

SPECIAL REPORT

NORTH AMERICAN CAMPING AND THE EFFECTS OF COVID-19

— Report issued May 11, 2020 —

*A survey of the general population conducted by Cairn Consulting Group
Sponsored by Kampgrounds of America*



CAMPING AFTER COVID-19

The timeline for when the world will start to emerge from COVID-19 and when people will feel comfortable to start traveling again remains unclear.

The results of this special COVID-19 edition of the [North American Camping Report](#), sponsored by [Kampgrounds of America, Inc.](#), indicate that camping is well positioned to rebound earlier compared to other types of travel, once travelers themselves deem it safe to travel again.

The situation remains fluid as different states, provinces and local governments begin to allow businesses to reopen in phases. Any number of factors could alter the course again at any given time. However, this new industry-first data, collected April 27-30, for the COVID-19 edition of the North American Camping Report shows camping likely gaining strength in the latter part of the season. The rebound can largely be attributed to camping providing a safe, accessible way to return to the outdoors while still maintaining acceptable social distancing standards.

Interest in camping has grown steadily for the past decade, adding millions of new camping households each year, as measured by the annual North American Camping Report. As more people search for safe, affordable vacation options closer to home due to the COVID-19 pandemic, it's anticipated that the interest in camping will continue to grow at an accelerated rate.

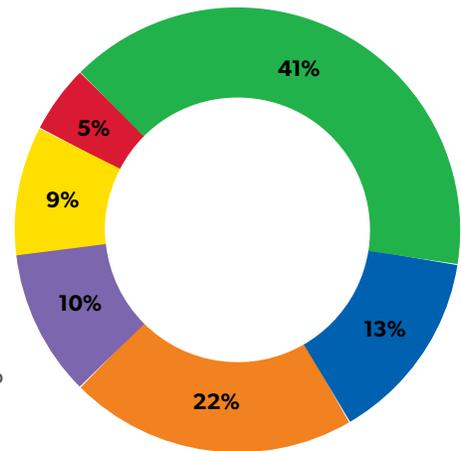
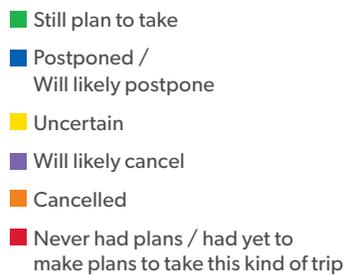
For reference in the following set of findings, campers are defined as leisure travelers who include camping as part of their trips. Noncampers are leisure travelers who don't not camp. Prospective campers are travelers who did not camp pre-COVID-19 but now say they are interested in camping.

KEY FINDINGS

THE CURRENT STATE OF CAMPING + TRAVEL PLANS FOR 2020

When asked about their travel plans for the remainder of 2020, 41% of campers say they still plan to take their planned camping trips, 31% have cancelled or will likely cancel, and 13% will postpone.

Camping Plans for 2020



Camping and Road Trips Likely to be the Re-entry Point for a Third of Leisure Travelers

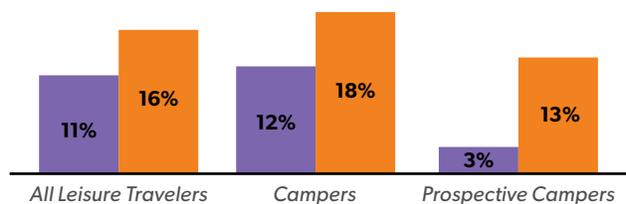
Campers are most likely to say that their first trip once restrictions are lifted will be a camping trip (29%) while noncampers are most likely to say they will take a road trip (30%).

Replacing Cancelled or Postponed Trips

Once it is safe to travel, it's likely the camping market will get a greater share of leisure travelers' trips in 2020. Nearly half of leisure travelers who camp say they will replace one of their cancelled or postponed trips with a camping trip (47%). Travelers who don't camp say they will replace a cancelled or postponed trip with a road trip or a hotel/resort trip (34% each).

Among all leisure travelers, prior to the pandemic, camping accounted for 11% of all trips while post COVID-19, camping is likely to account for 16%.

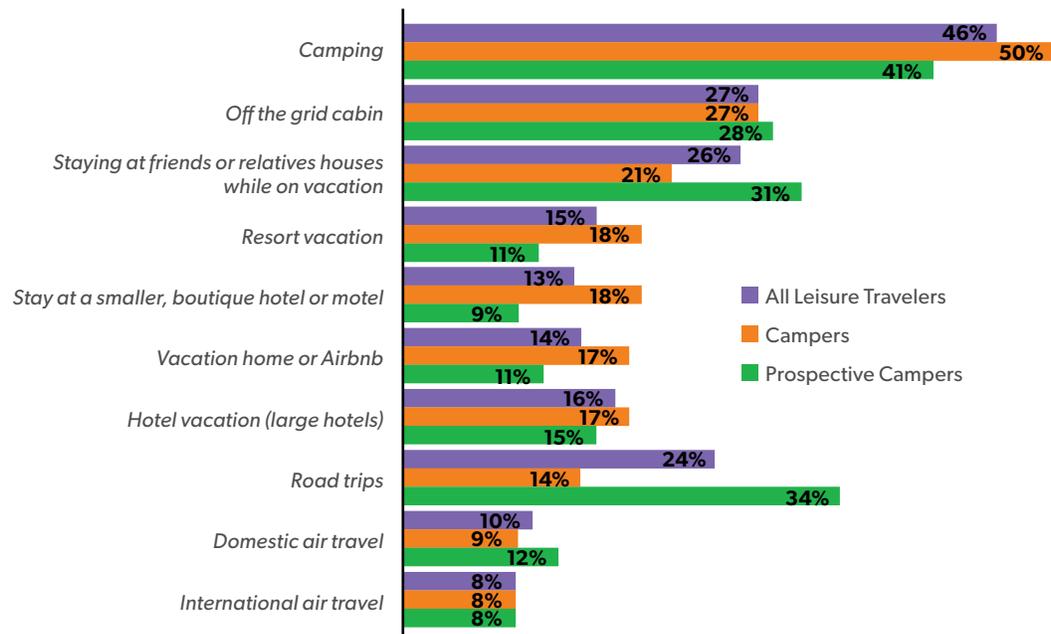
Share of Leisure Trips Accounted for by Camping



Half of campers rank camping as the safest type of travel once restrictions are lifted. This increases to 72% among Baby Boomer campers.

In looking at leisure travelers overall, including those who do and those who don't camp, this group also ranks camping as the safest type of trip (46%).

Views on the Safest Types of Travel When Restrictions Are Lifted



When They're Ready to Go

When asked how long it will be before they go camping after restrictions in their area are lifted, 21% of campers say they feel it is safe to go camping now, while the majority (54%) say within one to two months.

Of the campers who plan to go camping as their first trip after restrictions are lifted, 3-in-10 say it's OK to go now, and overall, 57% say they would go within a month.

Barriers

Campers cite work status (33%) and finances (26%) as the top barriers for their ability to camp, or to camp more, once restrictions are lifted.

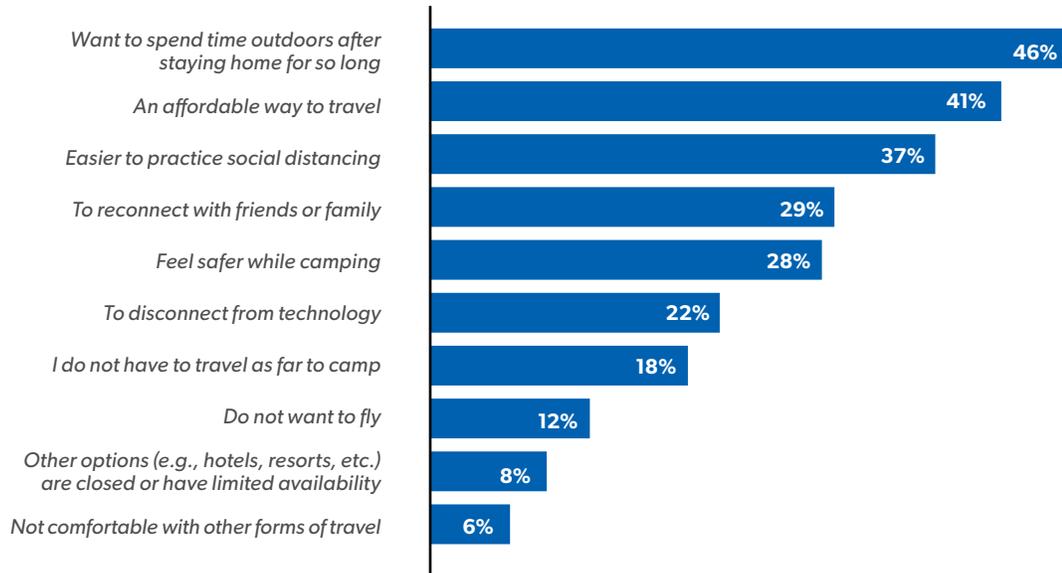


TRAVEL LIMITATIONS AND CAUTION SPARKING AN INCREASE IN PROSPECTIVE CAMPERS

COVID-19 Driving New Interest in Camping and May Bring New Campers to the Market

COVID-19 may bring more leisure travelers to the camping market. A third of leisure travelers who have not camped before say that they are now interested in camping. The top reasons these prospective campers cite are wanting to spend time outdoors after staying home for so long (46%); camping is an affordable way to travel (41%); and it's easier to practice social distancing, compared to other types of travel (37%).

Reasons for Considering Camping Among Prospective Campers



The highest level of interest among this group of prospective new campers is among Gen Z (44%) and millennials (45%). There has been an influx of new, younger campers to the market in recent years, a trend tracked annually by KOA's North American Camping Report, and COVID-19 could accelerate the rate of adoption among young people trying camping.

Prospective campers say if they were to try camping, they are most interested in a cabin (41%). Roughly, 36% specifically cited a full-service cabin with a bathroom Preference for trying a cabin is followed by a tent (21%) and an RV (19%).

COVID-19 AND HOW PEOPLE WILL RETURN TO CAMPING

Though camping is expected to be one of the earlier types of travel to return, how people camp this year will be different compared to a typical year. Based on the results of the survey, changes that can be expected in at least the short-term include:

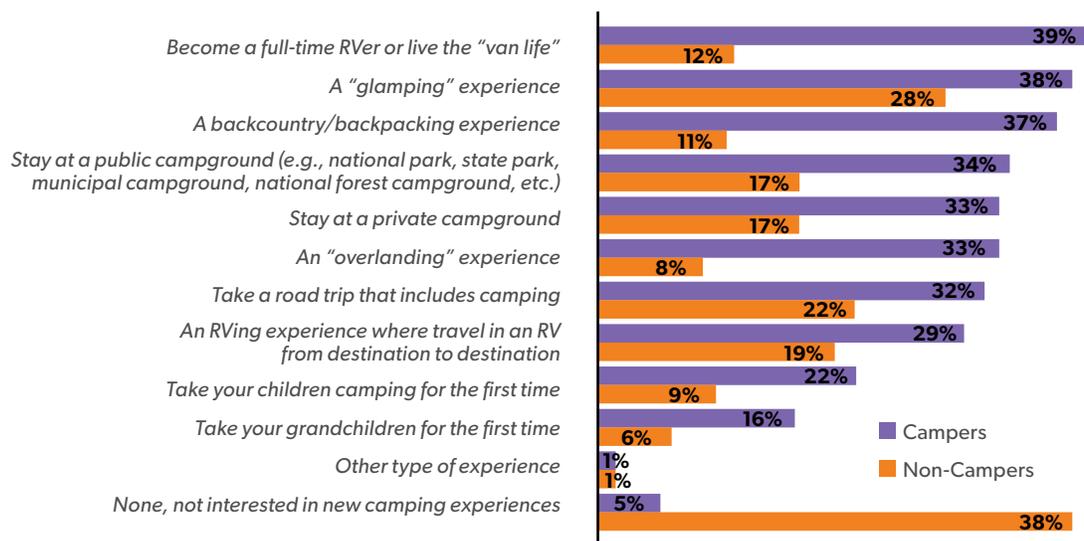
Group sizes shifting down. Campers say they are likely going to camp with fewer people compared to last year with 31% planning to camp with two people (compared to 25% in 2019) and 36% planning to camp with three to five people (compared to 41% last year). These results suggest that those who stayed in groups of three to five in 2019 plan to decrease their group size.

Camping closer to home and potentially at less crowded destinations. A full 70% of campers say they plan to camp closer to home than they did before COVID-19. Campers (68%) also say they are more willing to travel to less popular locations in order to avoid overcrowding in places such as national parks or national monuments.

Increased interest to try different types of camping. Campers are now more likely to consider different types of camping experiences and accommodations. In fact, four in ten campers say they are interested in becoming a full-time RVer (or living the #VanLife), trying glamping or trying a backcountry experience.

Not surprisingly, prospective campers are less certain which type of experience they are interested to try though nearly 1-in-3 are interested in trying glamping – a travel trend that’s been on the rise in recent years as measured in the [2019 North American Glamping Report](#).

Interest in Different Camping Experiences



Campers and prospective campers say they are also now more likely to consider different types of accommodations, compared to pre-COVID-19:

- Nearly half of current tent campers and 1-in-3 prospective campers are now more likely to try a Deluxe Cabin (full service with a bathroom)
- About half of people who currently camp in cabins or tents, and a quarter of prospective campers, are now more likely to consider RVing
- Nearly half of people who currently camp in cabins or tents, and 23% of prospective campers, are now more likely to consider a glamping type of accommodation
- Half of current cabin campers say they are more likely to consider tent camping

The bathroom factor. With concerns over the safety of communal facilities spiking from COVID-19, the importance of having a private bathroom in a cabin or RV is now very important to campers (63% of current campers and 44% of prospective campers). About half of campers and prospective campers say the availability of private bathrooms in a cabin or RV will influence where they stay.

Increased interest in RV ownership. Health and safety concerns spiking from COVID-19 are also driving an increased interest in RV ownership. More than half of campers (52%) say that they are now either somewhat (29%) or very likely (23%) to consider purchasing an RV. Interest is highest among Gen X (41%) and millennials (33%). Cleanliness of accommodations at hotels or resorts is the primary factor driving this interest, as campers want to avoid communal facilities.

Potential to extend the camping season. Depending on the circumstances, including whether schools remain closed and/or people continue to work remotely, 38% of campers say these factors could allow them to extend their camping season or camp more often. This increases to 45% for campers with children in the household.



COVID-19 IS MAKING THE OUTDOORS MORE IMPORTANT THAN EVER

COVID-19 Has Increased the Importance of Spending Time Outdoors

The pandemic has impacted travelers' views toward nature and experiencing the outdoors — 43% of leisure travelers say spending time outdoors is now more important as a result of the pandemic.

The Importance of Kids Spending Time Outdoors

Travelers (60%) also feel it is more important than ever for kids to spend time outdoors (31% have always felt it is important for children to spend time outdoors). Of travelers who say they plan to take children camping for the first time when restrictions lift, two-thirds (67%) say their experiences have increased the importance they place on children spending time outdoors.



LOOKING FORWARD TO GETTING BACK ON THE ROAD AFTER COVID-19

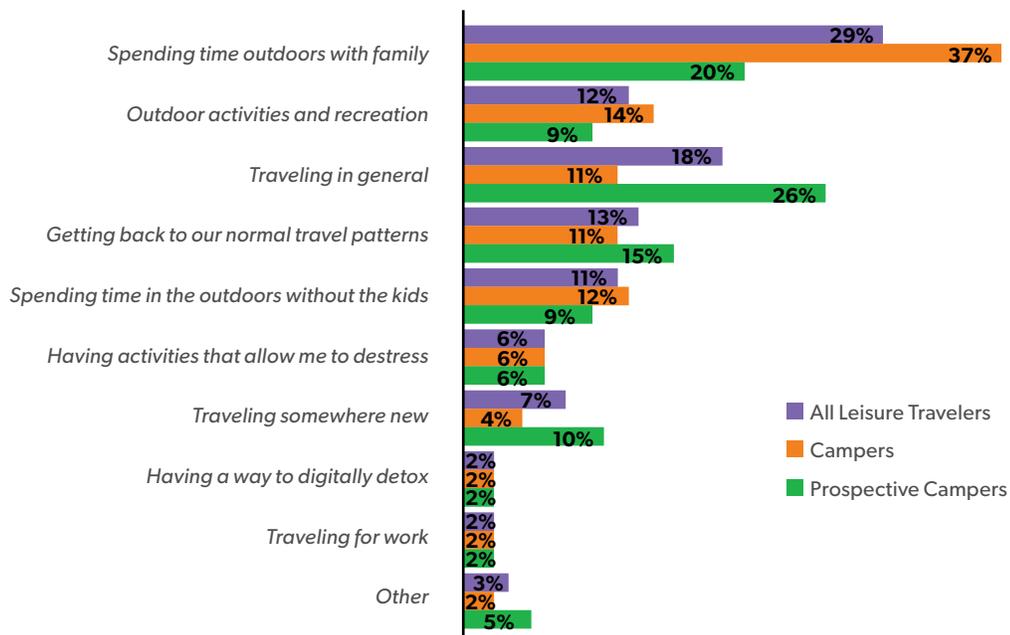
Getting Back to Camping: The Benefits of the Outdoors Campers Seek Most

Once restrictions are lifted and they feel comfortable going out camping or experiencing the outdoors again, campers are most likely to want to explore (69%), be able to relax (67%) and be in the outdoors to clear their mind (66%).

What Travelers are Looking Forward to Most

Among all leisure travelers, spending time outdoors with family ranks the highest in terms of what they're looking forward to most once they feel it's safe to travel again. Among campers, this increases to 37%.

Looking Forward to Most When Returning to Travel



Navigating Outdoor Recreation Safely After COVID-19

Nine out of every ten leisure travelers (and 95% of campers) feel that it is reasonable to have at least some measures in place to limit contact with others.

When asked which measures they felt are reasonable to limit exposure to COVID-19 at public parks and campgrounds, nearly half of campers (47%), as well as nearly half of leisure travelers overall, agree that limiting the number of people on a trail is reasonable. Prospective campers believe that limiting group sizes (48%) and requiring masks (39%) in certain areas is also reasonable; and the likeliness to agree increases with age.

APPENDIX

Methodology

The North American camping survey was conducted by Cairn Consulting Group, an independent market research firm with extensive experience in the hospitality and services industries.

The survey was conducted from April 27-30, 2020. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households who participate in leisure travel.

Sampling was designed to obtain n=4,000 completed survey among representative U.S. households and n=500 representative Canadian households. A sample of n=4,000 U.S. households is associated with a margin of error of +/- 1.55%. Among Canadian households, a sample of n=500 is associated with a margin of error of +/- 4.37%. All surveys were completed online via an outbound solicitation sent to a randomly selected cross-section of U.S. and Canadian households.

About The North American Camping Report

The [North American Camping Report](#) is an annual research initiative, sponsored by [Kampgrounds of America, Inc.](#), that reports on the behaviors and attitudes of North American campers, including where, how, why and with whom they camp.

Media: With correct sourcing and credit, KOA and its research partner Cairn Consulting Group encourages the use of the North American Camping Report findings by industry partners and the media. We're happy to work with interested parties wanting to explore the findings further.

Please visit the [KOA Press Room](#) to contact a member of the KOA media relations team or to access past reports and visual assets.

About Kampgrounds of America

[Kampgrounds of America, Inc.](#) (KOA) is the world's largest system of open-to-the-public campgrounds with more than 520 locations across the U.S. and Canada. The industry leader in outdoor hospitality, KOA's family of campground brands – KOA Journey, KOA Holiday and KOA Resort – offer sites and amenities designed for every type of camping experience. The company was founded 58 years ago in Billings, Mont., and today serves more than a million camping families each year, who rely on the standards of excellence and unique outdoor adventures KOA is known for. For more information, visit [KOA.com](#).



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