



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



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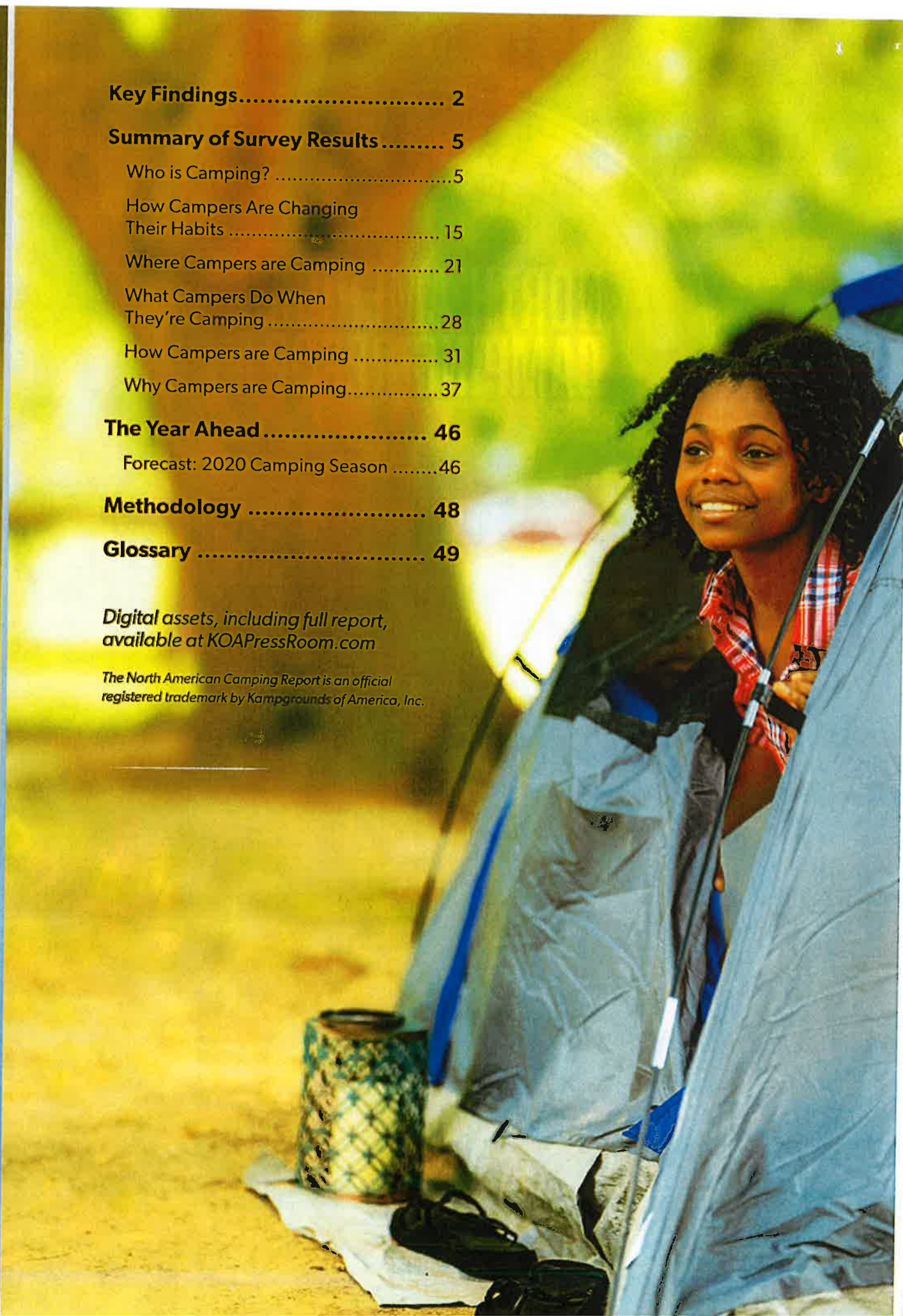
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*Digital assets, including full report,
available at [KOAPressRoom.com](https://www.koapressroom.com)*

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INTRODUCTION

Camping is changing. Decompressing by a crackling fire as you soak in the outdoors is still a primary driving force for North America's most popular family pastime. But the influx of new, younger and more diverse camping families began to transform camping into a much more experience-driven activity that accelerated in recent years.

This 2020 North American Camping Report® finds another 2.7 million households in North America adopted the camping lifestyle in 2019 alone. More than 9.7 million families have taken up camping since the annual North American Camping Report was created in 2014.

Then, COVID-19 arrived. The 2020 North American Camping Report®, painting the picture of camping in North America based on data from 2019, points to the continued growth of camping due to its many benefits for health and well-being. The unexpected arrival of a global pandemic has served to amplify the growth of camping as a safe, family-oriented pastime as seen in our Special Report: North American Camping and the Effects of COVID-19. Both reports, when taken together, tell the true story of camping in 2020 and hint at the future of camping in a post-COVID-19 world.

This year, many of the forecasting elements of the annual report have been removed. All of us had a very different view of 2020 in December of last year. Within this report you'll find valuable demographic data regarding the overall landscape of camping.

Many of these new campers in 2019 were in search of something different: a unique outdoor "experience."

In fact, about 1.3 million of the families new to camping in 2019 said they were attracted to camping by their interest in glamping – a form of camping involving accommodations and facilities that are more luxurious than those associated with traditional camping.

New. Unusual. Unique. These are not necessarily words associated with camping over the decades. But they are now.



Building for the Future

Pre-COVID-19, campground owners throughout North America were beginning to meet the emerging demand for new, unique facilities and outdoor experiences. There has been an influx of new deluxe, full-service cabins, yurts, pods, glamping tents and even tree houses that provide what campers say they are looking for from their excursions to the outdoors.

The unexpected events of 2020 have also led campground owners to increase their focus on the safety of their guests. Curb-side check-in, enhanced cleaning procedures and contactless activities are just a few ways that the naturally socially-distanced pastime of camping is becoming safer.

Longtime campers who have an increased desire to return to the outdoors in light of the pandemic are also a huge factor in the growth of camping's popularity. The overall population of camping households in the U.S. is now at 82 million. Over time, these campers are taking more camping trips (an 82 percent growth in campers who camp more than three or more times per year since 2014). Even in today's uncertain world, because camping is considered one of the safest ways to travel we expect the contingent of North American campers to continue to grow.

Another factor that bodes well for the camping industry is that more campers are identifying themselves as "lifelong campers." Since 2015, there has been a nine-percentage-point increase in campers who identify themselves in this group.

The bottom line is that while camping can be defined as a non-essential "option," it is far from optional for most who partake in the activity.

Camping is a very desirable lifestyle. It's the preferred way millions of North Americans choose to connect to the outdoors, and to their family and friends in a safe environment.

Who camps – and how they camp – will continue to evolve to meet the changing desires of new campers and in response to both local, national and international events. But the reasons they camp will likely remain constant.

As it always has, camping fills an important need for North American families. That won't change.

KEY FINDINGS

New and unique outdoor experiences are driving the growth in camping in North America.

Camping appears to be reaching a greater number of U.S. households each year, which may be a result of demographic changes, as well as the camping sector providing more lodging options and amenities designed to draw in new campers.

It is estimated that about 1.3 million of the additional 2.7 million camping households added in 2019 were attracted by their interest in glamping.

Younger campers and reduced barriers are driving greater diversity in camping.

Diversity and inclusion in the outdoors continues to increase with nonwhite representation increasing by 9 percentage points over the last six years. Growth in same-sex households among campers is also consistent over the past five years, having doubled since 2015, from 5 percent to 10 percent in 2019.

The increase in diversity – in both age and ethnicity – appears to be closely associated with the younger demographic with approximately one-fourth of new campers in 2019 under the age of 25. Campers under 25 are the most diverse ethnically with 52 percent being comprised of non-white participants.

Additionally, the removal of barriers – including factors such as safety and security, campground atmosphere, availability of information, and having others to participate with – has helped to create a more diverse set of campers in North America.

Whether campers view the use and availability of technology as having a positive or negative impact on their camping trips depends a great deal on their interpersonal situations and their careers.

Campers who indicated they always worked while camping were able to spend a significantly higher number of days camping, and that is directly attributable to technology.

Campers who say they always work while camping (59 percent) also were more likely to say camping allowed them to spend more time with their families than campers who said they don't work when they camp (39 percent).

The “typical” camper is also evolving.

The 2020 North American Camping Report found that participation in camping continued its growth trend among the youngest generations (Millennials, Generation X and even Generation Z groups). In fact, camping among these groups now far exceeds the generational population Census figures.

The same holds true for minorities and camping. Minority representation in the population of active camping households continued to creep closer to Census figures, with 28 percent of 2019 active camping households made up of minorities. The trend is even more pronounced in the group of campers new to camping in 2019, with an even split between white and nonwhite campers in 2019.

Note regarding active camper households and recent camper households: Active camper households identify themselves as campers, but do not necessarily camp each year, versus the annual or recent camper households which is a count of households who camped in the past year.

FAST FACTS

- ACTIVE CAMPER HOUSEHOLDS IN THE U.S. IN 2019: 82+ MILLION
- YEAR-OVER-YEAR GROWTH IN U.S. CAMPING HOUSEHOLDS, 2018 TO 2019: 2.7 MILLION
- NUMBER OF HOUSEHOLDS WHO CAMPED AT LEAST ONCE IN 2019: NEARLY 42 MILLION
- SINCE 2014, INCREASE IN THE NUMBER OF HOUSEHOLDS WHO CAMP THREE+ TIMES PER YEAR: 82 PERCENT

**FROM 2018-2019, 2.7 MILLION
HOUSEHOLDS STARTED CAMPING.**



SUMMARY OF SURVEY RESULTS

WHO IS CAMPING?

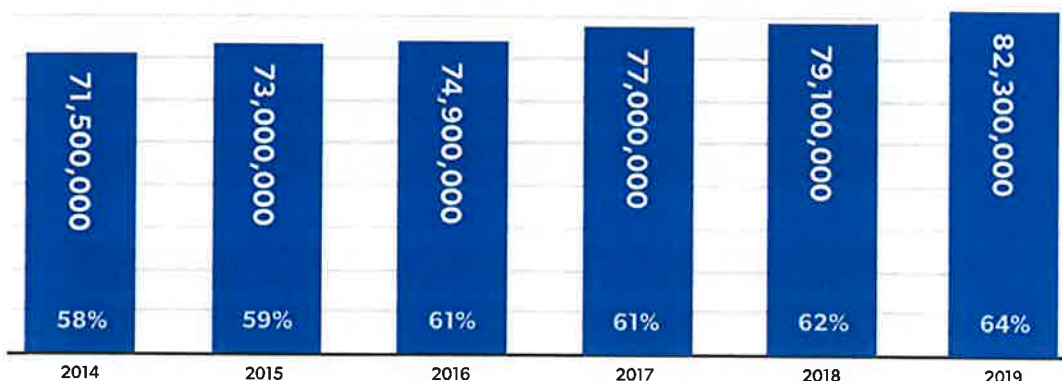
Active Camper Households

The overall incidence of camping (i.e., the number of households that identify as camping households) has been stable, and has actually demonstrated a consistent climb since 2014. According to survey results, 64 percent of U.S. households said that they camped at least occasionally (if not annually), up from 58 percent in 2014.

From 2018 to 2019, 2.7 million households started camping, the largest YoY increase since 2014-2015.

Combined with the increase in households overall, about 10 million more households have at least one camper in their household compared to 2014.

GROWTH IN ACTIVE U.S. CAMPING HOUSEHOLDS (2014 TO 2019)

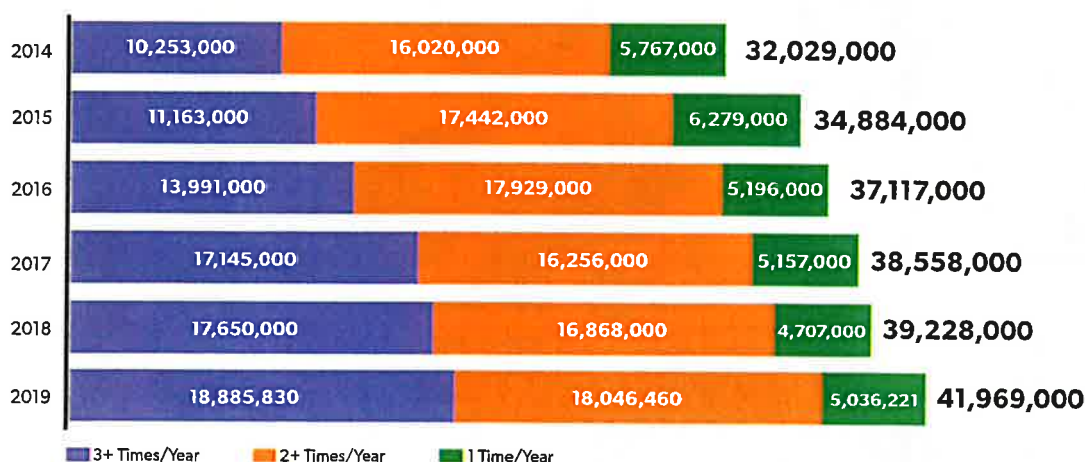


Frequency of Camping

From 2014 to 2019, there was a 31 percent increase in annual camper households – those who camp at least once a year – resulting in an additional 10 million households camping each year.

Over time, campers have been taking more trips, with 82 percent growth in the higher-volume campers – those who camp three or more times per year – since 2014.

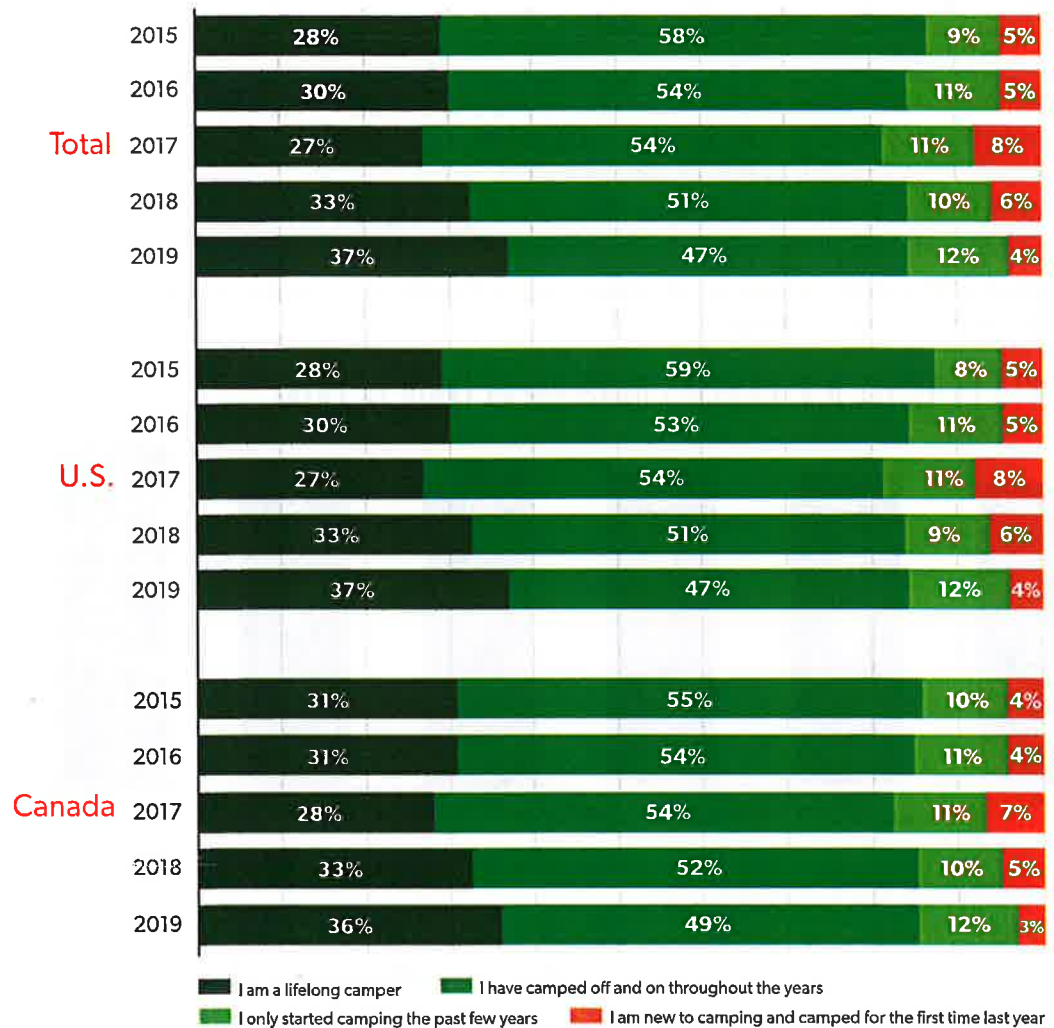
GROWTH IN ANNUAL CAMPER HOUSEHOLDS IN THE U.S. (2014-2019)



New Campers and Lifelong Campers*

In 2019, 1.9 million households went camping for the first time. Since 2015 there has been a nine percentage point increase in campers who identify as lifelong campers.

CAMPING EXPERIENCE (2015-2019)

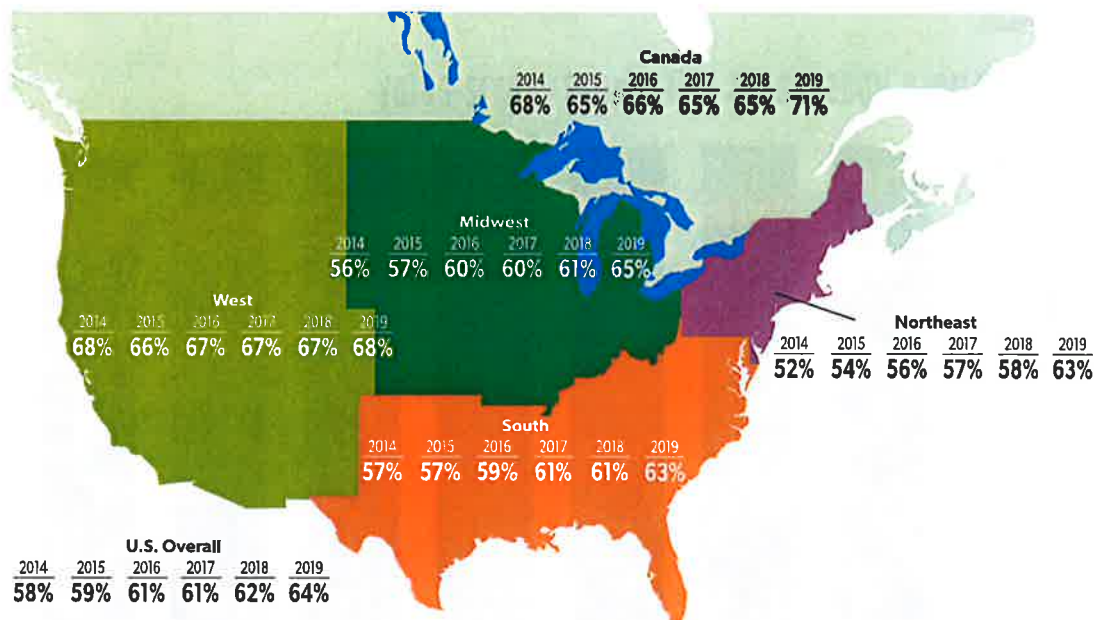


*Note: Data reflects camper sentiment from 2019. Results of the 2021 North American Camping Report will reflect the behavior and sentiments of new campers in 2020 and in relation to the global Coronavirus pandemic.



Demographics

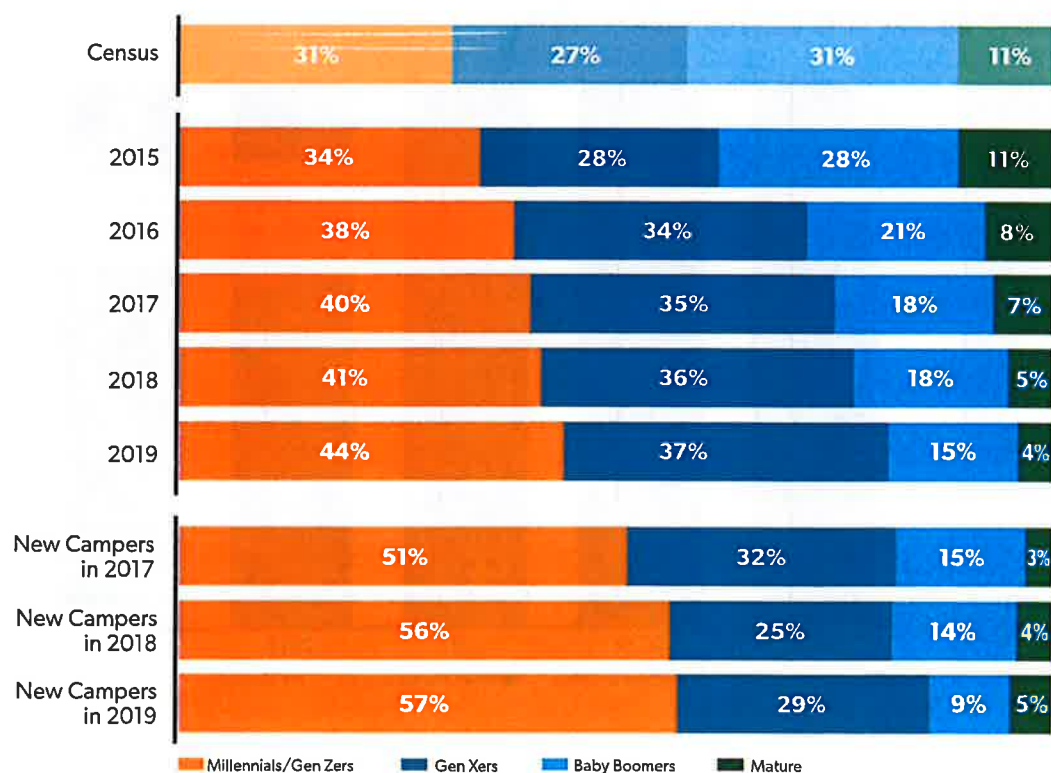
ACTIVE CAMPER HOUSEHOLDS BY REGION (2014-2019)



Participation in camping among the youngest generations (Millennial and recently, Gen Z campers) as well as Gen Xer households has grown steadily over time, and exceeds the generational population sizes in the general population.

New campers in 2019 continued to trend younger.

GENERATIONS OF CAMPERS (2015-2019)*

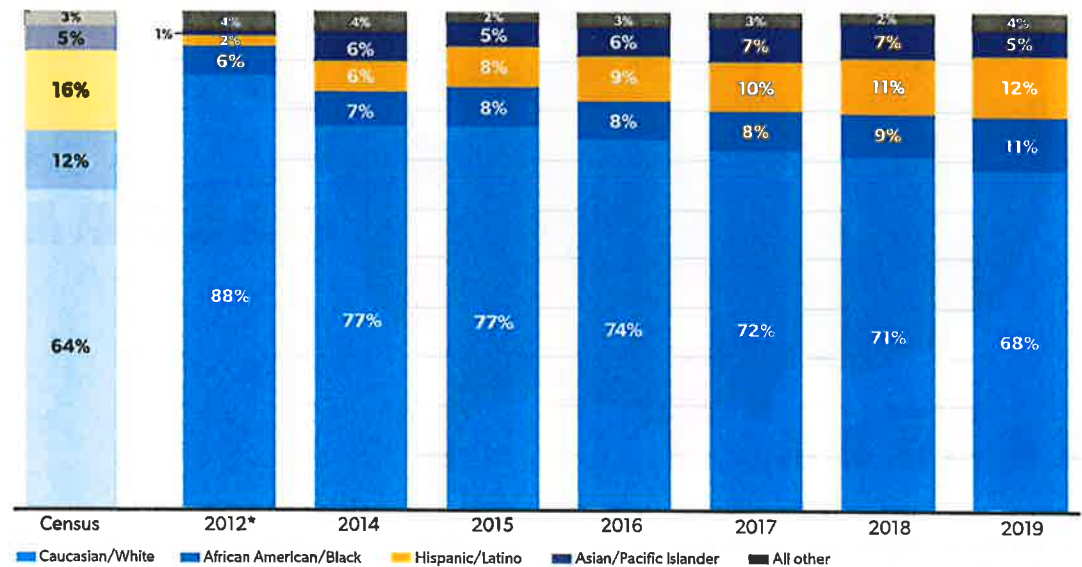


*Note: Due to low representation among Gen Z campers in previous iterations of the survey, those campers have been rolled into the Millennial category for comparison purposes.

Over time, the incidence of non-whites among all campers continues to align with the general population.

Camper ethnicity is nearly aligned with census figures, with non-white representation increasing by three percentage points in 2019. That is up from 29 percent in 2018 to 32 percent (vs. 36 percent in the census).

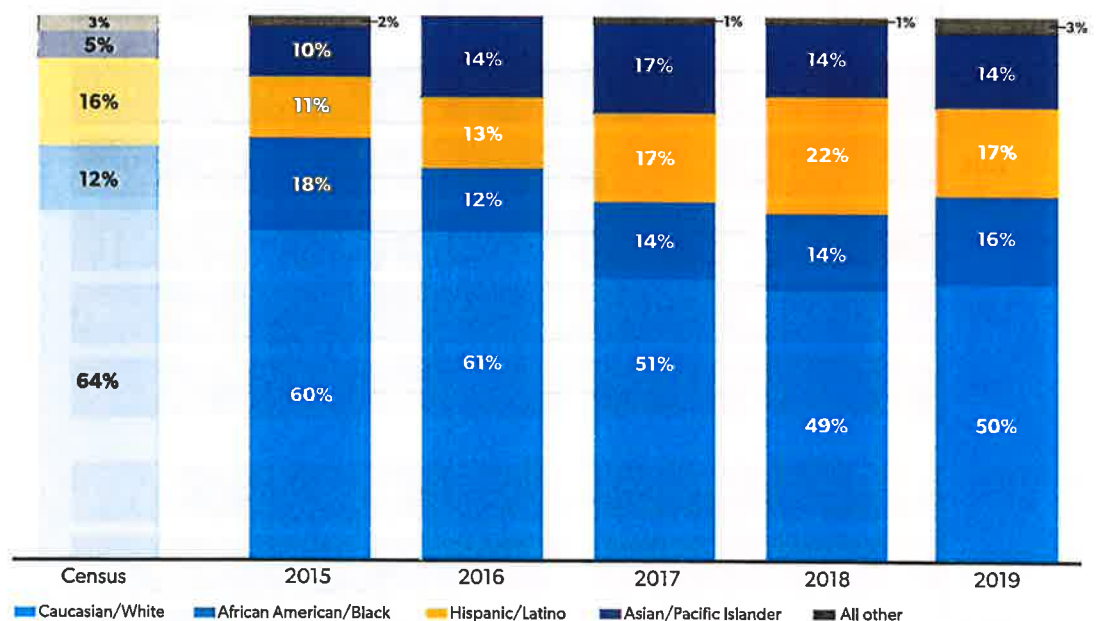
ACTIVE CAMPER HOUSEHOLDS BY ETHNICITY [2012-2019]



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

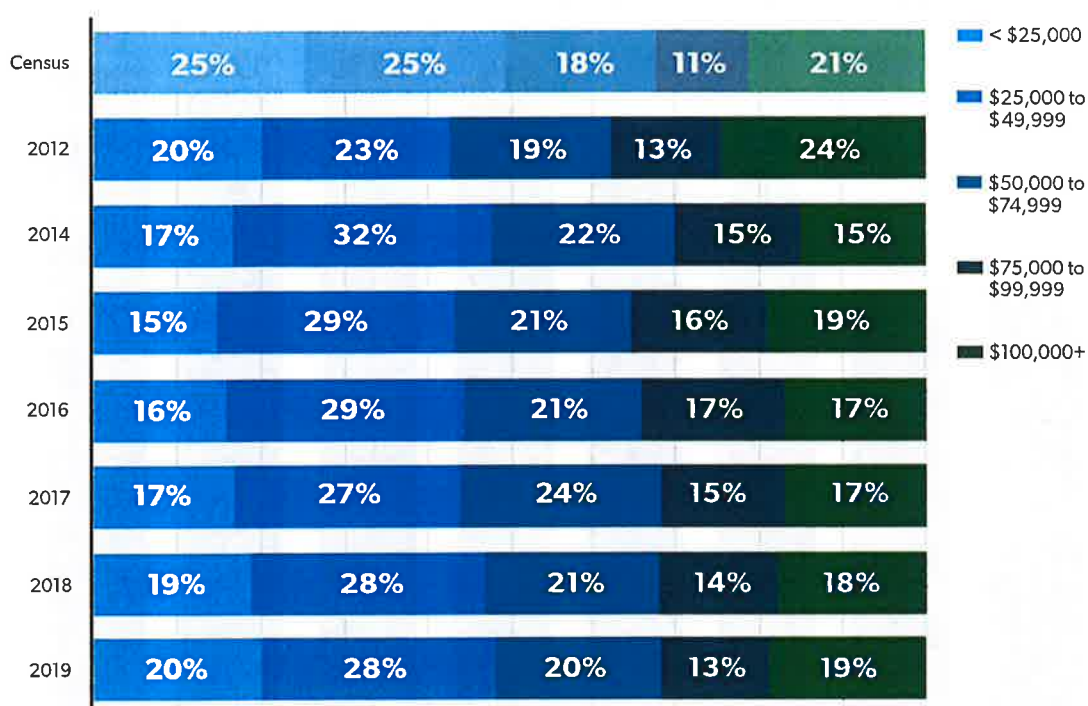
Consistent with 2018, there was nearly an even split between white and non-white campers within the group of new campers for 2019.

ETHNICITY AMONG NEW CAMPERS (2015 -2019)



Household income among campers is generally in line with what is observed in the overall population, which is solidly middle income, and is remarkably consistent.

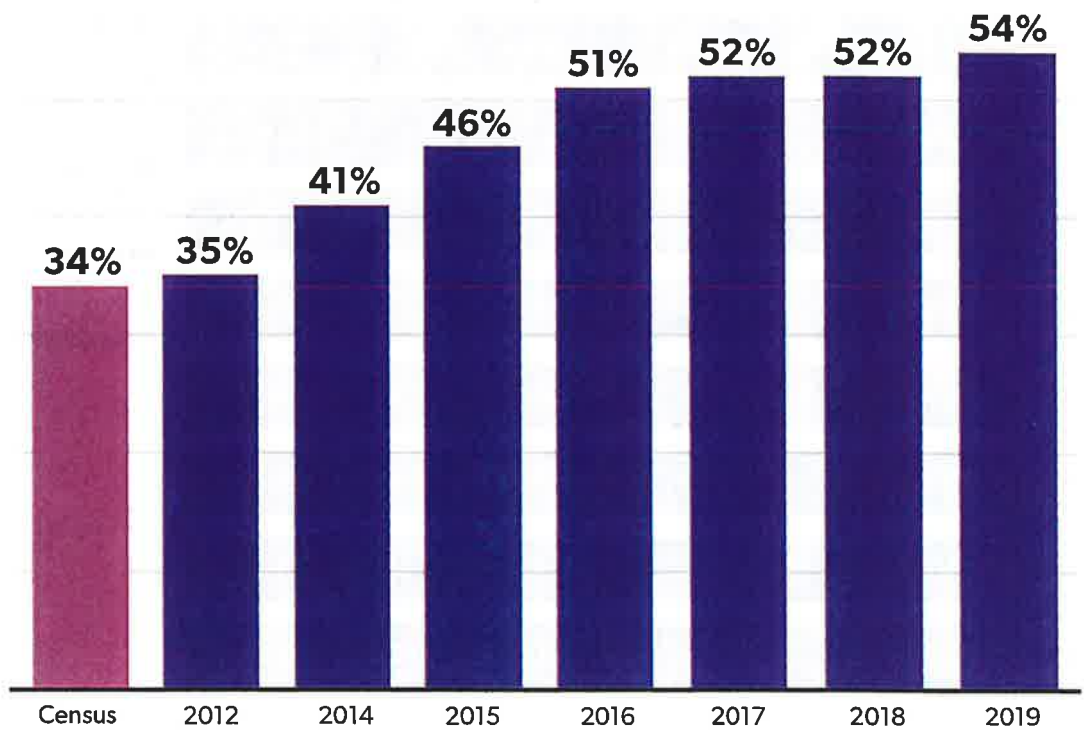
HOUSEHOLD INCOME (2012-2019)



IN 2019, CAMPER
ETHNICITY WAS
NEARLY ALIGNED
WITH CENSUS
FIGURES.

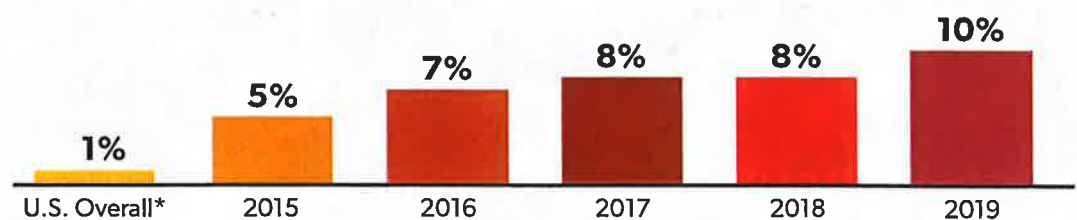
Similar to the past three years, a majority of camper households reported having minor children in the household. The percentage of camping families with children in the household has increased 19 percentage points in the past six years.

CHILDREN IN THE HOUSEHOLD [2012-2019]



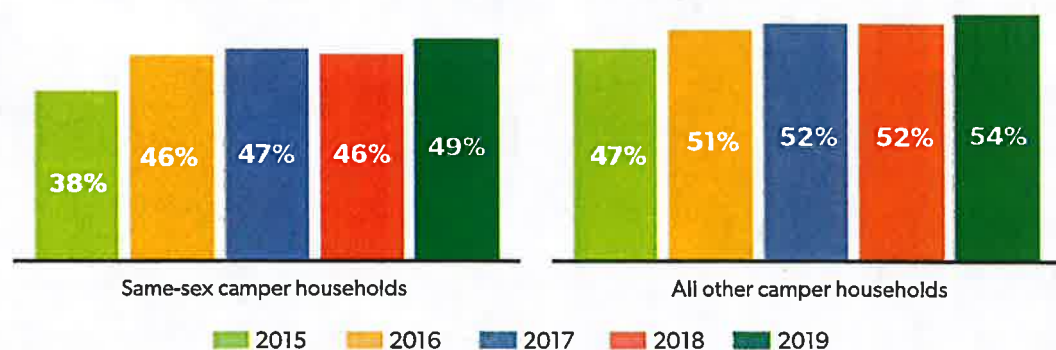
Growth in same-sex households among campers is also consistent over the past five years, having doubled since 2015.

PERCENTAGE OF SAME-SEX CAMPING HOUSEHOLDS [2015-2019]



And among same-sex households, those who camp with children has also shown steady growth, with half sharing their camping trips with children.

SAME-SEX HOUSEHOLDS WHO ARE CAMPING WITH CHILDREN [2015-2019]



The 2017-2019 iterations of the North American Camping Report included a special survey of Gen Z teens. With Gen Z now entering the workforce and early adulthood, the results of the 2020 report allow for a comparison between Gen Z's behaviors and attitudes about camping as teenagers, and what their actual behaviors and attitudes are as young adults.

- When asked as teens, 22 percent of Gen Z campers said they were interested in taking backpacking trips; 24 percent said they tried backpacking for the first time in 2019.
- Perhaps due to the influence of their parents, 73 percent went fishing as teens, but only 43 percent go fishing as adults. Similarly, 60 percent hiked on trips as teens, but only 41 percent hiked in 2019.
- Biking has stayed consistent, with 40 percent who biked on camping trips as teens, and in 2019, 42 percent included biking in their camping trips. Overall, canoeing and kayaking is the most popular type of outdoor recreation Gen Zers are doing while camping as adults.

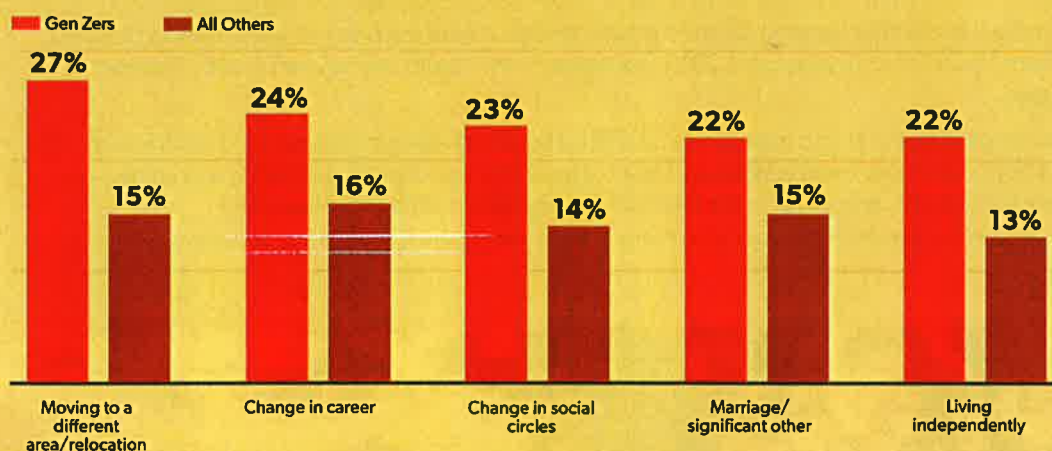
It is interesting to note that while as teens, 40 percent said technology made camping better, yet as adults, only 25 percent said that technology enhanced their camping trips.

About 6-in-10 said they use camping to digitally detox, but among all generations, it takes Gen Z the longest to relax once they stop using electronics.

And Gen Zers are much less likely than Millennials to sometimes or always work while camping (35 percent vs. 44 percent for Millennials). This youngest generation of campers said they unplug by having a smartphone only and using it for apps and information to enhance their experiences.

Gen Z campers indicated they are significantly more likely than Millennials and twice as likely as Gen Xers, Boomers and Mature campers to stay at alternative locations such as music festivals, wineries/breweries, dispersed camping areas, casinos, and auto races.

LIFE EVENTS THAT IMPACTED CAMPING MORE OFTEN [2019]

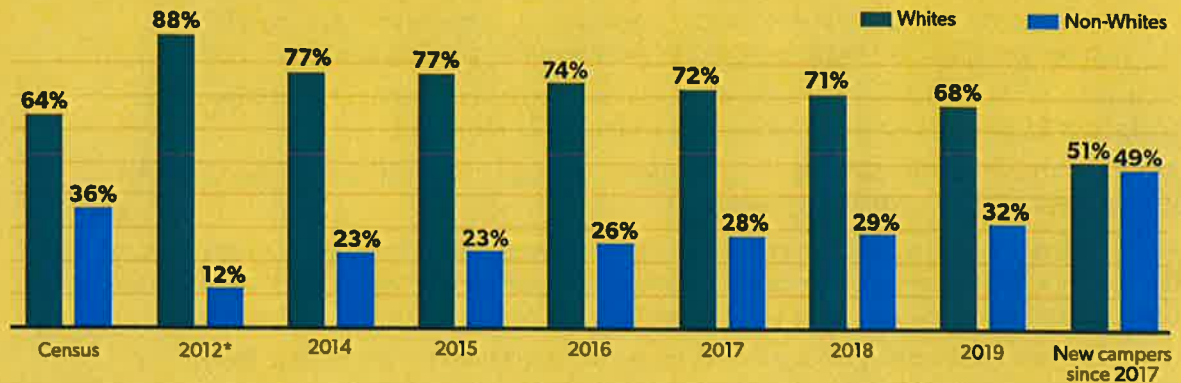


Greater Diversity

For the households that went camping in 2019, ethnicity was nearly aligned with census figures.

Over the last six years, non-white representation has increased by 9 percentage points. Just over the last three years, non-white representation has indeed exceeded census figures with nearly half of new campers being either African American, Hispanic or Asian.

WHITE VS. NON-WHITE CAMPERS SINCE 2012



*The 2012 survey was conducted using the Harris Poll in September 2012, using a random sample of n=1,500 adults chosen randomly from a statistically balanced sample of U.S. households.

Growth in Same-Sex Households That Are Camping

Growth in same-sex households among campers is also consistent over the past five years, having doubled since 2015, from 5 percent to 10 percent in 2019, according to the results of this year's North American Camping Report.

This growth among campers fits into the mindset of LGBTQ leisure travelers in general, who say they are seeking travel opportunities to escape stress and relax, spend time with friends and family, and immerse themselves in local cultures, according to the International Journal of Tourism Research.*

*Vorobjovas-Pinta, Oskaras & Hardy, Anne. (2015). The Evolution of Gay Travel Research. *International Journal of Tourism Research*. 18. 10.1002/jtr.2059.



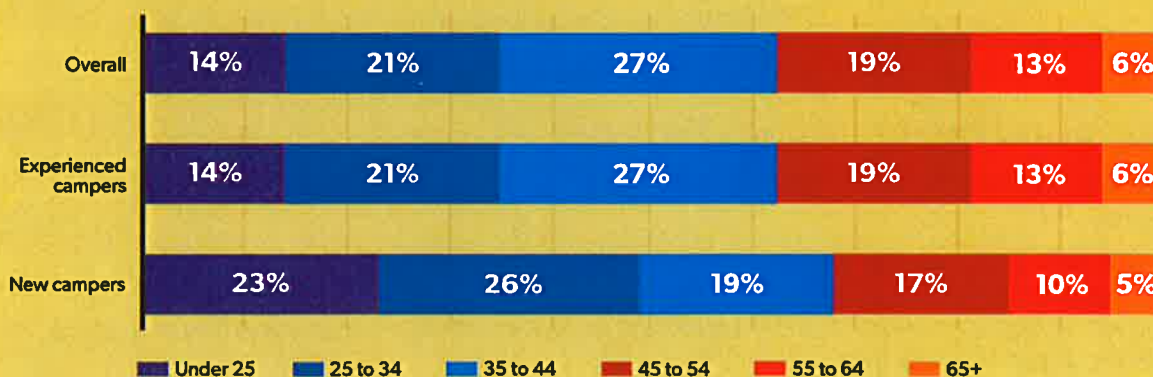
Younger Campers + Reduced Barriers Driving Greater Diversity

The increase in diversity – both age and ethnicity – is closely associated with the younger demographic that is participating in camping at higher rates in recent years.

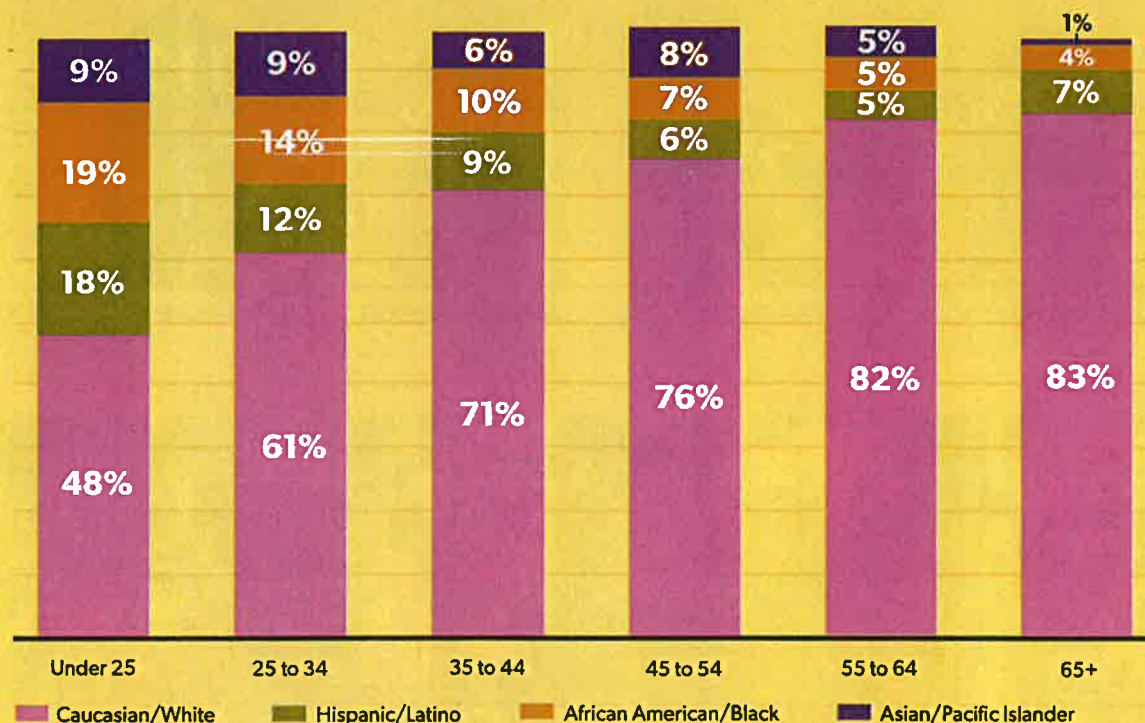
In 2019, about one-fourth of new campers were under the age of 25. Overall, one-third of all campers were younger than 35. The largest bloc of campers (45 percent) were in the 35 to 54 year age groups.

The youngest group of campers (under 25) is far and away the most diverse ethnically, with more than half (52 percent) being comprised of non-white participants. Additionally, the younger set of Millennial campers (age 25 to 34) tend to fall in line with overall census figures for ethnicity.

AGE DISTRIBUTION AMONG NEW CAMPERS IN 2019

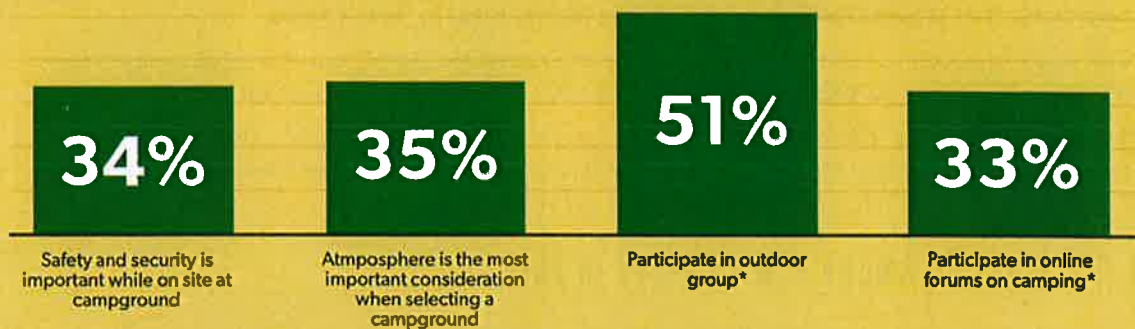


ETHNICITY BY AGE GROUP [2019]



The removal of barriers – including factors such as safety and security, campground atmosphere, availability of information, and having others to participate with – could be attributed to helping to create a more diverse set of campers in North America.

FACTORS INFLUENCING PARTICIPATION IN CAMPING



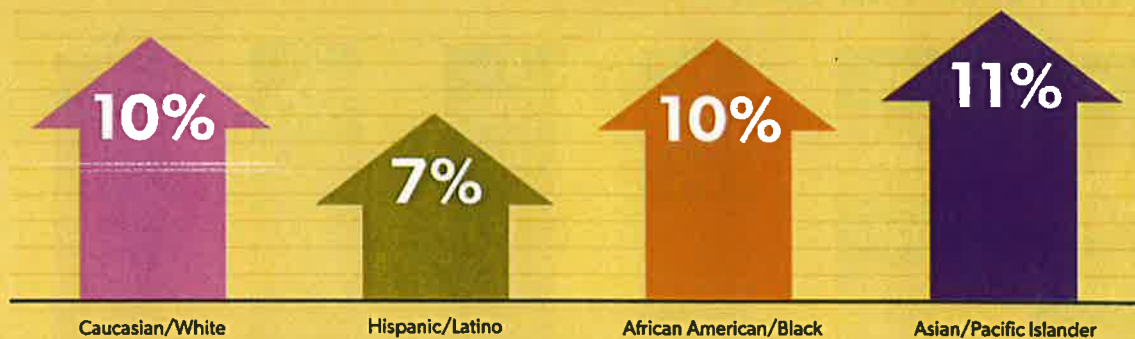
*Source: 2020 Diversity in the Outdoors Survey

Adopting the Camping Lifestyle

Over time, it appears that a younger, more diverse demographic is identifying themselves as lifelong campers.

Overall, since 2014, there has been a nine percentage point increase in campers who identify as lifelong campers. Much of the increase can be attributed to African American and Asian American campers, with increases of 10 percentage points and 11 percentage points respectively, which indicates they're adopting camping as part of their lifestyle.

GROWTH IN IDENTIFICATION AS "LIFE-LONG CAMPERS" FROM 2014 TO 2019

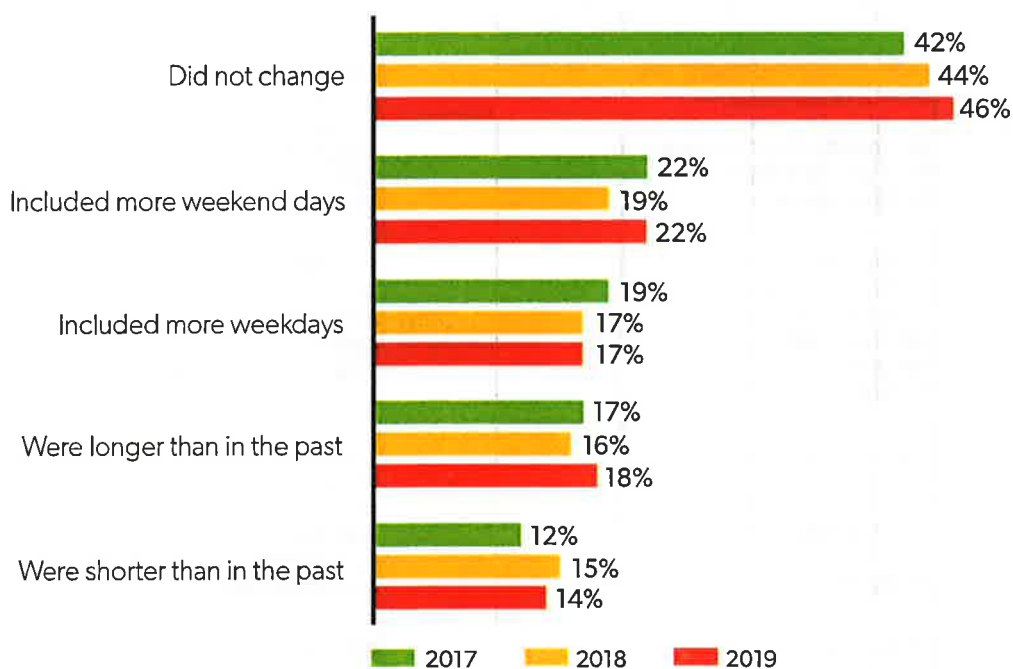


HOW CAMPERS ARE CHANGING THEIR HABITS

Camping Trips

Over time, campers are less likely to change their trips, but in 2019, the youngest campers – whether it's Gen Zers at 27 percent or Millennials at 30 percent – were most likely to include more weekend days, which could have been due to changes in their employment and careers.

WAYS CAMPING TRIPS CHANGED IN THE PAST YEAR [2017-2019]



IN 2019, GEN Z AND MILLENNIAL CAMPERS SPENT MORE WEEKEND DAYS CAMPING.

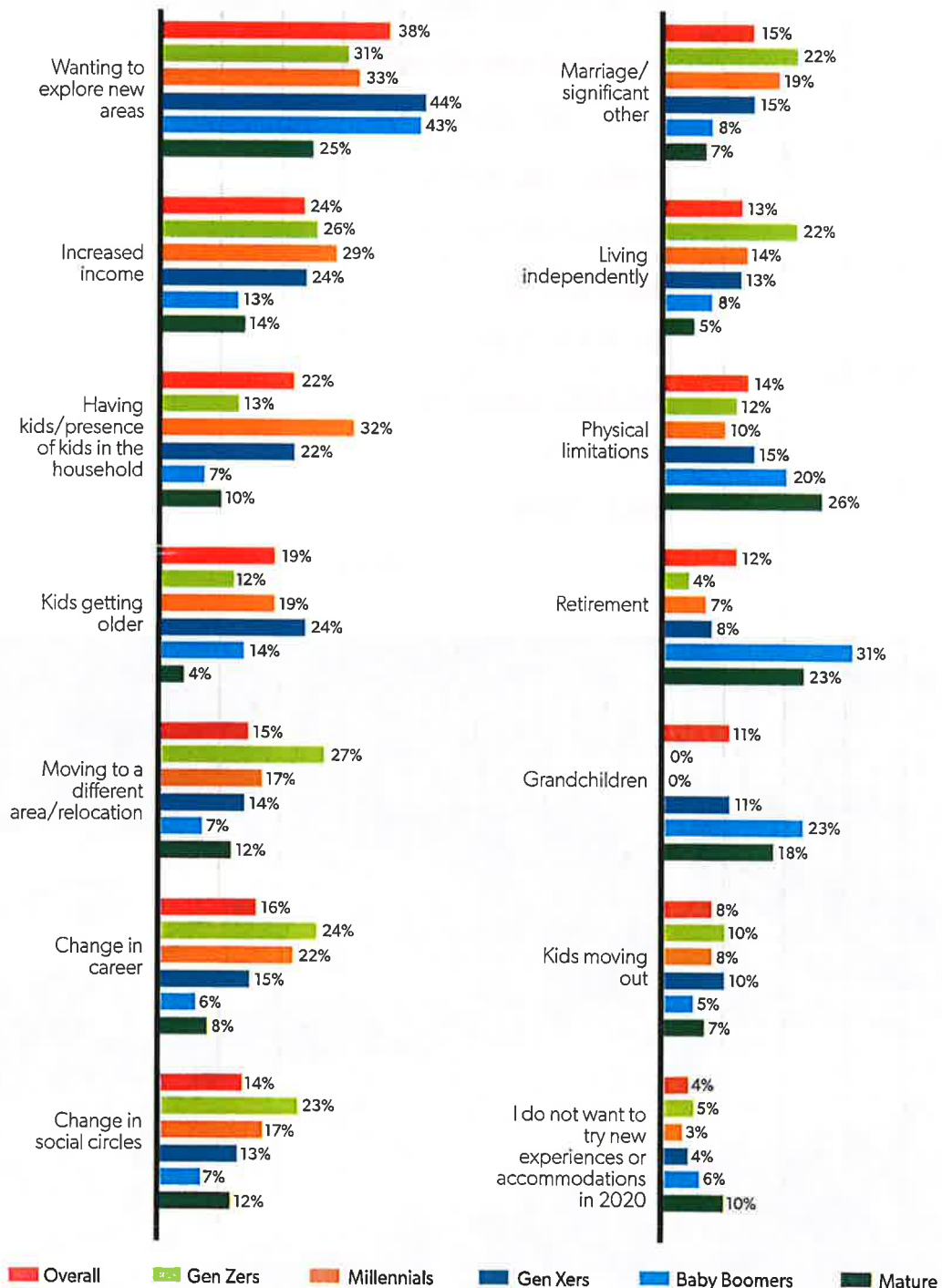


Life Stages and Life Events That Impact Camping

Overall, the desire to explore has had the greatest impact on camping plans, while other key events/factors that impact camping were most likely to include changes in income, having kids/kids getting older, all of which alter the household's views toward how they plan to experience the outdoors.

Exploration and the desire to do so has the greatest impact on those who are at the point where children are getting older, and they may have more freedom and free time (Gen X and Boomers), while having an increased income impacted the Gen Z and Millennials. Gen Zers indicated experiencing the most changes in their lives which are impacting their plans, whether it's income, career change, moving to a new area, change in social circles or living independently. The findings around life stages and life events reflect a pre-COVID-19 world, and it will be interesting to see what factors campers identify as having impacted their camping in 2020 in next year's report.

FACTORS IMPACTING CAMPING PLANS [2019]



By viewing a ranking of these events, aside from a desire to explore, income impacts Gen Z, Millennials and Gen X, while having kids getting older is more likely to impact Gen X. Physical limitations impact mature campers most, and retirement is a major factor for both Boomers and mature campers.

RANKING OF TOP 10 FACTORS IMPACTING CAMPING PLANS [2019]

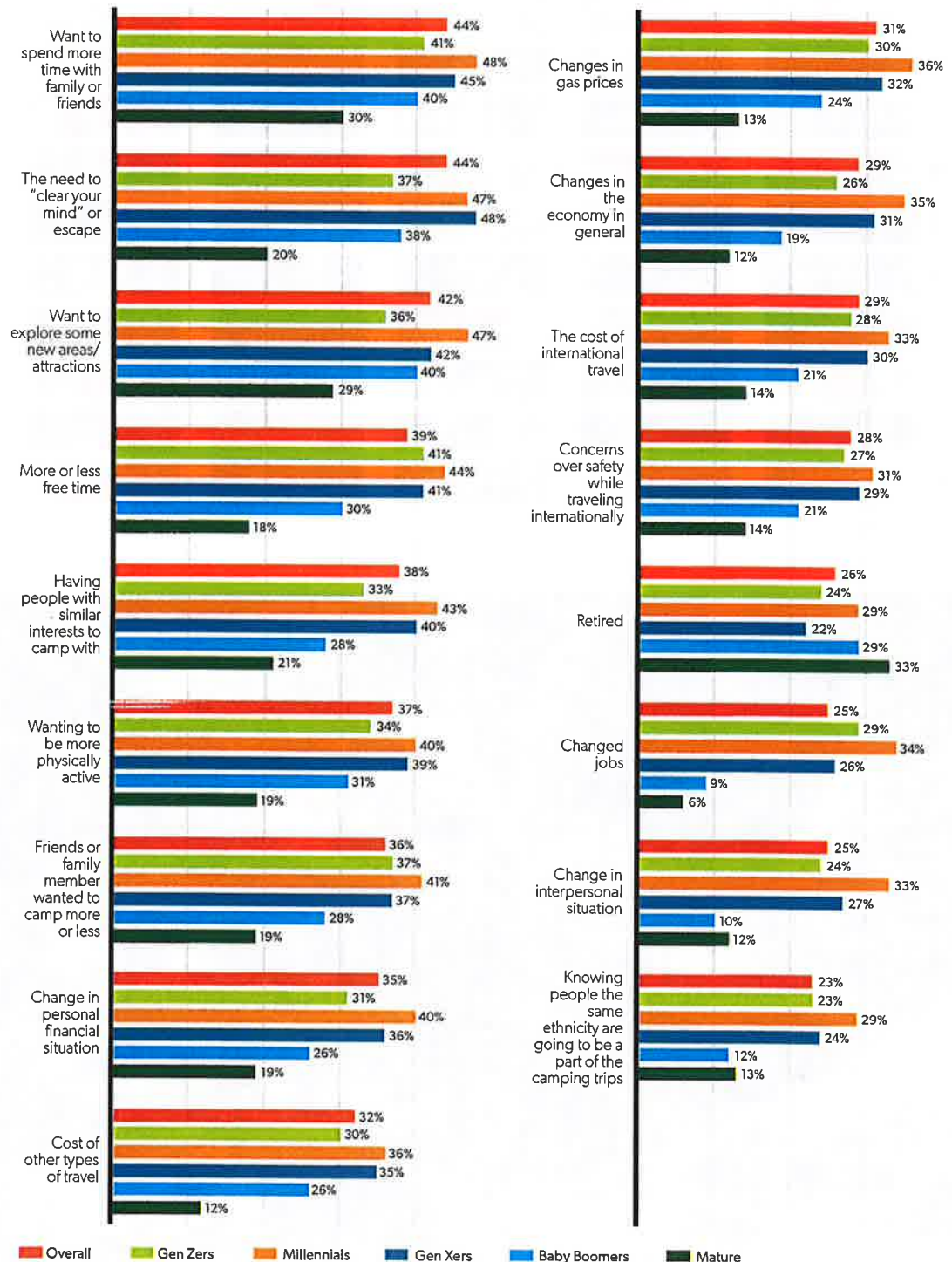
	Gen Zers	Millennials	Gen Xers	Baby Boomers	Mature
1	Wanting to explore new areas	Wanting to explore new areas	Wanting to explore new areas	Wanting to explore new areas	Physical limitations
2	Moving to a different area/relocation	Having kids/presence of kids in the household	Kids getting older	Retirement	Wanting to explore new areas
3	Increased income	Increased income	Increased income	Grandchildren	Retirement
4	Change in career	Change in career	Having kids/presence of kids in the household	Physical limitations	Grandchildren
5	Change in social circles	Kids getting older	Physical limitations	Kids getting older	Increased income
6	Living independently	Marriage/significant other	Marriage/significant other	Increased income	Moving to a different area/relocation
7	Marriage/significant other	Moving to a different area/relocation	Change in career	Marriage/significant other	Change in social circles
8	Having kids/presence of kids in the household	Change in social circles	Moving to a different area/relocation	Living independently	Having kids/presence of kids in the household
9	Kids getting older	Living independently	Change in social circles	Having kids/presence of kids in the household	I do not want to try new experiences or accommodations in 2020
10	Physical limitations	Physical limitations	Living independently	Change in social circles	Change in career



Among those who increased their camping trips in 2019, a desire to spend more time with family/friends, and the need to escape and clear their minds were most impactful.

Younger campers, and especially Millennial campers, mentioned job or interpersonal changes allowing them to camp more often. As noted above, the 2021 North American Camping Report will include details about how COVID-19 impacted camping in 2020.

REASONS FOR INCREASING TRIPS IN 2019 [2019]



According to report data through 2019, Hispanic camping trends have flattened out, and, as with other groups, the key driver for any differences based on ethnicity is age.

Continued Growth in Camping

In 2019, Hispanic households represented 12 percent of all camping households and was the largest non-white group of campers. What's more, 17 percent of new campers in 2019 were Hispanic. The group represents the fastest growing group of campers based on ethnicity (up from 6 percent in 2014 to 12 percent in 2019).

Destinations and Experiences

While Hispanics took less scenic drives than they did in years past (12 percent decline since 2014), they indicated participating more in other recreational activities, including canoeing/kayaking, which increased by 10 percent in the past five years to 43 percent. Another popular activity for Hispanics was fishing (46 percent).

When it comes to their preferred camping locations, more than one-third (36 percent) of Hispanic campers chose to camp in state or national campgrounds. The adventure truly lies in the destination for many Hispanic campers. In fact, more than a quarter of Hispanics were most interested in the overlanding experience that often comes with camping.

RV usage has become increasingly popular among Hispanic camper households. Five years ago, only 12 percent of Hispanic camper households were using RV's to camp, whereas in 2019, 26 percent were using RV's. Peer-to-peer RV rentals were especially popular among Hispanics with more than three-fourths (77 percent) of Hispanic campers most likely to rent an RV from a peer-to-peer service for camping.

Weekend trips were popular for Hispanics, and 32 percent were most likely to include at least one weekend day in their camping travel. A weekend day, along with access to technology while camping, allowed them to camp for longer periods of time. In fact, they reported 6.1 days of camping in 2019, vs. 4.3 in 2018.

The longer, more flexible camping trips may also help accommodate a larger group. After all, about 6 in 10 camping households took at least one camping trip a year in 2019 with multiple generations of campers – including 69 percent of Hispanic camping households. Half of Hispanic campers specifically brought their grandchildren and their grandchildren's parents along while camping at least 50 percent of the time they camped.

**IN 2019, HISPANICS REPRESENTED
THE LARGEST NON-WHITE GROUP
OF CAMPERS.**





TRAVEL DISTANCES FOR CAMPING
CONTINUED TO DECREASE IN 2019.
ONE-THIRD OF CAMPERS STAYED
WITHIN 50 MILES FROM HOME.

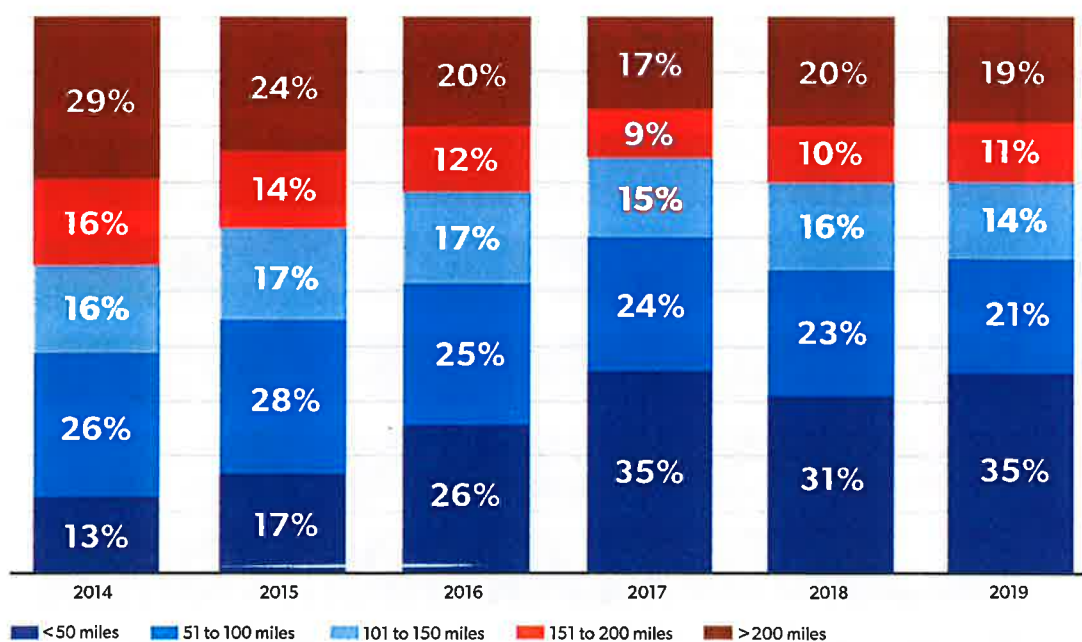
WHERE CAMPERS ARE CAMPING

Distance from Home

Over the past three years (2017-2019), travel distances for camping have decreased with about one-third of campers staying closer to home (within 50 miles). Only about 1-in-5 campers traveled more than 200 miles to camp in 2019.

Gen Zers (47 percent) and Millennials (42 percent) were substantially more likely to camp closer to home when compared to Gen X (32 percent), Boomers (23 percent), or Mature campers (24 percent). All non-white groups, and especially Asian campers, traveled the shortest distances, with about 4-in-10 staying within 50 miles of home.

TRAVEL DISTANCES FOR CAMPING TRIPS (2014-2019)



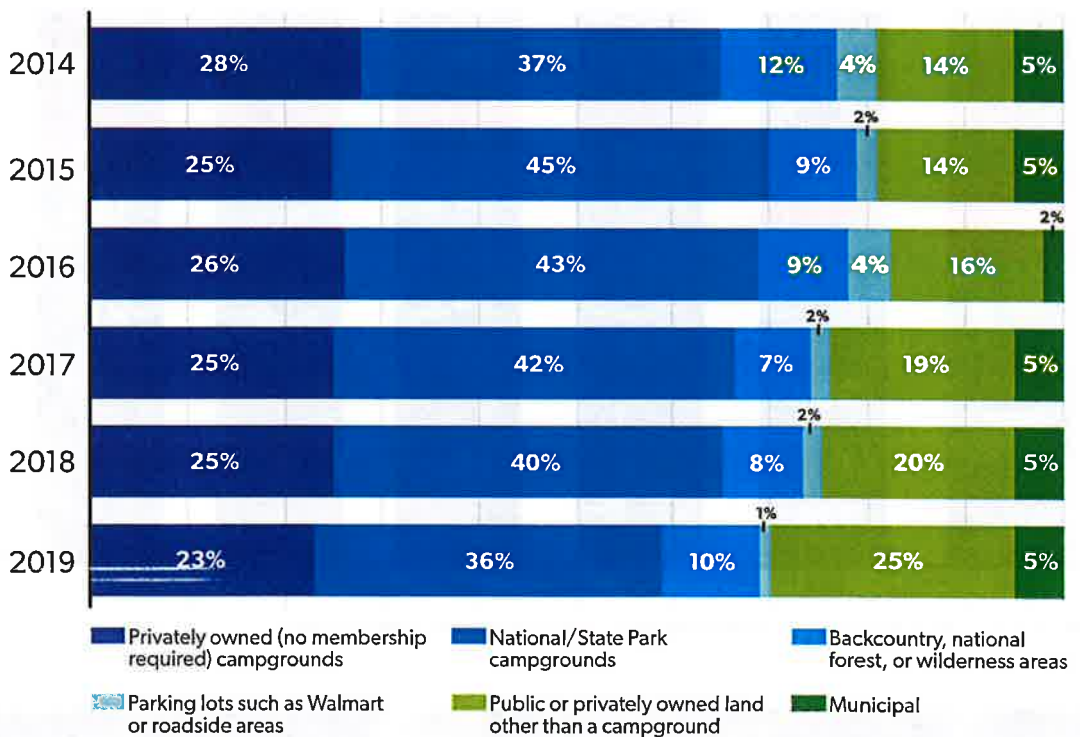
Camping Nights

Over the years, results demonstrate that campers are increasing their volume of camping (more and more campers are taking three or more trips annually), which has resulted in an expansion of camping to a variety of locations that includes both public and private land. Thus, even though the proportion of nights may see a drop, the nights spent at the different locations can remain constant (if not grow).

However, it is still important to consider that campers are spending a majority of the nights camping on some type of public land – whether it's state/national park campground, backcountry/wilderness areas, municipal campgrounds or other public lands – including about two-thirds of Millennial camper nights.

Thirty-six percent of camper nights were spent at state or national park campgrounds in 2019.

WHERE CAMPING NIGHTS ARE SPENT (2014-2019)

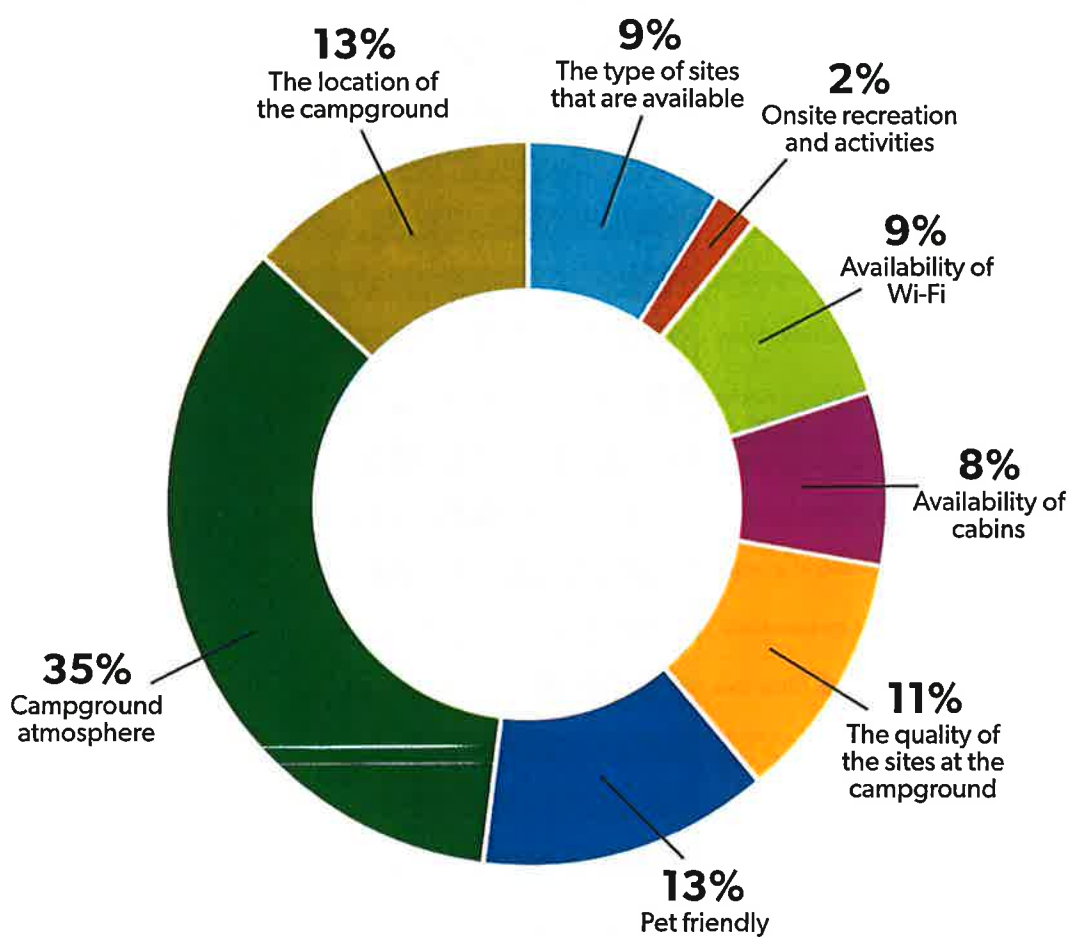


Campground Selection and Offerings

Campground atmosphere was the single most important consideration among more than a third of all camper households in 2019, followed by campground location.

Campground atmosphere, which includes campers' level of comfort while staying at a location (and also includes a sense of safety and security), was one of the key considerations in determining whether campers will stay at a location, or even consider camping at all.

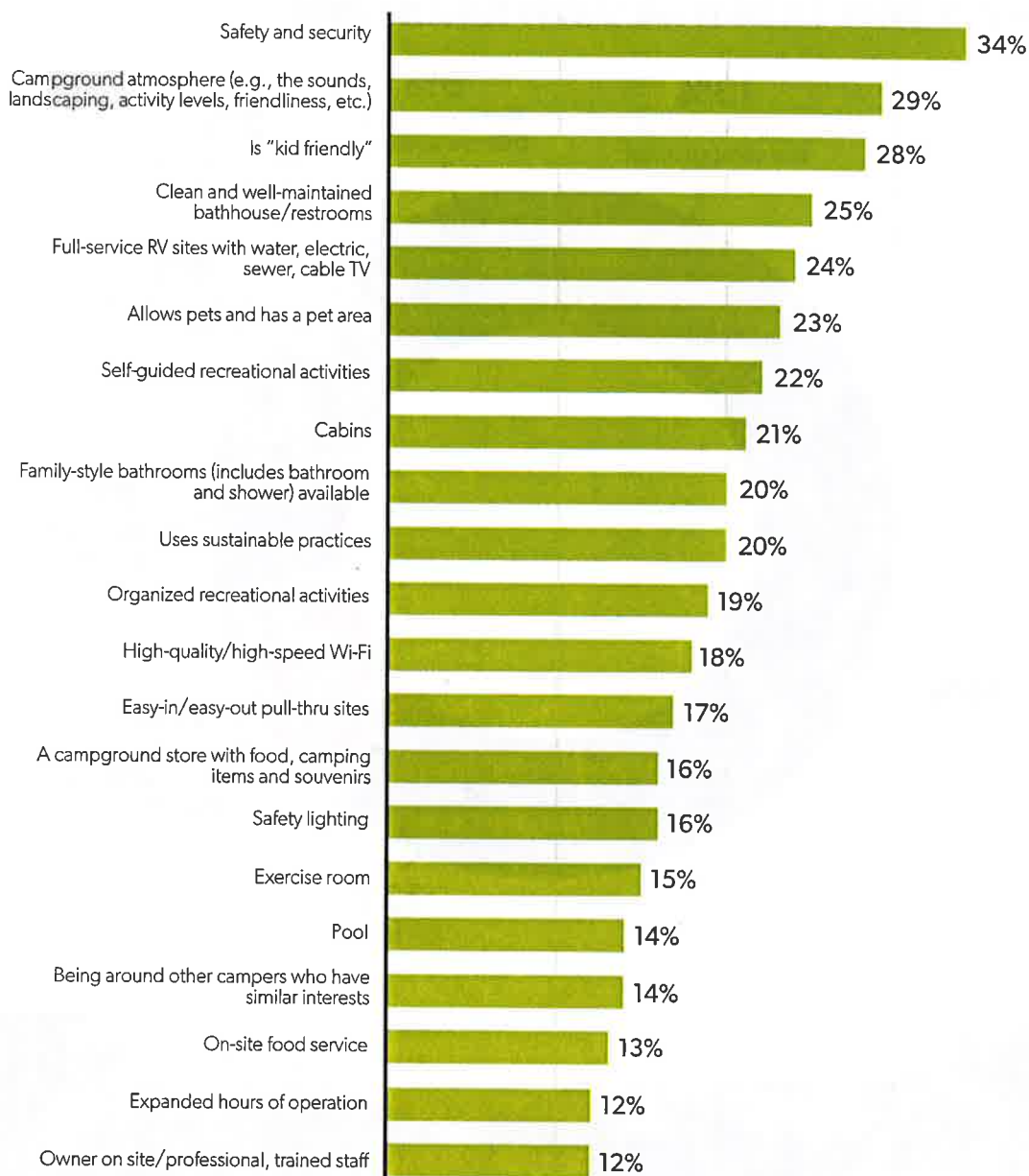
MOST IMPORTANT FACTOR IN CAMPGROUND SELECTION [2019]



All campers, regardless of camping type, camper age or ethnicity, highly valued a sense of safety and security, followed by campground atmosphere and being kid-friendly.

Indeed, when asked to rank the most important considerations while on-site, the atmosphere, which includes a sense of safety and security as well as a kid-friendly atmosphere, were more important to campers than clean and well-maintained restrooms.

MOST IMPORTANT CONSIDERATIONS WHILE STAYING AT A CAMPGROUND [2019]



The use of sustainable practices at the campground was ranked highest among Gen Z campers, but ranked ninth among Millennials and did not make the top ten among Gen X or Boomer campers.

TOP TEN CONSIDERATIONS WHEN STAYING AT A CAMPGROUND [2019]

	Gen Zers	Millennials	Gen Xers	Baby Boomers	Mature
1	Sustainable practices	Safety and security	Safety and security	Safety and security	Safety and security
2	Safety and security	Is "kid friendly"	Campground atmosphere	Campground atmosphere	Cabins
3	Clean bathhouse	Campground atmosphere	Is "kid friendly"	Full-service RV sites	Campground atmosphere
4	Is "kid friendly"	Clean bathhouse	Clean bathhouse	Clean bathhouse	Allows pets and has a pet area
5	Self-guided recreational activities	Full-service RV sites	Allows pets and has a pet area	Family-style bathrooms	Sustainable practices
6	Organized recreational activities	Self-guided recreational activities	Full-service RV sites	Cabins	Full-service RV sites
7	Family-style bathrooms	Allows pets and has a pet area	Cabins	Is "kid friendly"	Easy-in/easy-out pull-thru sites
8	High quality/high speed WiFi	High quality/high speed WiFi	Self-guided recreational activities	Allows pets and has a pet area	Pool
9	Campground atmosphere	Sustainable practices	Self-guided recreational activities	Easy-in/easy-out pull-thru sites	Clean bathhouse
10	Allows pets and has a pet area	Family-style bathrooms	Family-style bathrooms	Exercise room	Campground store

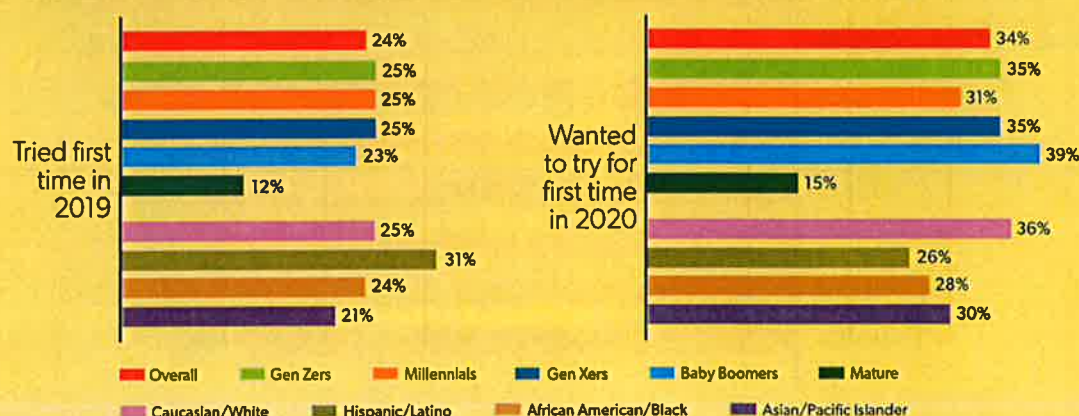
THE REVIVAL OF THE ROAD TRIP

In 2019, prior to shifts in travel due to the 2020 Coronavirus pandemic, there was a renewed interest in camping as a road trip.

- Fully one-fourth of campers said that they took a camping road trip for the first time; another one-third claim that they want to try a road trip that includes camping for the first time in 2020, indicating that there was a great deal of interest in taking camping road trips.
- Across most generations, trial of a road trip in 2019 was consistent with the exception of the oldest campers; interest in trying a road trip in 2020 is somewhat higher among Boomers.
- About 3-in-10 Hispanic households tried a road trip for the first time in 2019.

We expect to see many shifts in 2020 camping behavior due to the effects of the Coronavirus pandemic, including road trips and road trips that include camping.

TRIAL AND INTEREST IN A ROAD TRIP THAT INCLUDES CAMPING



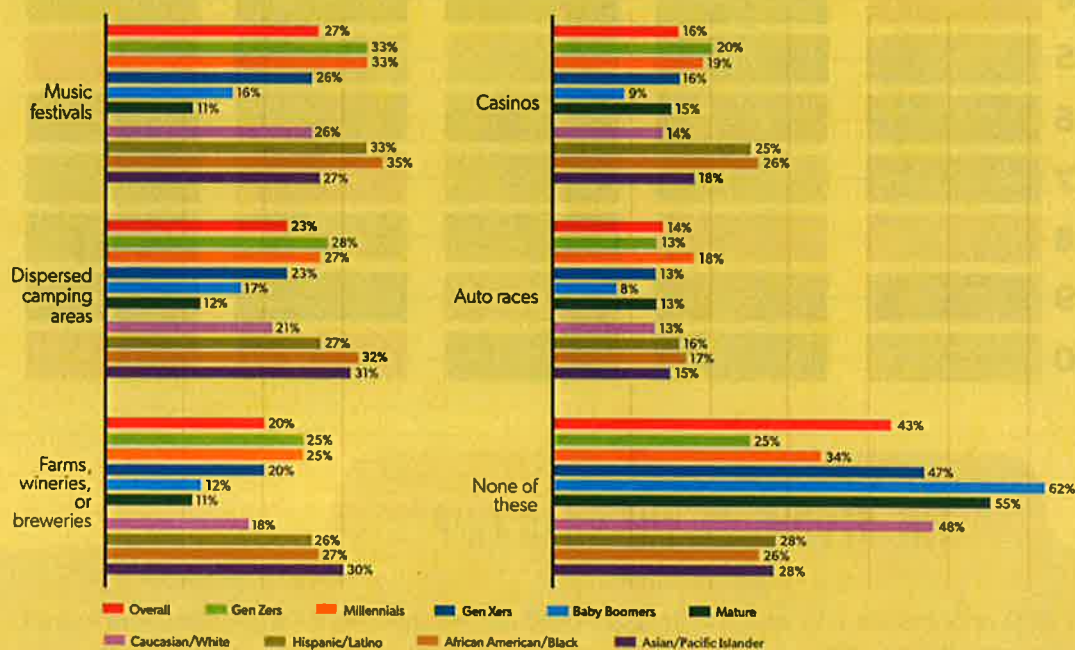
The proliferation of alternative camping locations changed not only how campers camped, but where, which included the access to private land camping via listing services.

Overall, about 6-in-10 campers stayed at some kind of alternative location for camping in 2019, which was most likely to include music festivals.

Younger campers were most likely to seek alternative places to camp which again is most likely to include music festivals, dispersed camping areas or farms/wineries/breweries.

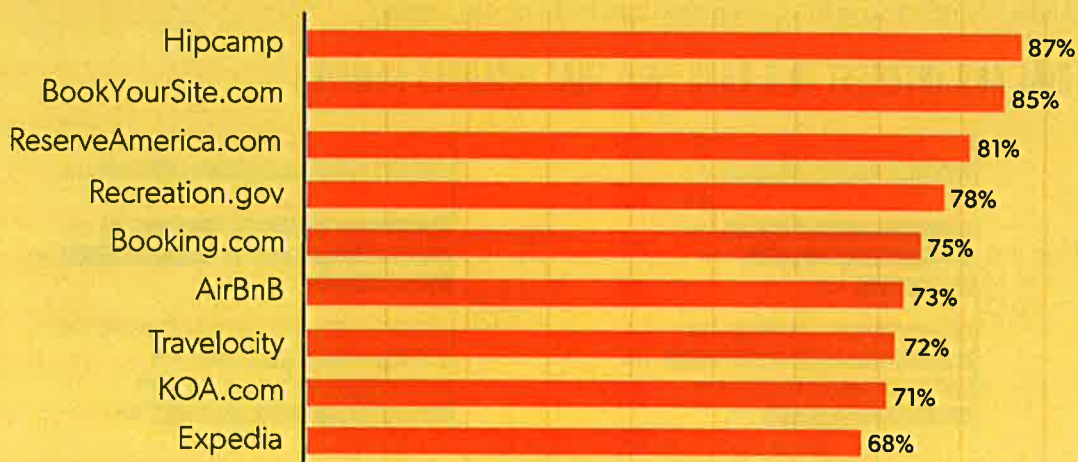
Non-white campers were significantly more likely than white campers to camp at these alternative locations.

USE OF OTHER/ALTERNATIVE LOCATIONS FOR CAMPING BY GENERATION AND ETHNICITY [2019]



In order to access these alternative locations for camping, campers actively used a variety of Online Travel Agencies. Most notably, Hipcamp and BookYourSite are the commonly used, with finding sites at music festivals and farms/wineries/breweries the most common locations.

USED FOR ALTERNATIVE SITE BOOKING



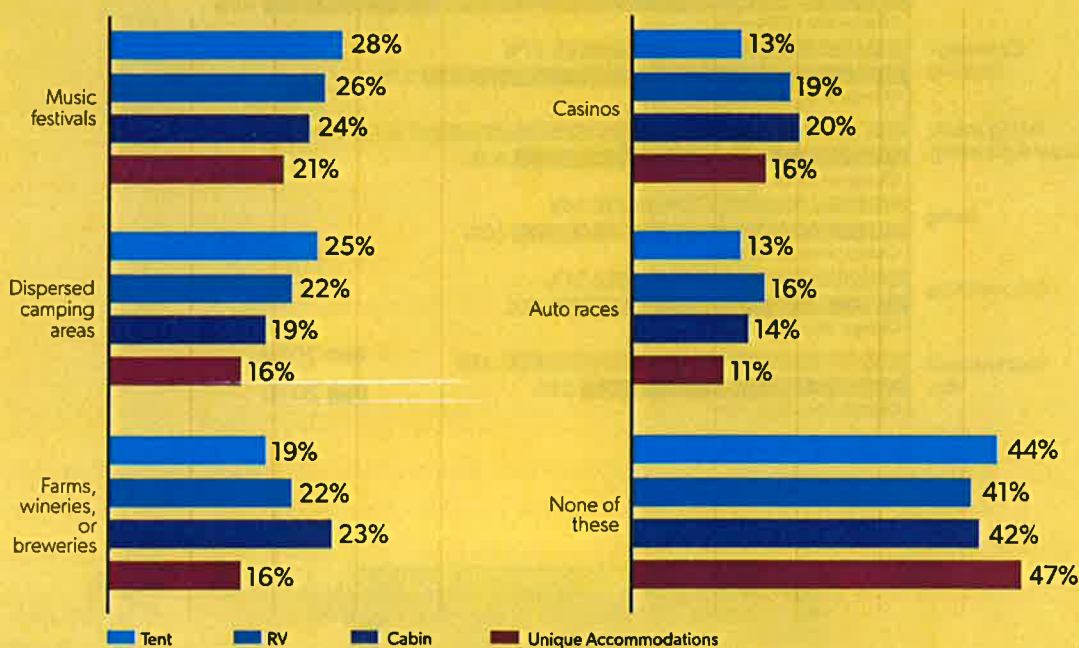
RVers and Alternative Locations for Camping

Overall, fully six-in-ten RVers used alternative camping locations – including music festivals, dispersed camping areas (boondocking), farms/wineries/breweries, or casinos – to supplement their stays at more traditional locations such as private and public campgrounds that were more likely to include full-service, patio, and/or pull-thru sites.

RVers split a majority of their camper nights between private campgrounds (26 percent) or state/national park campgrounds (26 percent), yet the remainder of their camper nights (nearly half, 48 percent) were spent at locations outside of these more traditional locations, including one out of every five RV camper nights spent on private land, whether it's through a listing such as HipCamp or other non-listed private land.

Like most campers, RVers used a variety of locations for camping suggesting that campsite inventory (even where there are no established campsites) was addressed by providers within the camping sector through the utilization of private land (and private land listings), public lands that are able to accommodate RVs at dispersed camping locations, casinos/racetracks/farms/wineries/breweries allowing access to RVers (and in some cases building RV sites), and OTAs that provide information about these locations at the campers' fingertips.

USE OF OTHER/ALTERNATIVE LOCATIONS FOR CAMPING BY PRIMARY ACCOMMODATIONS [2019]



33 PERCENT OF MILLENNIAL AND GEN Z
CAMPERS CAMPED AT A MUSIC FESTIVAL IN 2019.

WHAT CAMPERS DO WHEN THEY'RE CAMPING

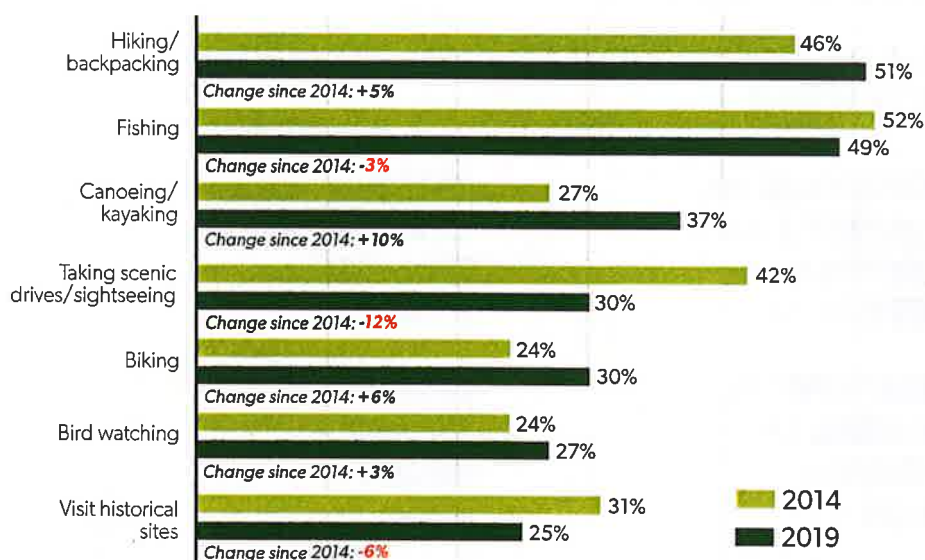
Outdoor Recreation

Campers participate in a variety of activities during their camping trips. Whether it's a highly physical activity or more relaxing/less physical pursuits, most campers have at least one activity they prefer while camping.

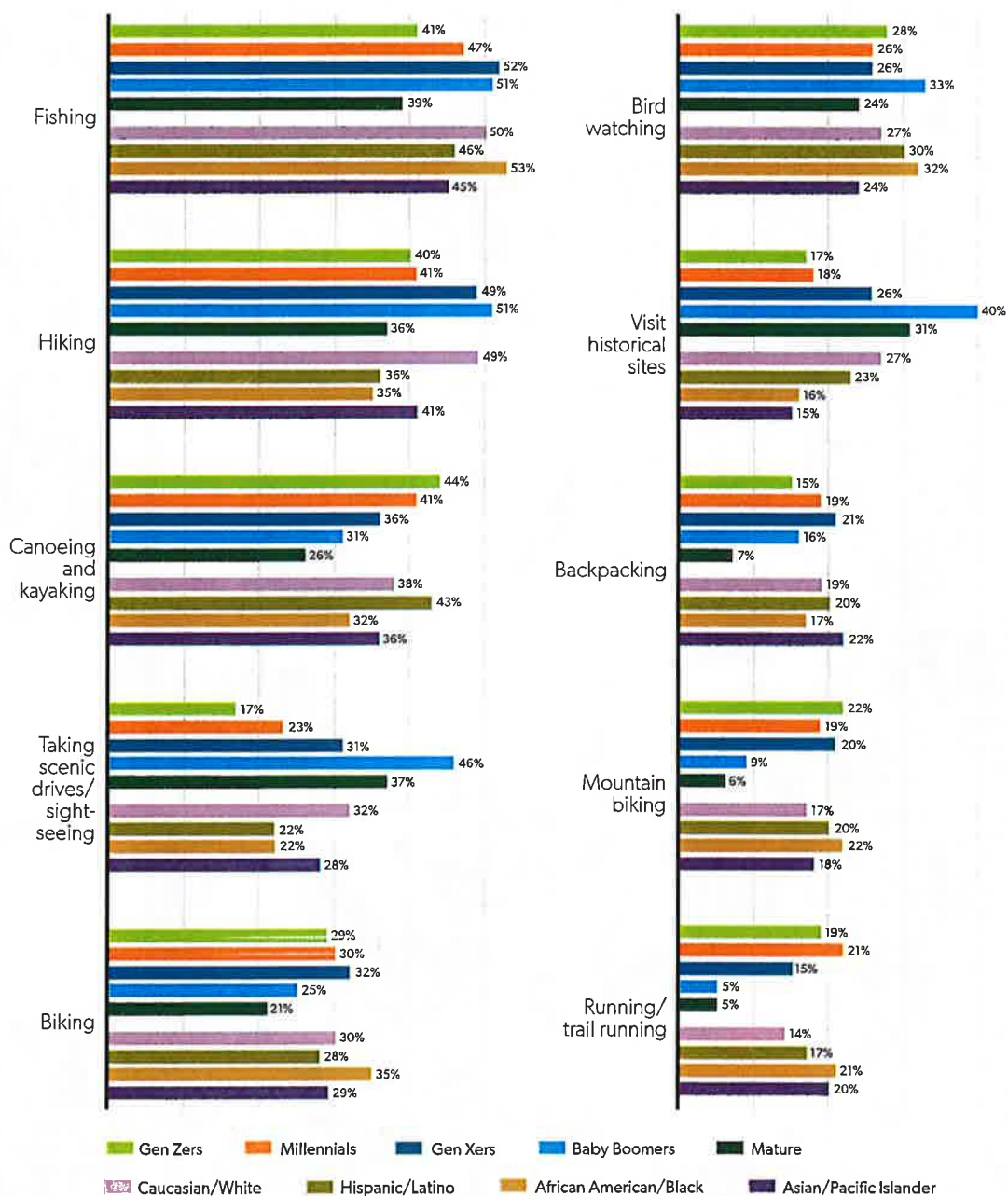
Overall, hiking/backpacking and fishing continued to be the most popular recreation activities in 2019.

Over time, participation in canoeing/kayaking has increased by 10 percentage points since 2014, while taking scenic drives (which is being impacted by lower levels of participation among younger campers) has declined by 12 points since 2014.

PARTICIPATION IN OUTDOOR RECREATION WHILE CAMPING (2014-2019)



PARTICIPATION IN OUTDOOR RECREATION WHILE CAMPING BY GENERATION [2019]



OVER TIME, AN INCREASING NUMBER
OF CAMPERS USE AN RV AS THEIR
PRIMARY CAMPING ACCOMMODATION.

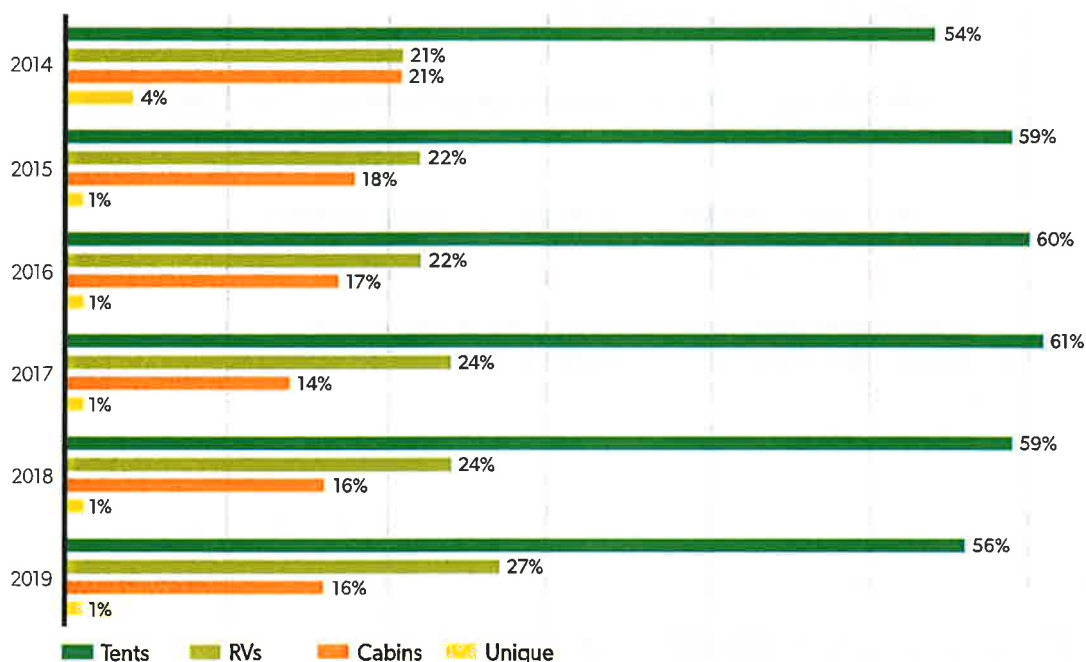


HOW CAMPERS ARE CAMPING

Accommodations

Over time, more and more campers claim to use an RV as their primary camping accommodation.

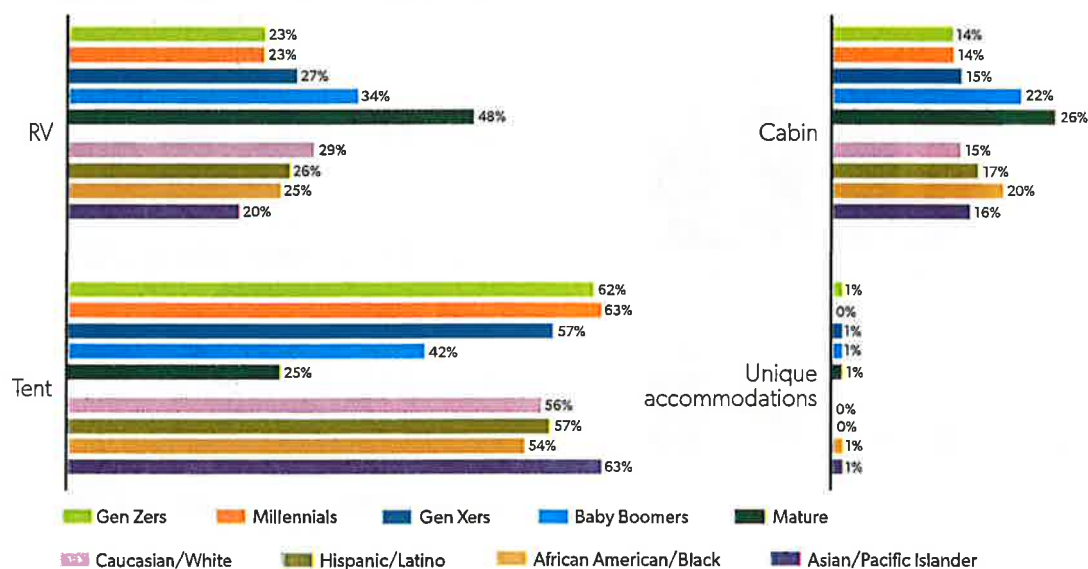
PRIMARY CAMPING ACCOMMODATIONS [2012-2019]



The usage of tents as a primary camping accommodation has dropped ten percentage points (from 67 percent to 57 percent) among Hispanic campers since 2015, while use of RVs (+7 percentage points) and cabins (+5 percentage points) have both increased.

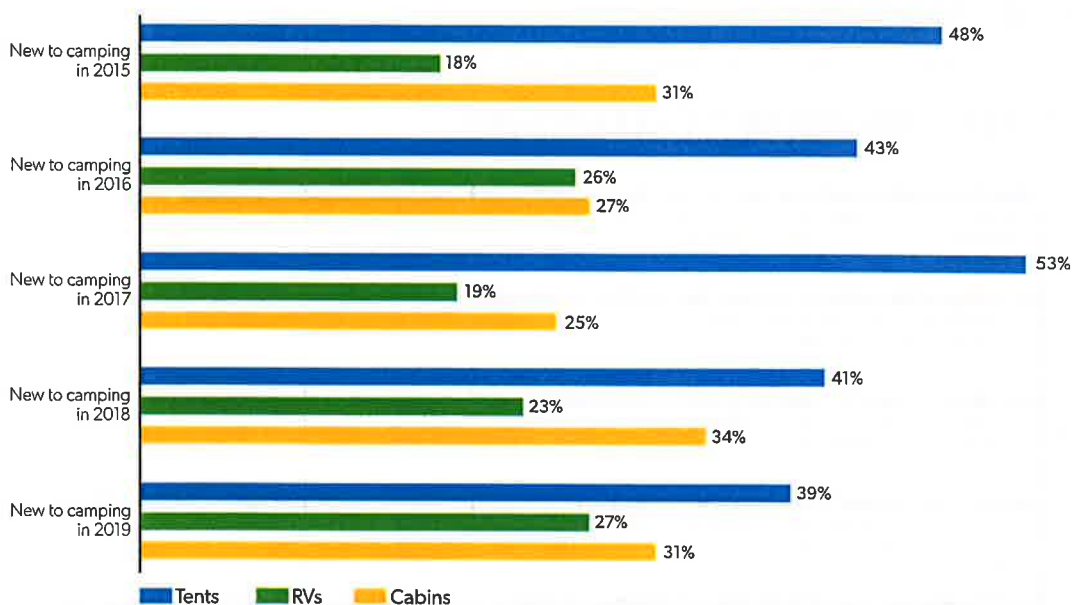
Use of RVs as a primary camping accommodation has also increased among African American campers (+8 percentage points) and Asian American campers (+7 percentage points) since 2015.

PRIMARY CAMPING ACCOMMODATIONS BY GENERATION AND ETHNICITY [2019]



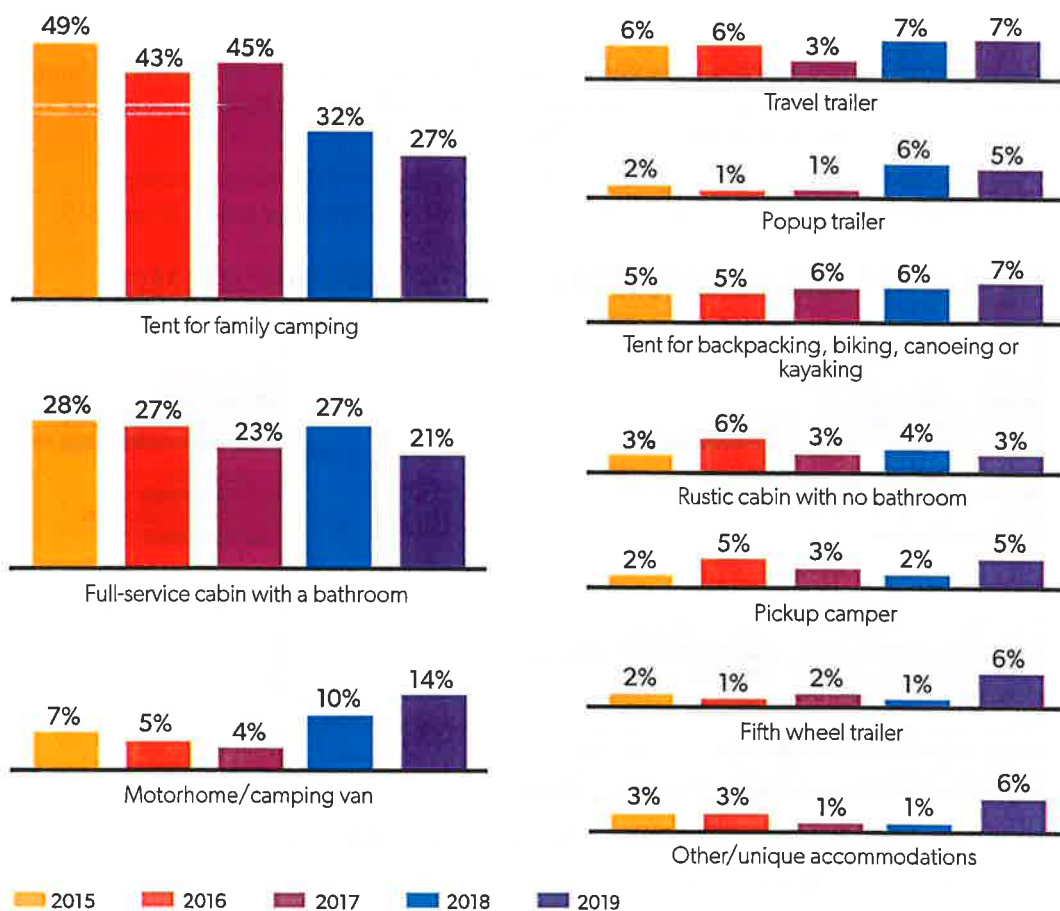
Among new campers, tent usage continues to decline, while RV use has increased since 2015.

PRIMARY CAMPING ACCOMMODATIONS BY NEW CAMPERS [2015-2019]



Upon a closer look, in a noticeable drop from past results, since 2015 far fewer new campers reported starting their camping experiences in a tent for family camping, while more started out in some type of RV or cabin/unique glamping type of accommodation.

SPECIFIC INTRODUCTORY ACCOMMODATIONS [2015-2019]



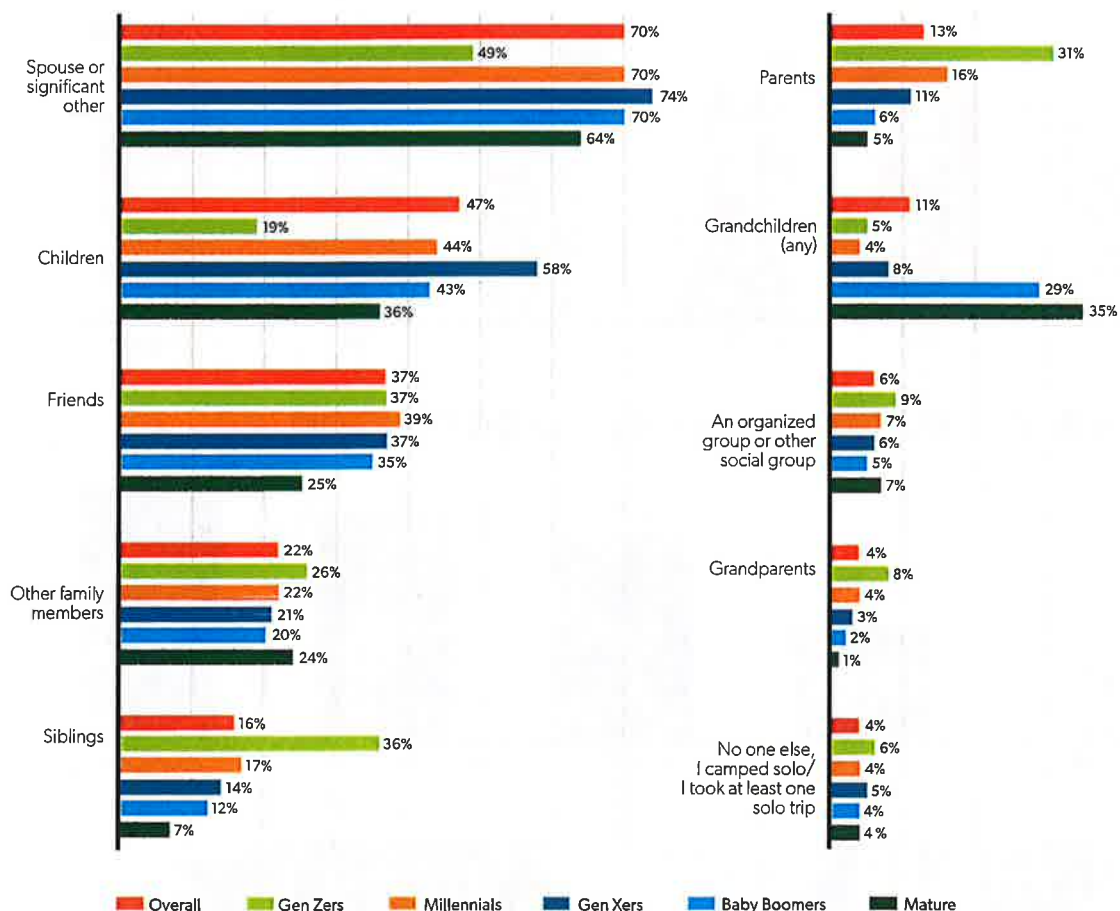
Who Campers are Camping With

While it is not surprising that campers were most likely to camp with their spouse or significant other, in general, campers are also likely to include those around them based on their stage in life. In particular, Gen Z, being at a transitional age, were less likely than other generations to include a spouse/significant other, but much more likely to camp with their siblings or parents.

Millennials, who as a group are approaching forty years of age and are beginning to build their own families, by contrast were half as likely to include friends or siblings, but more likely to camp with their children. About 3-in-10 or more Boomers and Mature campers included grandchildren.

Among campers who bring their grandchildren, seven out of ten reported at least some trips exclude the parents.

WHO CAMPERS ARE CAMPING WITH (2019)



More Households Camping + Camping More Often

North American residents continue to camp in greater numbers over the past five years.

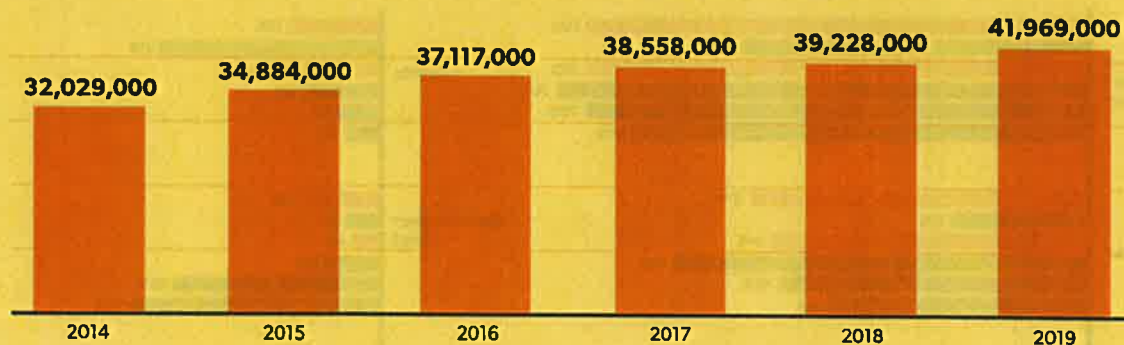
In 2019, it is estimated that approximately 42 million U.S. households went camping at least once, including an additional 2.7 million households compared to 2018.

This increase in camping can be accounted for by:

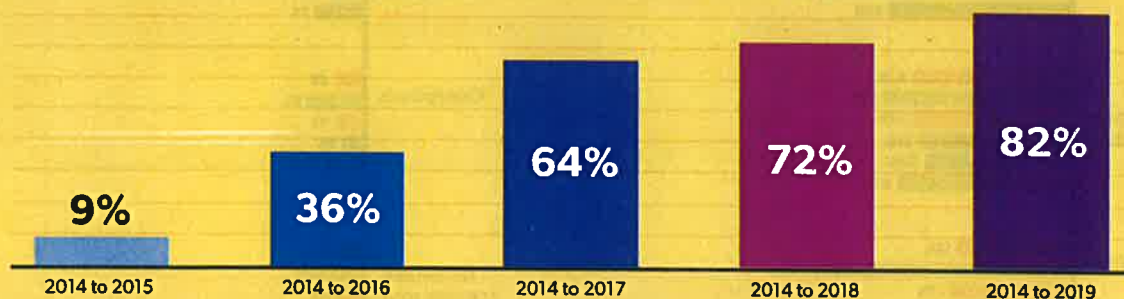
- Households that are new to camping altogether – it is estimated that there were about 1.9 million households who camped for the first time in 2019 that have never camped in the past, as well as,
- Lapsed campers who may have camped in the past, but had not done so in recent years.

Another factor driving growth in the camping sector is that campers seem to be camping more frequently. Since 2014, there has been an 82 percent increase in the number of high-volume camping households – those who camped three or more times in the past year.

NUMBER OF U.S. HOUSEHOLDS WHO CAMPED IN THE PAST YEAR [2014-2019]



GROWTH IN HOUSEHOLDS CAMPING 3+ TIMES ANNUALLY [2014-2019]



The availability and access to unique experiences – largely glamping and unique accommodations – has contributed to market growth.

Of the 2.7 million additional households that camped in 2019 compared to 2018, about 1.3 million of the additional camping households can be accounted for by an interest in glamping and/or unique camping experiences.

Approximately 1-in-5 (or about 9 million) campers said they took a glamping trip in 2019, and one-third indicated interest in 2020. More than one out of every 10 leisure travelers who did not consider themselves a camper in 2019 reported taking a trip that they considered glamping, and 44 percent said they were interested in taking a glamping trip in the future, according to the North American Glamping Report*, a separate research effort also sponsored by Kampgrounds of America, Inc. The Glamping Report measured the glamping incidence and behavior among North American leisure travelers, including, but not limited to, those who camp as part of their travel.

Sixty-three percent of leisure travelers who were interested in glamping said their interest was driven by having services and amenities that aren't typically a part of traditional types of camping. These findings provide a strong indicator that glamping may represent a critical part of the growth of camping.

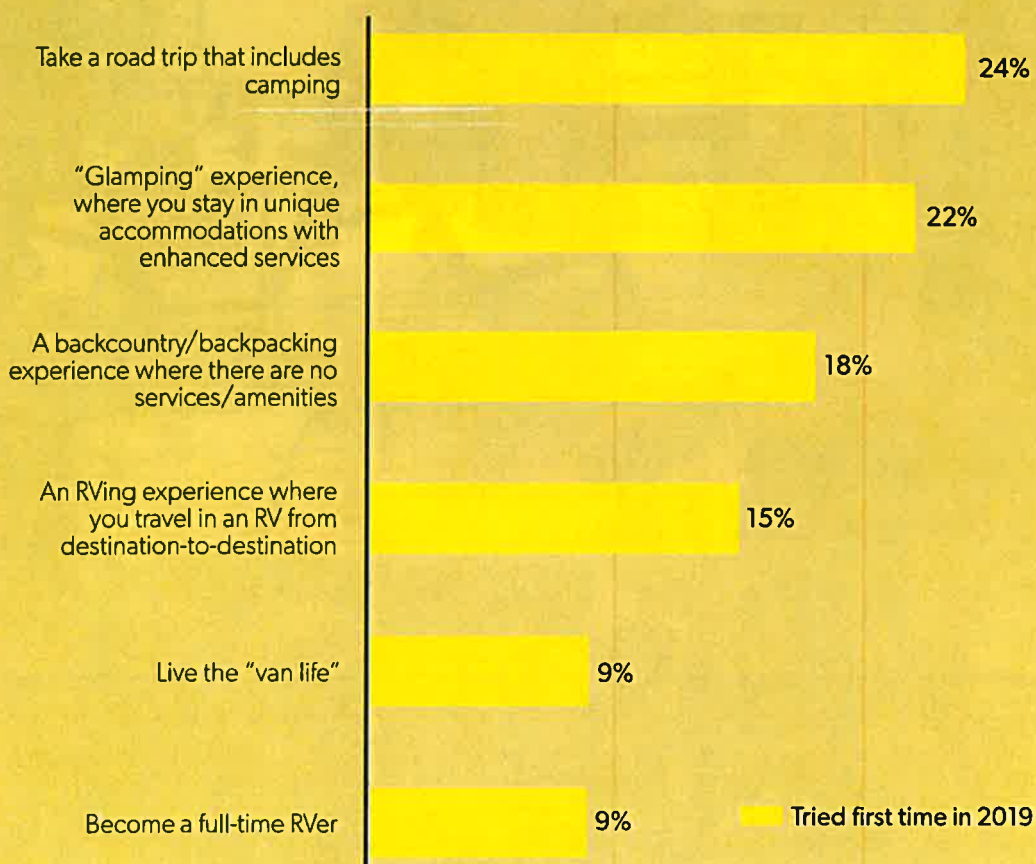
The proliferation of new types of camping experiences – including the resources to encourage participation, such as access to information and a peer group to participate with – is also attracting new campers as well as contributing to campers, both current and lapsed, taking a greater number of trips.

Close to half of lapsed campers (i.e., those who have camped in the past but not in recent years) participated in a camping experience in 2019 that included glamping, overlanding, van life, full-time RVing, or a backcountry experience. An additional 1-in-5 of these lapsed campers borrowed an RV for camping.

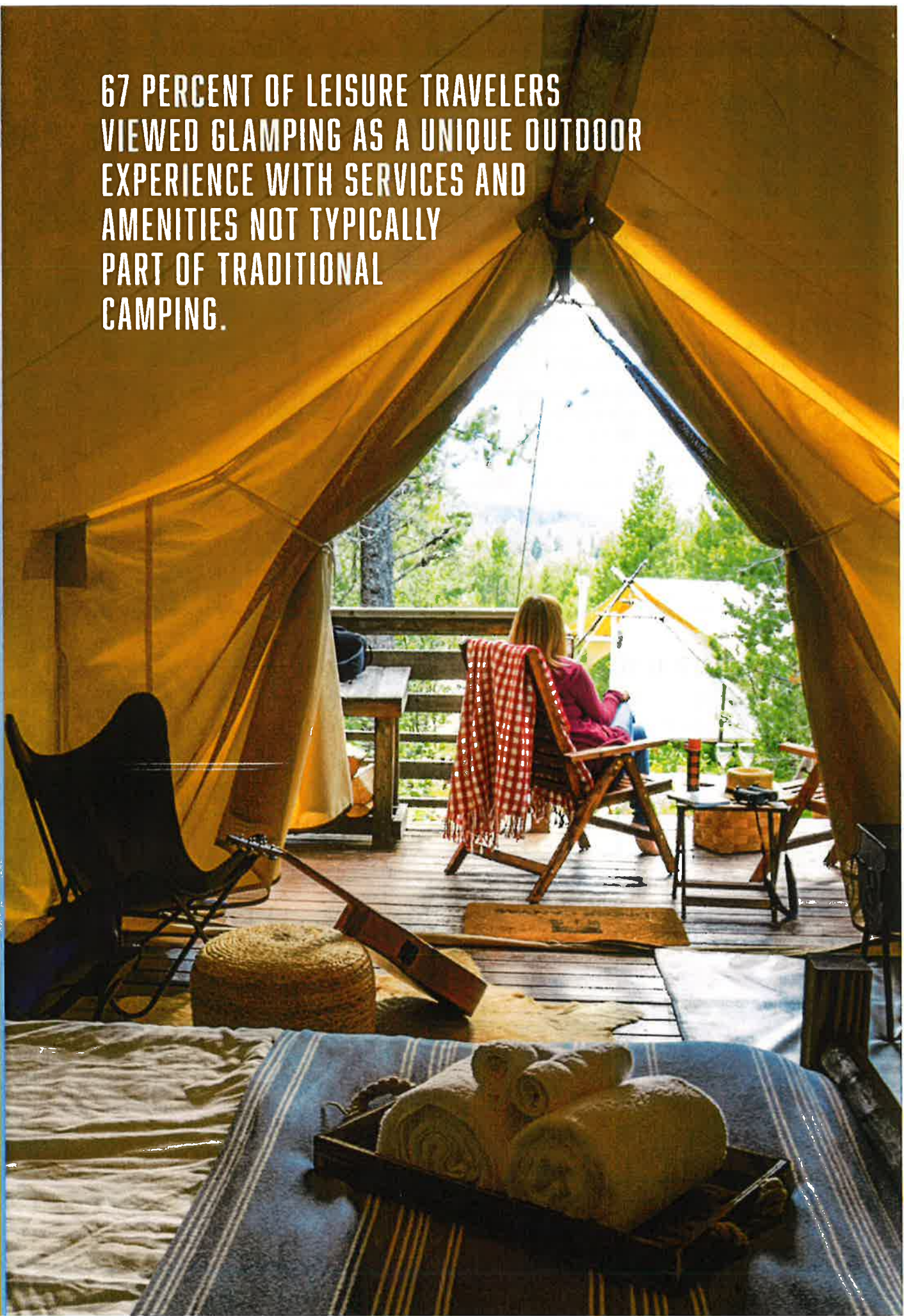
Again, this growth in camping frequency is closely aligned to the array of new camping accommodations and experiences available. In particular, higher volume campers are much more likely to take road trips, stay at private campgrounds for the first time, go glamping, take a backcountry trip, go RVing or overlanding.

**2019 North American Glamping Report sponsored by Kampgrounds of America, Inc. and available at [KOApessroom.com](https://www.koapressroom.com).*

TRIAL AND INTEREST IN NEW CAMPING EXPERIENCES AMONG ALL CAMPERS [2019]



67 PERCENT OF LEISURE TRAVELERS
VIEWED GLAMPING AS A UNIQUE OUTDOOR
EXPERIENCE WITH SERVICES AND
AMENITIES NOT TYPICALLY
PART OF TRADITIONAL
CAMPING.

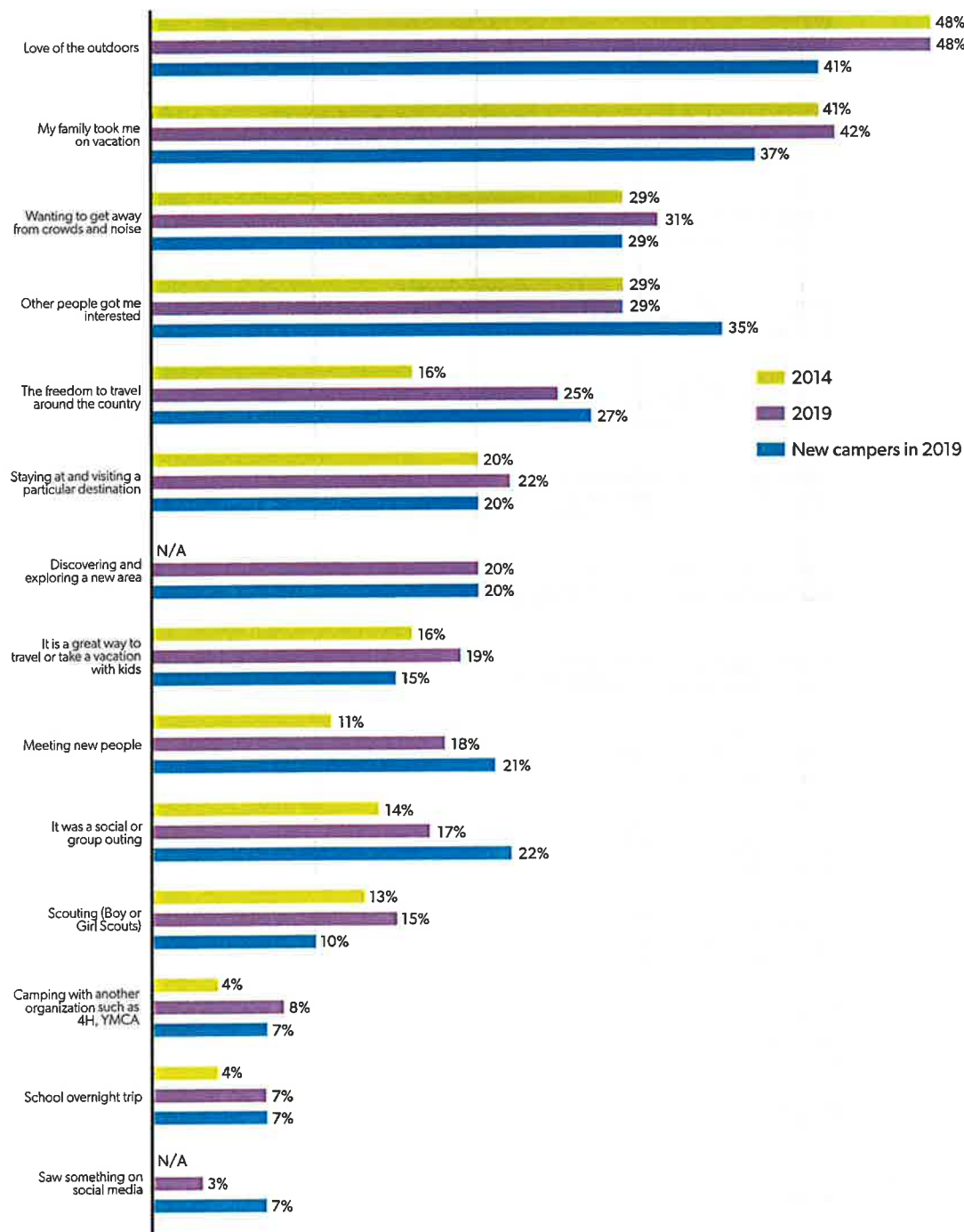


WHY CAMPERS ARE CAMPING

Initial Interest in Camping

Compared to experienced campers, new campers – who, in 2019, were comprised of a much younger demographic – were somewhat less likely to mention a love of the outdoors when compared to experienced campers, and more likely to suggest that other people got them interested, which is in all likelihood due to a younger generation of campers being introduced to camping by friends.

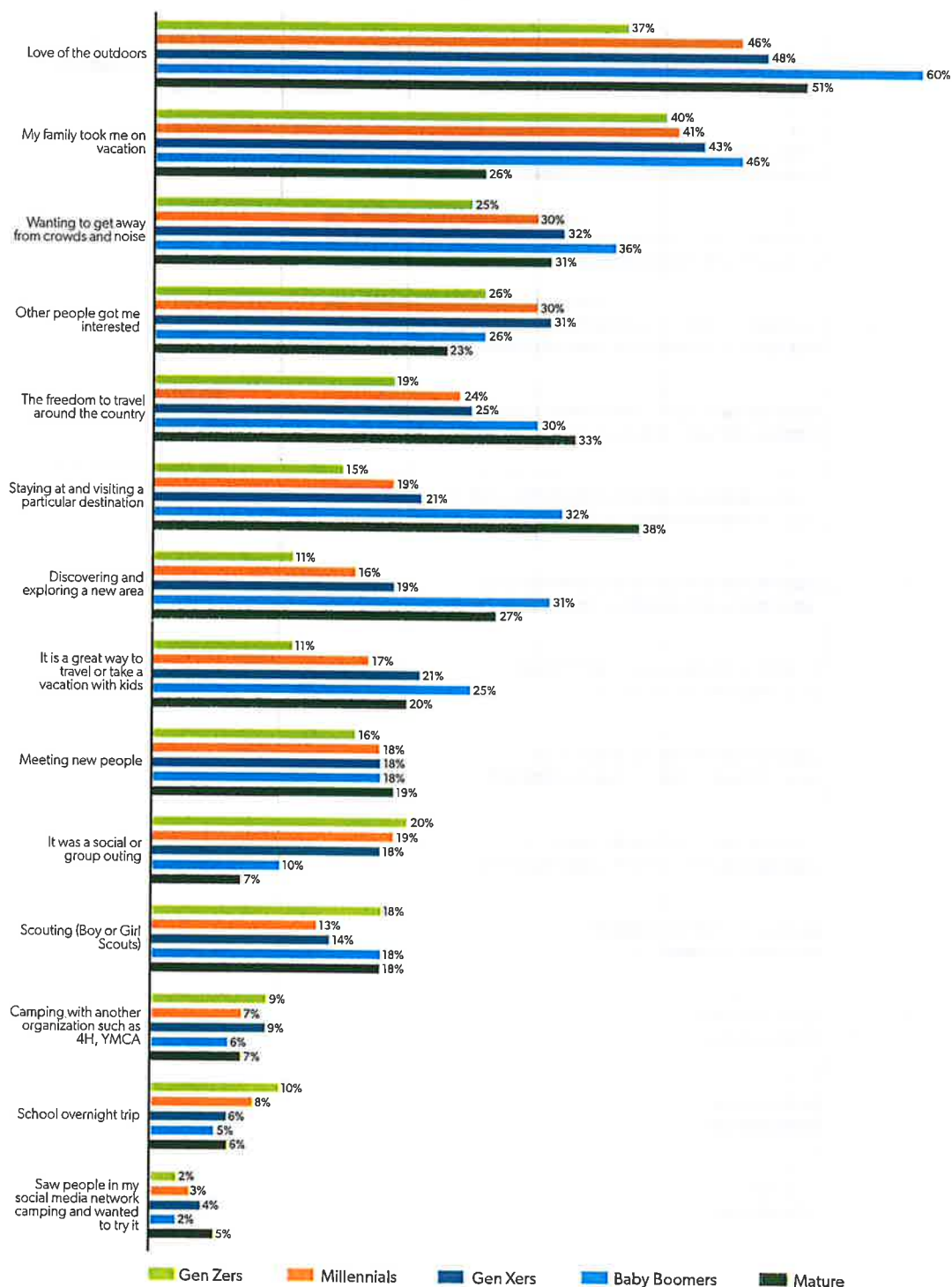
SPARKED INTEREST IN CAMPING [2014-2019]



Younger campers are less likely than older campers to say that their initial interest in camping was sparked by a love of the outdoors, and Gen Z campers are equally likely to say that they were brought along as part of a family trip. What this suggests is that among the younger set of campers (Gen Z and Millennials), interest in camping may be sparked as a result of a social situation, whether it was family, their friends taking them camping, or other people got them interested.

Additionally, it appears that there was a set of older campers who started camping later in life (7 percent of mature campers were new to camping in 2019) and upon retirement, sought the freedom to travel the country and stay at particular destinations.

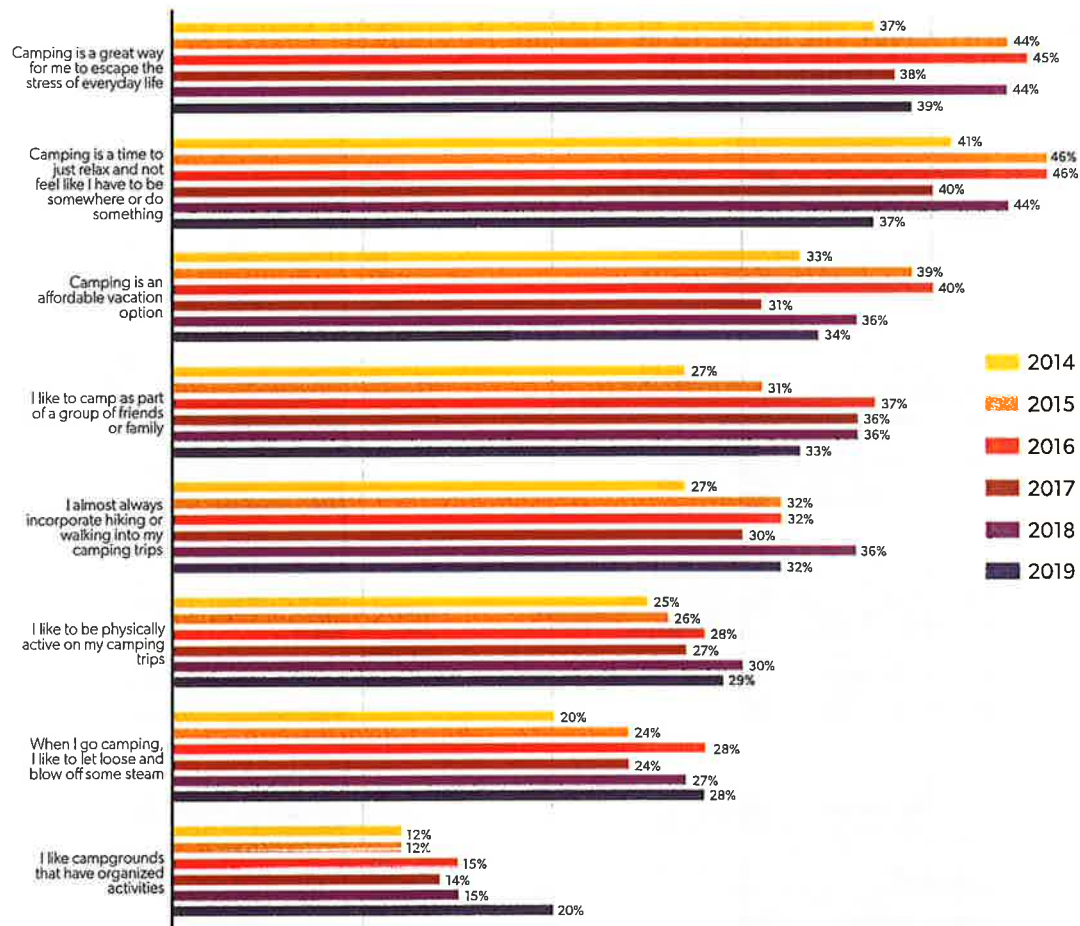
INITIAL INTEREST IN CAMPING BY GENERATION AND ETHNICITY [2019]



The Benefits of Camping

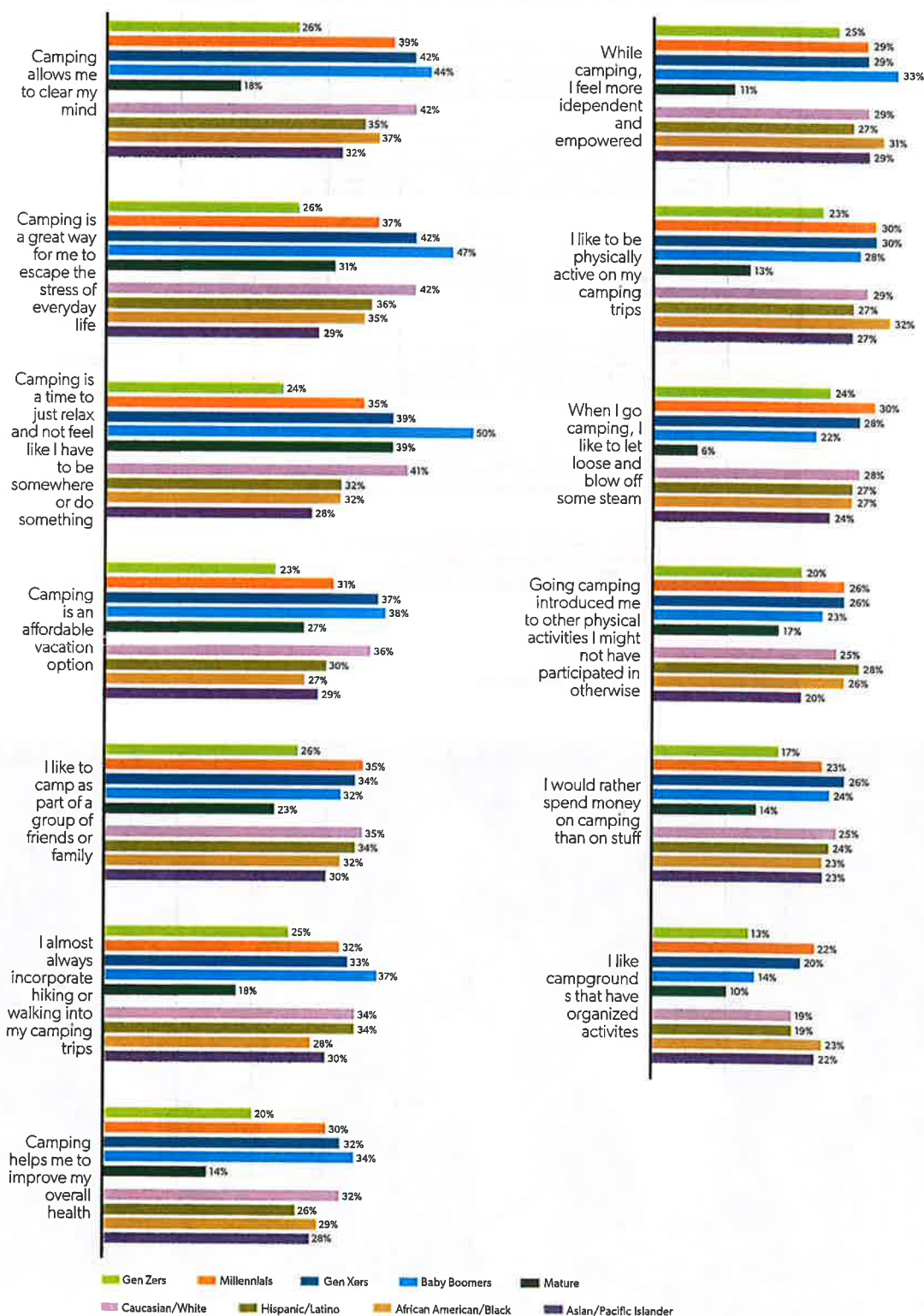
Overall, in 2019, campers were equally likely to view camping as a way to clear their minds, an escape from everyday life, and a time to relax.

THE BENEFITS OF CAMPING (% STRONGLY AGREE) [2014-2019]



The youngest and oldest age cohorts are less aligned with the benefits of camping compared to those in the middle year age bands, which may be a result of a similar view toward camping among campers in both of those generations. Gen Z and Mature campers could be more likely to use camping as a means of participation in activities (Gen Z) or access to a new lifestyle, such as traveling the country upon retirement (Mature). Because camping is a way to gain access to these experiences, camping itself is less likely to be associated with these benefits.

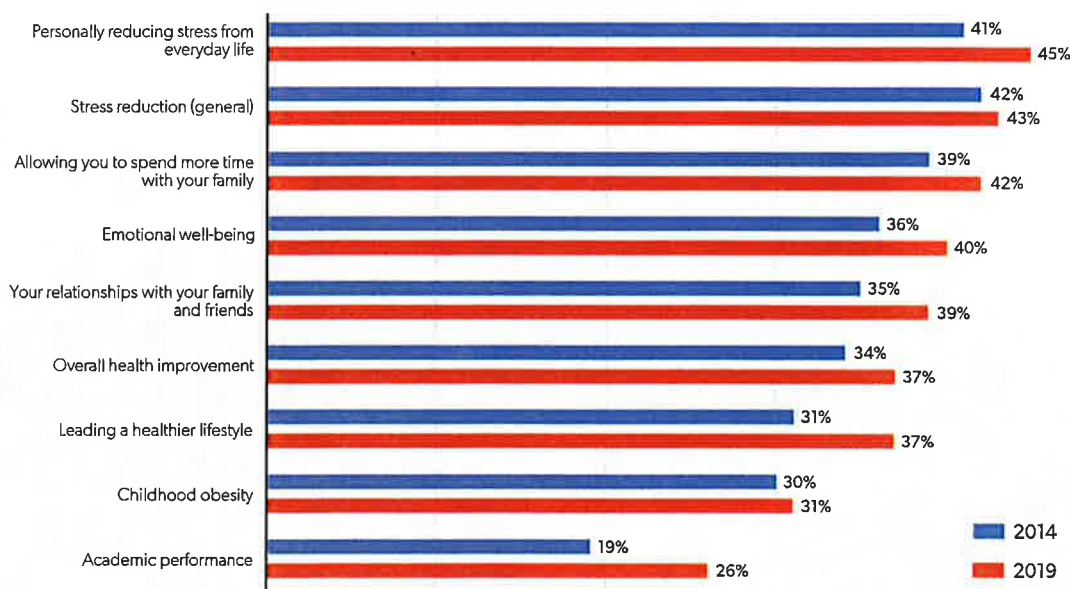
AGREEMENT ABOUT THE BENEFITS OF CAMPING (% STRONGLY AGREE) BY GENERATION AND ETHNICITY [2019]



As noted throughout the previous iterations of this report, campers continue to gravitate to camping due to some of the emotional benefits of being in the outdoors, whether it's the impacts on stress reduction (whether it's personal or for people in general), emotional well-being and spending time with friends and family. Indeed, around two-thirds of campers said that camping has a positive impact on relationships, their health and lifestyle.

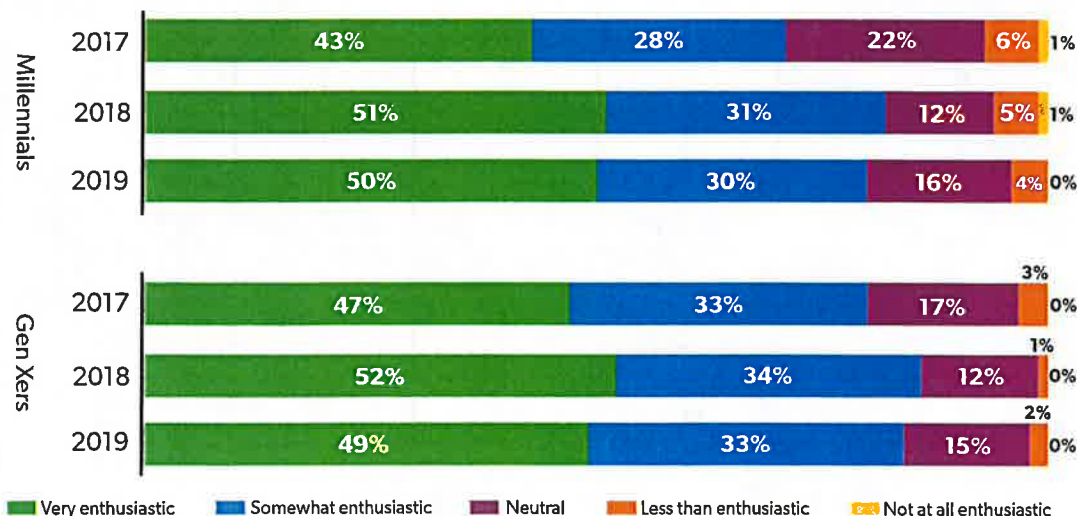
Over time, the impact of camping has remained relatively consistent across most categories, which is interesting given that even though the way people camp has changed over time, the reasons and positive impact of camping they are seeking from a camping experience, and the benefits campers realize from camping remains constant.

THE IMPACT OF CAMPING ON HEALTH, MENTAL HEALTH, & RELATIONSHIPS (% GREAT DEAL OF IMPACT) [2014-2019]

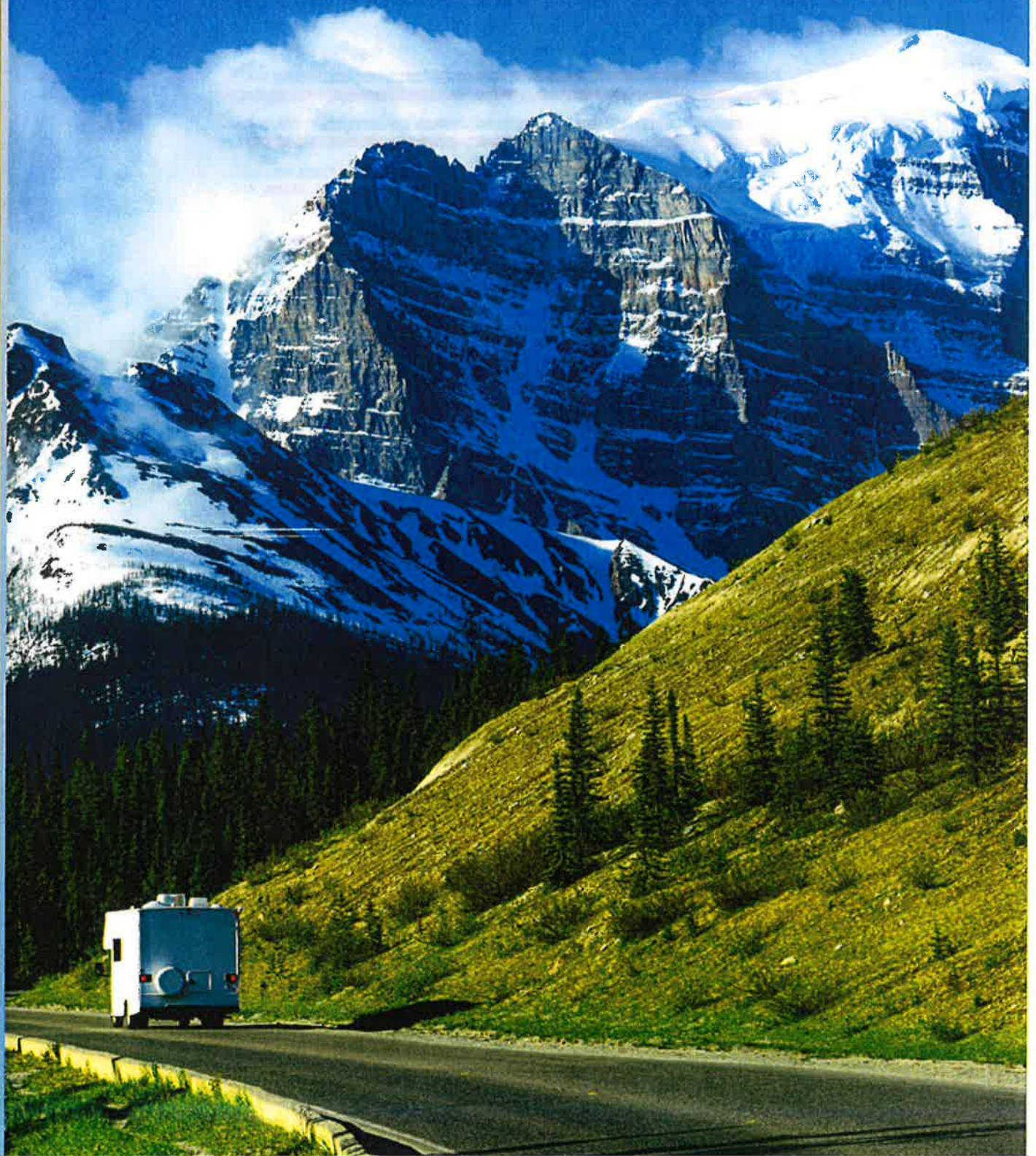


Campers who are bringing young children on their camping trips continue to report high levels of enthusiasm for camping among the children they include in their trips. Even with all the distractions in their everyday lives, digital overload, and participation in other activities, kids remain enthusiastic about their time spent in the outdoors.

CHILDRENS' ENTHUSIASM TOWARD CAMPING AMONG THOSE WHO CAMP WITH CHILDREN [2017-2019]



TYPICAL CANADIAN CAMPERS TRAVEL LONGER DISTANCES THAN U.S. CAMPERS FOR THEIR CAMPING TRIPS – ABOUT ONE-FOURTH TRAVEL MORE THAN 200 MILES.



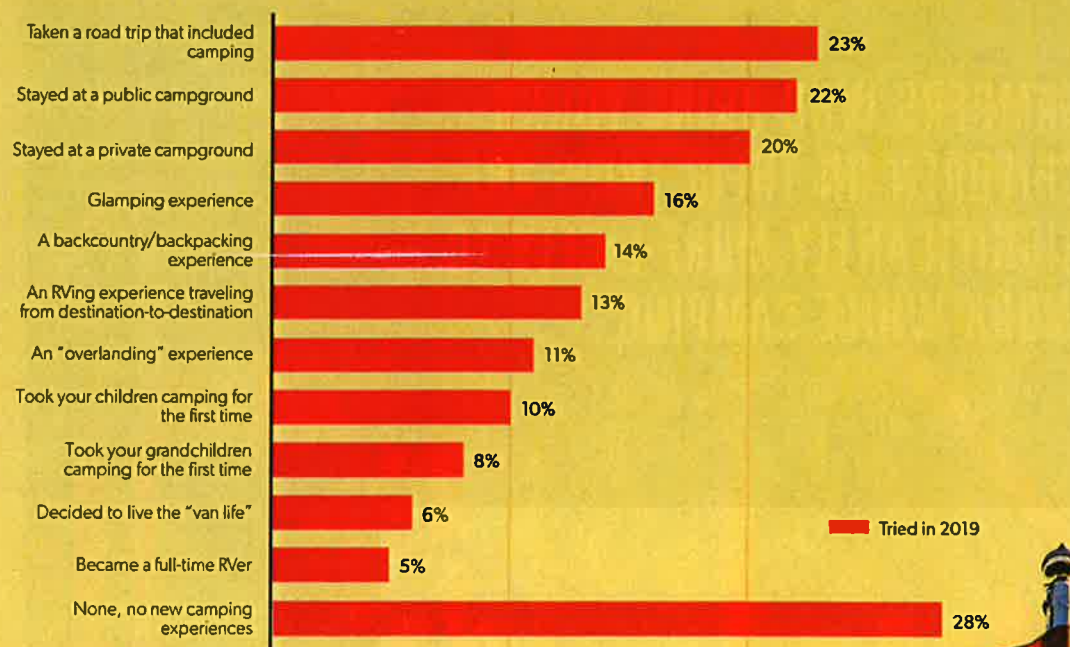
As previous versions of the North American Camping Report have shown, the Canadian camper tends to be more set in their camping habits compared to campers in the U.S.

- Canadian campers were much less likely to report any changes in their trips in 2019 (39 vs. 26 percent in the U.S.).
- They were also less likely to have tried new/unique camping experiences in 2019 (28 percent did not try anything new in 2019, versus 16 percent in the U.S.).
- Among those Canadian households who did try new accommodations or experiences in 2019, they are most likely to say that they took a road trip, went glamping, or RVing.
- Canadian campers were also less likely to stray from the more traditional locations for camping, and much less likely than U.S. campers to seek alternative locations such as music festivals, casinos, wineries/breweries, dispersed areas, or auto races (43 vs. 60 percent in the U.S.).

Other notable areas of difference between Canadian and U.S. campers include:

- The typical Canadian household reported traveling longer distances for their trips (about one-fourth travel more than 200 miles, and more than half travel more than 100 miles).
- Compared to U.S. households, Canadians were more likely to use RVs as their primary camping accommodation (34 percent vs. 26 percent).
- Regarding technology and camping, Canadian campers were likely to use WiFi to check emails or the weather, and less likely to use it for streaming movies or other high-end uses. Almost 6-in-10 Canadian camper households said they use camping to “digitally detox.”

TRIAL OF NEW CAMPING EXPERIENCES IN 2019



Whether campers view the use and availability of technology as having a positive or negative impact on their camping trips depends a great deal on their interpersonal situations and importantly, their careers.

Campers who always work while camping were, not surprisingly, most likely to say that WiFi is important to them, go online frequently, report that technology enhances their experiences, and a majority always use camping to digitally detox.

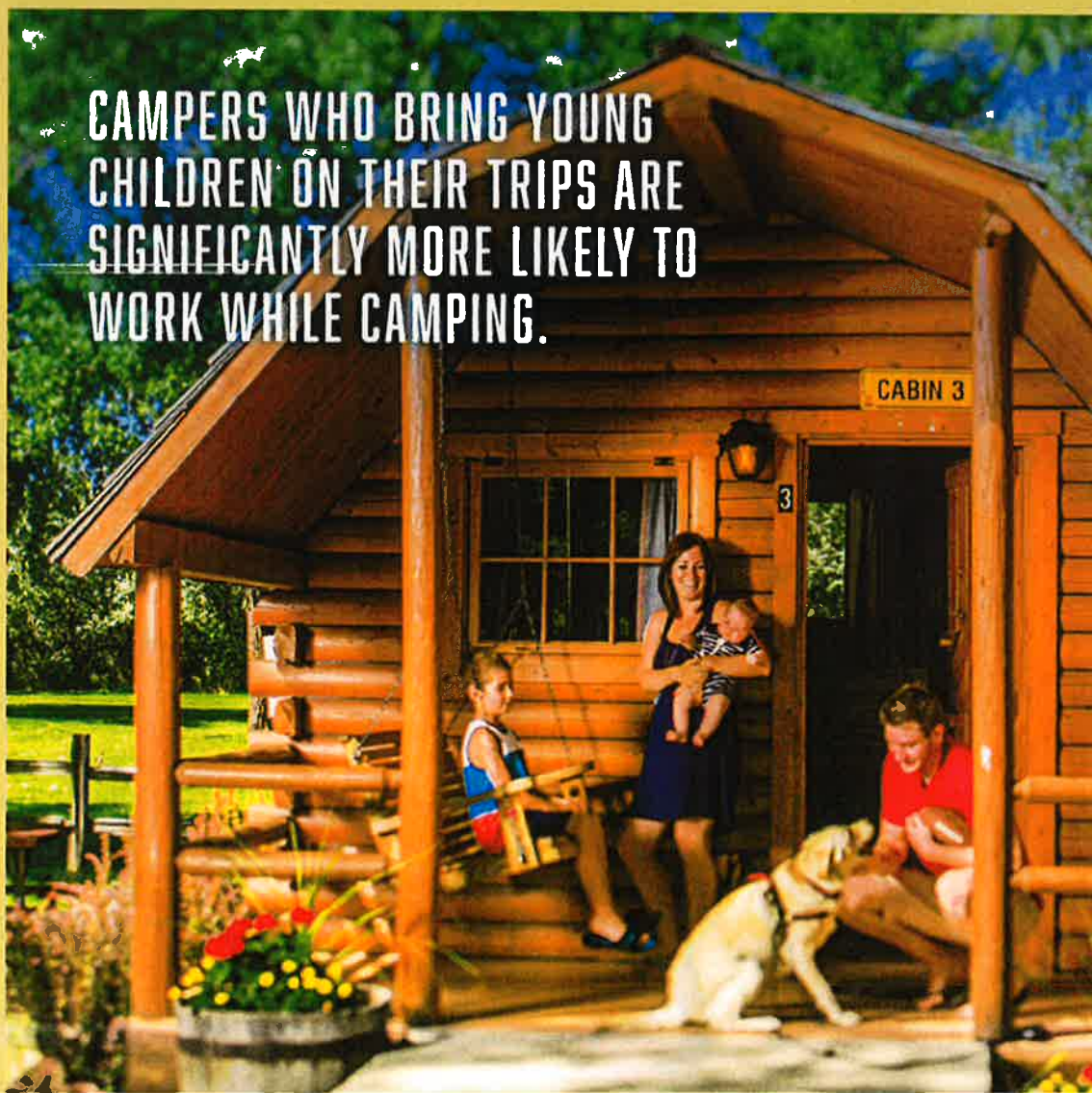
Those who always work while camping were also able to take a significantly higher number of days camping in 2019, which was directly attributable to technology.

It also appears that the use and availability of technology by campers allows families to spend more time together. Of note, campers who bring young children on their trips were significantly more likely to say that they sometimes or always work while camping, and were also almost twice as likely as those who do not camp with kids to say that camping allows them to take more time vacationing each year (35 percent vs. 20 percent). Additionally, almost three-fourths of campers who brought along their children (73 percent) also reported that the use of technology allowed them to take at least one more day camping, compared to those without children (57 percent).

Campers who always work while camping (59 percent) were significantly more likely than those who do not work while camping (39 percent) to say that camping allows them to spend more time with their families.

The impact of technology on camping and camping incidence in 2020, especially in light of the significant shift of North Americans working from home in 2020, will be an interesting point of measurement in the 2021 North American Camping Report.

**CAMPERS WHO BRING YOUNG
CHILDREN ON THEIR TRIPS ARE
SIGNIFICANTLY MORE LIKELY TO
WORK WHILE CAMPING.**



TECHNOLOGY, WORKING WHILE CAMPING AND THE ABILITY TO SPEND MORE TIME OUTDOORS



50%

believed technology enhanced experiences



46%

thought Wi-Fi was very important when camping



45%

went on-line at least 3 times per day



7 additional days camped due to technology



66%

camped with children and said technology allowed for more time with family



26%

camped in state or national parks



52%

used camping to "digitally detox"



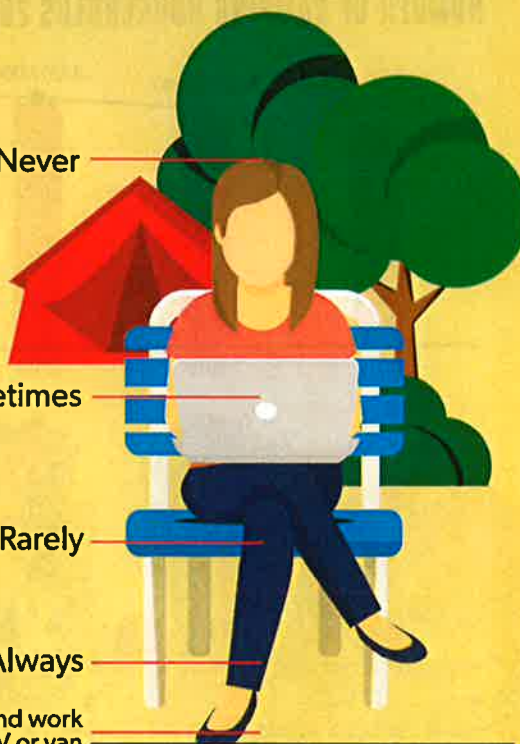
41% Never

25% Sometimes

21% Rarely

12% Always

1% Live and work in an RV or van



CAMPERS WHO WORKED WHILE CAMPING IN 2019

THE YEAR AHEAD

FORECAST: 2020 CAMPING SEASON

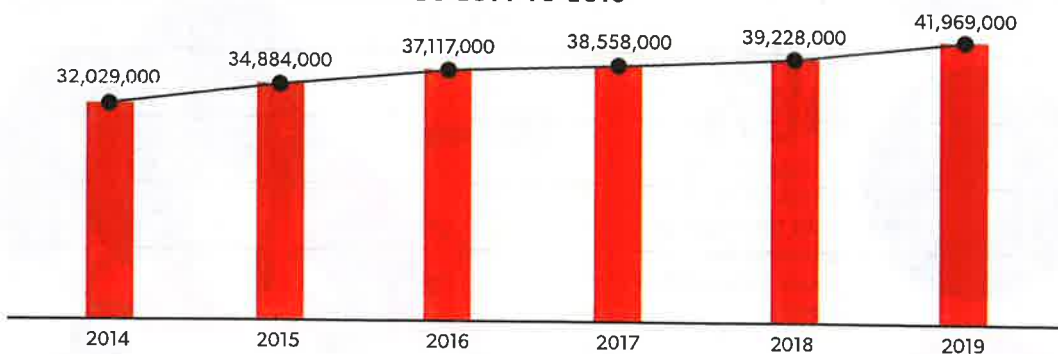
On March 11, 2020, the World Health Organization declared COVID-19 a pandemic. In response and amid health and safety concerns in the U.S. and Canada, businesses were closed, including campgrounds, and travel restrictions imposed. In light of the COVID-19 virus and suspended travel, the initial camping season forecast results do not provide a clear picture of the 2020 season.

To provide a more accurate look at the North American travel landscape amid the COVID-19 pandemic, and in order to obtain real-time perspective on camping, a special survey of North American leisure travelers was conducted by Carin Consulting and supported by Kampgrounds of America, April 27-30, 2020.

The special report, North American Camping and the Effects of COVID-19, showed that among all leisure travelers surveyed, 46 percent ranked camping as the safest type of trip to take once travel restrictions were lifted. In fact, interest among prospective campers – those who did not camp pre-COVID-19 but now say they were interested in camping – is promising. Thirty-two percent of these prospective campers expressed interest in camping. Prior to the pandemic, camping accounted for 11 percent of all leisure trips while post COVID-19, camping may account for 16 percent.

Based on trends from the annual North American Camping Report, the growth in annual camping households was expected to continue in 2020. While the largest growth in camping households occurred in 2014/2015, with an influx of 2.8 million families, the interest of prospective campers in 2020 is expected to support continued growth of the camping sector. Even against the backdrop of this year's global pandemic, the influx of potential new campers, coupled with the notion of camping as a safe travel option, demonstrates a strong influence camping will continue to have in the outdoor recreation economy.

NUMBER OF CAMPING HOUSEHOLDS 2014 TO 2019





METHODOLOGY

Background

This report represents the sixth annual installment of detailed reporting that compares 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, 2018 and 2019.

NOTE: The North American Camper Survey is annually fielded in January, and participants are asked to reflect on their previous year of camping, as well as forecast activity in the current calendar year. Due to the escalation of the global Coronavirus pandemic in March 2020 and response of the U.S. and Canadian governments, including travel restrictions, 2020 forecasting results have been removed from the 2020 North American Camping Report.

U.S. and Canadian Household Results

The results present in this most recent iteration of the North American Camper Survey is based on a total of n=2,942 surveys completed among a random sample of U.S. (n=2,417) and Canadian (n=525) households. Within the U.S. sample of households, results are stratified by Census Region: Northeast (n=602); Midwest (n=607); South (n=604); and West (n=604). Overall a sample of n=2,417 U.S. households is associated with a margin of error of +/- 1.99%, while a sample of n=525 Canadian households 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. 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.

Other Research

Additional studies and sources cited in the 2020 North American Camping Report include:

2019 North American Glamping Report: Sponsored by Kampgrounds of America, Inc. and available at KOApessroom.com.

Diversity in the Outdoors Survey: Results for this report are based on random household surveys completed online November 2019, with a random sample of n=1,500 adults, aged 18 and older, living in all 50 U.S. states.

Teen Surveys: Surveys cited in this year's report are available in the 2017-2019 editions of the North American Camping Report, available at KOApessroom.com.

North American Camping and the Effects of COVID-19: In response to the 2020 Coronavirus pandemic, a Special Edition of the 2020 North American Camping Report was released in May 2020. The report detailed survey responses from North American leisure travelers, conducted April 27-30, 2020 in order to obtain real-time perspective on camping amid the unprecedented global health crisis. The report is available at KOApessroom.com.

2020 North American Camping Report Citation Information

For use in third party news sources or other material, please cite the source as: **The 2020 North American Camping Report sponsored by Kampgrounds of America, Inc.** Please remember that while the report name reflects 2020, the data included within the report reflects 2019 behavior. For questions regarding usage, please email newsroom@koa.com.

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.”

Dispersed Camping – The term used for camping anywhere in the National Forest outside of a designated campground. Dispersed camping means no services such as trash removal, and little or no facilities which may or may not include tables and fire pits.

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

Overlanding – An “overlanding” experience is where you travel in an off-road vehicle, taking back roads, no services/amenities, you are completely self-sustaining and the purpose is the journey.

Public Land Camping – Staying at a public campground in a national park, state park, municipal campground, national forest campground, national forest land, BLM land, designated wilderness areas.

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

RVing Experience (used in new camping experiences) – Where you travel in an RV from destination-to-destination.

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



Type C Motorhome



Roof Tent – A tent that is designed to easily mount directly to the rack or aftermarket bars on the roof top of a vehicle.



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



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.



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



Type B 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.



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



*Types of RVs" credit: GoRVing.com





FALL 2020 UPDATE

THE GROWTH OF CAMPING AMID COVID-19

— Report Issued October 1, 2020 —

A fall 2020 survey of the general population conducted by Cairn Consulting Group
Sponsored by Kampgrounds of America



THE CONTINUED EFFECT OF COVID-19 ON CAMPING

With the ongoing uncertainty around COVID-19, leisure travel continues to feel the effects. Not so for camping, though.

According to the results of this special COVID-19 edition of the North American Camping Report, sponsored by Kampgrounds of America, Inc., camping continues to experience a strong rebound with its ability to meet travelers' desire to experience the outdoors with natural social distancing.

Once travelers felt it was safe to resume travel, camping experienced a summer boom with campers taking more trips than originally planned and new campers trying the activity for the first time.

Interest in and frequency of camping has increased steadily since the start of measurement through the annual North American Camping Report in 2014 — and increased camping is expected to continue. Across all leisure travelers, camping is projected to account for 15% of their remaining travel for the year, versus just 11% prior to the pandemic. Other means of travel have not experienced this improvement or projected growth in light of the pandemic.

While there is still uncertainty around COVID-19, the outlook for camping in the remainder of 2020 and beyond is promising and strong. Some may believe camping is having its moment in the sun, but as millions of North American campers already know — and many new campers found out this summer — camping has long fulfilled people's intrinsic desires and provides a place to reconnect with ourselves and others.

For the purpose of this research, campers are defined as leisure travelers who include camping as part of their trips, and noncampers are leisure travelers who don't not camp. Prospective campers are travelers who did not camp pre-COVID-19 but say they are interested in camping. New or first-time campers are those who have indicated taking their first camping trip between May and September 2020.

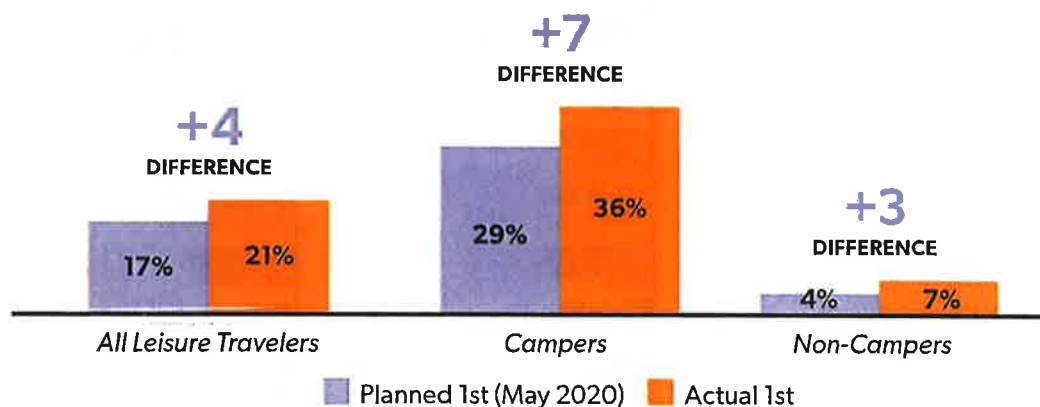
KEY FINDINGS

THE CURRENT STATE OF CAMPING AMID COVID-19

Summer Camping Activity Was Busier than Expected

When originally surveyed in May, leisure travelers predicted that camping would be their first trip once travel restrictions were lifted and results of this September follow-up survey suggest that travelers in fact exceeded their intentions to camp.

**Camping as First Type of Planned Trip
Once COVID-19 Restrictions are Lifted (May – September 2020)**



One-fourth of North American Campers Took Their First Camping Trip During the Pandemic

Nearly half of all campers (46%) either started camping for the first time in 2020 or restarted after having not camped in recent years. Further, 19% of Millennial, 17% of Gen X and 15% of Gen Z travelers report having gone camping for the first time since the start of the pandemic.

First-time Campers Represent a Much Younger Demographic, as well as Families

Millennials comprise 55% of new campers who have indicated taking their first camping trip since the start of the pandemic. What's more, 82% of first-time campers have children in the household.

Interest in Camping Remains Strong

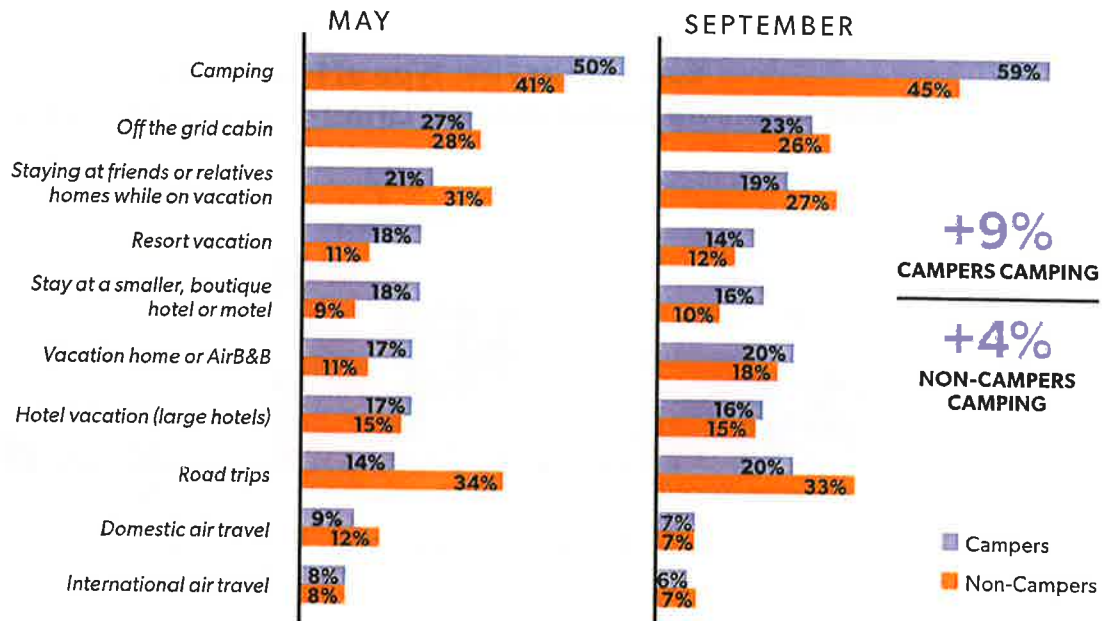
Close to half of all campers, 42%, say that they will still be taking their planned camping trips during the remainder of this year; only 17% cancelled and 10% will likely cancel.

CAMPING STILL CONSIDERED THE SAFEST FORM OF TRAVEL

As Travelers Feel it is Safe to Resume Travel, Many to Replace Trips with Camping

Campers and non-campers alike rank camping as the safest type of travel. In fact, 29% of general travelers, 45% of campers and 15% of non-campers plan to replace cancelled or postponed travel with a camping trip.

Rankings of the Safest Forms of Travel



Private Bathrooms Still a Preference for Ultimate Social Distancing

Having a private bathroom facility while camping is important to 48% of all leisure travelers, 42% of campers and 58% of prospective campers.



CAMPING BEHAVIOR AMID COVID-19 REALITIES

Campers Are Willing to Visit Less Popular Locations to Avoid Overcrowding

A willingness to travel to less popular locations in order to avoid overcrowded areas is of interest for 68% of campers and 60% of general leisure travelers.

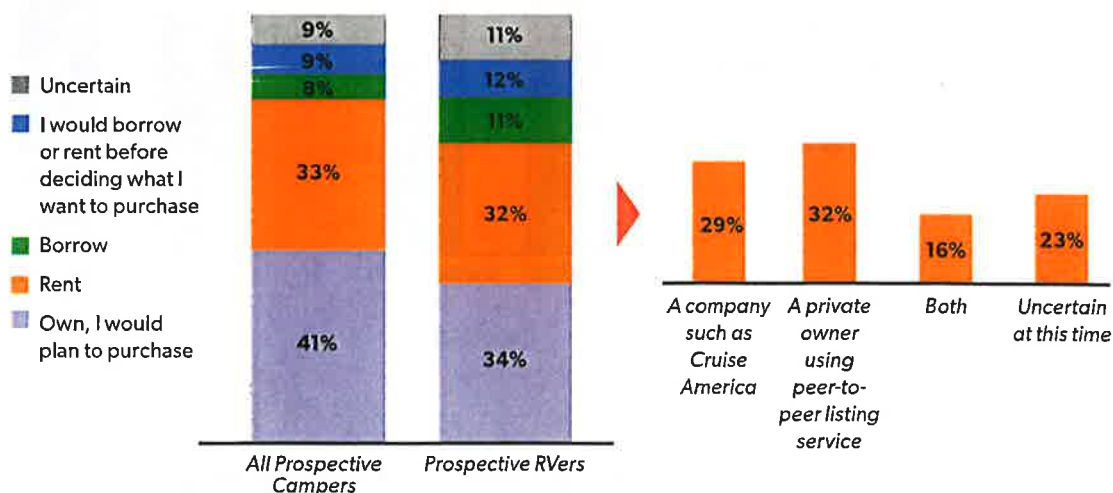
What's Driving the Current Popularity of RVing

RVs provide the ultimate in personal space for traveling, which makes it no surprise that more than half of all campers (51%) say that they are now more likely to purchase an RV. The primary driver of an RV purchase among campers is concerns over cleanliness while traveling.

Looking at RVing by age, Gen X campers are most inclined to purchase an RV (62%) while interest in full-time RVing is highest among millennial campers (36%).

Among prospective RVers, there is almost an even split between those who would buy versus rent an RV; however, among renters there is a larger difference between traditional and peer-to-peer services.

Prospective RVers' Plans to Buy, Borrow or Rent an RV



Since the Pandemic Began, 46% of Leisure Travelers Have Spent More Time Outdoors

This includes 57% campers, but for all respondents, spending more time outdoors is most closely tied to having more free time (58%), followed by the desire to get outside after being forced to stay inside (47%) and exercise (41%).

TRAVEL PLANS FOR THE REMAINDER OF 2020 HIGHLY IMPACTED BY REMOTE WORK AND SCHOOL SETTINGS

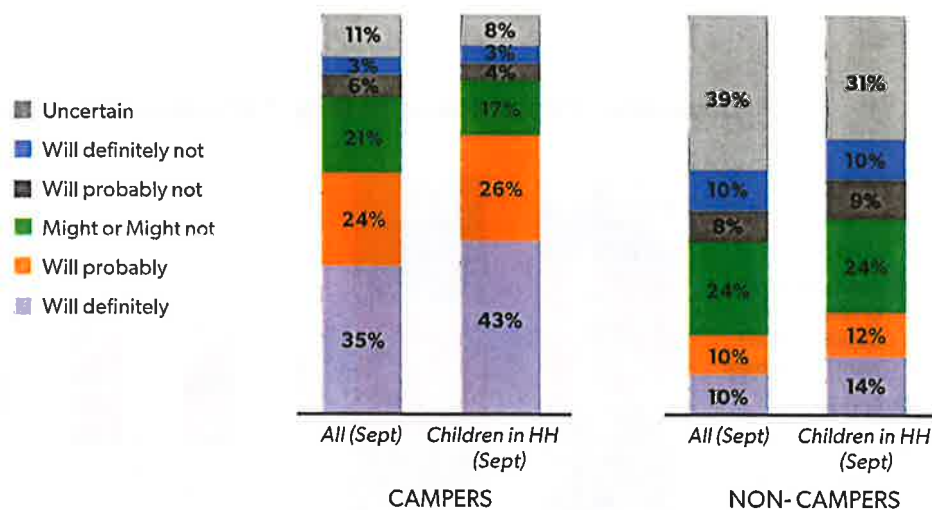
Campers are Reaping the Benefits of Remote Work and Schooling to Camp More Often

A full 60% of campers say that the ability to work from home during the pandemic is allowing them to camp more often (and work simultaneously) through the remainder of 2020. The impact of working at home on potential camping trips is most pronounced among Gen X (45%) and Millennial (40%) campers.

For those with children in the home, 43% of campers and 14% of prospective campers say that they will “definitely” be able to extend the camping season if learning remains remote.

Impact of Remote Work and/or Learning on the 2020 Camping Season

ABILITY TO EXTEND SEASON AND/OR CAMP MORE OFTEN



Access to Technology Impacts Camping Frequency

In the COVID-19 landscape, access to technology to stay connected to family and friends, work remotely and facilitate learning is important and likely the caveat that will allow for more camping trips.

For 46% of campers, access to technology was considered very important for working remotely, and 36% of campers for allowing both children and campers themselves to complete schoolwork.

Interest in Snowbirding

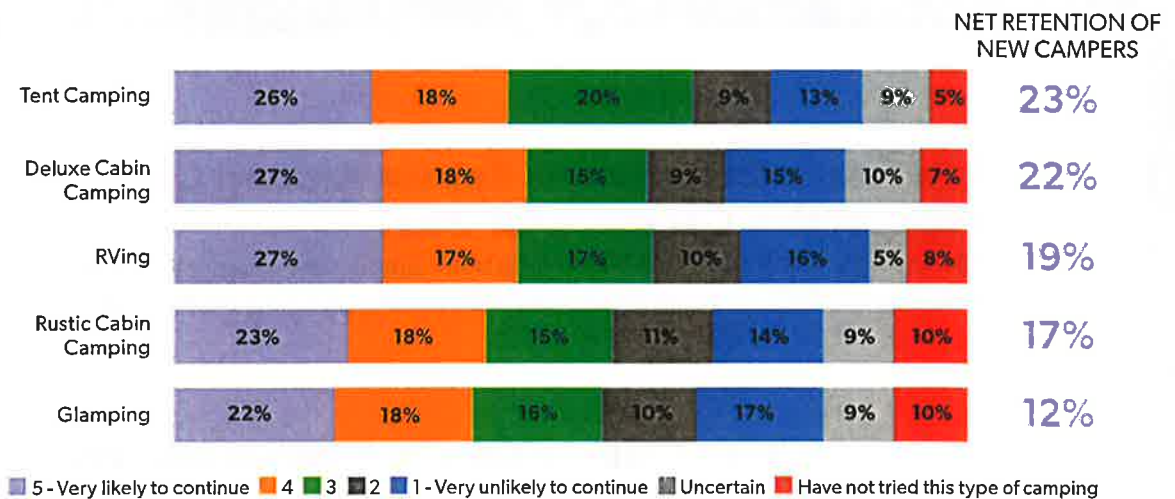
Whether American or Canadian, 28% of active campers indicate likelihood of becoming a “snowbird” camper with the highest interest from Gen X campers and non-campers alike.

THE CONTINUED GROWTH OF CAMPING IN 2021

Retention Forecast

Of new campers in 2020, it is estimated that 18% will continue camping in 2021. New campers who recognize themselves as tent or cabin campers have the highest likelihood of continuing to camp next year.

New Campers to Continue Camping in 2021

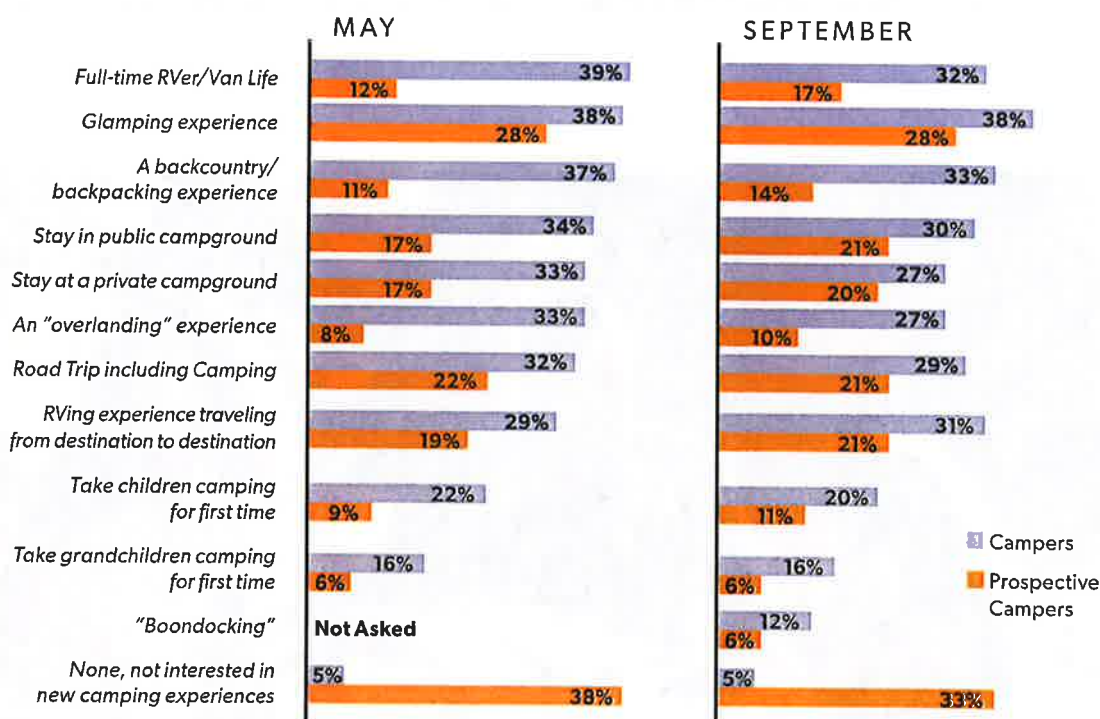




Interest in Glamping is Robust Among Campers and Prospective Campers for 2021

Interest in glamping remains robust among both campers and prospective campers; Gen X (45%) and Millennial (42%) campers are the most interested in glamping experiences.

Interest in Types of Camping Experiences for 2021



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 September 4-9, 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=3,508 completed surveys among representative U.S. households and n=500 representative Canadian households. A sample of n=3,508 U.S. households is associated with a margin of error of +/- 1.65 percentage points. Among Canadian households, a sample of n=500 is associated with a margin of error of +/- 4.37 percentage points. 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

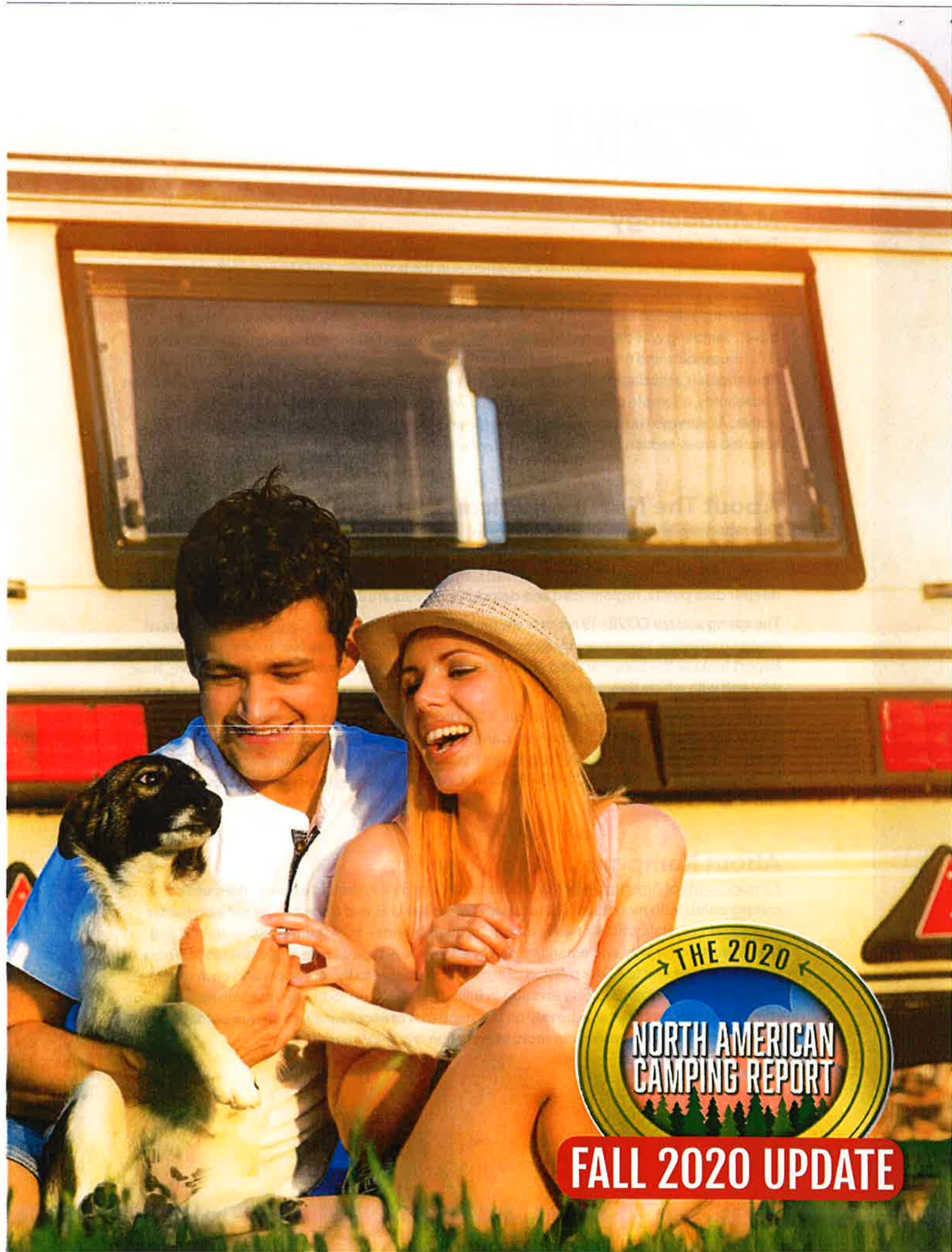
This report represents an abridged version of the full survey results available. We're happy to work with interested parties wanting to explore additional findings from this report, or the spring COVID-19 Special Report, [North American Camping and the Effects of COVID-19](#). In addition to deeper data points, regionalized and demographic cuts are available.

The spring and fall COVID-19 reports are part of the [North American Camping Report](#) annual research initiative, sponsored by [Kampgrounds of America, Inc.](#). The North American Camping Report looks at 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 North American Camping Report findings by industry partners and the media. Please visit the [KOA Press Room](#) if you are interested in speaking with KOA about expanded data from the fall COVID-19 North American Camping Report 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. These offerings are central to KOA's mission of connection people to the outdoors and each other. 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](#).



FALL 2020 UPDATE