasingly important. This factor has increased 6 percentage points between 2014 and 2017, with more than one-third of Gen X campers saying it is an important consideration.

Wi-Fi's importance as a consideration in campground choice may be decreasing as it becomes more widely available and becomes an expected amenity, which may be diminishing the importance it was assigned in previous measurements.

However among campers who state Wi-Fi is important, close to half say technology enhances the camping experience by providing them with a sense of safety, the ability to access information while traveling, keeps them in touch with friends, and allows them to share their experiences on social media.

Campers who say technology overall enhances how much they enjoy their camping experience, also say the availability of Wi-Fi allows them to extend their camping trips.

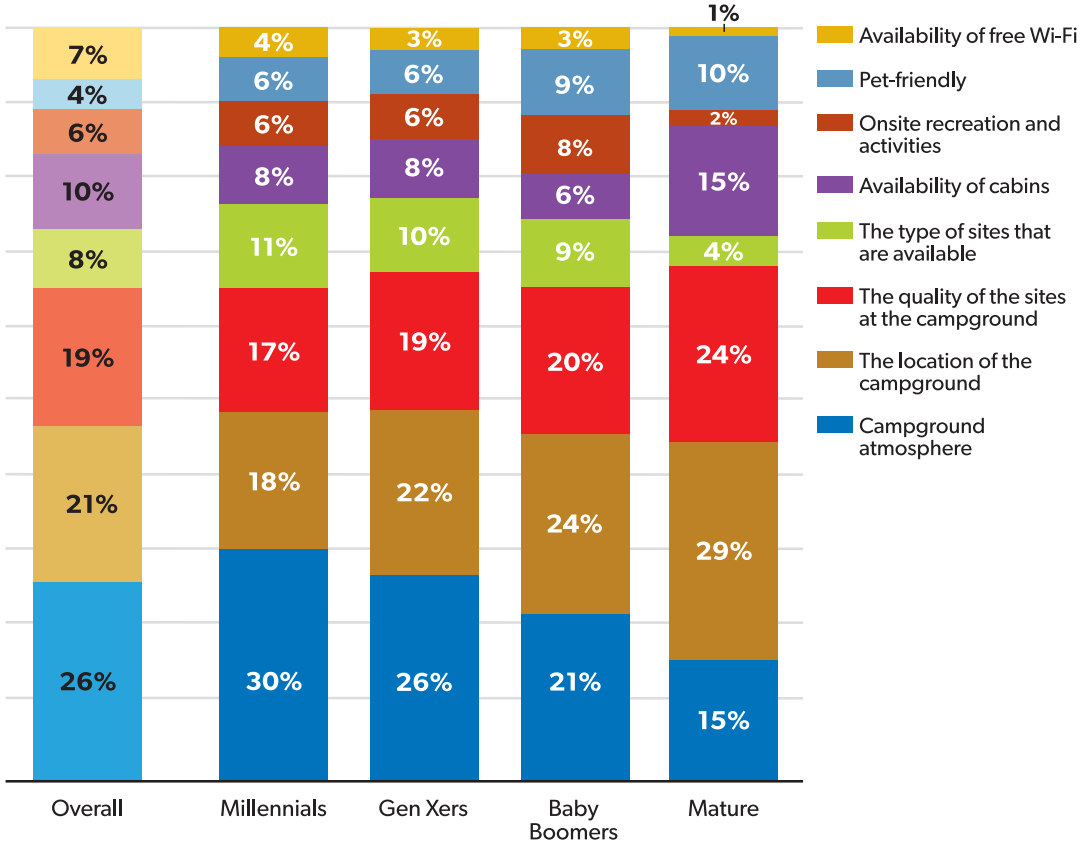
TOP 5 CONSIDERATIONS IN SELECTING A CAMPGROUND



Younger campers choose campgrounds based more on atmosphere, compared to older campers who prioritize the location and the quality of sites.

Both millennials and Gen Xers say on-campground recreation is important. This is also true, to a degree, among all younger campers.

MOST IMPACTFUL FACTOR IN SELECTING A CAMPGROUND, BY AGE



African American/Black Campers and RVing

African American/Black campers are more likely than other campers to have tried out or would like to purchase an RV.

African American/Black campers are much more likely to try different camping accommodations compared to other campers (about 80 percent compared to 53 percent for all other campers). They are also much more likely to try camping in a motorhome. In fact, 24 percent of African American/Black campers say they tried a motorhome or camping van in 2017, compared to just 9 percent of all other campers.

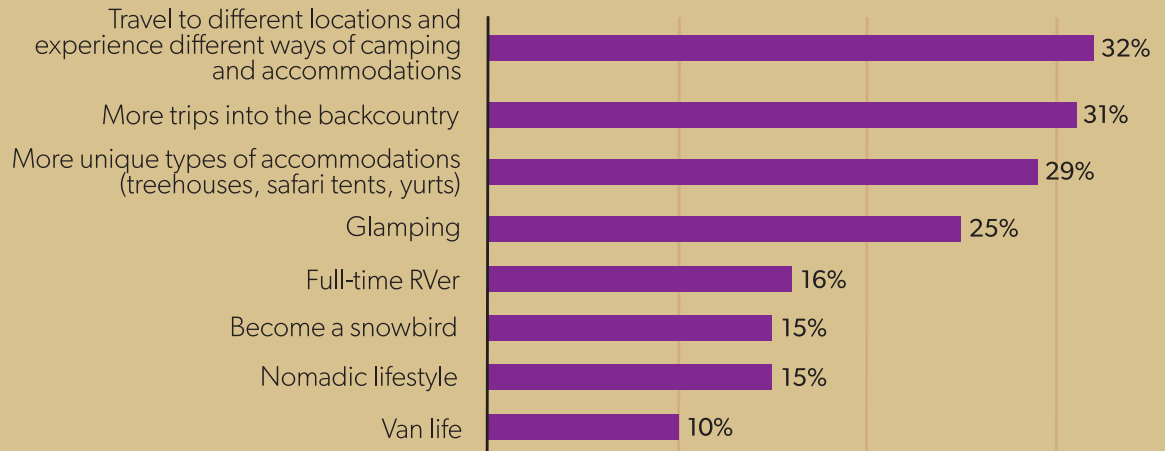
Almost one-third of all African American/Black campers say they would like to purchase an RV or become full-time RVers. That compares to just 15 percent of campers overall.

Millennials and RVing

Millennials now make up 37 percent of RVers. While millennials are attracted to the concept of RVing, they are skeptical of purchasing an RV, and doubt if they would consider full-time RVing. However, this might be due to differing definitions of what it means to be an RVer.

Being an “RVer” may mean different things to different groups. For example, many millennials who camp in camping vans don’t necessarily consider themselves RVers.

HOW CAMPING TRIPS MIGHT CHANGE (MILLENNIALS ONLY)



RV Ownership Versus Renting

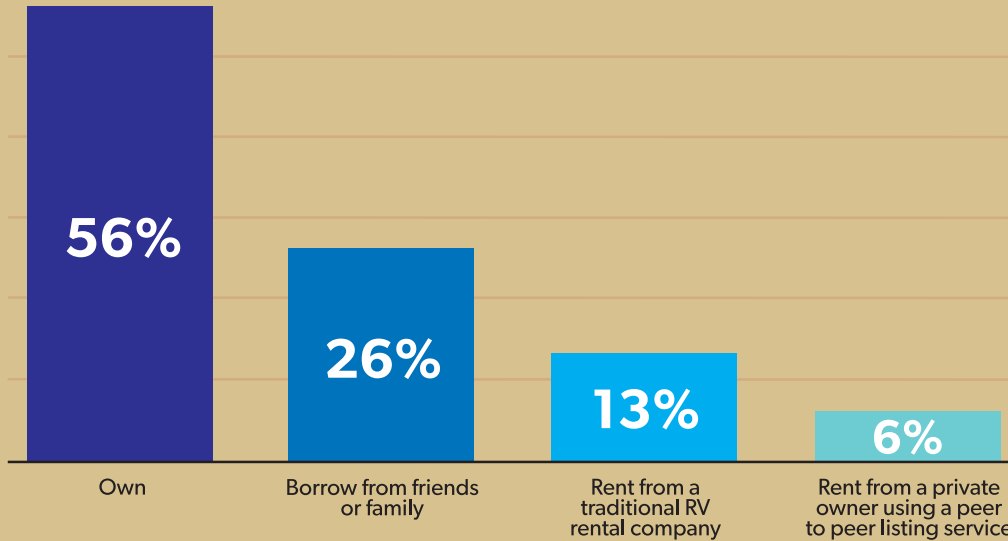
Among all campers who say their primary camping accommodation is an RV, 44 percent say they do not own the RV they use the most. One-fourth of this group says they borrow their RV from someone they know, and 1-in-5 say they rent from a traditional RV rental company.

Among millennials, 22 percent say an RV is their primary type of camping accommodation. Half of millennials who say they primarily RV don't own the rig they use. They tend to borrow or rent.

About 3-in-10 millennials who don't own an RV now say they would consider purchasing one, but only when they retire.

Borrowing an RV is most common among Gen X campers.

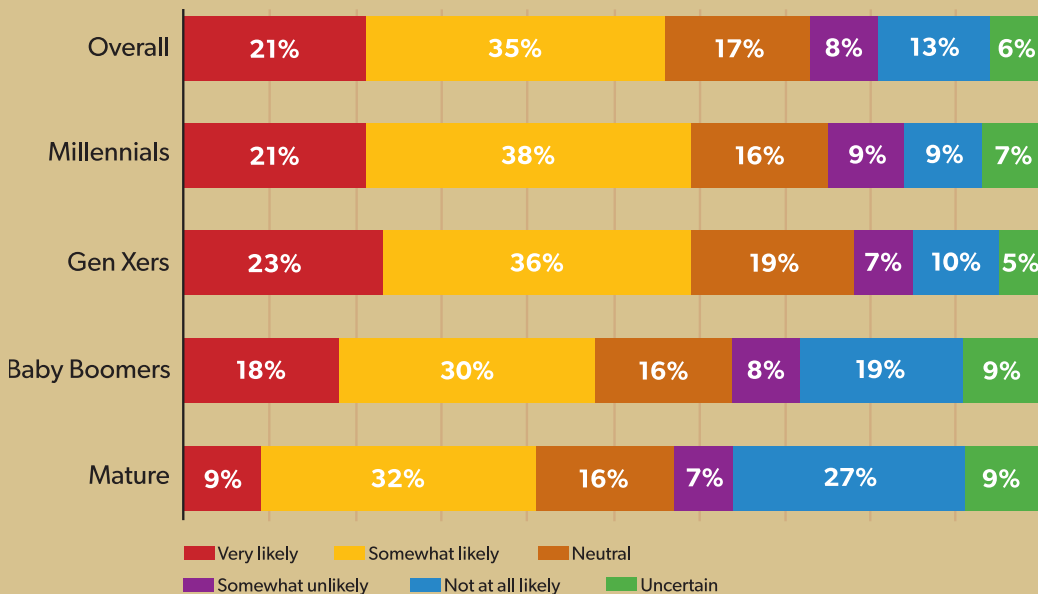
SOURCE OF RV (RVERS OF ALL AGES)



The Sharing Economy and RVing

More than half of non-RV owners indicated they would consider renting their RV from a peer-to-peer service. Millennials and Gen Xers are the most receptive to this form of renting. Seven-in-10 African American/Blacks campers who don't own an RV would consider peer-to-peer rental services, while 63 percent of Asian campers would consider such as arrangement.

CAMPERS WHO WOULD CONSIDER RENTING AN RV FROM A PEER-TO-PEER SERVICE



Ethnicity and Camping

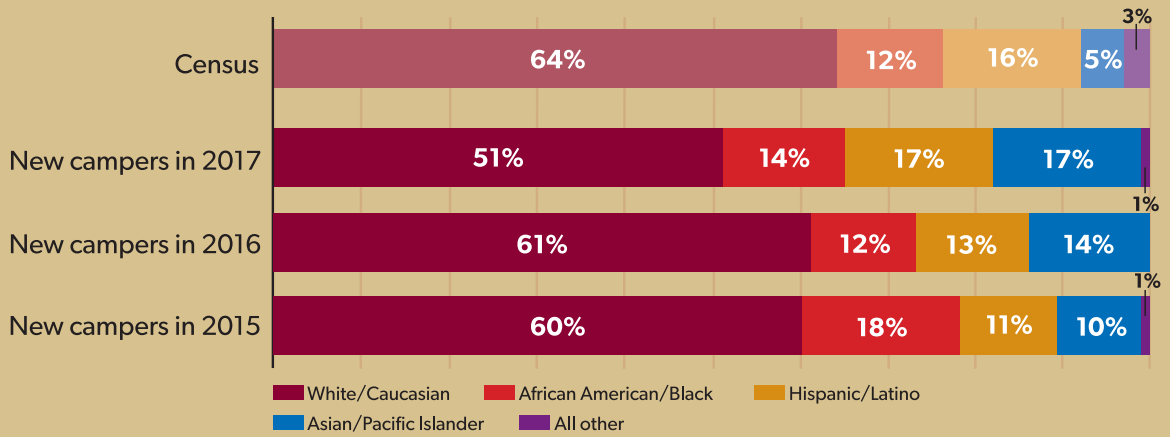
The new campers in 2017 are more diverse than the overall population with a nearly even split between white and non-white campers. Hispanic and African American/Black representation among new campers is in line with U.S. Census figures, while new campers of Asian descent are represented at a rate three times that of U.S. Census figures.

And with the influx of new campers, who are both younger and more diverse, differences in attitudes between campers from different ethnicities are beginning to lessen.

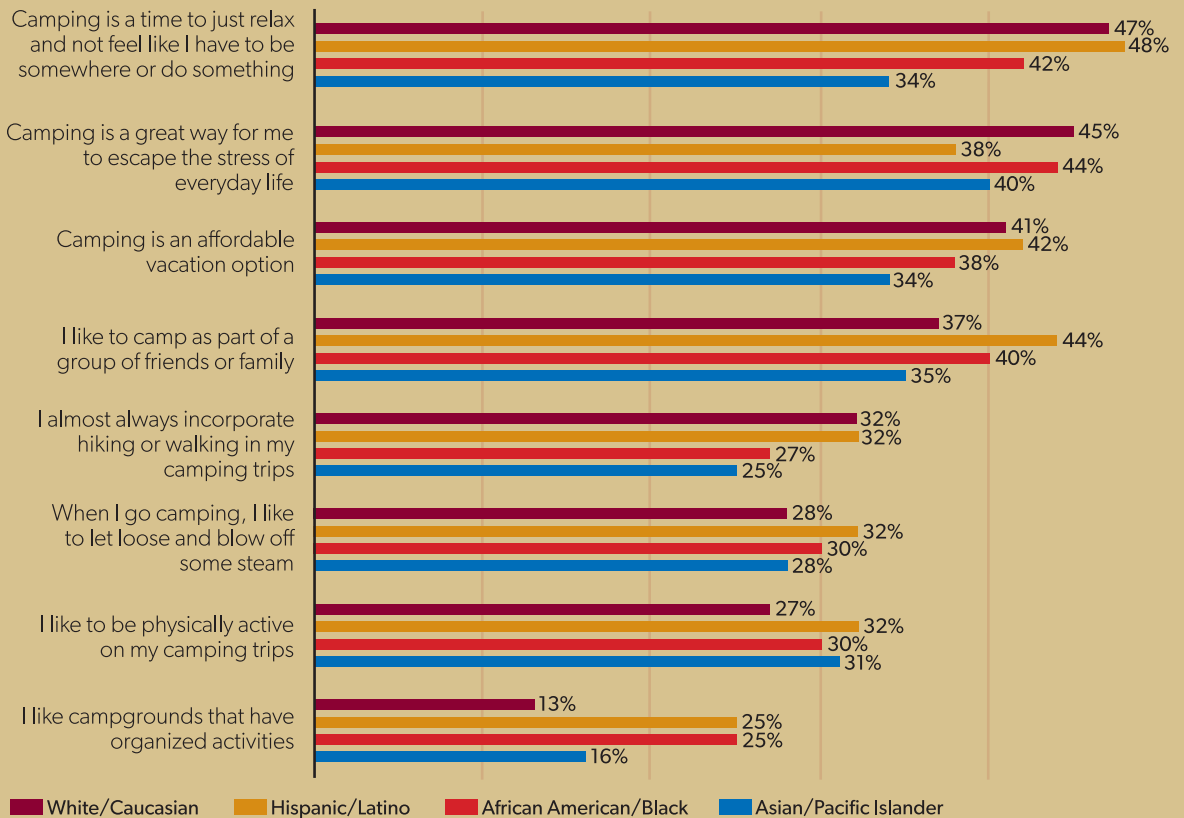
Through 2015, there were large differences in the self-reported benefits of camping between white and non-white campers. However, since 2016, these differences have flattened dramatically.

Still, campers of Asian descent are least likely to view camping as a time to relax. And while they are likely to travel with friends and family (their group sizes are some of the largest among all camper groups), they are least likely to view this as a benefit of camping.

NEW CAMPERS BY ETHNICITY



BENEFITS OF CAMPING (% STRONGLY AGREE)



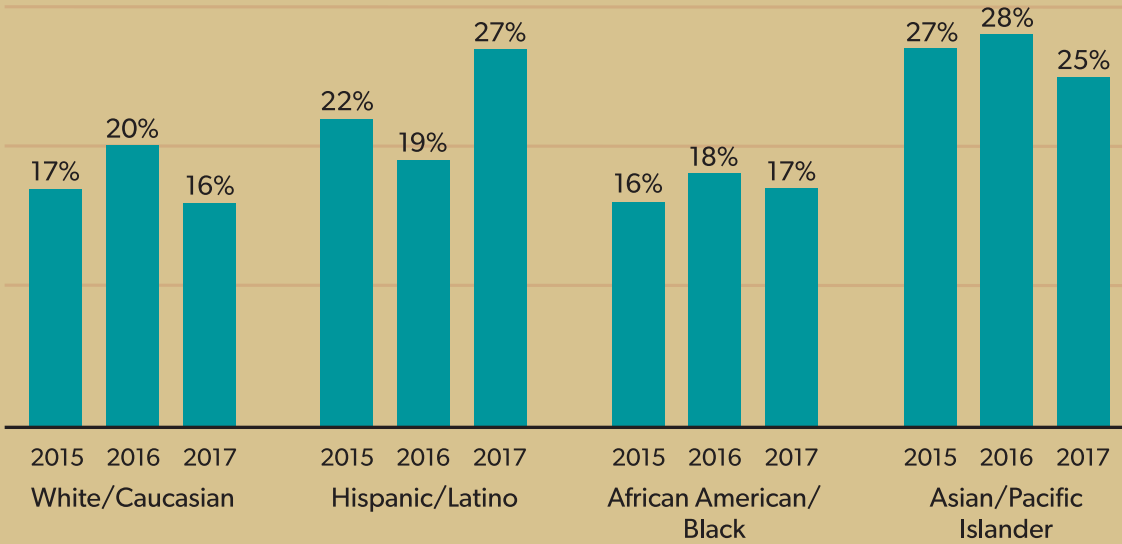
Camping at National Park Campgrounds

Public debate surrounding the status of the national parks might be impacting some attitudes toward our national parks.

Overall, 2017 was a robust year in terms of national park usage and campers of all ethnicities camped at national park campgrounds. About 1-in-5 camping nights is spent at a national park campground.

Hispanic campers spent the highest percentage of nights at these campgrounds in 2017, followed closely by campers of Asian descent.

PERCENTAGE OF NIGHTS SPENT AT NATIONAL PARK CAMPGROUNDS



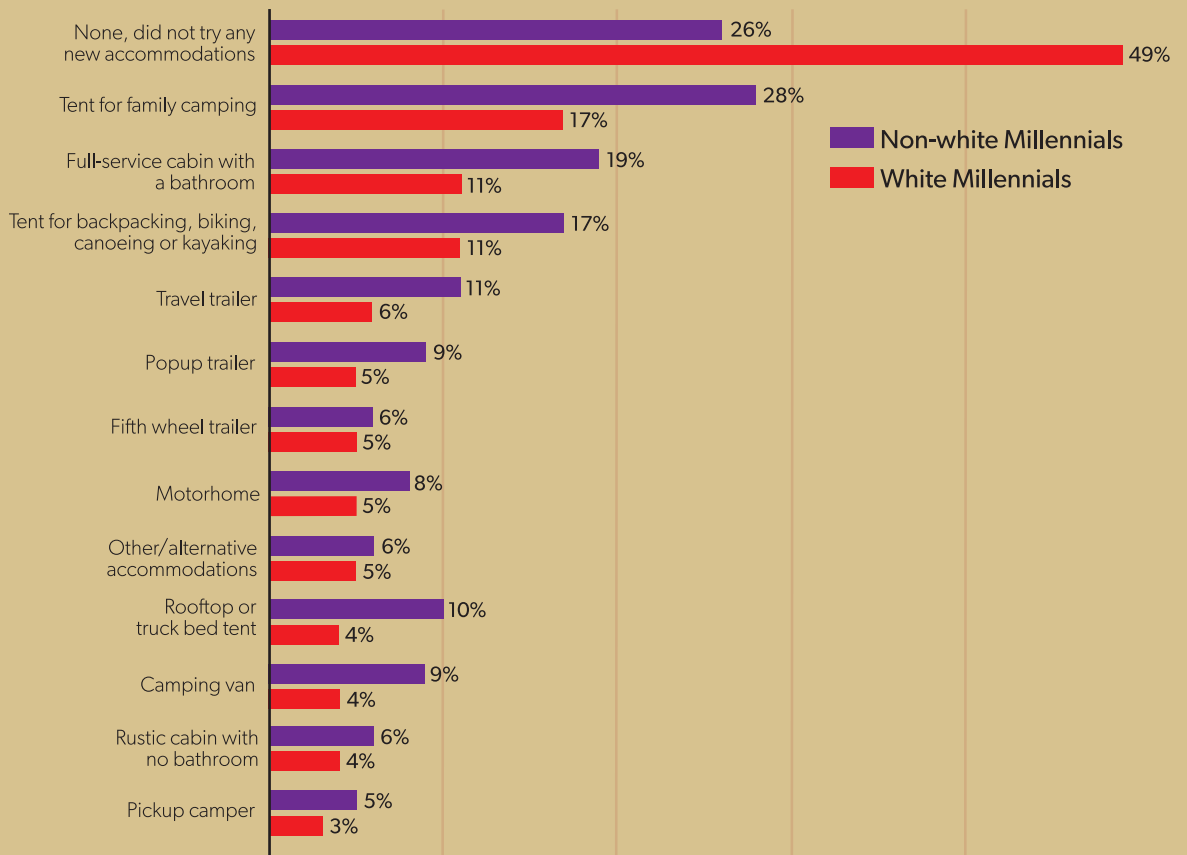
Accommodations and Recreation

Non-white millennials are driving changes in the types of camping accommodations campers are trying out. While millennials of all ethnicities are trying out new accommodations, the rate of trial of new accommodations is significantly higher among non-whites. Almost three-fourths of non-white millennials said they tried a new accommodation in 2017, compared to just half of white millennials who said they tried something new. Non-white millennials are also trying a variety of accommodation types – from tents to cabins, to RVs.

However, a comparison of white and non-white millennials shows that there are few differences when it comes to the types of accommodations they would like to try in 2018.

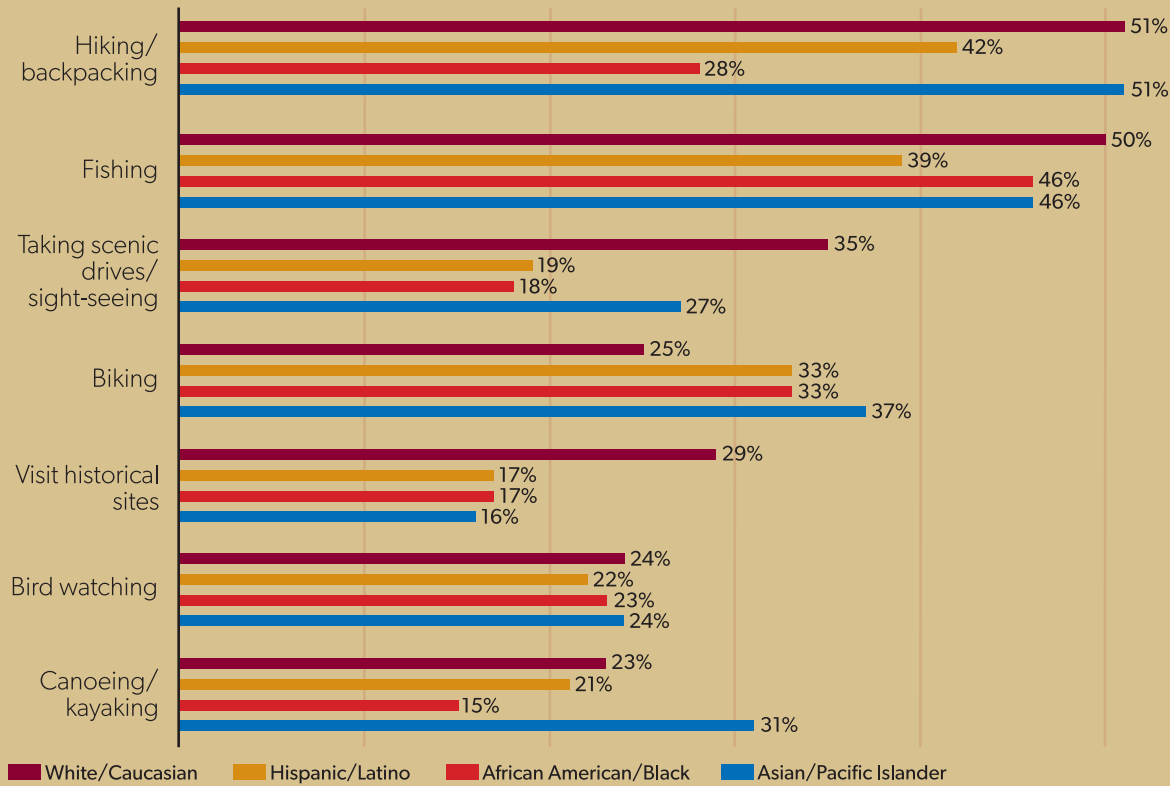
There are also few differences between white and non-white millennials regarding their motivations for camping; how camping impacts their lives and children; or the destinations they prefer.

TRIAL OF NEW ACCOMMODATIONS IN 2017

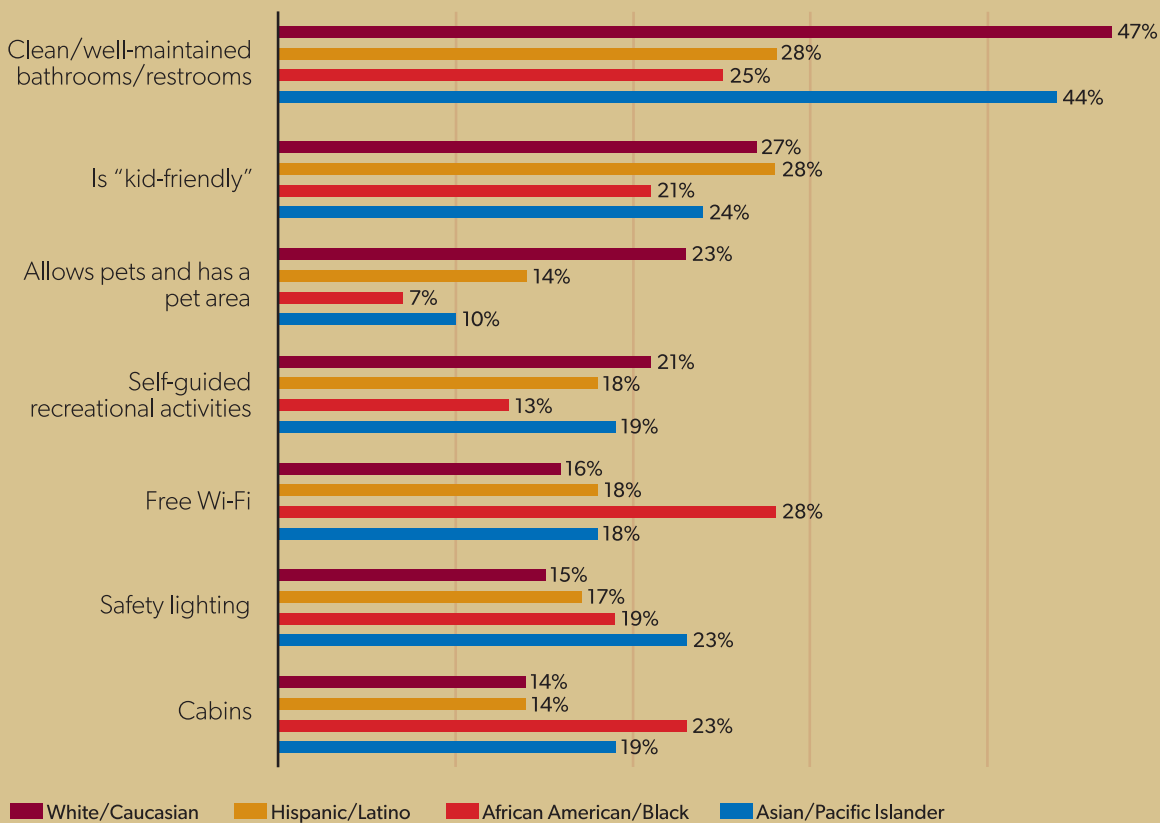


Preferences for recreation and activities while camping show some differences between ethnicities, as does what's most important to each group in a campground.

RECREATION WHILE CAMPING



IMPORTANCE IN CAMPGROUND SELECTION

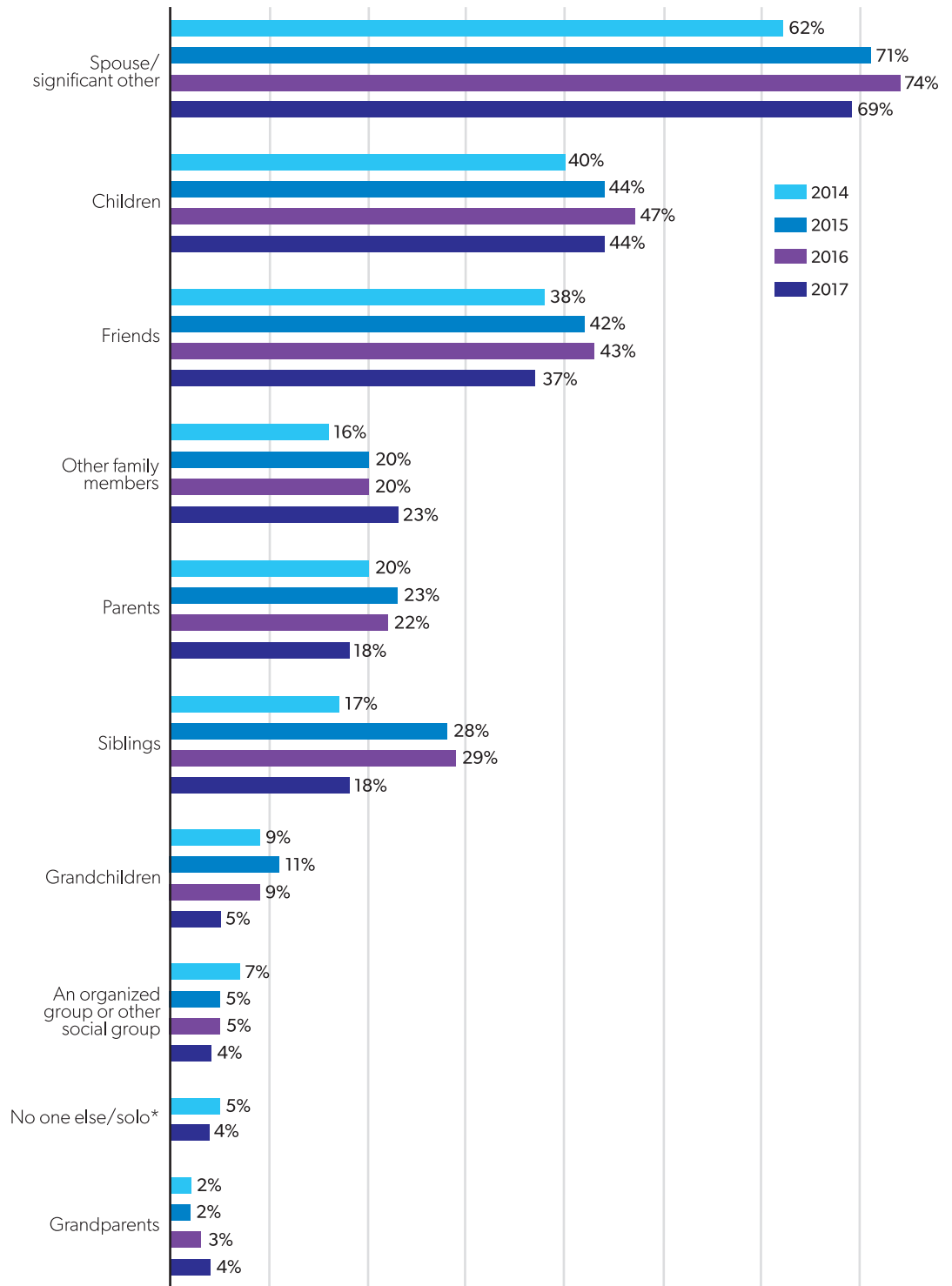


Who Campers Are Camping With

Gen X campers are most likely to camp with their significant other, while millennials like to camp with larger social groups of friends, siblings and parents.

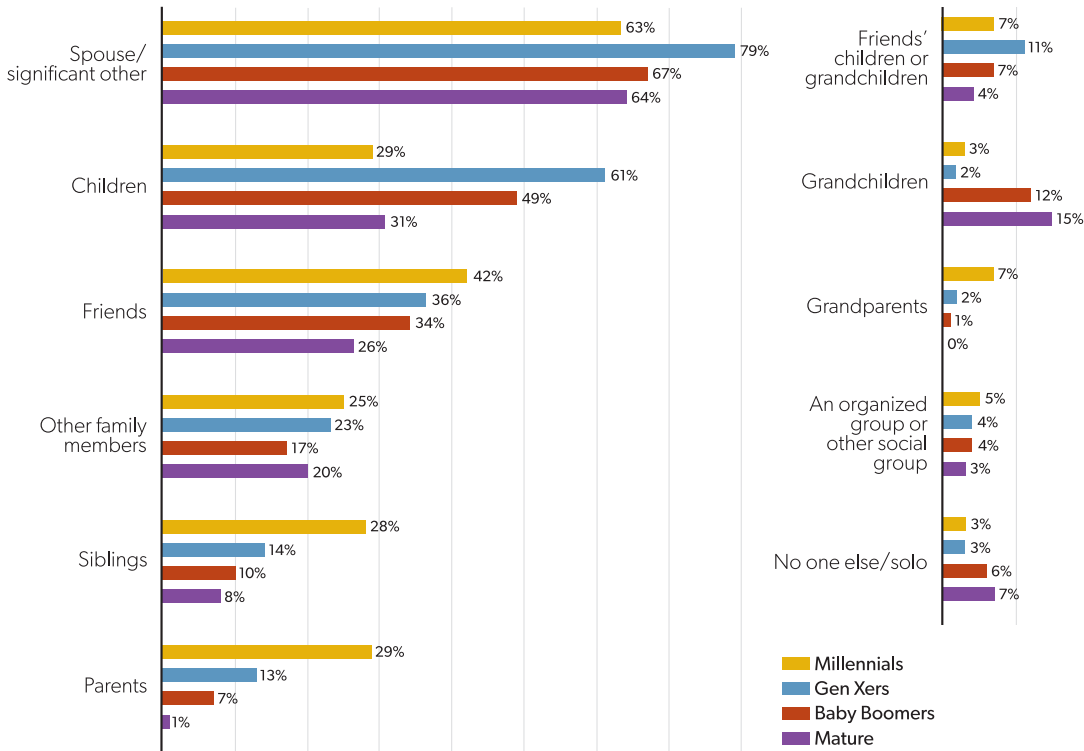
About one-fourth of millennial households say they camp with their parents.

WHO CAMPERS ARE CAMPING WITH



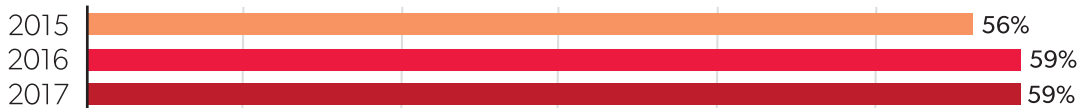
*Not asked in 2014 and 2015

WHO CAMPERS ARE CAMPING WITH, BY AGE

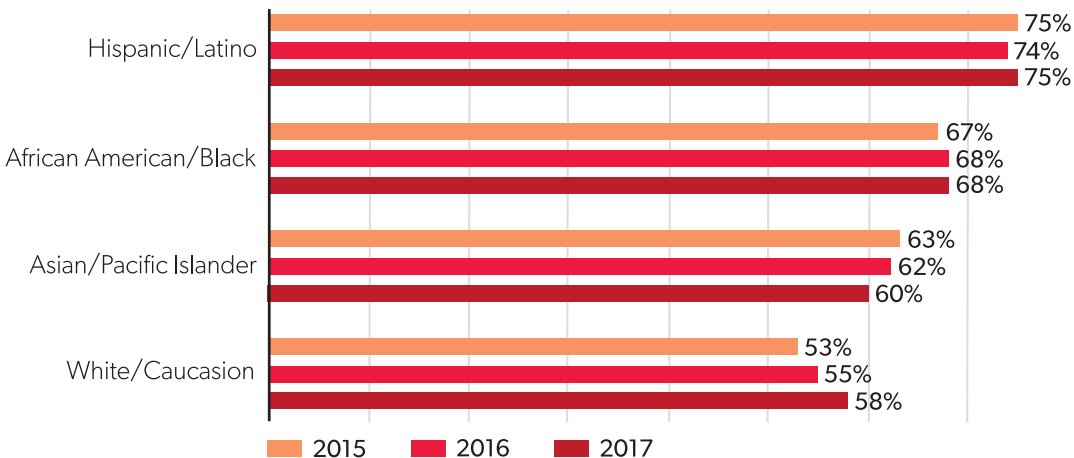


MULTI-GENERATIONAL CAMPING

Multi-generational camping appears to be rising from 56 percent in 2015 to 59 percent in 2016 and 2017.



As was first noted in 2015, Hispanic campers are the group most likely to camp with multiple generations. Though, multi-generational camping has increased among whites.



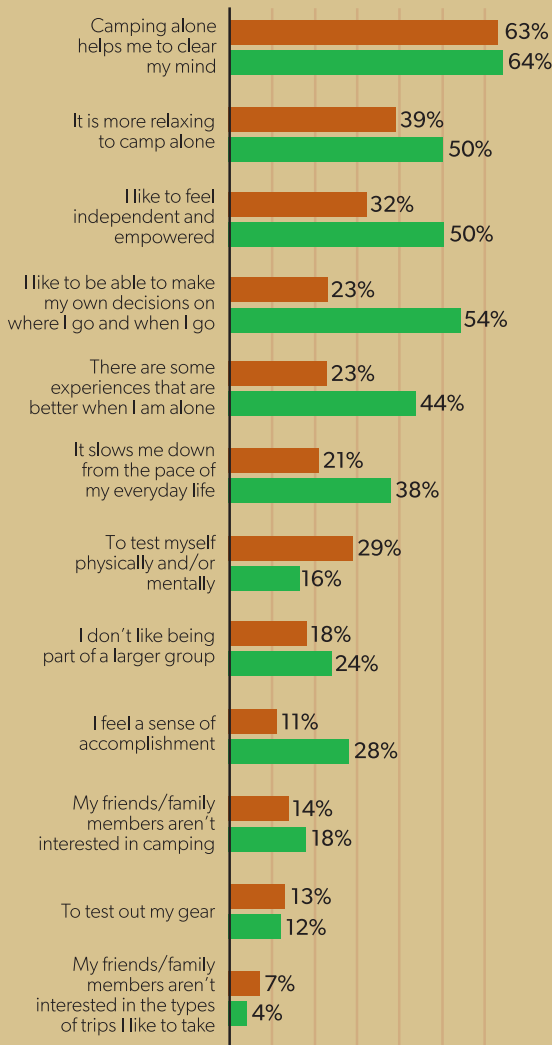
Camping Solo

The percentage of solo campers is still relatively low, but has increased in recent years. In 2017, 6 percent of men and 3 percent of women took at least one solo camping trip. Solo campers are much more likely to be experienced campers, and also more likely to take more camping trips.

Solo campers see it as an opportunity to feel empowered, clear their minds and avoid distractions.

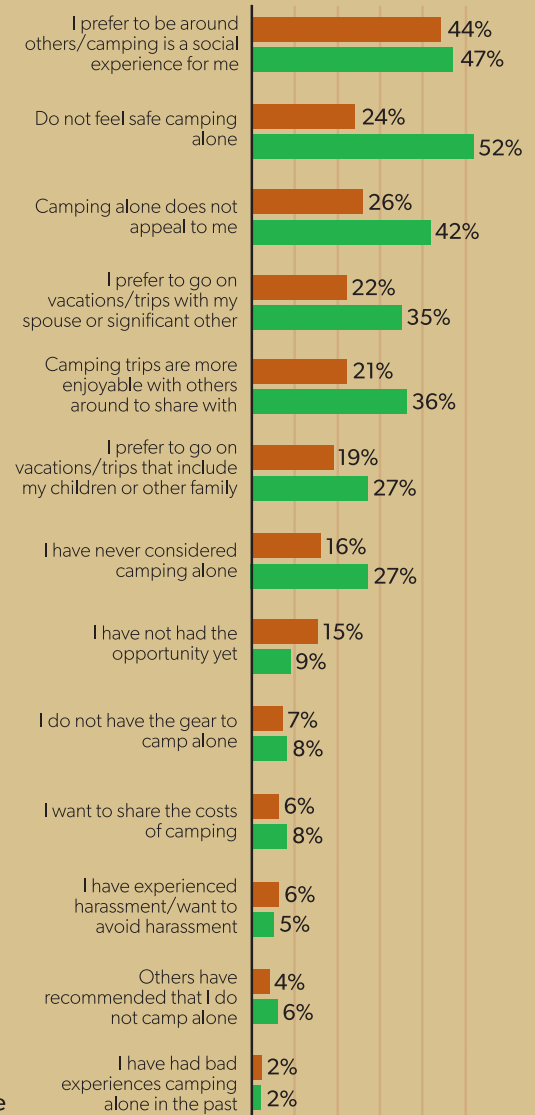
Women are the most likely to identify a variety of reasons for camping solo, including feeling independent, empowered and allowing them to make their own decisions.

REASONS FOR CAMPING SOLO (CURRENT SOLO CAMPERS)



Male
Female

BARRIERS TO CAMPING SOLO (CAMPERS WHO DON'T CURRENTLY CAMP SOLO)





A CLOSER LOOK AT CANADA

Camping in Canada remains very stable, both in numbers and in camping habits.

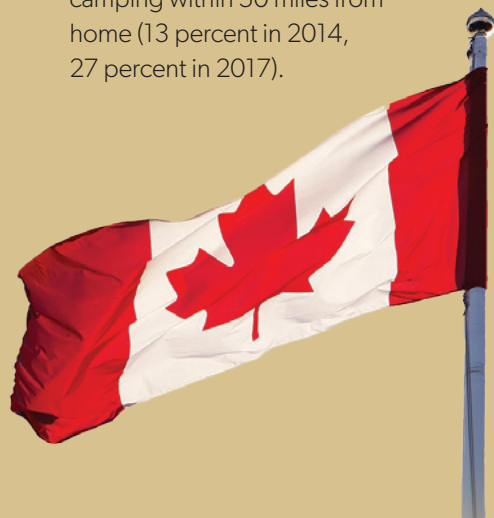
The number of new Canadian camping households grew by a half million in 2017. Canadians are becoming more optimistic about their camping than in past years, with a projected increase in camping for 2018.

About 4-in-10 Canadian households tried a new accommodation in 2017. One-third of Canadian campers say they would like to try a luxury cabin in 2018, and a similar proportion would like to try a motorhome.

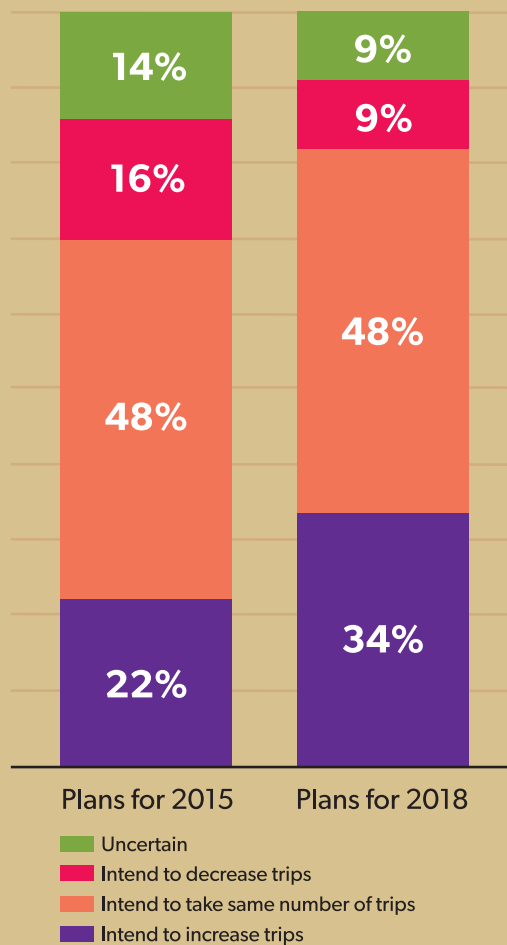
Canadian campers also appear to be swapping tents for RVs. Use of tents dropped from 60 percent in 2016 to 54 percent in 2017, while the use of an RV increased from 22 percent to 28 percent.

Canadians are also more likely than U.S. campers to own their RV, and less likely to use peer-to-peer renting services or rent from a separate company.

Canadian campers are staying closer to home, with twice as many campers now camping within 50 miles from home (13 percent in 2014, 27 percent in 2017).



CHANGE IN CAMPING TRIPS FOR THE COMING YEAR





WHAT CAMPERS DO WHEN THEY'RE CAMPING

Activities

Campers are physically active during their trips with nearly all incorporating some type of activity into camping. Hiking/backpacking and fishing are the most popular activities among all generations.

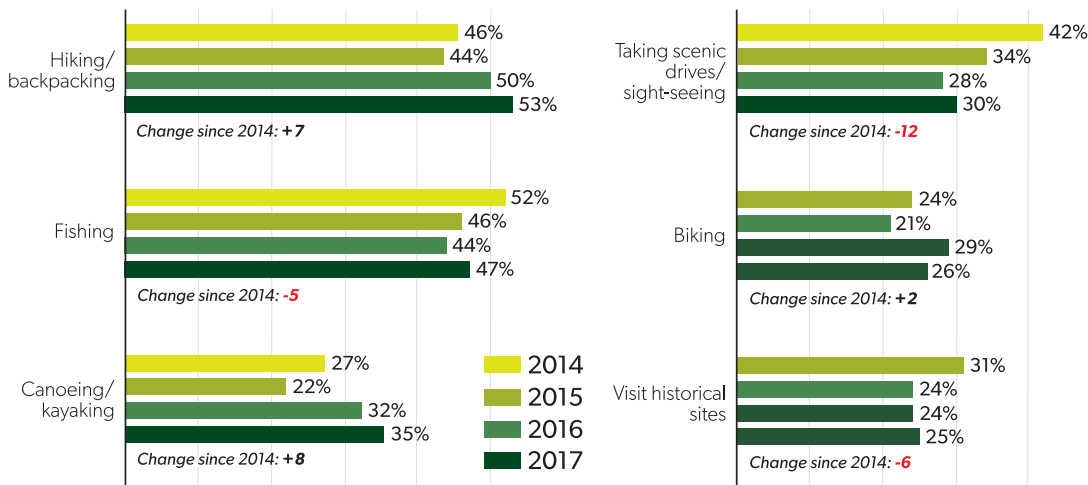
Campers say they recognize the health benefits of being outdoors, and are integrating higher levels of physical activity into their camping.

Activities that are more physically active are growing in popularity overall, with canoeing and kayaking having grown the most since 2014. Overall, about 8-in-10 campers say they like physically demanding activities such as mountain biking and trail running.

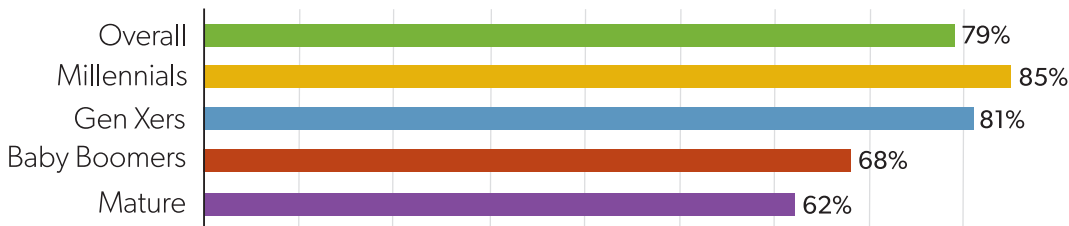
The increasing popularity of more physically active recreation is tied to the influx of younger campers, as younger campers are more likely to participate in more physically active pursuits compared to older campers.

Millennials and Gen Xers are the most likely to leave a campground to participate in other outdoor activities. Baby boomers and mature campers, on the other hand, are most likely to take scenic drives, dine out or shop.

TYPES OF ACTIVITIES WHILE CAMPING



PERCENT OF CAMPERS WHO ARE PHYSICALLY ACTIVE



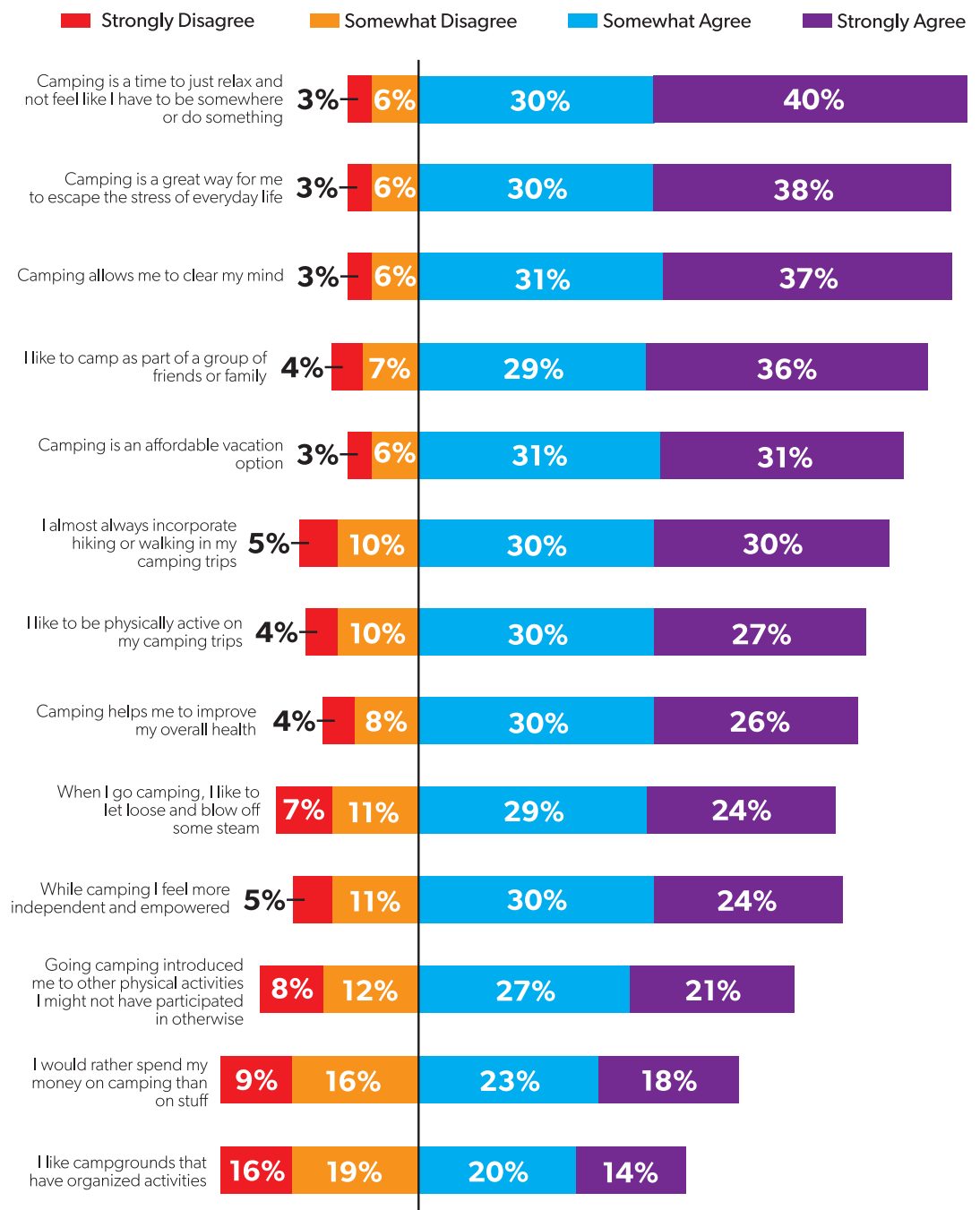
WHY CAMPERS ARE CAMPING AND THE IMPACT/BENEFITS

Escaping Stress and Relaxing

Overall, campers view camping as a time to relax, escape stress and clear their minds.

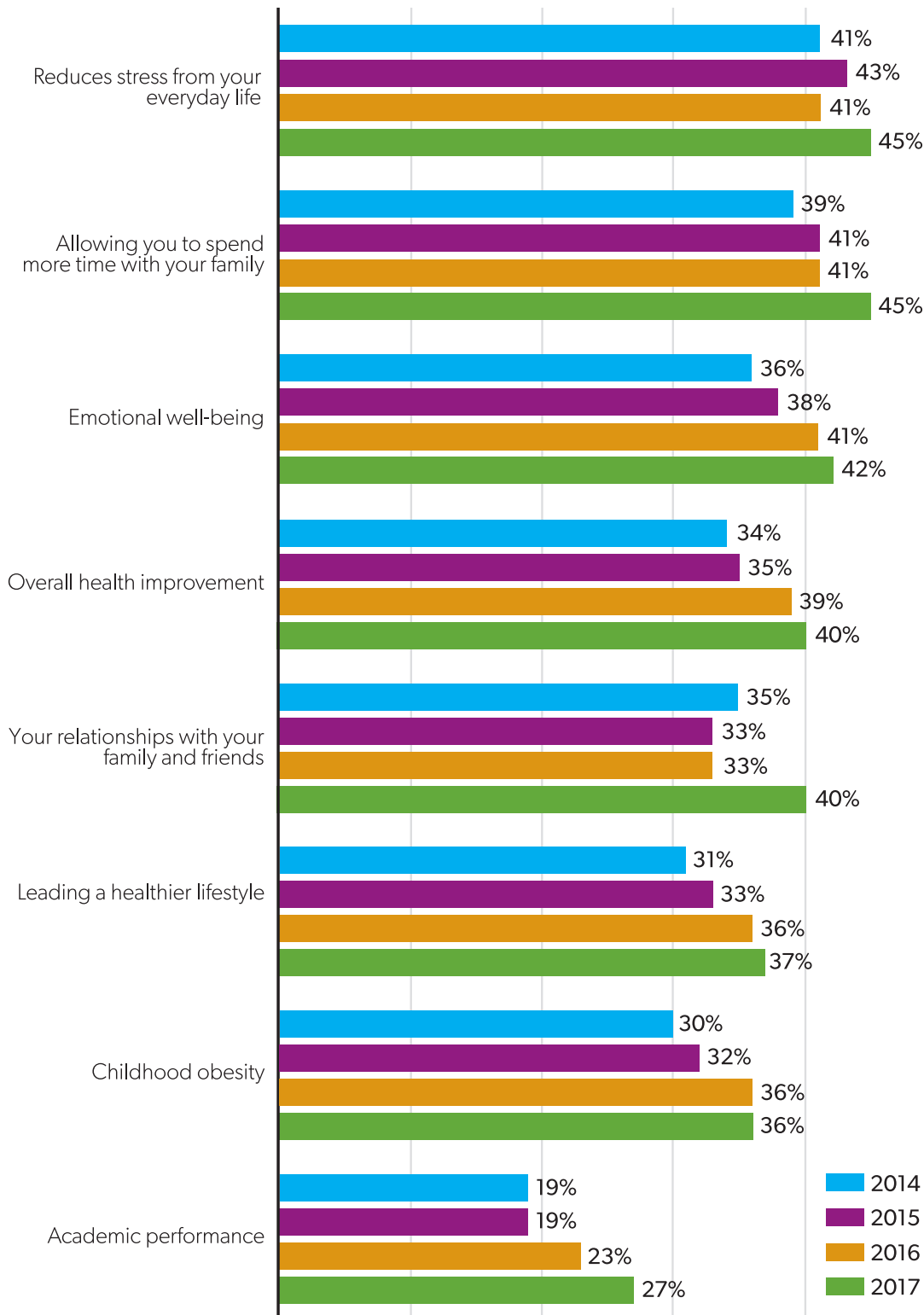
And with the influx of new campers, who are both younger and more diverse, differences in attitudes between campers from different ethnicities are beginning to lessen.

KEY REASONS FOR CAMPING



Close to half of all campers suggest that camping has “a great deal of impact” on reducing stress and allowing them to spend more time with their families. There is also increased recognition that camping contributes to emotional and physical health.

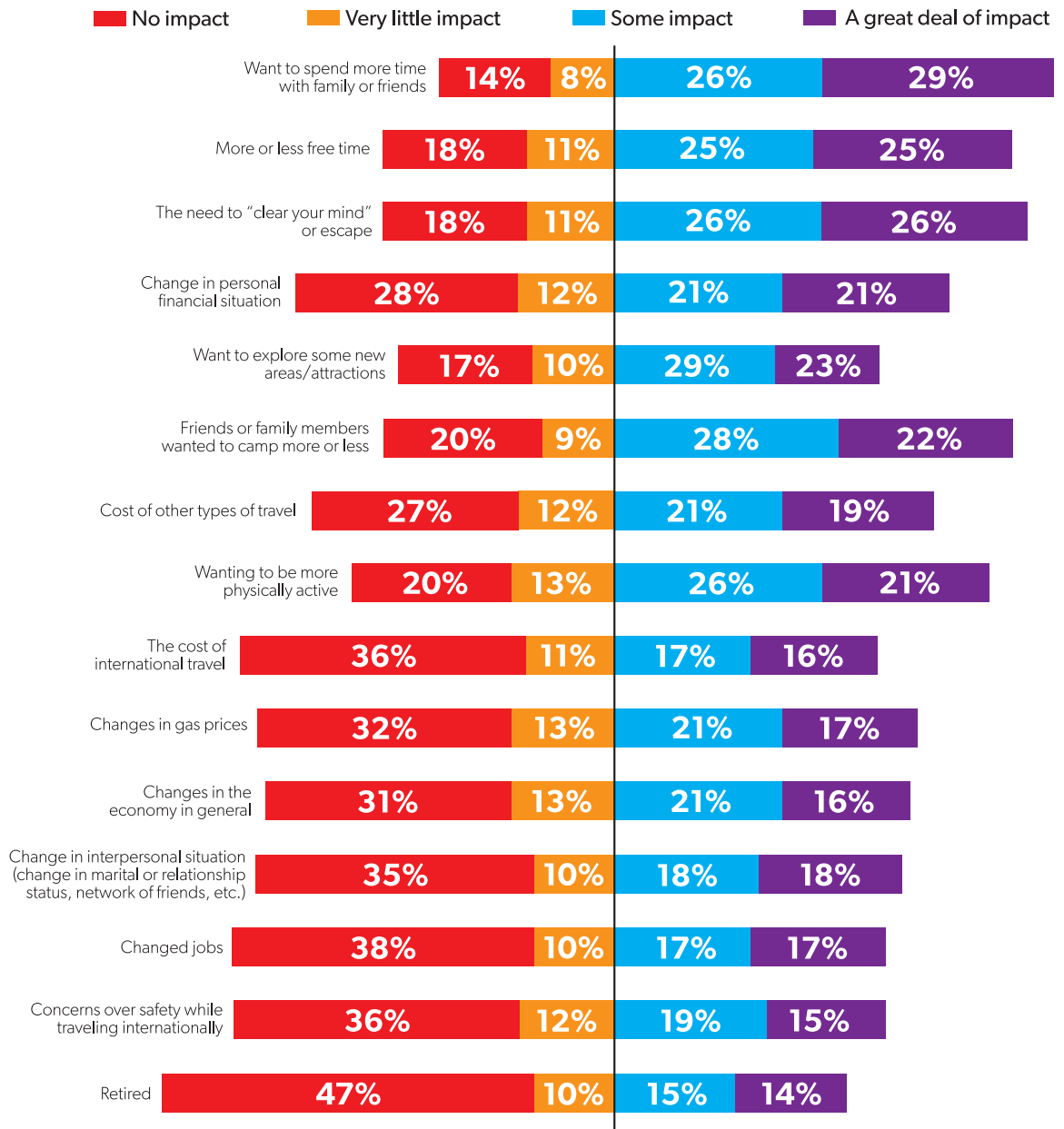
IMPACT OF CAMPING (% REPORTING A GREAT DEAL OF IMPACT)



Among those who increased their camping trips in 2017, spending time with family and friends, the need to escape their daily lives, and clearing their minds were the most impactful factors in their decisions to camp more.

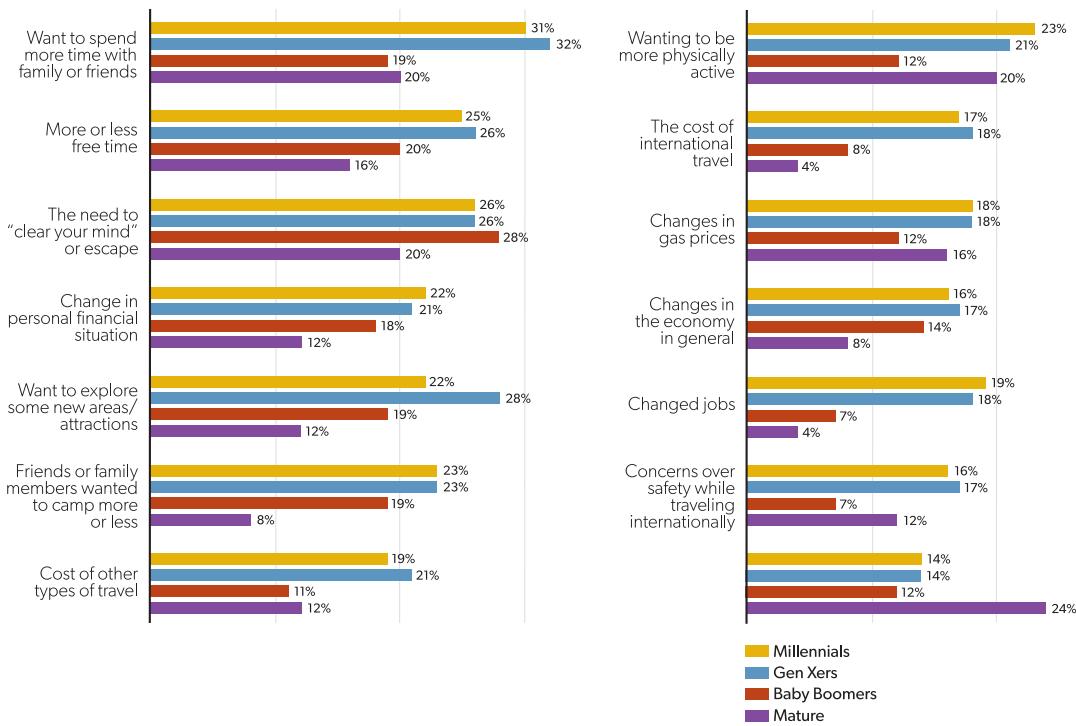
Those who camped less in 2017 attributed it to changes in their financial situation or having less free time.

IMPACT ON INCREASE IN CAMPING TRIPS



Younger campers are more likely to say that they increased their camping trips to spend more time with friends or family, or because they have more free time.

FACTORS IMPACTING INCREASED CAMPING [% REPORTING A GREAT DEAL OF IMPACT]



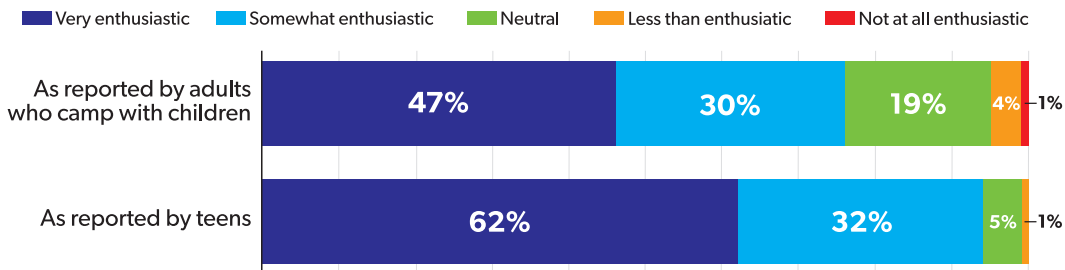
Children and Camping

When asked about their children's enthusiasm towards camping, three-fourths of adult campers with children say their kids are somewhat or very enthusiastic about camping.

According to a survey of teen respondents, teens are significantly more likely to say they are very enthusiastic about camping. Virtually none of the teens expressed a negative view toward camping.

Teens may be more enthusiastic toward camping than their parents realize. In fact, 1-in-5 adults said their children are neutral toward camping, while only 1-in-20 teens said they are neutral when asked directly.

ENTHUSIASM ABOUT CAMPING AMONG CHILDREN



Camping with Technology

Nearly all campers (97 percent) said they bring technology with them while camping.

Smartphones are gaining in popularity, while the use of laptops, tablets and GPS devices are waning.

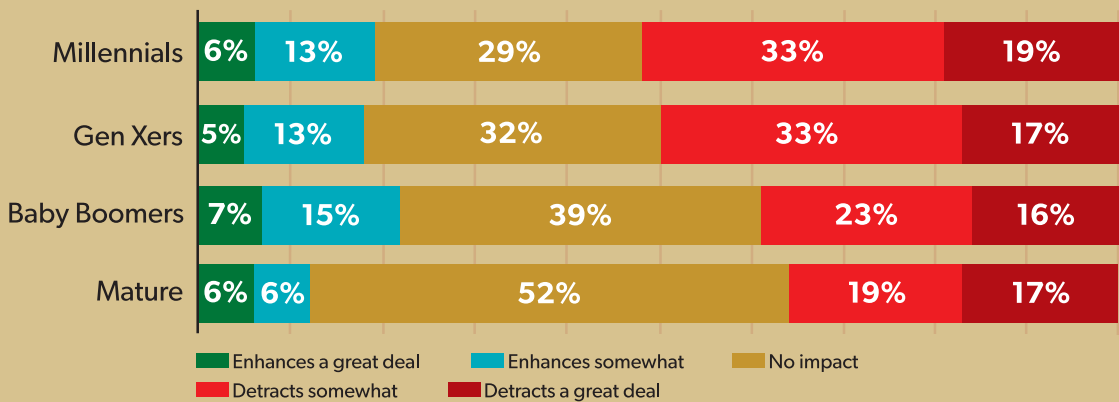
In a continued upward trend since 2014, campers are significantly more likely to go online while camping. Younger campers say they go online at least occasionally, and three-fourths of African American/Black campers say they go online daily.

However, while they are going online more, campers are also significantly more likely to say technology detracts from their overall enjoyment of their camping experience, which is a departure from last year's results (38 percent in 2016, 49 percent in 2017). Only 1-in-5 campers say technology enhances their camping experiences.

Younger campers are the most likely to say technology is a distraction.

With more and more campers saying that camping is a way for them to relax, escape, and clear their minds, the intrusion of technology while camping might be viewed as a distraction.

IMPACT OF TECHNOLOGY ON ENJOYMENT OF CAMPING EXPERIENCES



Social Media

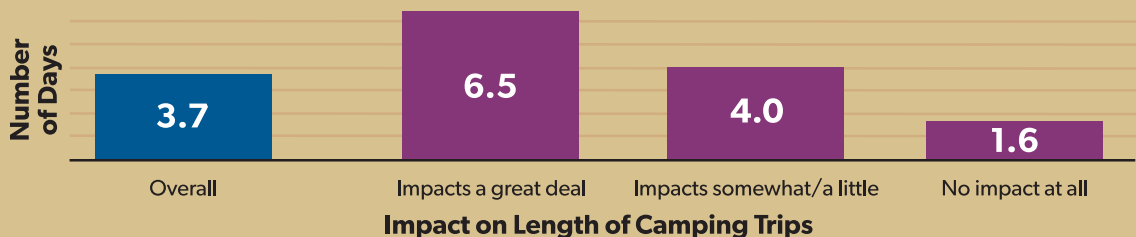
The use of social media to share photos and videos while camping continues to grow (from 45 percent in 2016, to 49 percent in 2018). Millennial and Gen X campers are only slightly more likely to say sharing camping experiences on social media is important (27 percent of millennials and 25 percent of Gen X campers, compared to 24 percent of all campers). African American/Black campers (43 percent) are the most likely to cite the importance of social media while camping.

Technology, Mobility and Vacation Days

About 44 percent of millennial campers say access to cell or Wi-Fi service impacts the amount of time they can camp. Campers who say they value cell and Wi-Fi access report they are able to take almost an extra week of time camping.

Campers acknowledge that using technology while camping is a functional necessity, and allows them to camp more. But, they also feel it often detracts from their overall enjoyment of their camping trips.

ADDITIONAL DAYS CAMPED DUE TO TECHNOLOGY

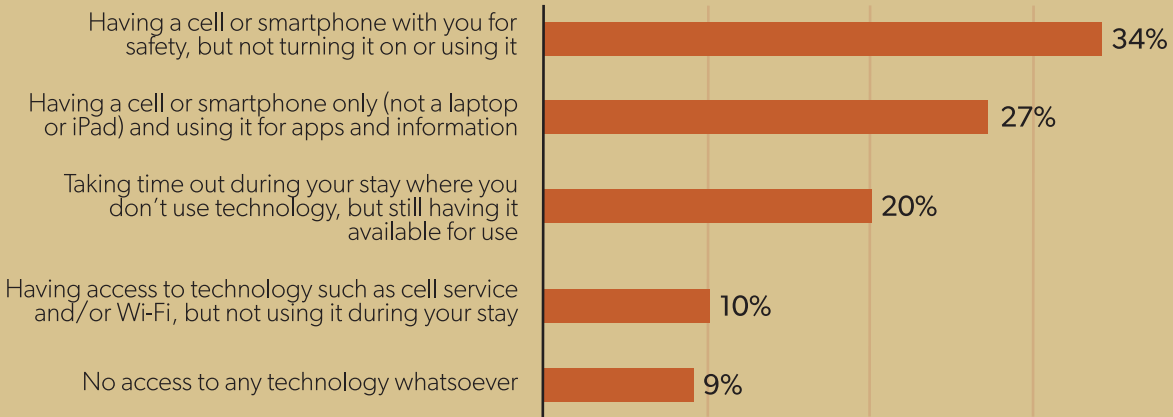


Defining “Unplugged”

The idea of “unplugging” while camping is in fact unlikely to mean a complete disconnect from technology. Only 1-in-10 say that unplugging means no access to any technology.

When asked how they “unplug” while camping, about a third of all campers say that they have their smartphone with them, but they don’t turn it on (use it for safety only).

WHAT IT MEANS TO “UNPLUG” WHILE CAMPING



THE FUTURE OF CAMPING

Summary

The massive influx of younger, more diverse campers is building the momentum for camping becoming an established part of the North American lifestyle.

These campers are camping more often year over year, and integrating it as part of their lifestyle through the recreation, social aspects and health benefits it offers. Increases in how much campers camp are likely to continue upward in future years.

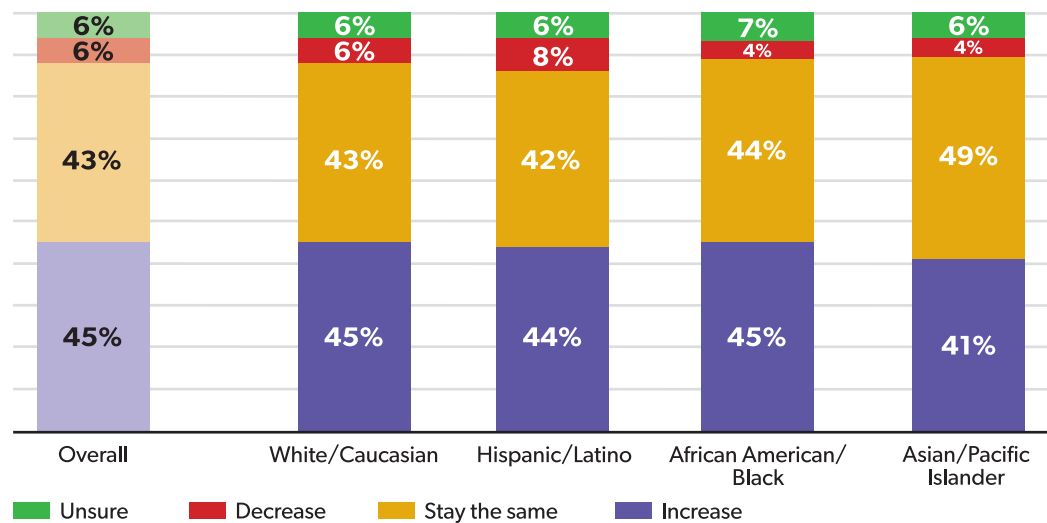
And it appears these new campers are here to stay. There was an increase of 2.6 million new camper households last year.

Contributing to this growth, non-white North Americans are heading outdoors and starting to camp in record numbers. In 2017, about half of all new campers came from non-white groups, indicating an over correction in terms of ethnicity. African American/Black campers are the most likely to report an increase in their camping.

The upward trend of more younger people starting to camp is likely to continue. Gen Z teens continue to be highly engaged in camping and demonstrate a great deal of enthusiasm toward camping and the outdoors (94 percent say they are enthusiastic about camping).

Nearly all of the teen campers surveyed claim that they intend to camp as adults, and if they have children, they intend to bring them camping as well.

INTENT TO INCREASE CAMPING IN 2018, BY ETHNICITY



The behaviors of younger campers – who are more interested in seeking and discovering different types of camping experiences – are already impacting the outdoor industry, and will continue to do so.

Younger campers are playing a larger role – and one that will continue to grow – in driving the camping economy as they experiment with different types of accommodations and camping.

More than one-third of RVers are now millennials, yet half of millennial campers don't own the RV that they use. Almost 1-in-10 are renting from peer-to-peer services while one-fourth borrow an RV from friends or family.

These behavioral changes among millennial campers are magnified by the sheer size of the group. Their attitudes and behaviors – such as camping in larger groups and trying different accommodations – will likely encourage the outdoor industry to innovate its offerings in order to provide the gear, facilities, services and access that will fulfill the needs of this highly motivated group of campers.

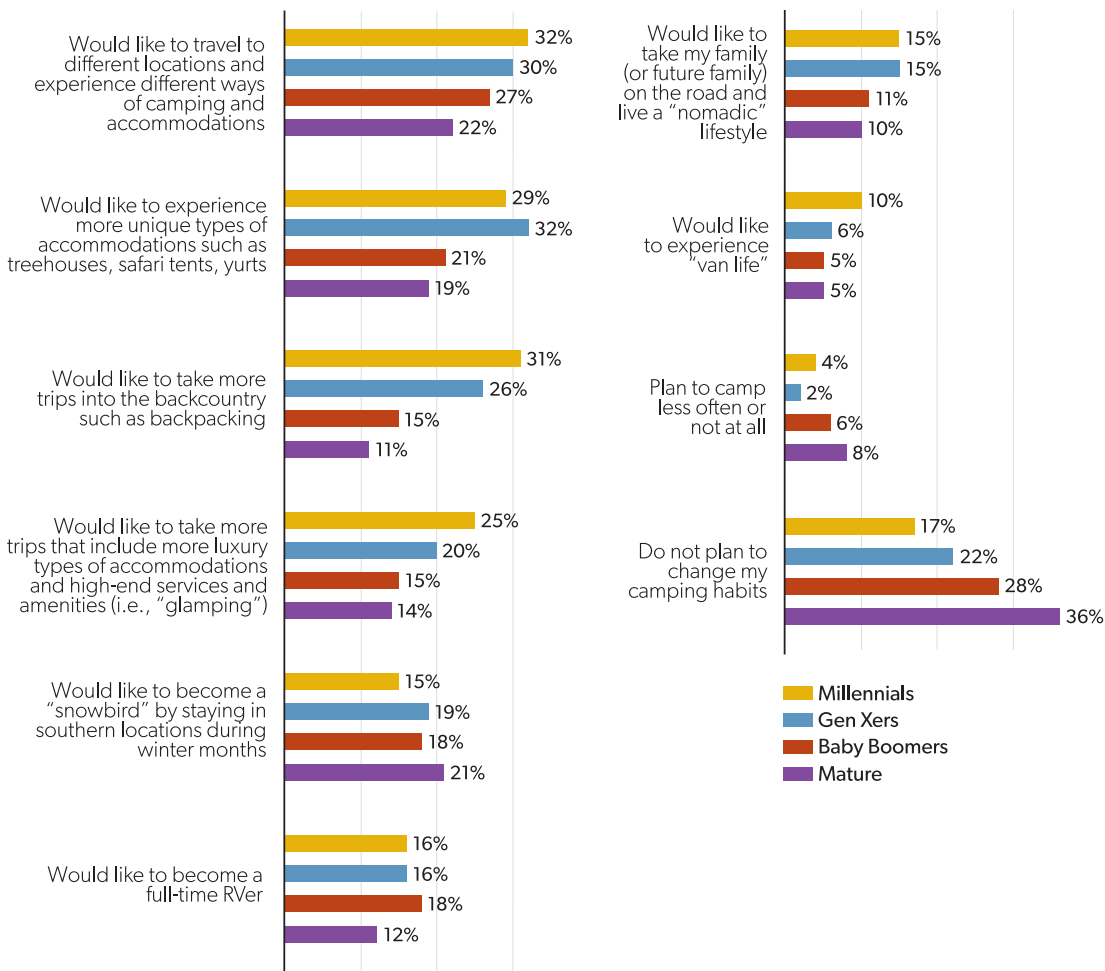
Looking ahead at how their behaviors may impact the industry in years to come, campers will continue to seek different types of camping experiences in terms of location and accommodations.

One-fourth of campers would like to try backcountry camping and 1-in-5 campers would like to go glamping.

Millennials are most likely to want to experience backcountry camping and/or glamping, while Gen Xers seek unique accommodations.

One-fourth of African American/Black campers indicate that they would like to become a full-time RVer.

CAMPERS PREDICT HOW THEIR BEHAVIOR WILL CHANGE







THE YEAR AHEAD

FORECAST: 2018 CAMPING SEASON

When looking at the year ahead, the outdoor hospitality sector can expect to see higher levels of camping across the board, but primarily among younger campers. These campers are also seeking new camping experiences in 2018.

Plans for the Upcoming Year

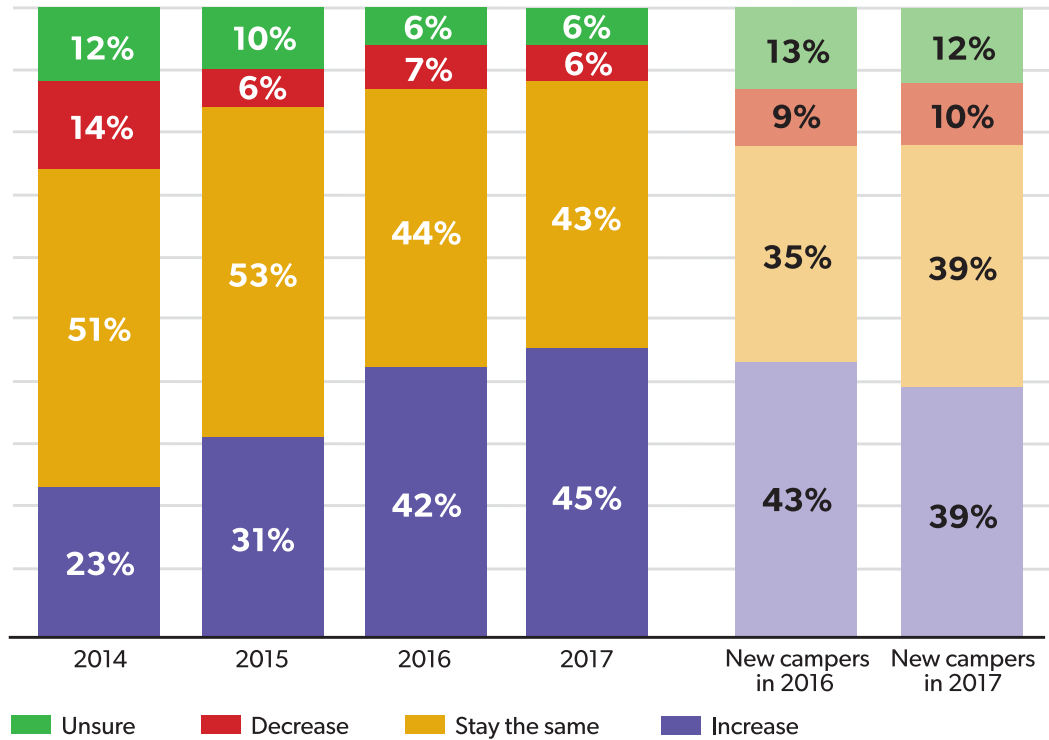
Campers, overall, will likely continue to camp more in 2018 than they did the year before (45 percent say they plan to camp more).

Campers of all ethnicities are equally likely to say that they intend to increase their camping trips in 2018.

It is also worth noting that the level of uncertainty about their plans to camp in the year ahead appears to be diminishing as campers continue to integrate their camping trips into their lifestyles.

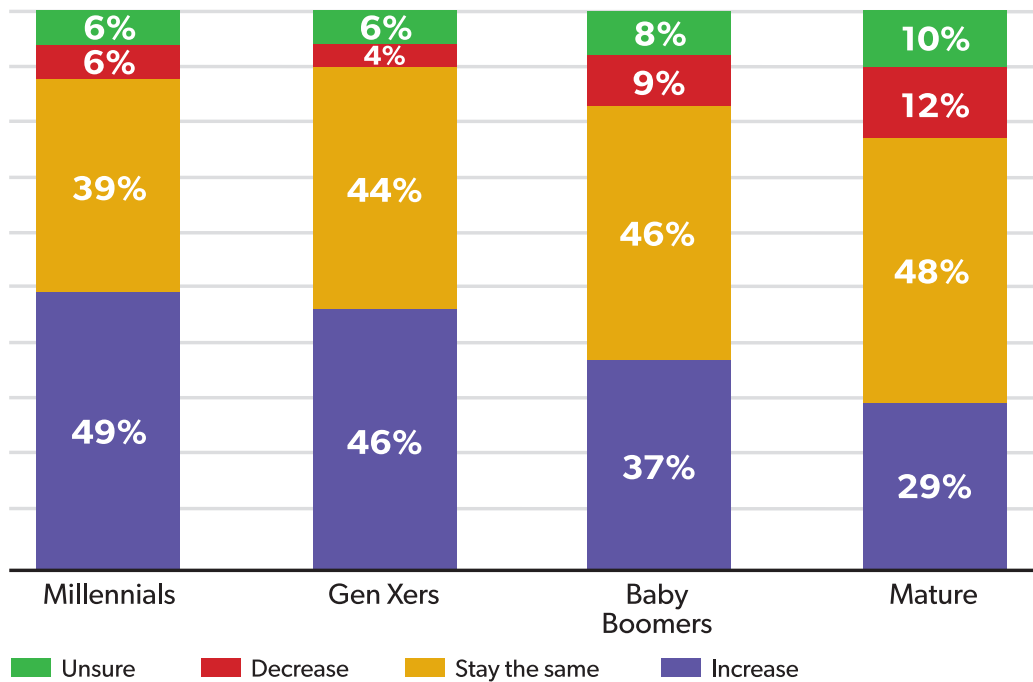
In 2016, almost 1-in-5 new campers said they were unsure whether they would camp more or less in the year ahead (2017). Among the latest group of new campers, this uncertainty has waned somewhat. About 39 percent of new campers said they intend to camp more in 2018.

INTENT TO CHANGE CAMPING TRIPS



Millennials and Gen Xers are most likely to report that they intend to increase their camping trips (with little decrease) while the oldest segment of campers demonstrate a gain of only 29 percent.

INTENT TO CHANGE CAMPING TRIPS IN 2018, BY AGE

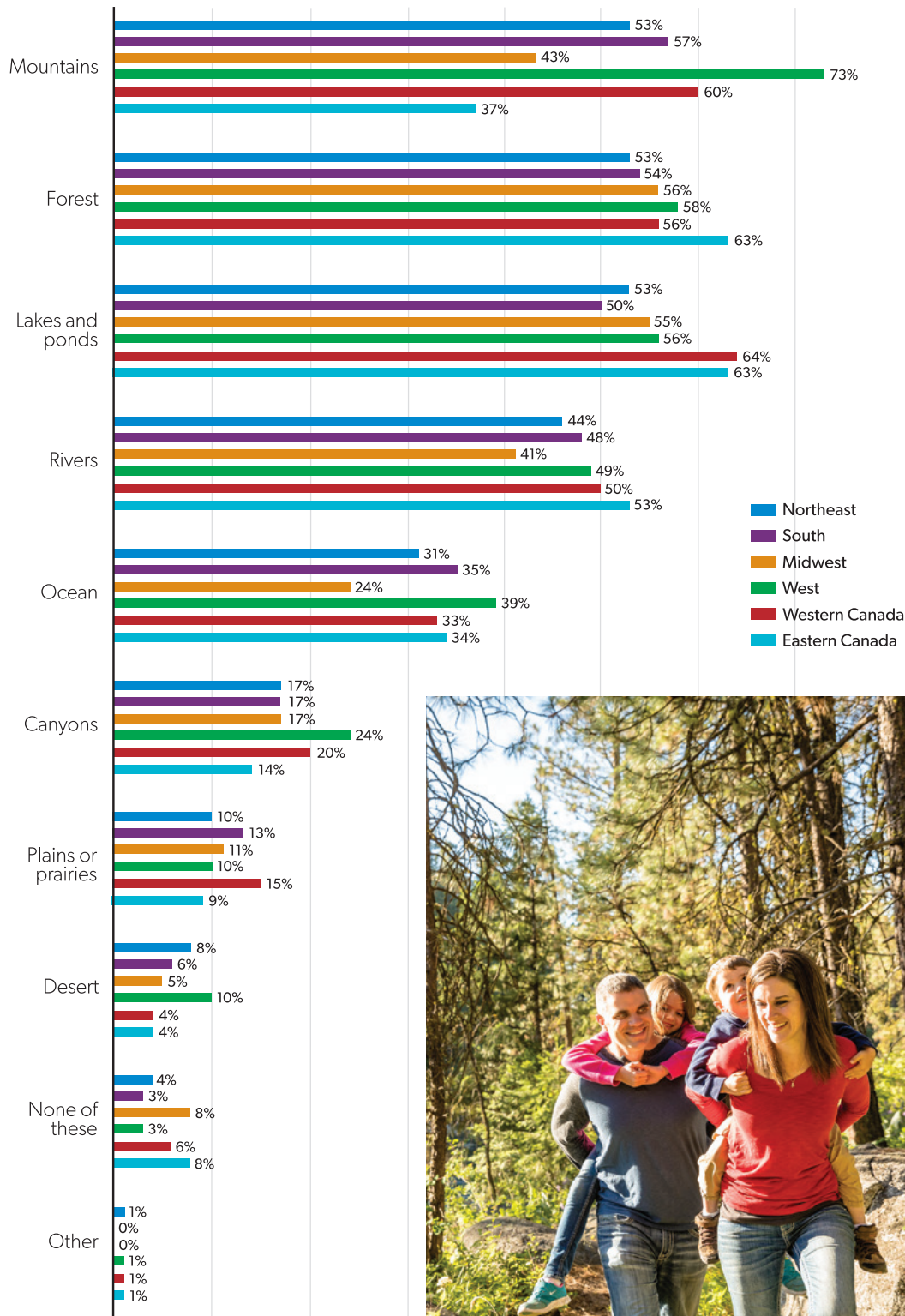


2018 Camping Destinations

Campers express a desire to camp in a setting that's different than where they live. For example, in areas with no ocean access, such as the midwest, one-fourth of campers would like to travel to an ocean setting (another 17 percent would like to visit canyons).

The results suggest campers' desire to experience areas and landscapes that are different from what is found in their backyard.

DESTINATIONS PLANNED FOR 2018, BY REGION OF RESIDENCE



METHODOLOGY

Background

This report represents the fourth annual installment of a detailed reporting that will compare the latest iteration of the North American Camper Survey to the previous results.

The survey, commissioned by Kampgrounds of America, Inc. (KOA), is designed to provide a detailed accounting of the U.S. and Canadian camping markets including the incidence of camping overall, 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.

This effort, on an overall basis, will be compared to a benchmark camping incidence study conducted in 2012, followed up in 2014, 2015, 2016 and now for 2017.

U.S. and Canadian Household Results

The results presented in this most recent iteration of the North American Camper Survey is based on a total of 2,903 surveys completed among a random sample of U.S. (n=2,402) and Canadian (n=501) residents.

Within the U.S. sample of respondents, results are stratified by Census Region:

Northeast (n=601)

Midwest (n=601)

South (n=600)

West (n=600)

Overall, a sample of n=2,402 U.S. residents is associated with a margin of error of +/- 1.99%, while a sample of n=501 Canadian residents 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 residents.

In order to calculate overall incidence, the sample of respondents was statistically balanced to ensure that the results are in line with overall population figures for age, gender and ethnicity. Some results may not add to 100 percent due to rounding.

Teen Survey Results

The results are based on a total of 403 surveys completed among a random sample of U.S. residents who have children in the household between the ages of 13 and 17.

Each survey was completed with a teen respondent whose parent was recruited and asked permission for their child to participate.

A sample of n=403 teen campers is associated with a margin of error of +/- 4.9 percent.

All surveys were completed online.

Camping Incidence

The sample of households from which the surveys were completed was statistically balanced to ensure that the results are in line with overall population figures by age, gender and ethnicity.

GLOSSARY

Research Terms

Baby Boomer – Born 1946 to 1964

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.”

Generation X – Born 1965 to 1982

Generation Z Teens – Born 1999 to 2003

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.

Mature – Born prior to 1946

Millennial – Born 1981 to 1997

RV – Includes type A, B, or C motorhomes, travel trailers, fifth-wheels, pick-up campers, pop-up trailers, and small van campers.

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 pick-up truck equipped with a device known as a fifth-wheel hitch.



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.



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

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.



Type B Motorhome

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



Type C Motorhome

Small Van Camper



“Types of RVs” credit: GoRVing.com

