



THE 2019 NORTH AMERICAN CAMPING REPORT 5-YEAR TRENDS

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



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INTRODUCTION

Camping is the new cultural melting pot of North America.

That's a bold statement, but it's true according to the 2019 North American Camping Report.

For the past five years the North American Camping Report, an annual independent study supported by Kampgrounds of America, Inc. (KOA), has found new campers are much more diverse than the overall U.S. population. In fact, half of the newest campers are from non-white groups, with more Asian, Hispanic and African American outdoor enthusiasts adopting the camping lifestyle.

The report also found that the popularity of camping has exploded in the past five years, adding more than 7 million new camping households since 2014. More than one million new households joined the camping family in 2018 alone.

The future for camping appears secure, with large increases in camping interest among every generation, including the emerging Generation Z (those born between 1995 and 2005). All groups included in the 2019 North American Camping Report data – both ethnic and generational – report that they intend to camp the same amount or more this year.

Private campgrounds in North America are preparing for this increase in camping by not only expanding sites on their parks when possible, but also adding the new, unique camping offerings campers say they want, from comfortable RV patio sites to more glamping tents and full-service cabins. More campgrounds are also in the works. Kampgrounds of America alone currently has 13 new campgrounds planned.

The big news in this year's North American Camping Report is that nearly every "trend" identified in the report's previous four yearly editions appear to be ongoing.

- Campers continue to increasingly camp closer to home. In 2014, about 13 percent of camping trips were under 50 miles from home. By 2018, that number had risen to 31 percent. While the ethnic and generational diversity of campers continues to grow, the differences between the groups, in regard to what they seek from the camping experience, continue to lessen.
- Campers continue to camp more. The number of campers who intend to camp three or more times each year continues to grow.
- More families are adopting the camping lifestyle, and they too intend to camp more than ever before.
- Campers are making decisions about their camping based on their life stage, not just their ethnicity or generation. Families with young children, for instance, have much in common, regardless if the parents are millennials or from Generation X.
- Campers are increasingly seeing camping and other forms of outdoor recreation (hiking, biking, fishing, etc.) as one in the same. This is being driven primarily by younger campers.
- Campers are excited to try new and different methods of camping, including full-service cabins, "glamping" tents and van camping. Their excitement has spawned new and expanding extensions of the outdoor industry.

The different ways people camp have evolved greatly over the years. But why they camp has never really changed – it's the basic human desire to connect with the outdoors, and with each other.

Camping, quite simply, connects.



KEY FINDINGS

After five years of surveying North American campers, the 2019 North American Camping Report shows the camping landscape is strong – new and life-long campers are committed to the outdoor camping lifestyle, as demonstrated by their diversity, camping more frequently and enthusiasm for using camping as a conduit to active outdoor lifestyles.

Since last year, about one million new camper households were added to those who consider themselves annual campers, with an estimated 7 million new camper households in the U.S. since 2014.

Since 2014, the percentage of campers who camp three or more times annually has increased by 72 percent.

Camping experienced aggressive growth from 2014 through 2017 in terms of the sheer number of new camper households, and has been impacted most by the influx of younger and more diverse campers. As this new group of campers has continued camping, they've brought with them a greater deal of enthusiasm, annually taking more trips and spending more nights camping.

Although we're starting to see a leveling off of intent to camp this year, it should be noted that there is not a decrease and even among those who say that they do not intend to change their camping in 2019, their frequency of camping is higher than what was observed in previous years. Of all campers, Hispanic campers are the group most likely to increase their camping this year.

Half of all campers identified their "love of the outdoors" for sparking their interest in camping, which is consistent to results of the first report and has remained the leading reason over its five years of research.

Campers are sharing this love with others. In 2018, 48 percent of new campers reported that other people got them interested in camping, while younger campers, not surprisingly, were introduced to camping by their families.

Camping momentum can also be seen in the growth of campers self-identifying as "life-long" campers. One-third of all campers now self-identify as life-long campers, which is also the highest among all years of the report. Although young, both millennials (ages 22-37) and Gen Xers (ages 38-53) are more likely to identify themselves as lifelong campers when compared to past years.

Campers' trial of new accommodations or camping experiences can be attributed to their life stage and life events.

Fifty percent of millennials say life events (such as having children and increased income) enables them to camp more often. Among younger campers the significant life shift of becoming a parent can be attributed to shifts in camping behavior, including increased frequency of camping and camping accommodation preferences. Camping families (campers with children under the age of 18 in the household) are the most devoted group of campers and, with children in the household, see increased desire to own their camping gear, whether a tent or RV. Camping families are most likely to say that their camping trips increased in 2018, and two-thirds say that their camping will increase in 2019.

Campers are continuing to make strong connections between camping and other outdoor recreation activities, considering them to be one in the same.

While hiking/backpacking and fishing continue to be the most popular recreation activities among campers, more active recreation continues to grow in popularity. Fishing dropped by 2 percentage points since 2014, yet the participation in hiking or backpacking has increased by 14 percentage points since 2014. In fact, the rates of African American campers' interest in hiking/backpacking have almost doubled since last year. Canoeing and kayaking have grown by 11 points since 2014.

The importance of on-site recreation to campers increased in 2018 with a full 40 percent of campers selecting campgrounds around it, yet can also be seen to fluctuate based on campers' stages in life.

For the first time in the report's history, in 2018 the percentage of new campers from multicultural groups (51 percent) outpaced the percentage of new caucasian campers (49 percent).

New campers remain more diverse than the overall U.S. population. In 2018, Hispanic campers exceeded what would be expected in the overall population (22 percent versus 16 percent against U.S. Census figures). Asian American campers are still represented at a rate three times higher than U.S. Census figures.

Interest in different types of experiences, including the establishment of "glamping" and "van life," has helped to further define camping today.

Glamping and van life were not included in the inaugural North American Camping Report in 2015 because they didn't exist as a camping category at that time. As these cultural trends emerged and grew – likely via high rates of sharing on social media – we see another example of how campers have adopted the camping lifestyle in a way that works for them. Notably, in the most recent results, close to half of all campers surveyed said that they would like to experience glamping in the coming year, a rate that has more than doubled over the past 12 months.

And while the rate is much lower, there is still a large increase in the percentage of campers who would like to experience van life from 2017 to 2018. It is interesting to note that there are essentially no differences in age among those who want to experience van life, however interest is higher among Hispanic campers and families.

Receptiveness toward peer-to-peer RV rentals is also robust. The establishment and growth among companies offering peer-to-peer rental services has grown exponentially since the start of the report. Today, 60 percent of non-RV owners are likely to consider this approach when renting with high rates of use among millennials and Gen Xers, as well as Hispanic (70 percent) and African American campers (about 66 percent).

In 2018 RV ownership has increased over borrowing or renting, as has interest in luxury cabins.

Sixty-one percent of RVers indicate ownership of the RV they use most – a five point improvement over 2017 results and likely being driven by Gen Xers who indicated an increase in ownership in 2018. Campers of all ages seek to have a luxury cabin experience in 2018, outpacing other accommodation options.

Canadian campers appear to be more satisfied with their camping experiences than their U.S. counterparts, based on lower rates of accommodation changes, trial of new accommodations or changes to camping trips.

Canadian campers continue to reflect the highest rate of RV ownership at 64 percent. Yet, while Canadian campers show the most enthusiasm for a more-of-the-same-type of approach to camping, still close to half of Canadian camper households (46 percent) are interested in a glamping experience.



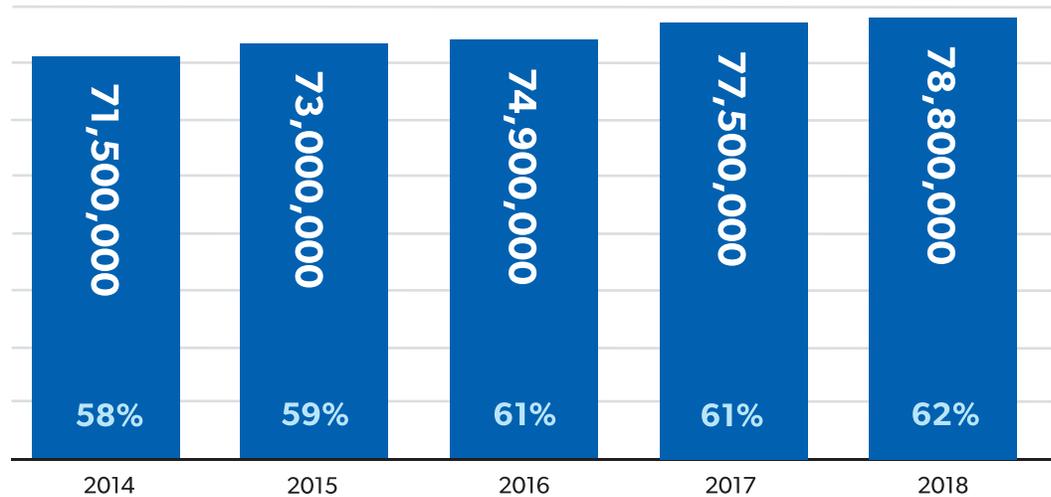
SUMMARY OF SURVEY RESULTS

WHO IS CAMPING?

Active Camper Households

The incidence of camping improved by four points overall in the U.S. in 2018. The number of camping households in the U.S. grew by 1.4 million, reaching a new high of 78.8 million households.

GROWTH IN U.S. CAMPING HOUSEHOLDS

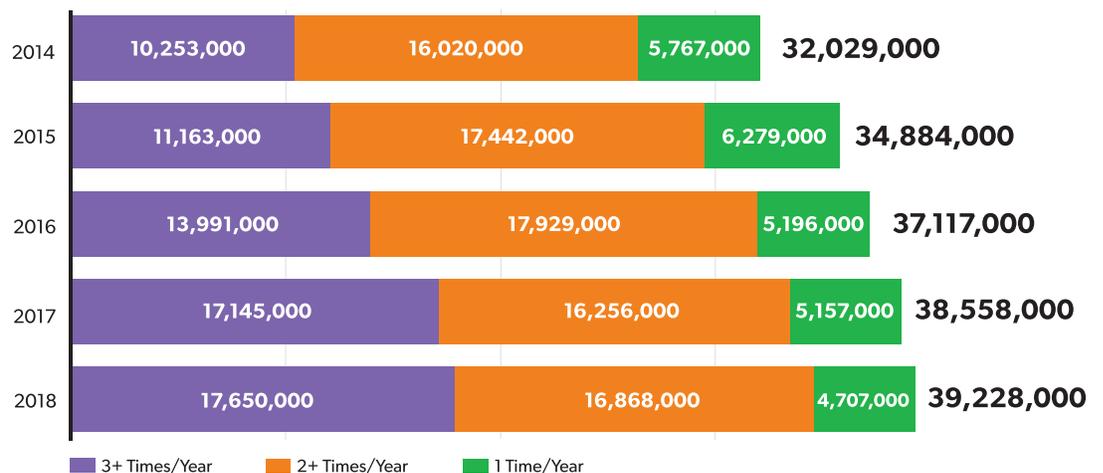


Frequency of Camping

The number of camping households that camp at least once each year has grown by nearly 7.2 million households (22 percent) since 2014.

Even more impressive, the percentage of campers who camp three or more times each year has increased 72 percent since 2014. The addition of more camping households, coupled with the increased propensity to camp more times each year, has led to a large increase in both the sheer number of campers, and the number of nights camped.

GROWTH IN ANNUAL CAMPER HOUSEHOLDS IN THE U.S. [2014-2018]



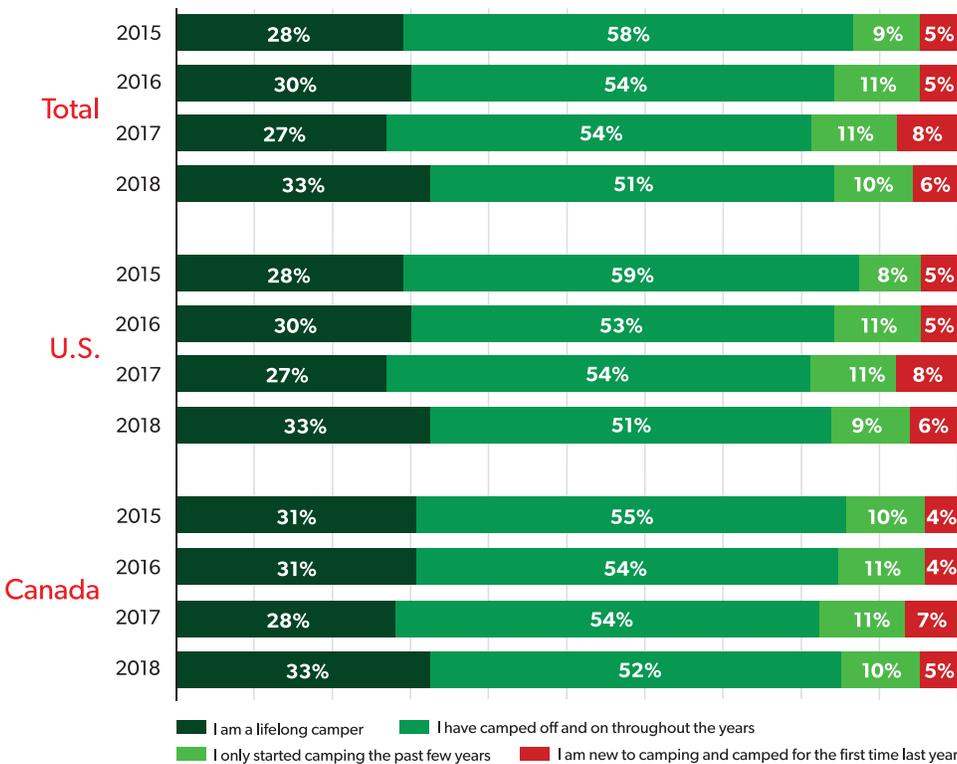
New Campers and Lifelong Campers

About one third of all campers identified themselves as lifelong campers, the most ever measured in that category and 5 percentage points higher compared to 2015. More millennial (32 percent) and Gen X campers (38 percent, up from 30 percent in 2016) now identify themselves as lifelong campers – and 90 percent of teen campers say they plan to camp as adults – indicating their desire to continue their camping lifestyles. These younger campers typically started camping at a younger age, and are showing a propensity to camp more often.

Both Asian (15 percent in 2015, 21 percent in 2018) and African American/Black campers (23 percent in 2015, 34 percent in 2018) campers overall were more likely to identify as lifelong campers.

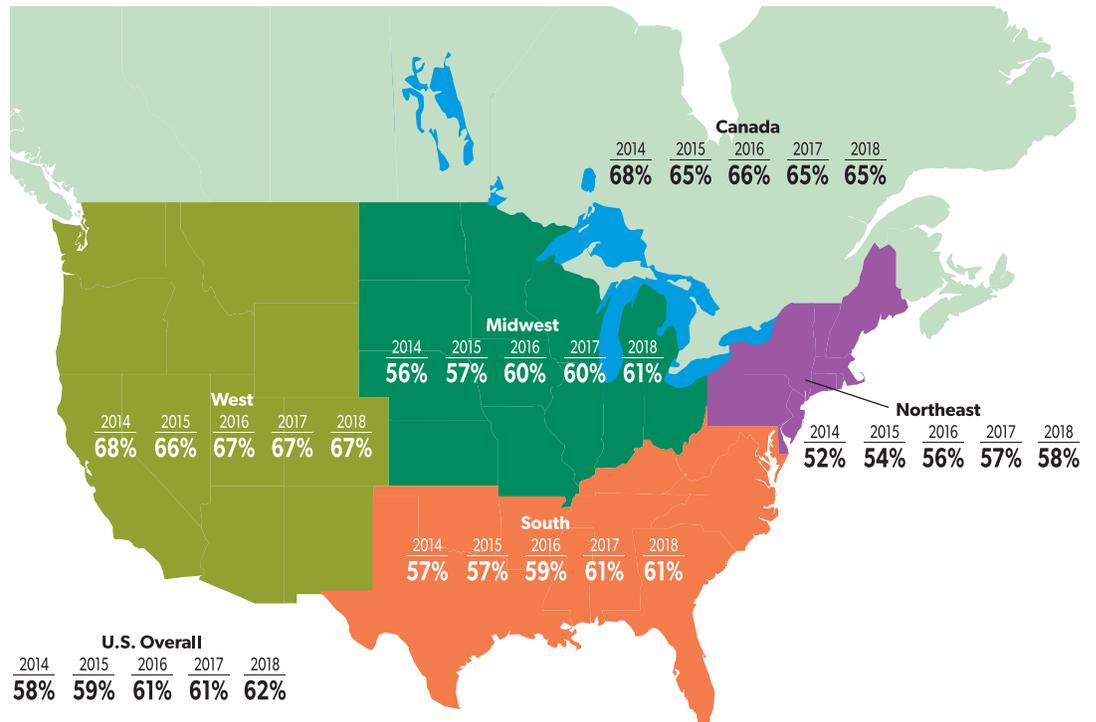
At the same time, new campers continued to adopt the camping lifestyle. About one out of every 20 camping households stated they camped for the first time in 2018.

CAMPING BEHAVIOR [2015-2018]



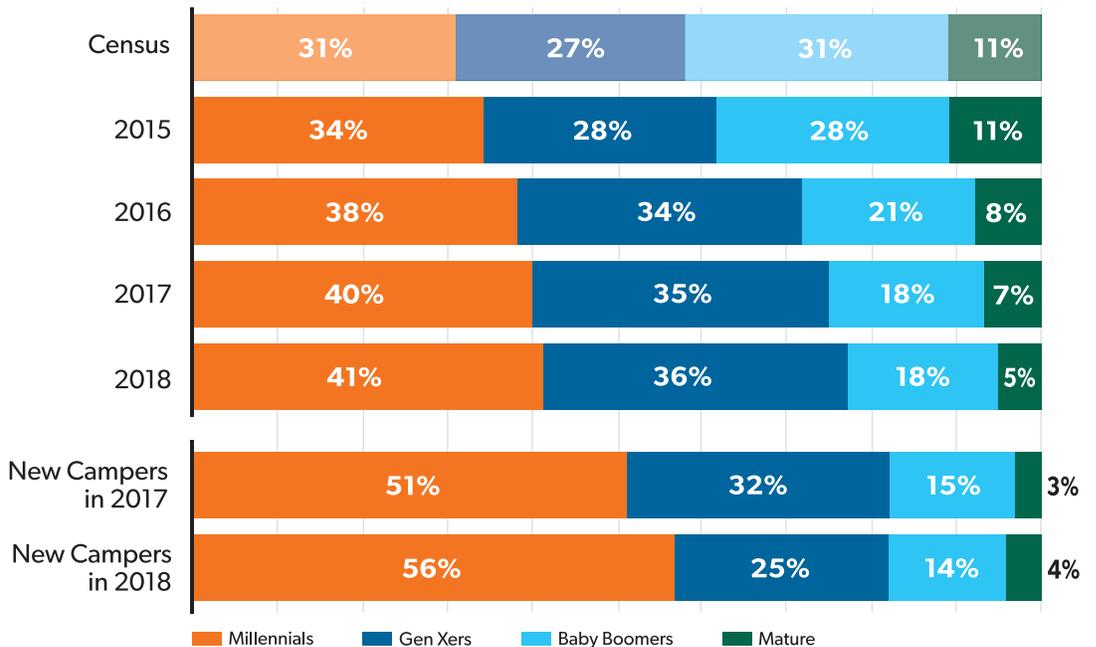
Demographics

RESIDENTS WHO CAMP AT LEAST OCCASIONALLY, BY REGION [2014-2018]



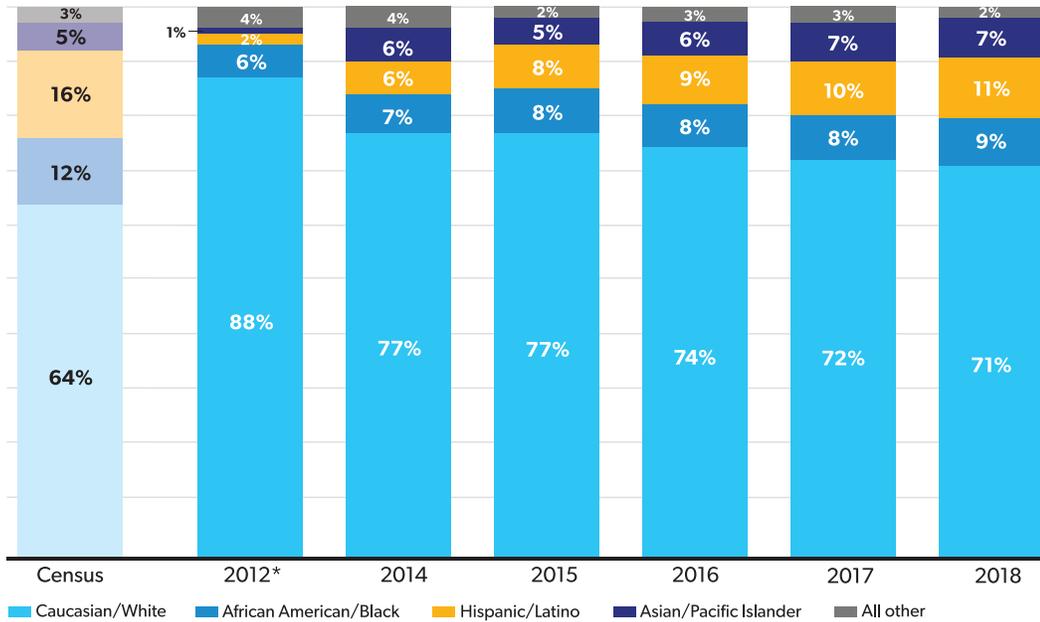
Millennials continued to make up the bulk of new campers in 2018, and also were the most likely to drive up the incidence of camping. Camping is still strong among the other generational groups, however, with 44 percent of new campers being 40 years old or older, and a full one-fourth of new campers being part of Gen X.

AGE



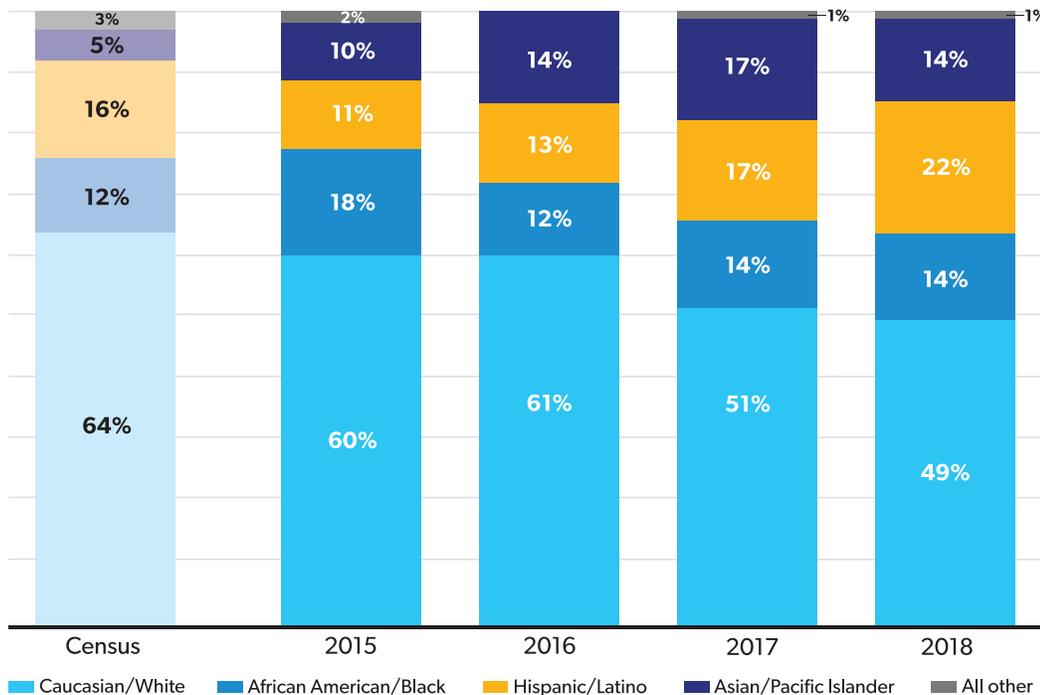
The ethnic mix of campers continued to move closer to percentages reported by the most recent U.S. Census. The camping public continues to become more diverse. Since the ethnic mix of campers was first measured in 2012, the percentage of non-white camping households has moved from 12 percent to 29 percent.

ACTIVE CAMPER HOUSEHOLDS BY ETHNICITY [2012-2018]



For the first time in 2018, the percentage of new non-white campers (51 percent) outpaced the percentage of new caucasian campers (49 percent).

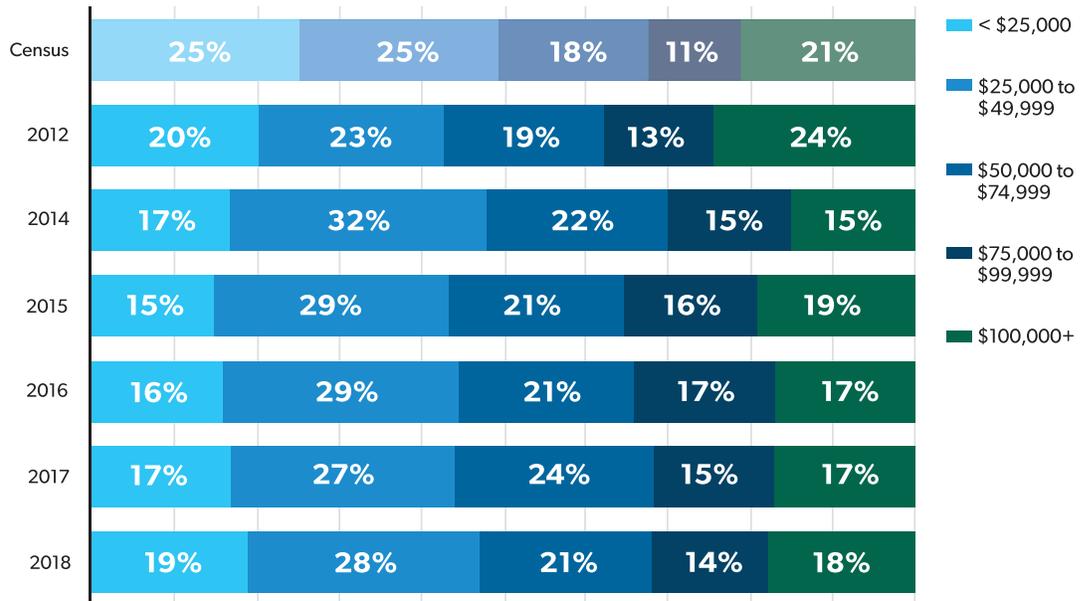
ETHNICITY AMONG NEW CAMPERS [2015-2018]



*Report data is based on a 2012 benchmark camping incidence study, which was followed up again in 2014. See Methodology section for more details.

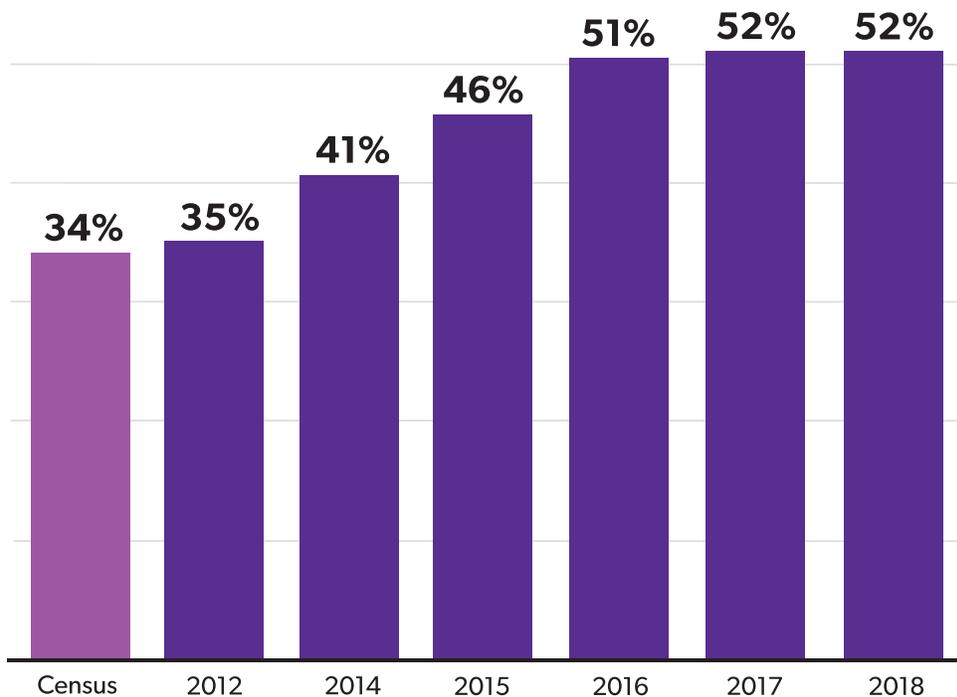
The majority of camping households in North America continue to be solidly middle income.

HOUSEHOLD INCOME [2012-2018]



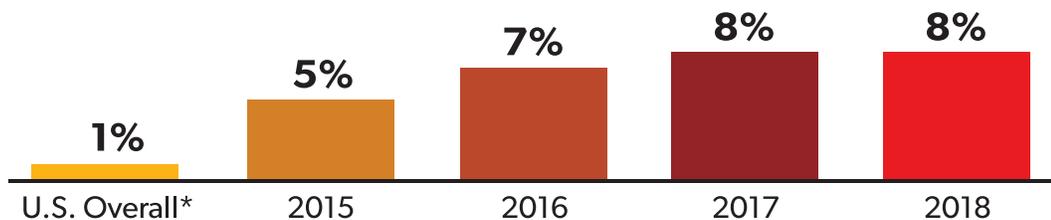
As in past years, the majority of camping households include minor children. As the overall demographic of camping families continues to trend younger, it can be expected that the number of households with minor children will remain high. The percent of families with children in the household has increased 17 percent in the past five years.

CHILDREN IN THE HOUSEHOLD [2012-2018]



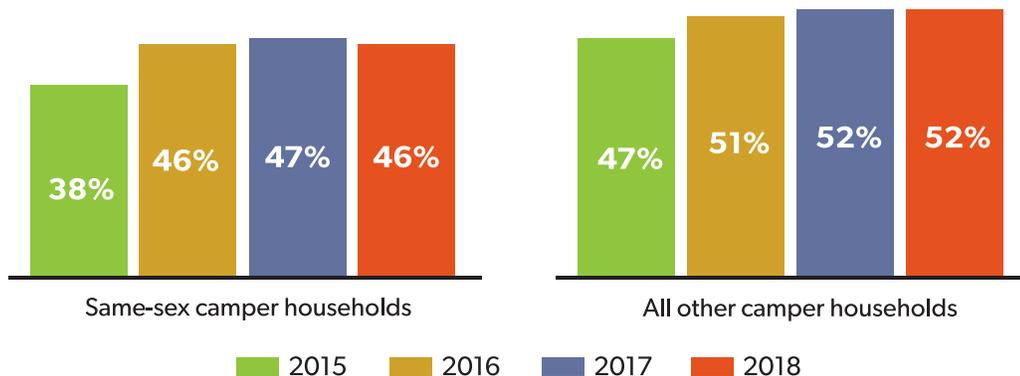
The percentage of same-sex camping households remained stable at 8 percent in 2018, but is still well above the percentage in 2015 (5 percent) and more than seven percent over the U.S. general population figures.

PERCENTAGE OF SAME-SEX CAMPING HOUSEHOLDS



The percentage of same-sex camping households camping with children also remained stable, not far below the percent of all other households who camp with children.

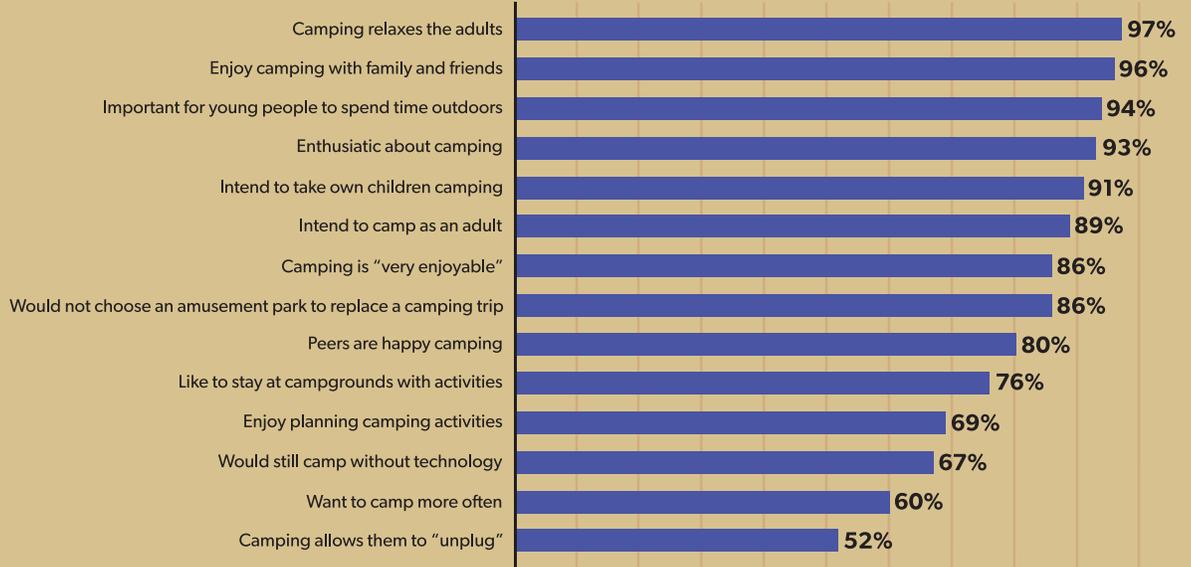
SAME-SEX HOUSEHOLDS WHO ARE CAMPING WITH CHILDREN [2015-2018]



Teens and Camping

Teens have strong opinions when it comes to the benefits of camping. About 96 percent say they enjoy the time camping with family and friends, and they realize that they are healthier thanks to the benefits of camping and other outdoor activities. They say they are more relaxed while camping, and acknowledge that camping is a good way for them to “disconnect” from their electronic lives.

TEEN CAMPERS’ VIEWS TOWARD CAMPING [2018]



Teen Campers and Recreation While Camping

Young campers list fishing (73 percent) and hiking (60 percent) as their favorite activities while camping. Biking (40 percent), sightseeing (42 percent), and canoeing (33 percent) were also popular. All of the above activities have been at the top of teens activities for the past three years.

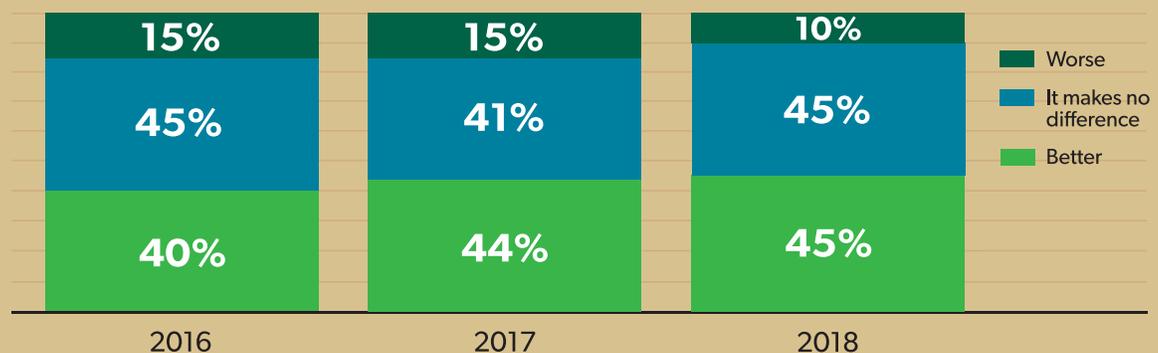
Teens, Technology and Camping

Since 2017, the importance of Wi-Fi or internet access while camping has declined among teen campers from 37 percent to 29 percent.

When pressed though, 80 percent of teens indicate going online one or more times per day while camping, and nearly half go online more than four times. Rest assured, two-thirds of teens claim that they would still want to go camping even if they could not stay in touch via a smartphone or computer.

Over the last three years, the percentage of teens who say that using technology enhances their camping experience has grown.

IMPACT OF TECHNOLOGY ON CAMPING EXPERIENCES [2017-2018]



ABOUT 96 PERCENT OF TEENS SAY
THEY ENJOY TIME SPENT CAMPING
WITH FAMILY AND FRIENDS.





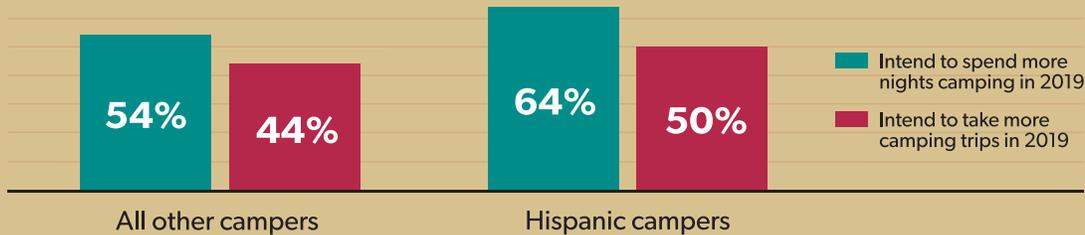
CURRENTLY, HISPANIC HOUSEHOLDS REPRESENT 11 PERCENT OF ALL CAMPING HOUSEHOLDS AND IS THE LARGEST NON-WHITE GROUP OF CAMPERS.

Growth in Camping

Even though there appears to be a leveling of the number of households camping based on ethnicity, since 2014 representation among Hispanics has improved by 5 percentage points. Currently, Hispanic households represent 11 percent of all camping households and is the largest non-white group of campers. What's more, 22 percent of new campers in 2018 were Hispanic. The group represents the fastest growing group of campers based on ethnicity (up from 6 percent in 2014 to 11 percent in 2018).

While Hispanic campers are just as dedicated in their camping as other groups of campers, they represent a much more optimistic group, reporting a higher likelihood to increase their camper nights (64 percent) and camping trips (50 percent) in the coming year. Out of all ethnicities, Hispanic campers are most likely to say that they intend to increase their camping in 2019.

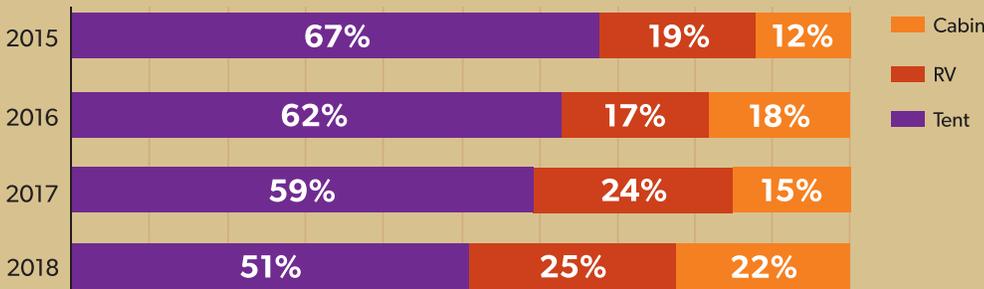
INTENTIONS TO CAMP MORE IN 2019



Camping Accommodations and Experiences

It appears Hispanic campers are trying different types of camping. Over the past four years, usage of tents is dropping among Hispanic camper households, while usage of cabins has increased by ten percentage points since 2015.

PRIMARY ACCOMMODATION PREFERENCES AMONG HISPANIC CAMPERS (2015-2018)



Hispanic campers are also most likely to have tried some type of new accommodation in 2018 (66 percent), and are significantly more likely than other campers to have tried a towable RV in 2018 (21 percent).

Reinforcing the idea that Hispanic campers are seeking new ways of camping and types of camping experiences, they are most likely to want to try an RVing experience (58 percent) or to experience "van life" (22 percent).

About one-fourth of Hispanic campers stay in RVs, yet about half do not own the RV they use most, resulting in Hispanic households highly likely (69 percent) to consider renting an RV from a peer-to-peer listing.

Hispanics are highly social campers. They are the most likely to camp with multiple generations of family members (74 percent), most likely to camp with larger groups of campers (8 campers on average) when compared to other campers, and are more likely than other campers to say that a group outing sparked their interest in camping (25 percent versus 15 percent overall).

Recreation and activities are important to Hispanic campers, with fully half (50 percent versus 40 percent among other campers) stating that on-site recreation is important and are most likely to agree that they like campgrounds with organized activities (44 percent versus 32 percent overall).

Hispanics are the group of campers most likely to leave the campground to go shopping (43 percent versus 32 percent among other campers), enjoy the area nightlife (24 percent versus 15 percent overall).

54 PERCENT OF CAMPERS TRAVEL LESS THAN 100 MILES FROM HOME TO CAMP.

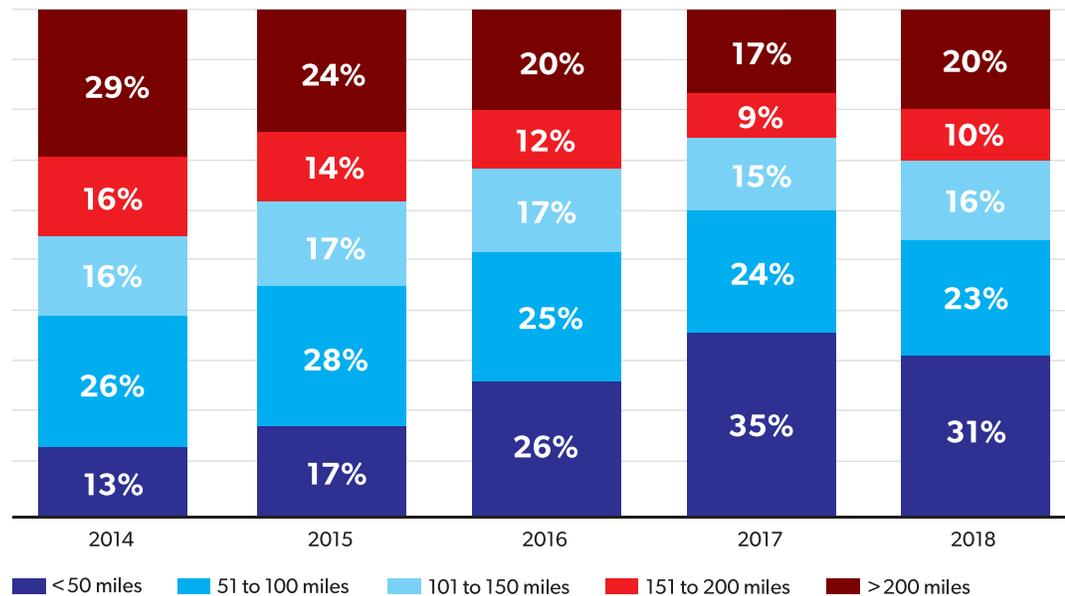


WHERE CAMPERS ARE CAMPING

Distance from Home

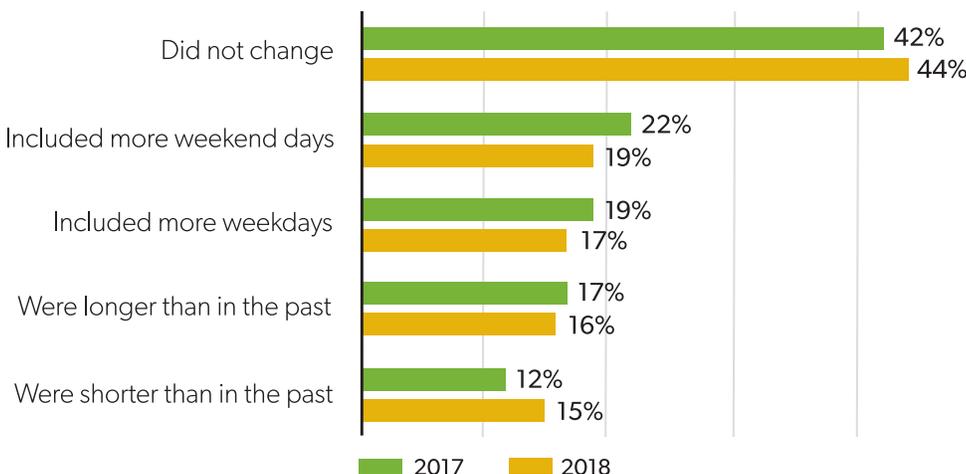
Since campers show a propensity for more, shorter duration trips, it stands to reason that they tend to stay closer to home when compared to previous years. In fact, 54 percent of campers state they travel less than 100 miles from home to camp. Millennial and Gen X campers are the most likely to camp closer to home (and camp more often), while Asian campers tend to travel the farthest distance, with more than half venturing more than 100 miles or more for their camping trips.

TRAVEL DISTANCES FOR CAMPING TRIPS [2014-2018]



While campers seem to be taking shorter duration trips each year, they appear to be taking a higher number of trips each year than in the past. This “camping habit” seems to be evolving into a consistent pattern. Older campers (56 percent of Baby Boomers and 54 percent of Mature campers) are the least likely to change their camping habit year to year. Younger campers are more likely to include more weekend days in their trips, or extend the length of their camping adventures.

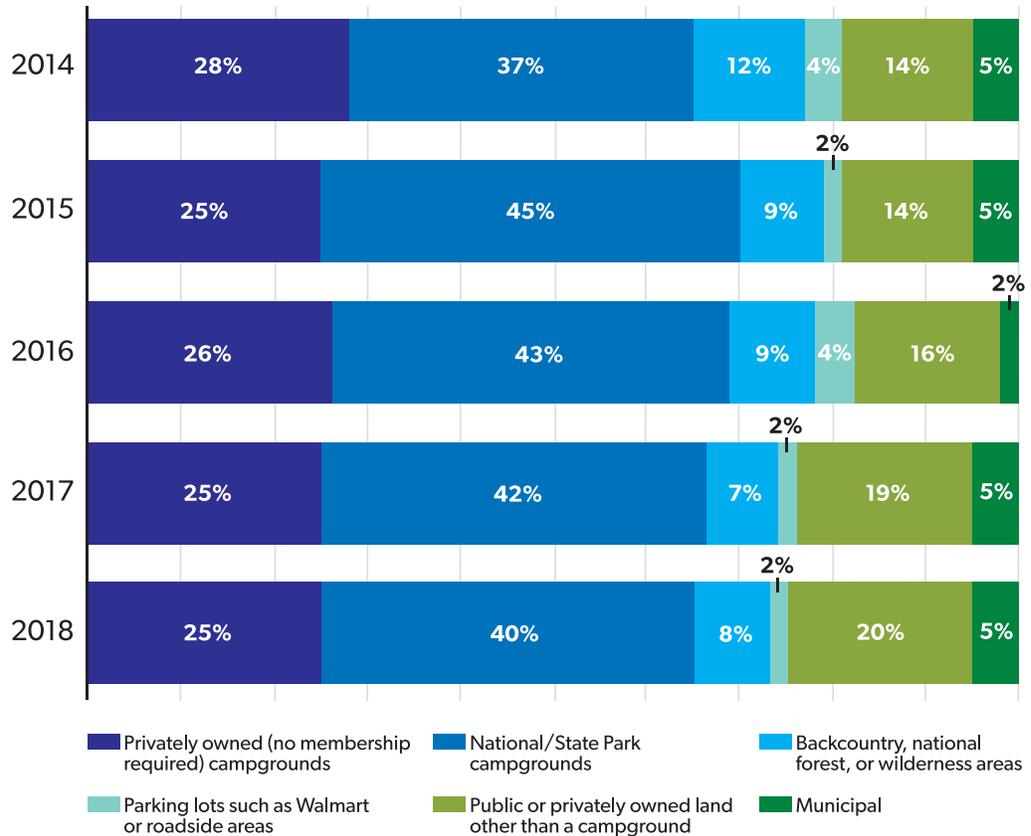
CHANGE IN CAMPING HABITS [2017-2018]



Camping Nights

As more families adopt the camping lifestyle, there is a trend emerging that shows campers are spending more time on public and private lands not specifically designated as a campground.

WHERE CAMPING NIGHTS ARE SPENT



America's Public Lands and Camping

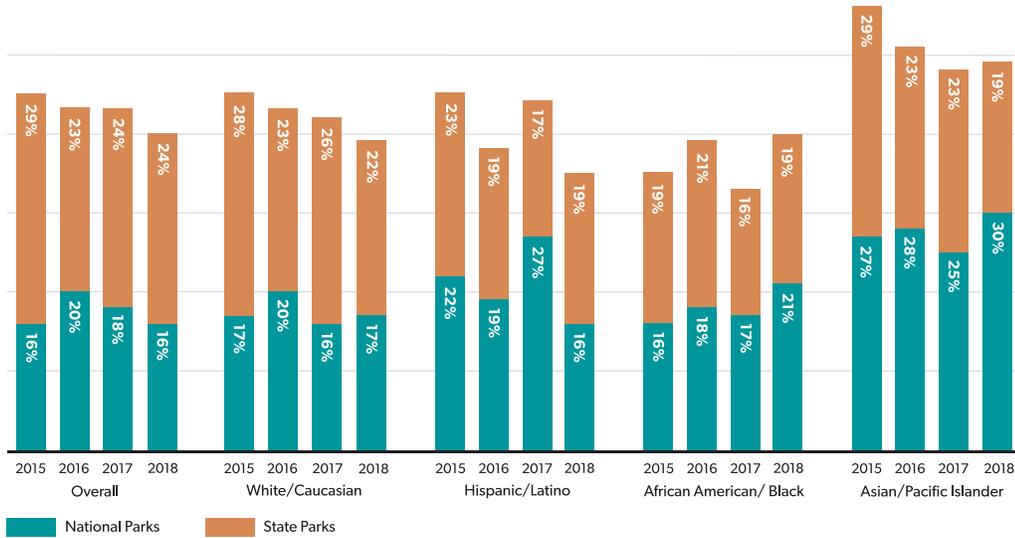
Campers continue to be reliant on public lands for their camping trips. About six in ten camper nights is spent on public lands or in public campgrounds.

While the proportion of camper nights spent at both state and national parks is near 2017 levels, there has been a proportional drop in camper nights in national parks since 2016, suggesting that as campers spend more time camping, they are devoting those additional camper nights to different locations (e.g. public & private land outside of campgrounds).

The overall proportion of camping in national parks and state parks has declined since 2015. However, the proportion of national park and state park camping among African American/Black and Asian campers reached an all-time high in 2018.



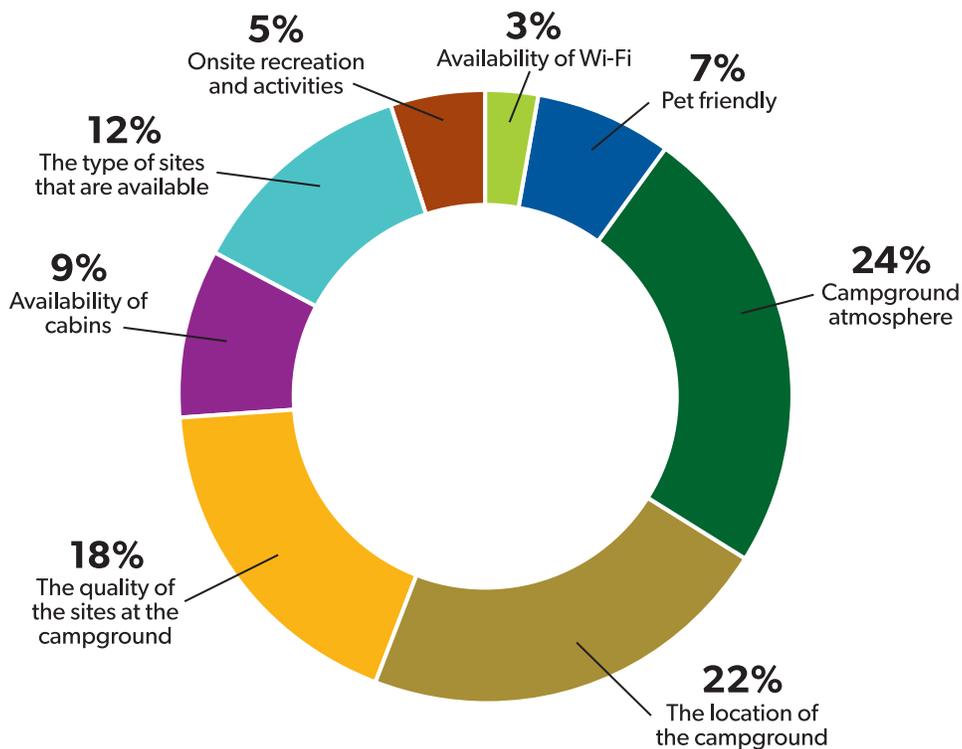
CAMPING NIGHTS IN STATE AND NATIONAL PARKS [2015-2018]



Campground Selection and Offerings

Four in 10 camping households say that the campground site type and quality of site have the most impact on their selection of campgrounds. About one-fourth of camping households mentioned campground atmosphere as a factor, with older campers the least likely to be influenced by campground atmosphere, and the most likely to be influenced by site type and quality.

THE TOP FACTOR IN SELECTING A CAMPGROUND IN 2018

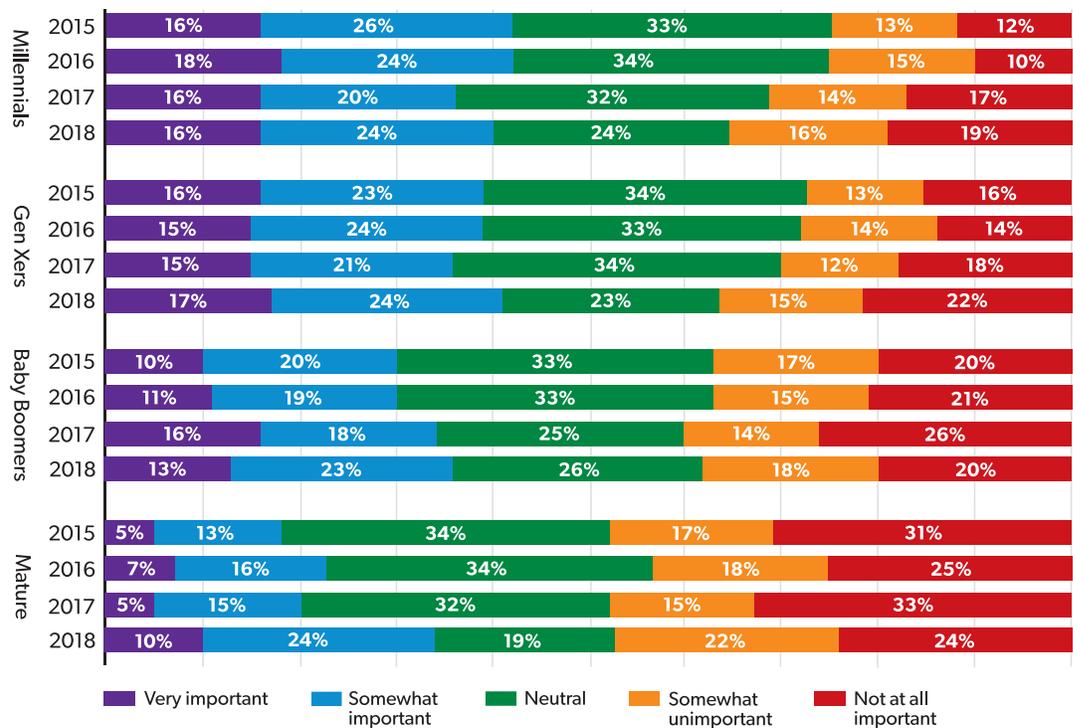


Even though only 5 percent of campers use the presence of on-site recreation as a determinant of campground selection, when asked to rate the importance of on-site recreation and the campground's proximity to local cultural events and attractions in selecting campgrounds, about 4 in 10 camping households view these as important considerations.

On-site recreation grew in importance across all age groups in 2018. About 40 percent of millennials and Gen Xers listed on-site recreation as an important factor in their camping experience, with 37 percent of Baby Boomers and 34 percent of Mature campers in agreement.

Once they're at the campground, clean bathrooms has consistently been the most important factor for campers while staying at a campground (averaging nearly 50 percent since 2014). The second tier of factors include allowing pets (up 4 percentage points since 2014 to 23 percent); being kid friendly (21 percent); and offering recreational activities (20 percent). Interestingly, the importance of free WiFi connectivity has dropped 3 percentage points since 2014, with a 2018 rating of 16 percent.

IMPORTANCE OF ON-SITE RECREATION [2015-2018]



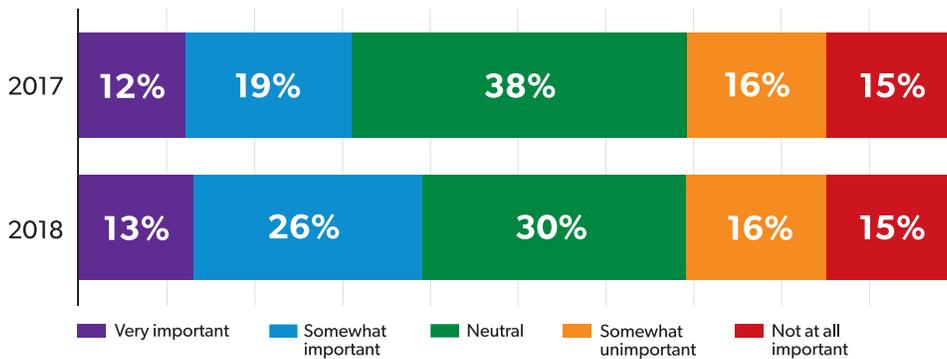
WHAT CAMPERS DO WHEN THEY'RE CAMPING

Activities

Nearly all campers (9 out of 10) say they leave campgrounds to participate in other activities, including sightseeing, dining or other outdoor recreational opportunities. Combining a camping trip with a musical event is increasing in popularity from (9 percent in 2016 to 19 percent in 2018).

These findings reflect a desire among campers for more diverse experiences while camping, while continuing to incorporate more forms of outdoor recreation into their camping trips.

PROXIMITY TO LOCAL ATTRACTIONS [2017-2018]

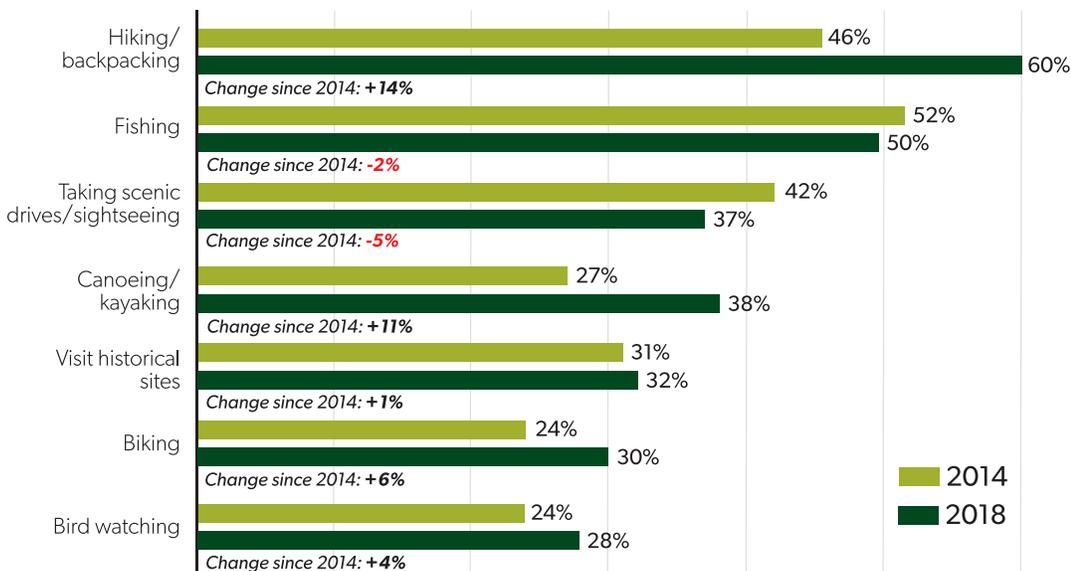


Outdoor Recreation

The growth in outdoor activities while camping is being driven by the more physical pursuits, including hiking and backpacking (up 14 percent since 2014), canoeing/kayaking (up 11 percent since 2014), and biking (up 6 percent since 2014). It should be noted that fishing continues to be the second-most-popular activity while camping, but has actually dropped slightly in popularity (down 2 percent) since 2014.

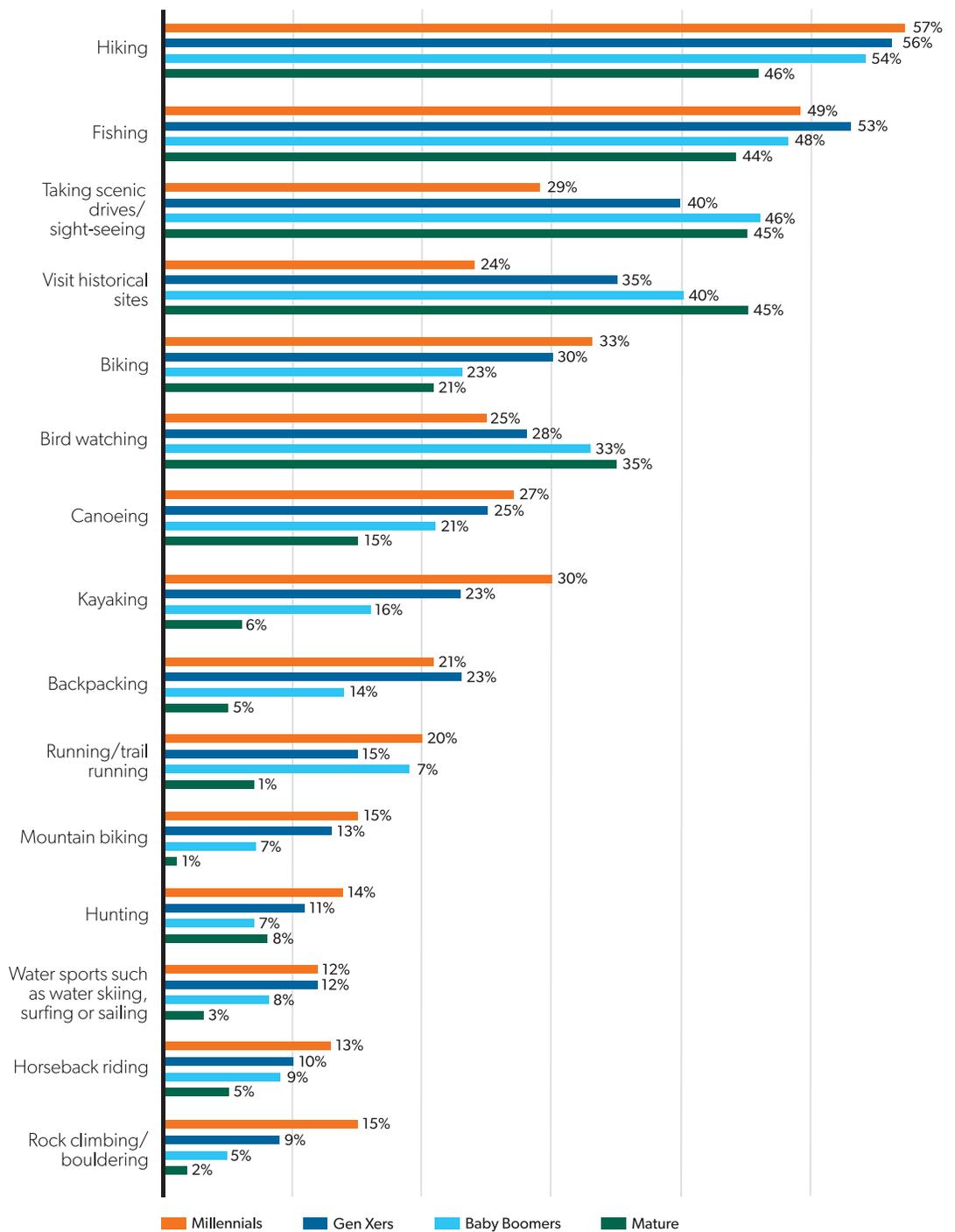
Participation in hiking/backpacking has almost doubled among African American campers since 2014 (from 34 percent in 2014 to 63 percent in 2018), while rates of fishing across all groups have dropped somewhat.

PARTICIPATION IN OUTDOOR RECREATION WHILE CAMPING [2014-2018]



Younger campers appear to be driving the increase in popularity of hiking and backpacking, but the popularity of hiking and fishing seems to cross all generations.

PARTICIPATION IN OUTDOOR RECREATION, BY AGE WHILE CAMPING [2018]



YOUNGER CAMPERS APPEAR TO BE
DRIVING THE INCREASE IN POPULARITY OF
HIKING AND BACKPACKING.



HOW CAMPERS ARE CAMPING

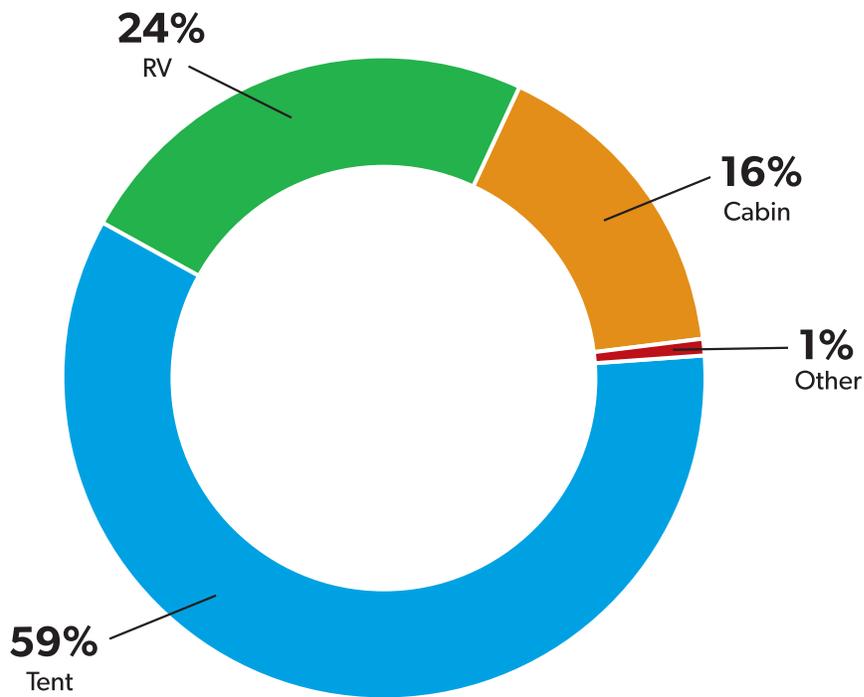
Accommodations

Tents continued to be the primary type of camping accommodation in 2018, with almost 60 percent of campers, overall, identifying as tenters.

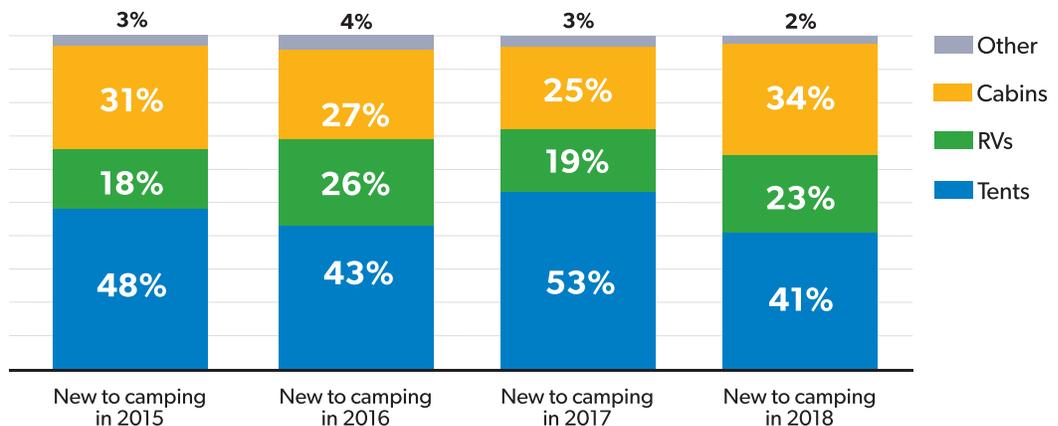
By contrast, new campers report that they are much less likely to stay in tents, with nearly 60 percent of new campers in 2018 staying in cabins, recreational vehicles or other accommodations. In 2015, just over 50 percent of new campers reported that tents were their primary accommodation.

In fact, cabins have increased in popularity among almost all campers, not only those new to camping, including millennials (from 14 percent in 2016 to 21 percent in 2018), Gen X (from 16 to 22 percent), and Baby Boomer campers (from 22 to 33 percent).

PRIMARY CAMPING ACCOMMODATION FOR 2018



PRIMARY CAMPING ACCOMMODATION AMONG NEW CAMPERS [2015-2018]

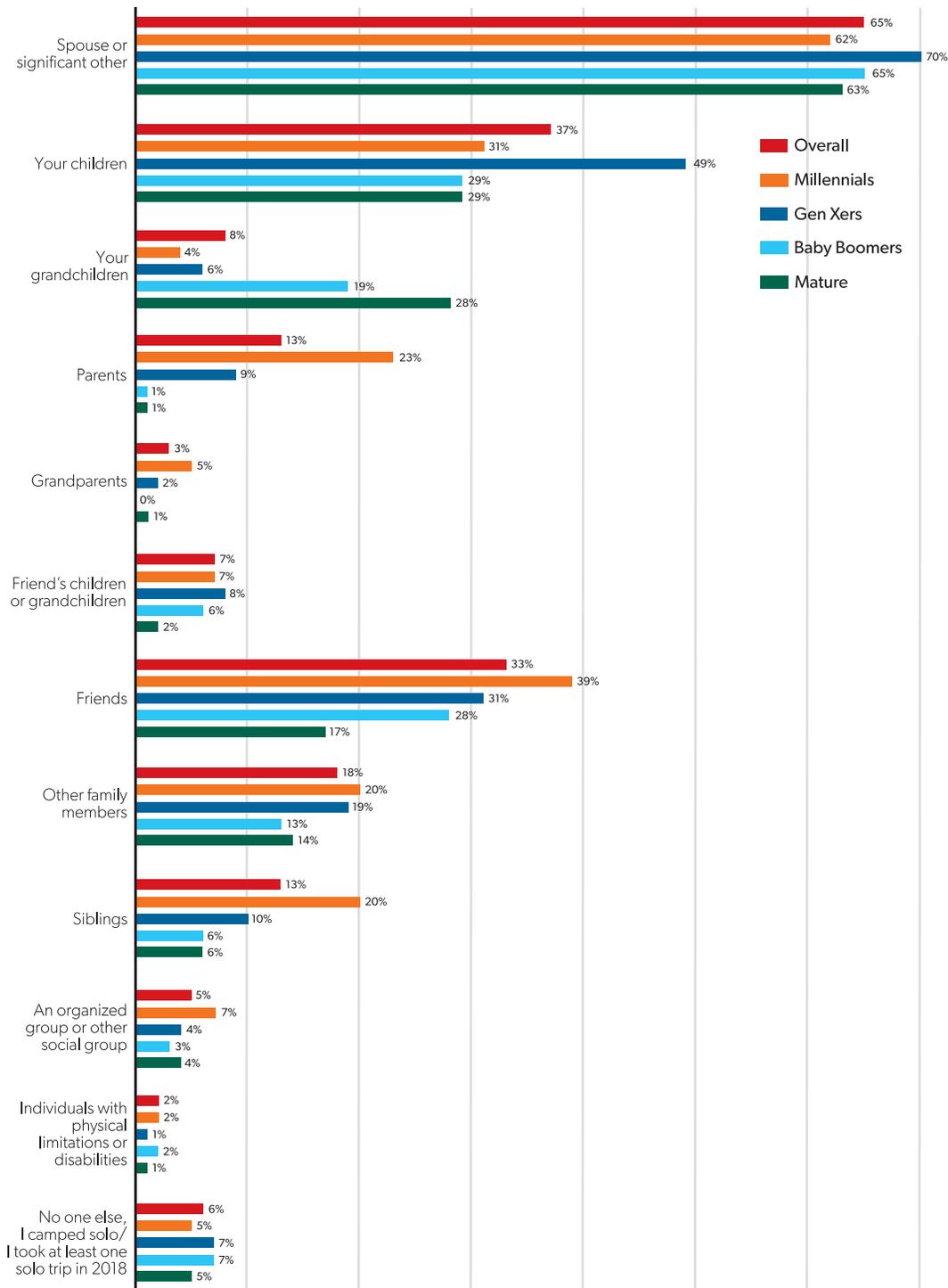


Who Campers are Camping With

Younger campers seem to identify more closely with their generation than with their ethnicity. Millennial campers tend to camp in larger social groups, forming their own “camping families” that may include friends, siblings and parents.

Gen X campers are more likely to camp with with spouse or significant other. In the past, Hispanic campers showed a high propensity to camp more with siblings (26 percent last year versus 15 percent in 2018) and parents (24 percent in 2017 versus 14 percent in 2018), but that characteristic appears to have decreased in 2018.

WHO CAMPERS ARE CAMPING WITH (2018)



Millennials (average camping group size: 6) and GenXers (6) are most likely to camp with a somewhat larger group during their typical trips when compared to Baby Boomers (5) and Mature campers (5).

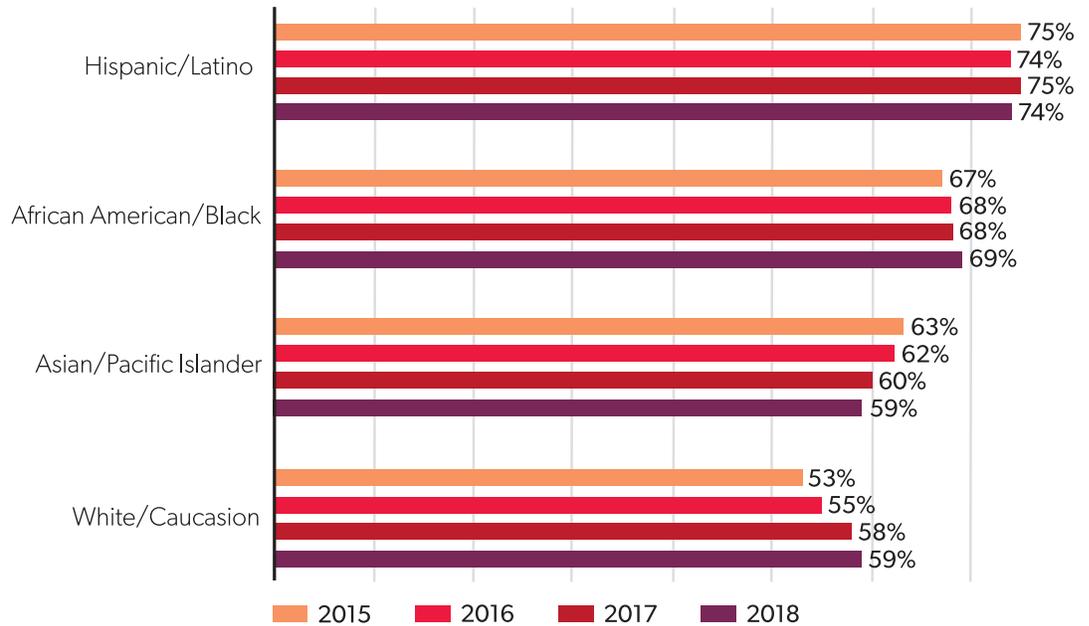
Hispanics report camping with the largest group sizes (8); African Americans report camping with somewhat reduced group sizes since last year (7 in 2017 versus 5 in 2018).

Multi-generational Camping

Multi-generational camping has increased moderately over time. Currently, about 60 percent of camping households report taking at least one camping trip that include multiple generations – up 56 percent from 2015.

Hispanic campers are still most likely to camp with multiple generations (74 percent), but there are upward trends among white (from 53 percent in 2015 to 59 percent in 2018) and African American (from 67 percent to 69 percent).

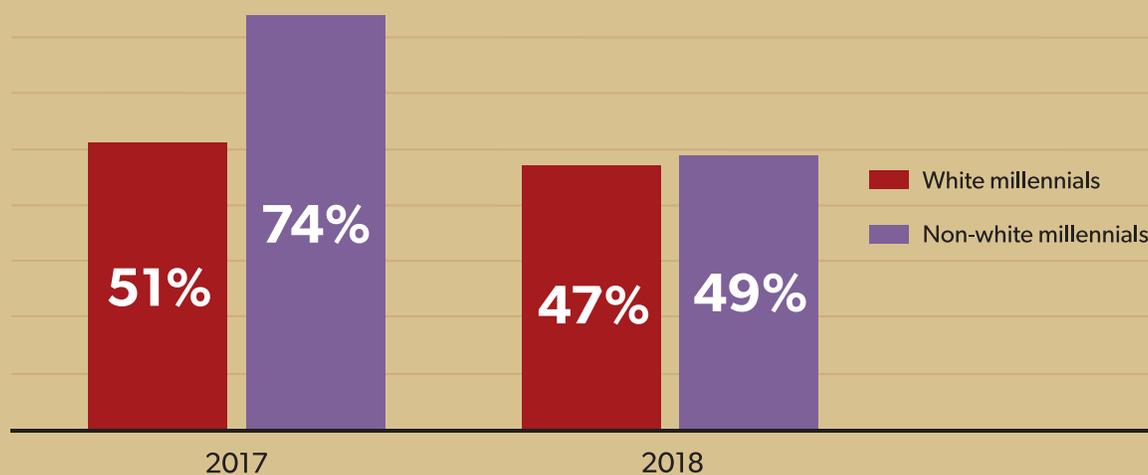
MULTI-GENERATIONAL CAMPING, BY ETHNICITY [2015-2018]



As the large bubble of new campers matures in their camping lifestyle, they seem to be settling into their favorite styles of camping, leading to less "experimentation" in different camping accommodations.

- Even though 47 percent of all campers indicated that they tried a new accommodation in 2018, this represents a decline from 55 percent in 2017.
- Looking at the influx of young, more diverse new campers over the last several years, in 2018 trial of new accommodations dropped among all ethnicities but was even more dramatic among younger, non-white campers, indicating less experimentation and a development of camping preferences.

TRIAL OF NEW ACCOMMODATIONS [2017-2018]



OLDER CAMPERS SAY THEIR OVERALL
LOVE OF THE OUTDOORS IS WHAT DROVE
THEM TO THE CAMPING LIFESTYLE.



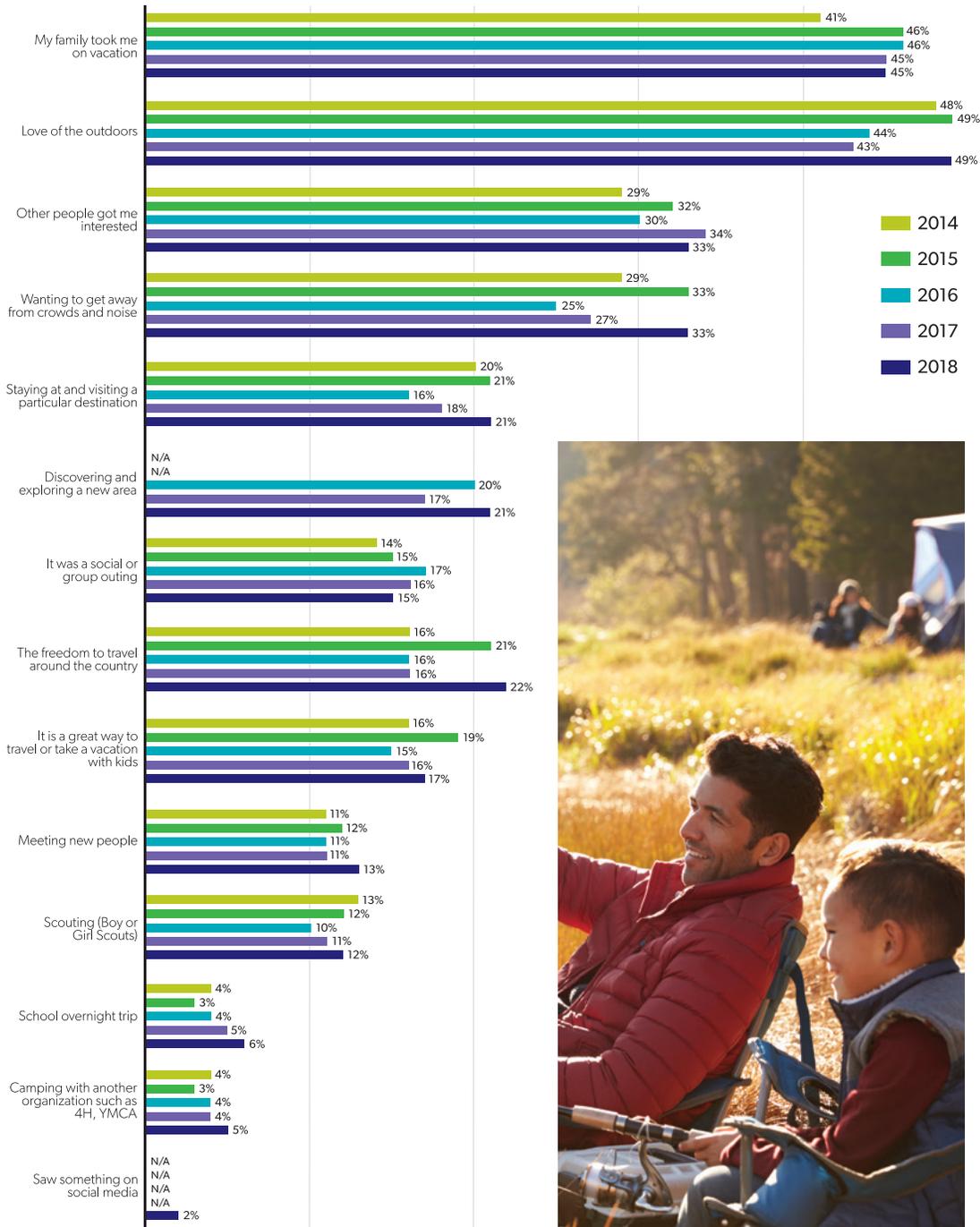
WHY CAMPERS ARE CAMPING

Initial Interest in Camping

An overall love of the outdoors is emerging as a driving force for North Americans to get outside. Escaping crowds and noise also grew markedly in 2018 as a driving factor.

Younger campers credit family influence for their interest in camping (nearly 50 percent), while older campers say their overall love of the outdoors is what drove them to the lifestyle (nearly 60 percent).

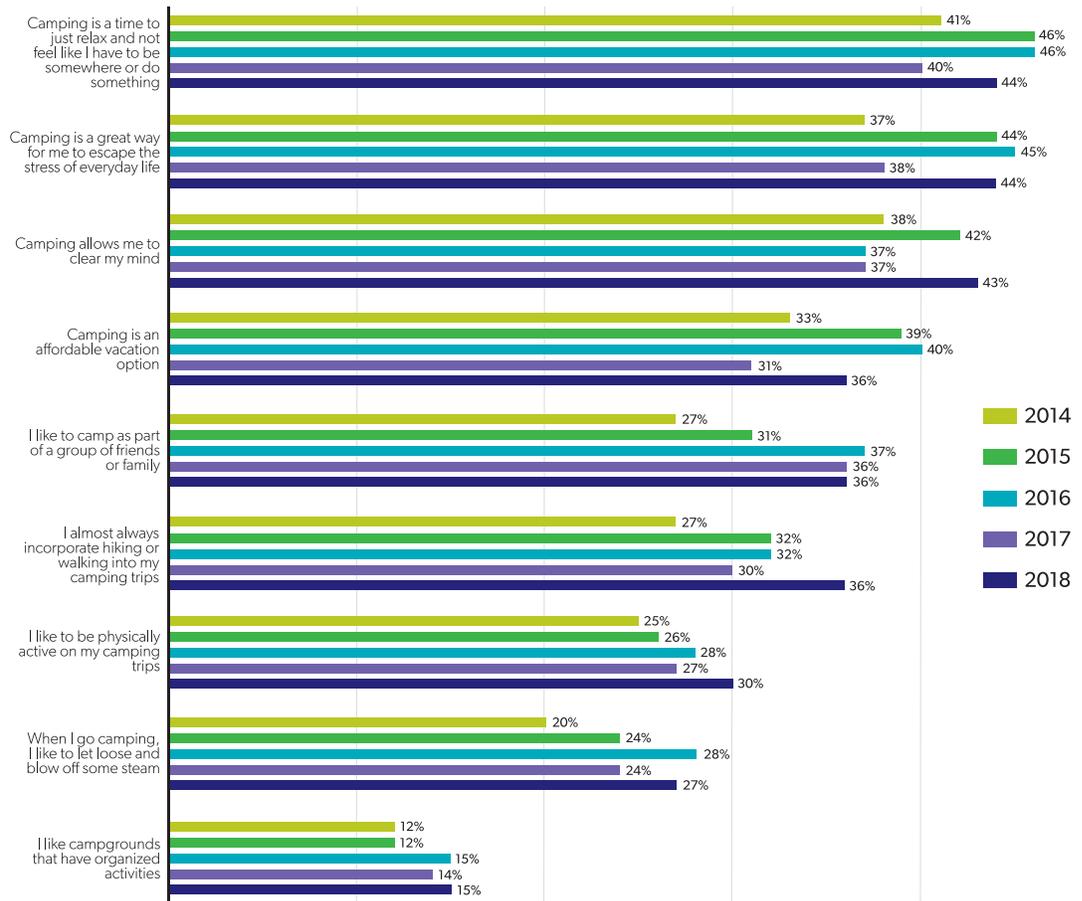
SPARKED INTEREST IN CAMPING [2014-2018]



The Benefits of Camping

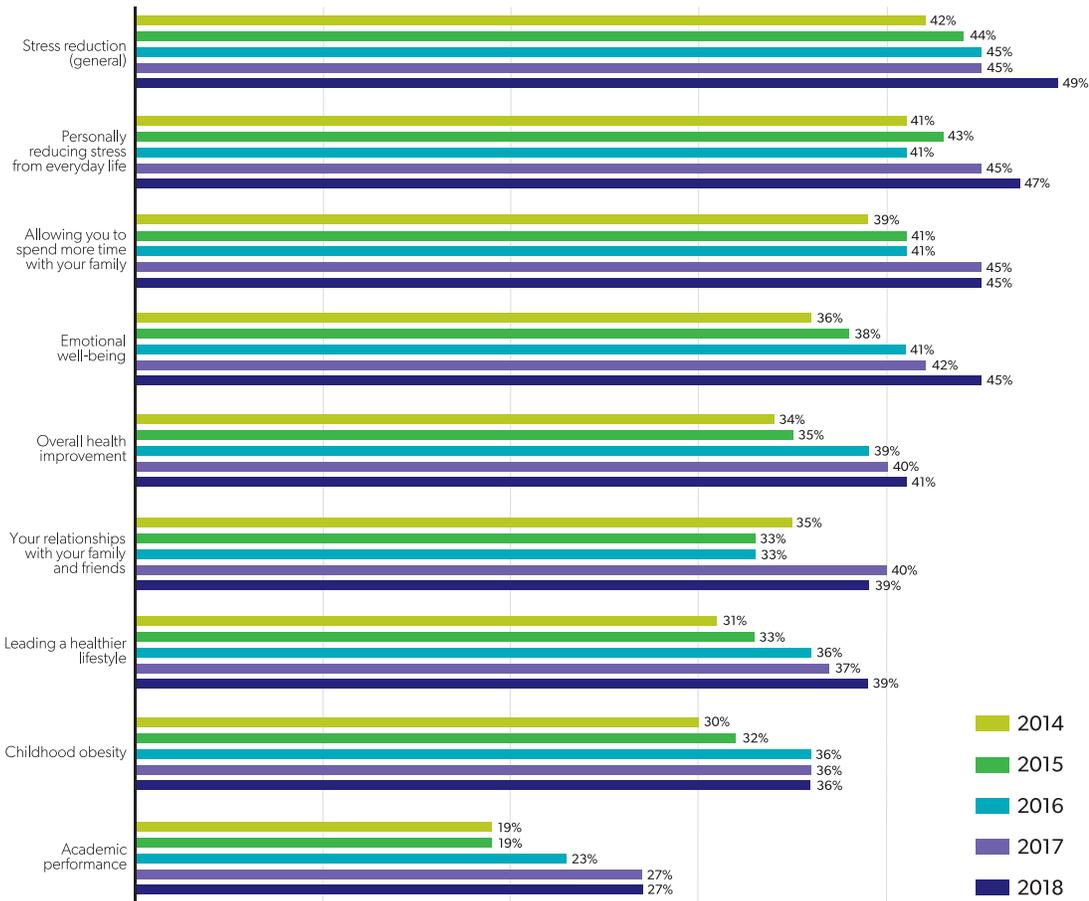
Overall, campers are increasingly seeking ways to become more active. That goes for all generations and all ethnic groups. Campers view camping as a means to escape the stress of their everyday lives, relax, and clear their minds. Hiking and/or walking seems to be the primary means to add activity to their camping trips.

THE BENEFITS OF CAMPING (2014-2018)



Half of all campers say camping has a great deal of impact, both in general and for themselves, in decreasing stress levels and allowing them to spend more time with their families. In fact, camping is credited for contributing to emotional and physical health and overall healthier lifestyles. Since 2016, the differences between white and non-white campers in the area of recognized camping benefits continues to decrease as younger, more diverse campers become more established in their camping habits.

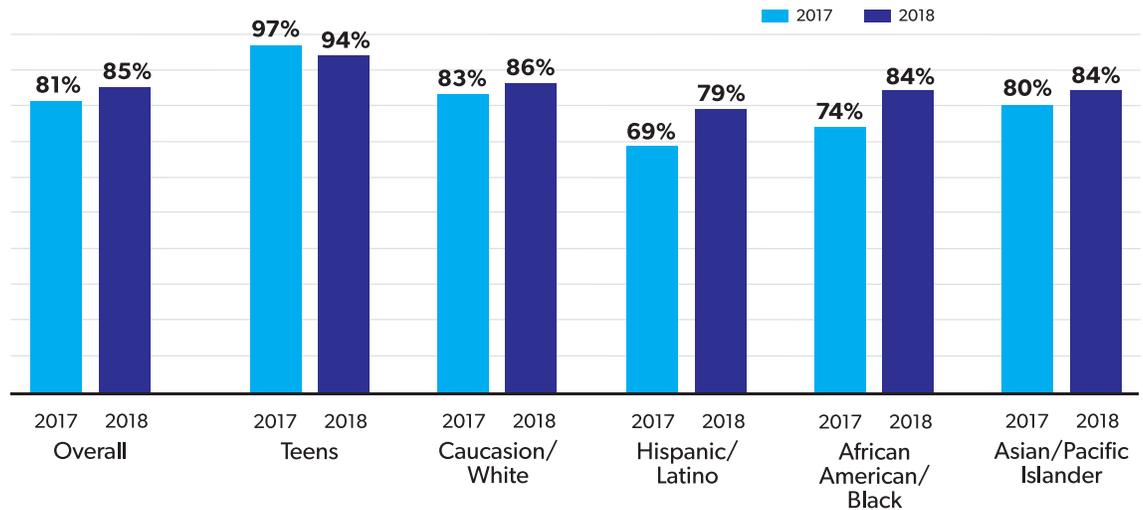
IMPACT OF CAMPING - % GREAT DEAL OF IMPACT [2014-2018]



While 85 percent of adults say the participation of children in outdoor activities is important (an increase of 4 percent since 2017), teens themselves find kids' participation in the outdoors significantly more important (94 percent).

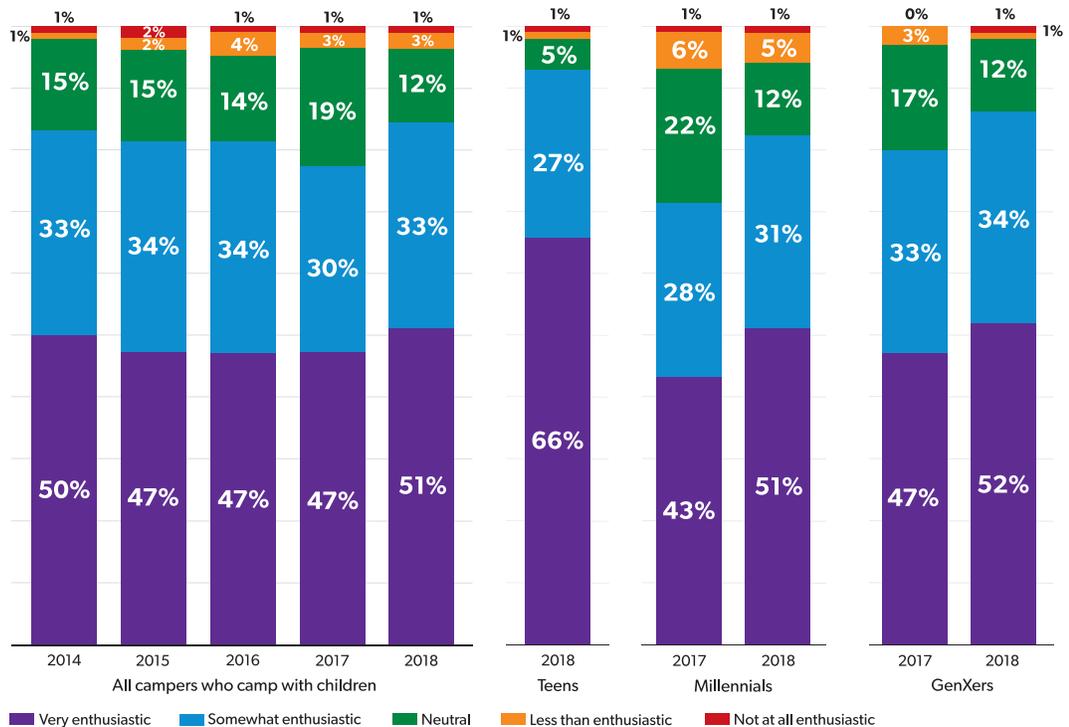
Non-white campers are increasingly more likely to say the participation of children in the outdoors is "very important."

IMPORTANCE FOR KIDS TO PARTICIPATE IN OUTDOOR ACTIVITIES [2017-2018]



As more millennials with children adopt the camping lifestyle, enthusiasm for camping among children is increasing. In fact, teens again have a much higher level of enthusiasm (66 percent say they are very enthusiastic about camping) compared to 51 percent of adults camping with children.

ENTHUSIASM FOR CAMPING AMONG KIDS [2014-2018]



The Canadian camping market appears to be more stable than the U.S. market with Canadian campers less likely to change their habits in terms of the number of trips or nights.

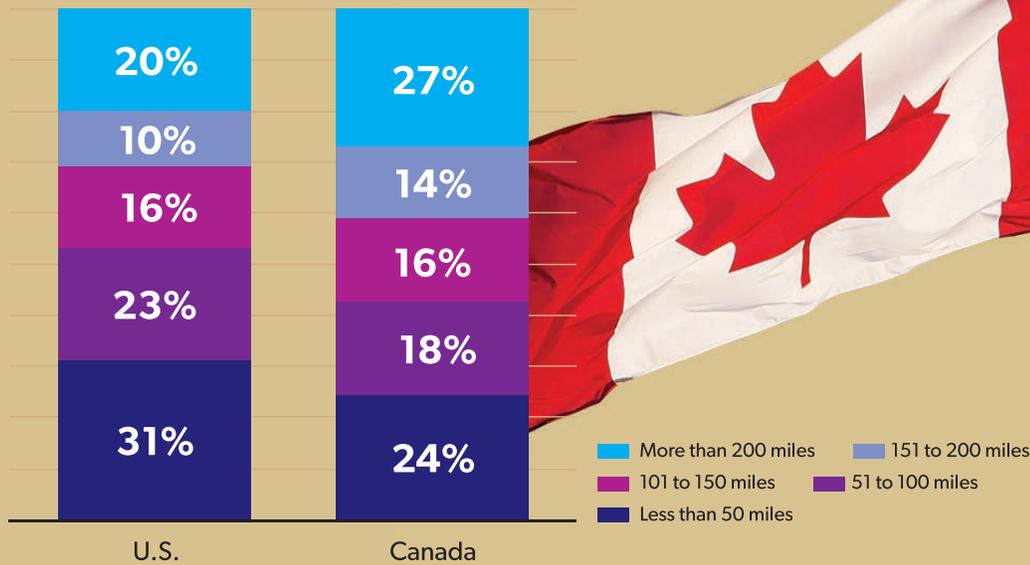
Compared to campers in the U.S., Canadian campers appear to be more satisfied with their camping experiences, being much less likely to seek new types of accommodations or experiences. Canadians are significantly less likely to say that they plan to purchase or upgrade their accommodations whether it's a tent or RV.

However, Canada continues to see some changeover in the types of accommodations being used, with the use of tents dropping from 60 percent in 2016 to 51 percent in 2018, and the use of an RV increased from 22 percent to 30 percent.

Similar to last year, 42 percent of Canadian households tried a new accommodation in 2018, and one-third say they would like to try a luxury cabin in 2019. Down substantially from last year, and possibly due to a high rate of RV ownership (64 percent) and usage (30 percent), interest in trying a motorhome dropped by 12 percentage points. Still, close to half of Canadian camper households (46 percent) are interested in a glamping experience.

Canadian campers tend to travel longer distances for their camping trips, while U.S. based campers who reside in the west are also somewhat less likely to stay close to home.

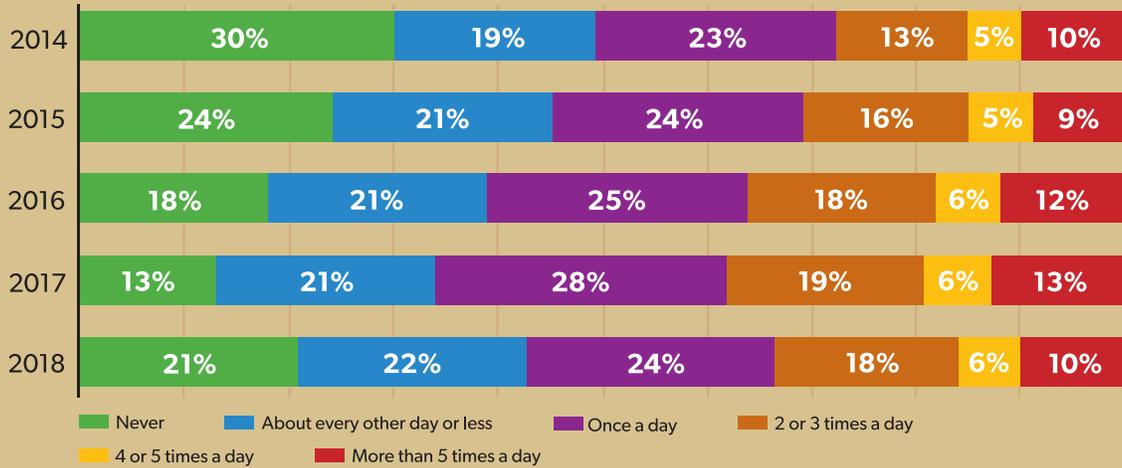
TRAVEL DISTANCES FOR CAMPING



Going Online While Camping

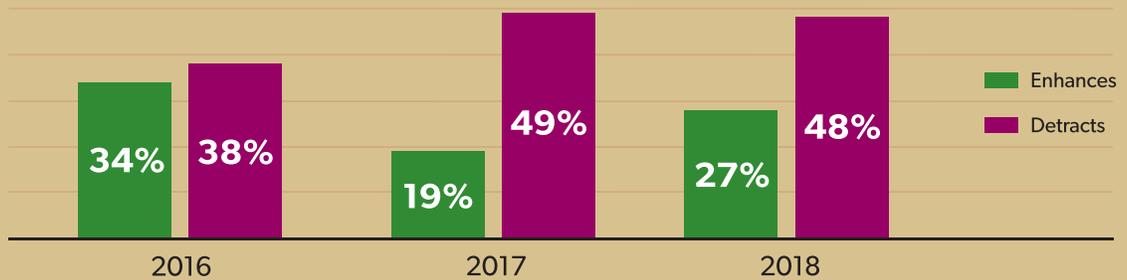
Campers are apparently not as “hooked” on the internet as they were previously. Breaking a trend first reported in 2014, campers in 2018 say they are less likely to go online, even occasionally, while camping. This holds true across all age groups.

FREQUENCY OF GOING ONLINE WHILE CAMPING (2014-2018)

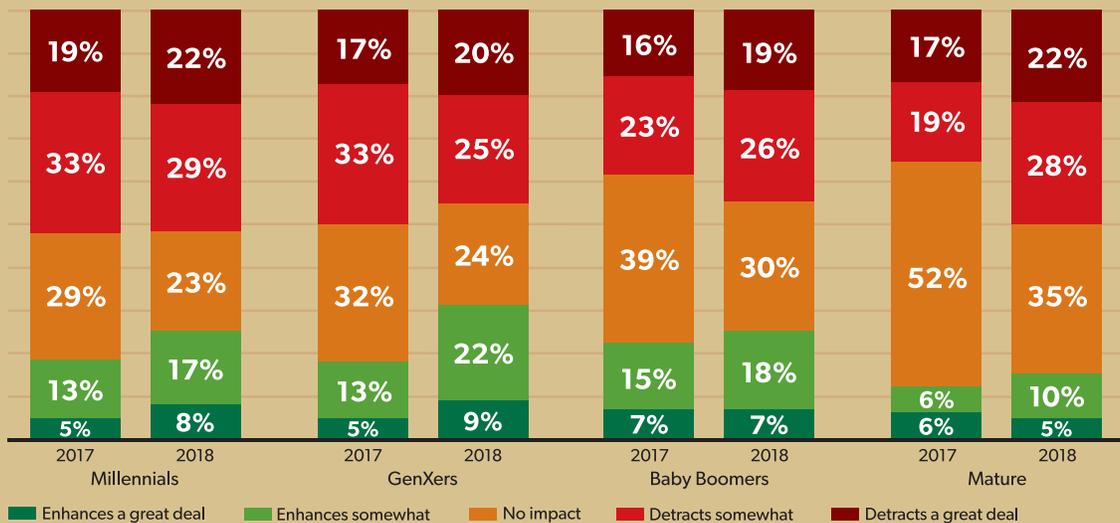


While the results this year are comparable to last year in terms of whether campers say that the use of technology detracts from their experiences, there is an increase in the percentage who say it enhances their experiences (with a corresponding drop in those who say it has no impact).

IMPACT OF TECHNOLOGY ON ENJOYMENT WHILE CAMPING (2016-2018)



Younger campers are the most likely to say that technology detracts from their experiences.



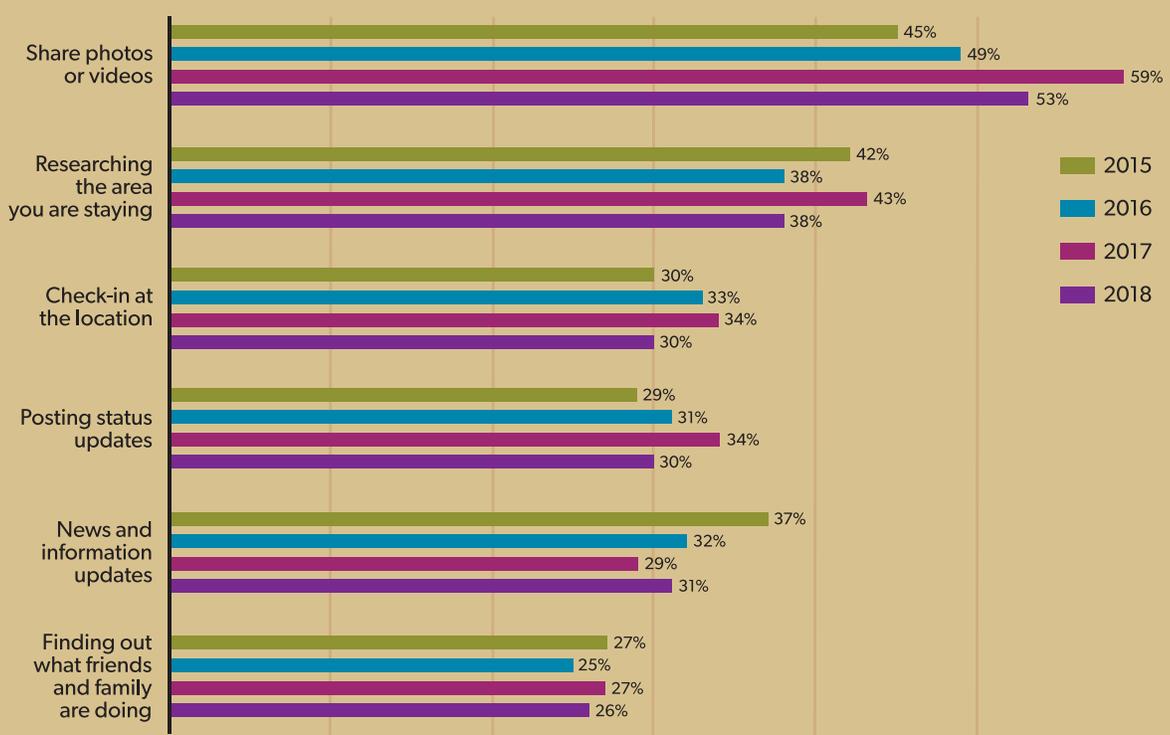
Unplugging While Camping

Because technology is so highly integrated into our daily lives, people have strong personal views on what it means to “unplug” -- even while camping. When campers were asked how they unplug while camping, similar to last year, about a third of all campers (34 percent) acknowledge they have their smartphone with them, but don’t turn it on. Overall, most campers rely on technology at some level, whether it’s to have it in case of emergency or whether they allot certain times of the day for usage, though there is an uptick in the percentage who say that unplugging means no access to any technology (from 9 percent in 2017 to 14 percent in 2018).

Using Social Media While Camping

In 2018, there appears to be a change in some of the habits of campers, including a drop in using social media to share photos or videos, researching new areas and to check in at a location, though usage is still at levels observed two years ago.

SOCIAL MEDIA USE WHILE CAMPING [2015-2018]



Technology, Mobility and the Ability to Camp More

Among campers who say access to cell service or Wi-Fi is important while camping, those campers report being able to camp more (an average of an additional six days per year) and take more trips when they have adequate Wi-Fi access.



Camping Families

Families with children are often the most devoted camping group, taking the most trips and spending the most nights camping in 2018. Couples with children are most likely to own or use an RV (29 percent), and this group also intends to spend more nights camping in the the coming year. The parents in camping families are quick to identify themselves as lifelong campers, and are the mostly likely group to own their own camping equipment – be it a tent or an RV – and they are also open to renting an RV from a peer-to-peer service.

Tents are far and away the preferred accommodation for all family types, though couples with children are least likely to prefer tents (52 percent versus 60 percent for couples with children) and most likely to camp in an RV (29 percent).

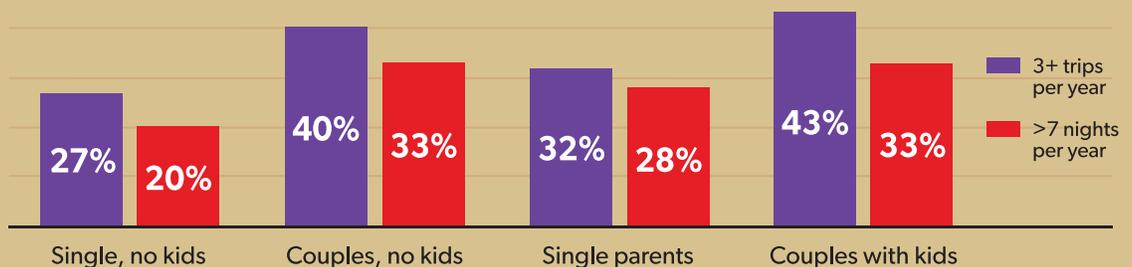
Couples with children are the most likely to purchase some type of new camping equipment, whether it's a tent, motorhome or towable RV.

LIKELY TO PURCHASE IN 2019

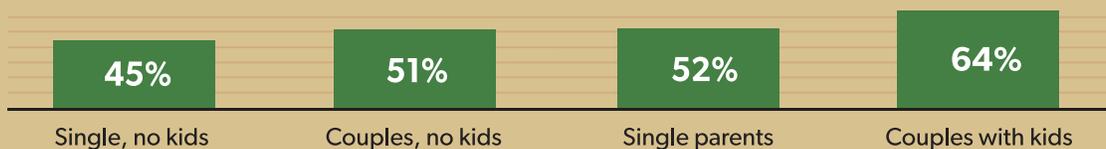
	Single, No Kids	Couples, No Kids	Single Parents	Couples, With Kids
Tent	34%	33%	42%	47%
Motorhome	21%	25%	28%	36%
Travel Trailer	13%	14%	19%	25%
Pop-Up	14%	13%	18%	25%
Fifth Wheel Trailer	10%	13%	19%	24%
Pick-Up Camper	11%	13%	18%	23%

Couples with children say they took more camping trips in 2018, and they say they are likely to keep camping more in 2019. Couples, in general, are more likely to identify themselves as established, lifelong campers, and their strong desire to spend quality time with their children helped spur their camping lifestyle. These parents also place a high value on children spending time in the outdoors.

CAMPING TRIPS AND CAMPING NIGHTS [2018]



INTEND TO SPEND MORE NIGHTS CAMPING IN 2019



Shifts in Camping Preferences Helping to Fuel Camping

Younger campers are looking for a variety of experiences when it comes to their camping. That variety could include glamping, RVing, backcountry camping or an off-road experience.

Interest in both van life and glamping has more than doubled in the past year.

PREFERENCES FOR TRYING NEW CAMPING EXPERIENCES, ALL AGES [2018]



YOUNGER CAMPERS DRIVING
THE FUTURE OF CAMPING



Glamping

A large number of campers are interested in a glamping (45 percent) or RVing experience (44 percent). Glamping is defined as staying in a unique, non-RV accommodation that includes an enhanced level of services and amenities.

No matter the age group, glamping is hot. A full 50 percent of millennials (and nearly 50 percent of Gen Xers) say they are interested in glamping (up 25 points from 2017 findings).

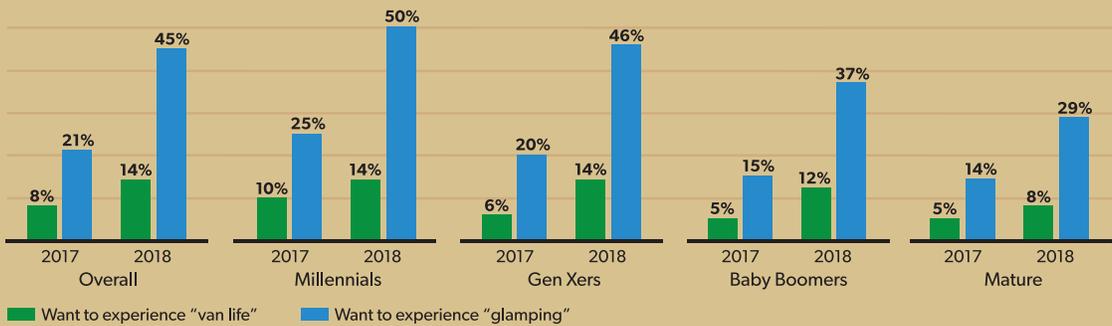
Interest in glamping has spiked among Asian camper households, rising 36 percentage points since 2017 (from 22 percent to 58 percent), though close to half of Hispanic and African American camper households are also interested in glamping, a rate that has doubled.

Van Life

“Van life” is a new, emerging style of camping that involves the use of a smaller, motorized Class B recreational vehicle. When it comes to van life camping, all age groups showed a similar interest.

Interest in van life is highest among African American campers, up 12 points to 22 percent since last year; Hispanic campers (58 percent) are most likely to seek an RVing experience.

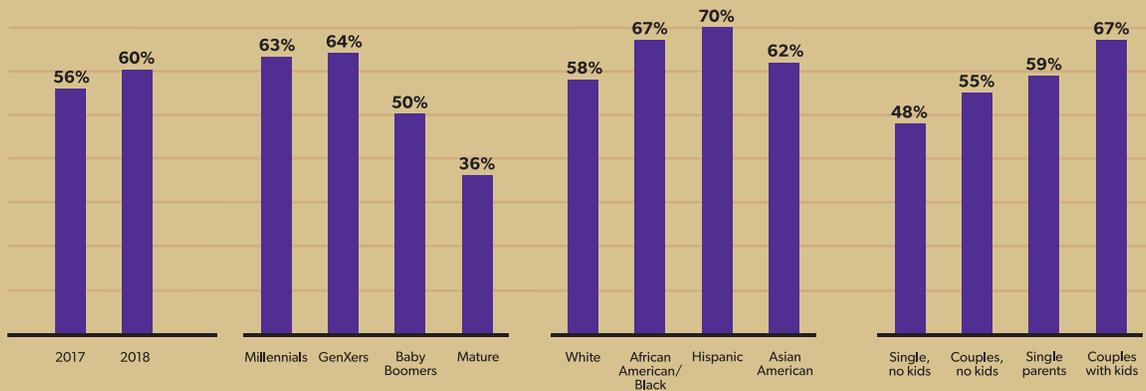
INTEREST IN GLAMPING AND “VAN LIFE” [2017-2018]



Peer-to-Peer RV Rental: Technology Making RVing More Accessible

While still a small part of outdoor industry, peer-to-peer rental companies are quickly gaining traction as a viable option for camping families who want to try RV camping, but aren't yet ready to buy. Six in 10 non-RV owners say they would considering renting from such a service, with more younger campers saying they would like that option prior to considering purchasing their own recreational vehicle. RV owners are increasingly making their vehicles available for peer-to-peer rental, seeing a means to generate income from their RV purchase. Peer-to-peer rental services appear to offer campers a new way to extend their travels, and access RVs that they otherwise wouldn't experience.

LIKELY TO RENT FROM PEER-TO-PEER SERVICE [2017-2018]



CAMPERS ARE FINDING A
CAMPING STYLE THAT WORKS
BEST FOR THEIR LIFE STAGE.



THE FUTURE OF CAMPING

Summary

The future of camping is strong, as evidenced by the steady participation of younger millennial and Gen X campers since the first report in 2015 (62 percent in 2015; 77 percent in 2018). As younger campers stay committed to camping – and enter into new life stages as they marry and have children – their behavior changes bode positively for the industry. Even the youngest of the youngest group of campers surveyed (Gen Z) report they intend to camp as adults (90 percent).

Whether young or old, new or a life-long camper, those who camp with friends or with their family, even those who are retired and live on the road, data is showing that campers are motivated to find a camping style that works for their life.

How Life Stages are Affecting Camping

No matter which generation a camper falls into, research shows life stages (having kids or increases in income, for instance) are a much better indicator to a camper’s desire to camp more or less often. Millennials are much more likely to say having kids is a major life event that impacts their camping lifestyle, often prompting them to camp more often. Gen X campers generally say they camp more as their children get older, while Baby Boomers and Mature campers say while retirement allows them more time to camp, eventual physical limitations negatively impact the amount of time they can camp.

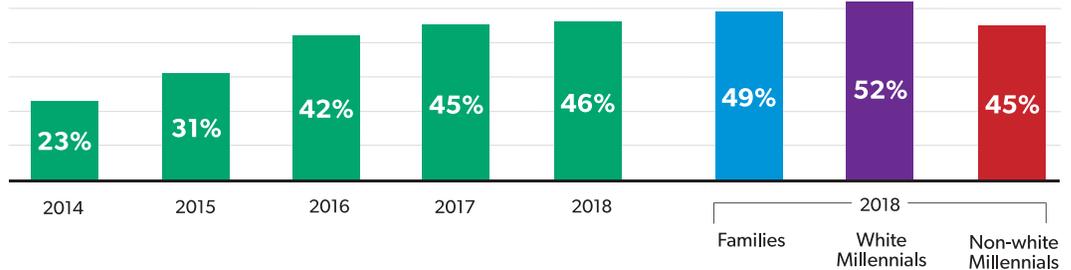
RANKING OF LIFE EVENTS THAT IMPACTED CAMPING IN 2018

	Millennials	Gen Xers	Baby Boomers	Mature
1	30% Having kids/presence of kids in the household	27% Seeing popular destinations others are going to	37% Retirement	37% Retirement
2	30% Seeing popular destinations others are going to	24% Kids getting older	24% Seeing popular destinations others are going to	28% Physical limitations
3	27% Increased income	22% Having kids/presence of kids in the household	22% Physical limitations	26% I do not want to try new accommodations
4	20% Marriage/significant other	20% Increased income	17% Grandchildren	24% Grandchildren
5	16% Moving to a different area/relocation	13% Physical limitations	16% I do not want to try new accommodations	16% Seeing popular destinations others are going to

Optimism Around Future Camping

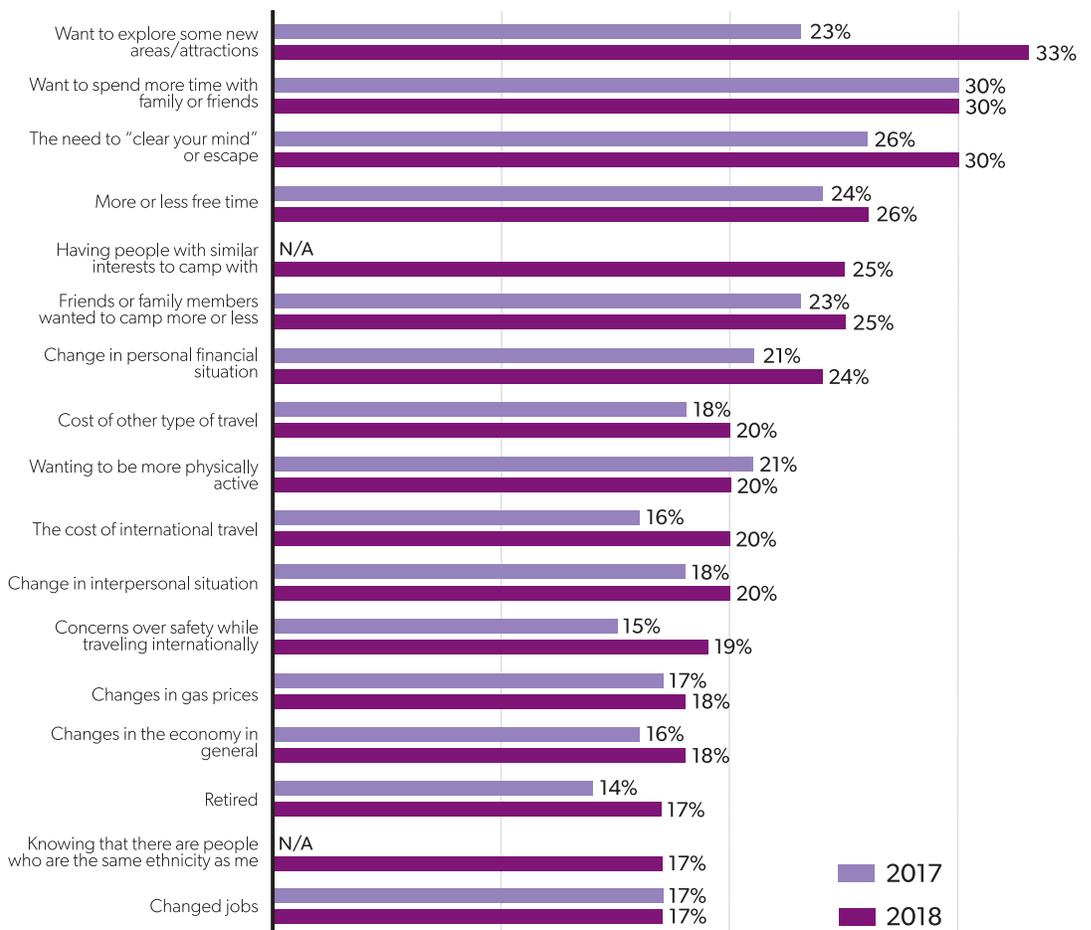
Since 2014, the percentage of campers who intend to camp more often has doubled to 46 percent in 2018, which can be seen as a strong indicator that campers are indeed finding ways to camp that work with their preferences and, most importantly, stages in life. Camping families and millennial campers are the most optimistic about their future camping.

INTENTIONS TO CAMP MORE OFTEN [2014-2018]



Among campers who increased the number of camping trips in 2017, the desire to explore new areas and spend more time with family and friends, as well as the need to get away were driving forces. If we look at the reasons people camped more in 2017, and over time, we know these factors are what will continue to drive increased camping in 2018 and beyond.

REASONS FOR CAMPING MORE OFTEN [2017-2018]

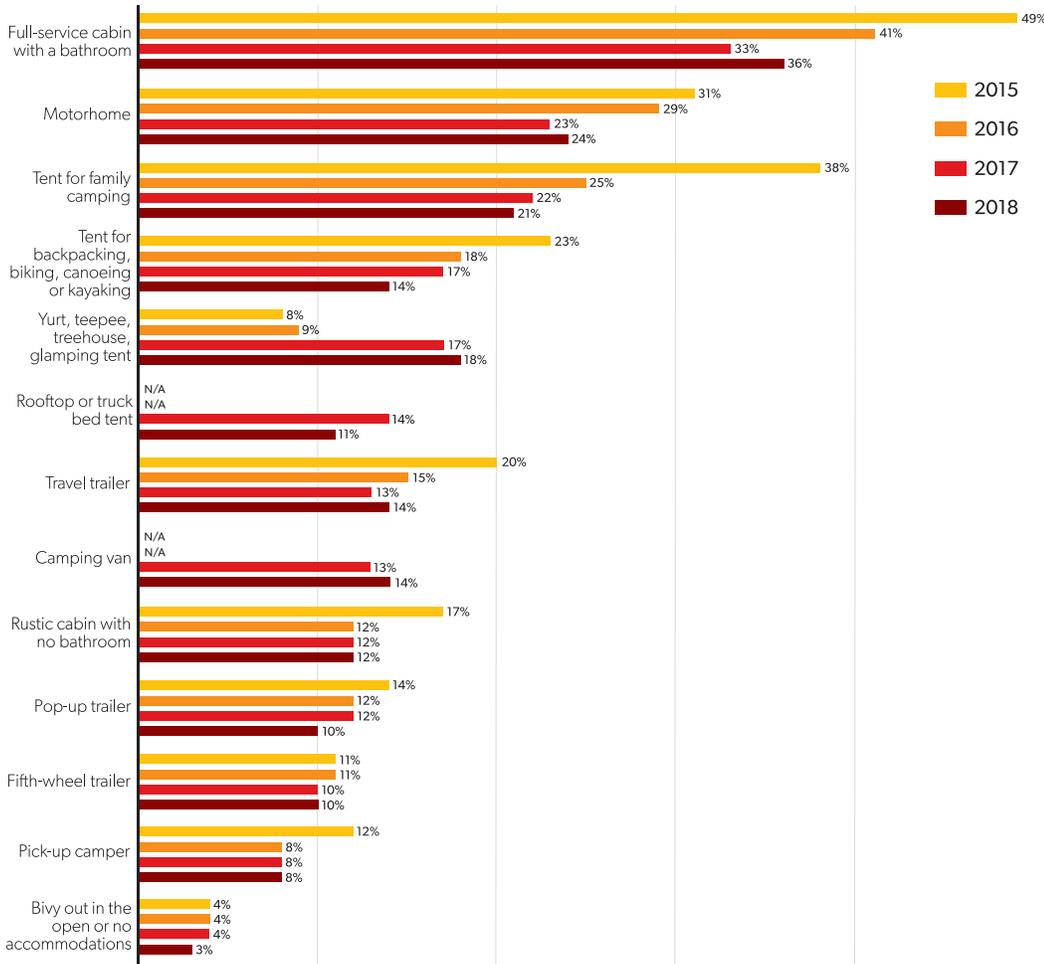


Future Trial of Accommodations

Similar to the past two years, campers of all ages seek to have a luxury cabin experience. Millennials continue to gravitate toward a tenting experience, though 1-in-5 express a desire to also give unique lodging options a try. Overall, younger campers are much more likely to want to try a variety of different accommodations, including unique options, smaller tents and the emerging “van life.”

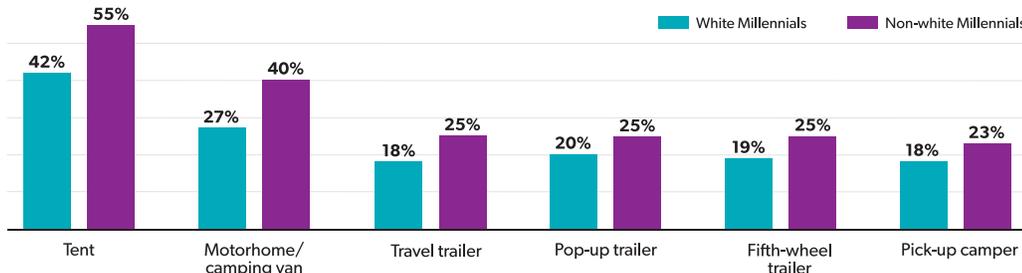
Seeing new and popular destinations is the impetus behind the trial of new lodging, followed by providing children with these experiences and increased income.

INTEREST IN TRYING NEW ACCOMMODATIONS [2015-2018]



Further, non-white millennials show a stronger desire to upgrade or purchase a new camping accommodation, whether it’s a tent or an RV. That desire is especially evident when it comes to their desire to purchase a motorhome or camping van.

INTENT TO PURCHASE



**BOTH MILLENNIAL AND GEN X CAMPERS ARE
THE MOST LIKELY TO SAY THEY INTEND TO
CAMP MORE IN 2019.**



THE YEAR AHEAD

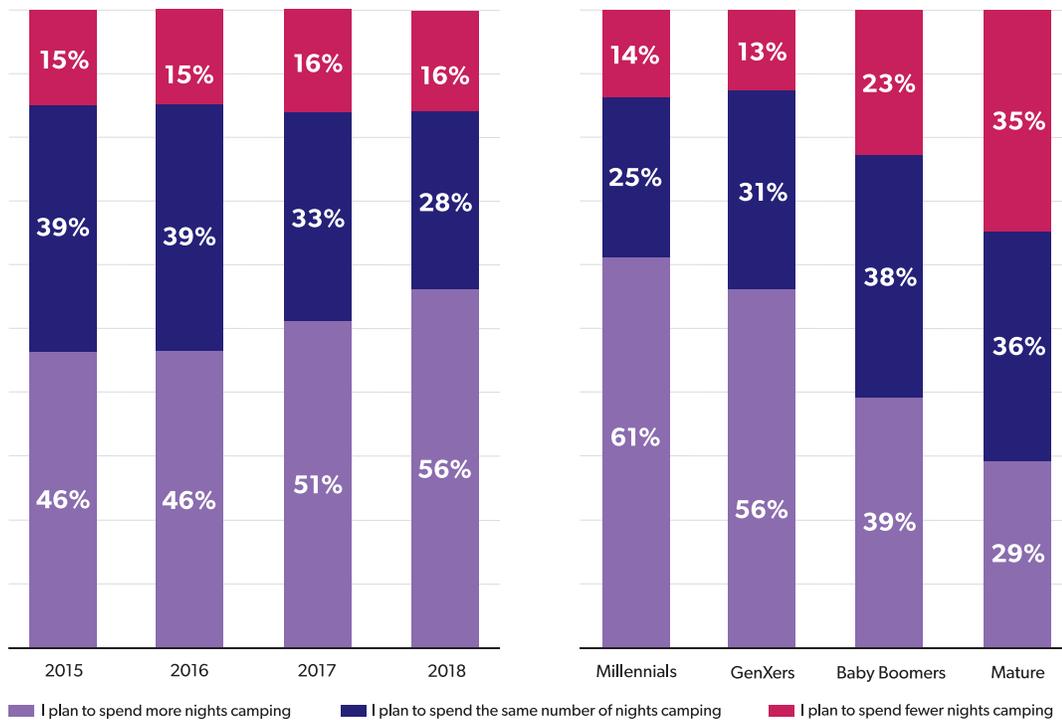
FORECAST: 2019 CAMPING SEASON PLANS

Camping More

Well more than half of current camping households indicate they plan to camp even more in 2019, continue an upward trend since first reported in 2015. In fact, a full 84 percent of campers say they plan to camp at least as much as last year, if not more.

In a very positive sign for the industry's future, both millennial and Gen X campers are the most likely to say they intend to camp more in 2019. As can be expected, the intent to camp more drops off in older generations as they age.

CHANGE IN NIGHTS PLANNED FOR THE COMING YEAR (2015-2018)



METHODOLOGY

Background

This report represents the fifth 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, 2017 and now for 2018.

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 2,900 surveys completed among a random sample of U.S. (n=2,400) and Canadian (n=500) residents. Within the U.S. sample of respondents, results are stratified by Census Region: Northeast (n=600) Midwest (n=600) South (n=600) West (n=600) Overall, a sample of n=2,400 U.S. residents is associated with a margin of error of +/- 1.99%, while a sample of n=500 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 400 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=400 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

Glamping – Defined as staying in unique accommodations with enhanced services and amenities.

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.

Van Life – Defined as a form of adventure tourism that involves a van that is livable and self-sustained, used to access remote areas to recreate in.

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.



Small Van Camper – a smaller vehicle that provides both transport and sleeping accommodation.



Type C Motorhome

“Types of RVs” credit: GoRVing.com

