



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



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INTRODUCTION

Man is inextricably connected to nature. No matter the age, the culture or the location, there is a constant longing to get ourselves outside. To experience the sun on our faces. To feel the grass between our toes.

It's that "outside desire" that seems to be propelling record numbers of North Americans to experience camping.

The 2017 North American Camping Report, an annual independent study supported by Kampgrounds of America, Inc. (KOA), shows that the number of active campers in the U.S. and Canada continues to grow, and grow rapidly.

Young millennials have discovered camping and intend to keep at it, and even Generation Zers say they love camping, and likely will for the rest of their lives.

Camping now has no cultural boundaries. This report shows Hispanics, African Americans/Blacks and Asians have discovered camping, and they like what they've found.

Camping connects people with family and friends. It provides relief from daily stresses, and helps add balance to campers' lives.

That's why 48 percent of North American campers plan to camp even more in 2017 than they did in the past. It's why more than 50 percent of campers are taking their children along.

For the first time in 2017, the North American Camping Report contains the results of a survey of teen campers, which found in them the same love of camping shared by their parents and grandparents.

Leisure camping has never been more popular, nor more necessary. North Americans crave the outdoor experience, and camping will continue to fill the need.



“TO POKE A WOOD FIRE IS MORE SOLID ENJOYMENT
THAN ALMOST ANYTHING IN THE WORLD.”

CHARLES DUDLEY WARNER

KEY FINDINGS

The overall incidence of camping in North America is up, demonstrating an upward trend in the number of North Americans who are camping.

Among U.S. households, 61 percent now include someone who camps. Well over 1 million households have started camping each year since 2014, resulting in 3.4 million U.S. households becoming new campers over the last three years.

A growing number of campers say they want to camp more often.

As overall camping incidence continues to improve, the percentage of highly avid campers is growing even more rapidly. Campers who previously camped just once per year are now planning to take multiple trips into the outdoors in 2017. Since 2014, it is estimated that growth among campers who take three or more trips annually has improved by 36 percent.

Millennials continue to drive growth of camping.

Not only are millennials taking to the outdoors, they are doing so in greater numbers than what would be expected. In the overall population millennials comprise 31 percent of the adult population, yet account for 38 percent of campers.

Enthusiasm is stronger among these younger campers. More than half of millennials (51 percent) state that they plan to camp more in 2017.

The millennial generation continues to change the camping landscape. The influence of millennials is resulting in fewer differences based on ethnicity when it comes to attitudes toward camping, as well as camper behavior.

Similar to the findings of the 2016 North American Camping Report, nearly 10 percent of non-white millennials were new to camping in the past year. This is a continuing trend, since a full 30 percent of non-white millennials report they've started camping in just the past few years, compared to 15 percent of white millennials.

Overall, there are few differences between white and non-white millennials in their motivations for camping, how camping impacts their lives and the types of destinations they prefer.

In terms of recreation activities overall, more physically active endeavors such as hiking/backpacking and biking/mountain biking are increasing in popularity. In fact, it appears affinity to one's age group often trumps ethnicity when it comes to camping desires and habits in younger generations.

There has been a large influx of campers of Asian descent over the past couple of years, contributing to the expanded diversity among campers.

In 2016, a full 14 percent of new campers were of Asian descent, which is a large shift from overall population figures. This increase is most prevalent among younger Asian campers, with 43 percent of



this group reporting that they have only started camping in the past few years. It's worth noting that older Asian campers are also likely to be relatively new to camping, with 25 percent having started camping recently.

There is also a marked difference between younger and older Asian campers when it comes to their preferences. Asian millennial campers report spending just over half of their camping nights at state or national parks, while Asian baby boomer and mature campers say that they spend almost two-thirds of their nights at these parks.

Camping appears to have strong foothold among Generation Z teens. Teens are overwhelmingly likely to assign importance to people their age getting outdoors and are highly enthusiastic about camping in general.

This year for the first time, the North American Camping Report includes a survey of teens and their attitudes about camping. Teen campers express strong opinions about what they like most about camping, but what is most prominent is being able to spend time with their family and spending time outdoors.

Even though many adults may have the view that teens are “glued” to their phones and cannot pull away from technology, teens are in fact no more likely to use technology than adult campers. Half of the teens surveyed say that camping offers them an opportunity to “unplug” from technology. Teens are highly likely (71 percent) to say that even if they could not stay in touch with others by using their phones or computers, they would still want to go camping.

Camping is an activity that elicits excitement and pleasure even before the trip takes place.

Almost two-thirds of campers find trip planning to be at least somewhat pleasant, which is well above other types of planning for purchases. By contrast, almost one-fourth of campers find the planning for purchasing a new vehicle relatively unpleasant.

These extended benefits could be contributing to the increased levels of camping, and reinforce the emotional ties campers have to camping via pre-trip cues that elicit a favorable sense of excitement about the upcoming trip. Even among teen campers, the planning process garners excitement with 79 percent saying that they find planning activities for an upcoming trip “very enjoyable” and 72 percent saying that planning where to stay is “very enjoyable” for them.



—71%—

OF TEEN CAMPERS SAY THEY WOULD STILL WANT TO GO CAMPING EVEN WITHOUT ACCESS TO TECHNOLOGY

Not surprisingly, most teens bring smartphones with them while camping, similar to their adult counterparts.

But an overwhelming majority of teens say they would still want to go camping if they could not stay in touch with others by using their phones or computers. In fact, half of the teens surveyed say that camping offers them an opportunity to “unplug” from technology.

Only 6 percent of teen campers say that they would not want to camp without access to technology. About one-fourth are on the fence, saying it depends on the trip.



NO PHONE? NO PROBLEM, ACCORDING TO TEENS



The overriding factor regarding technology is that, for U.S. campers, access to technology is allowing a substantial bloc of campers to spend more time outside.

Among all U.S. campers, 37 percent – including at least 43 percent of millennials – say their access to technology allows them to spend more time camping. Specifically, access to technology is freeing up more time among younger campers who, in all likelihood, are able to check work emails and check in with work via phone when needed.

What's more, campers who say that technology allows them to spend more time camping take an average of almost two additional vacation days for camping.

The National Park Service's 100th anniversary appears to have driven more people to visit the parks in 2016.

Overall, 3-in-10 U.S. campers say that the Centennial Celebration of the U.S. National Park Service in 2016 got them to visit a park they would not have otherwise visited. Millennials are the most likely to claim they visited a national park because of the anniversary. The anniversary also impacted about a third of Hispanic and African American/Black campers.

SUMMARY OF SURVEY RESULTS

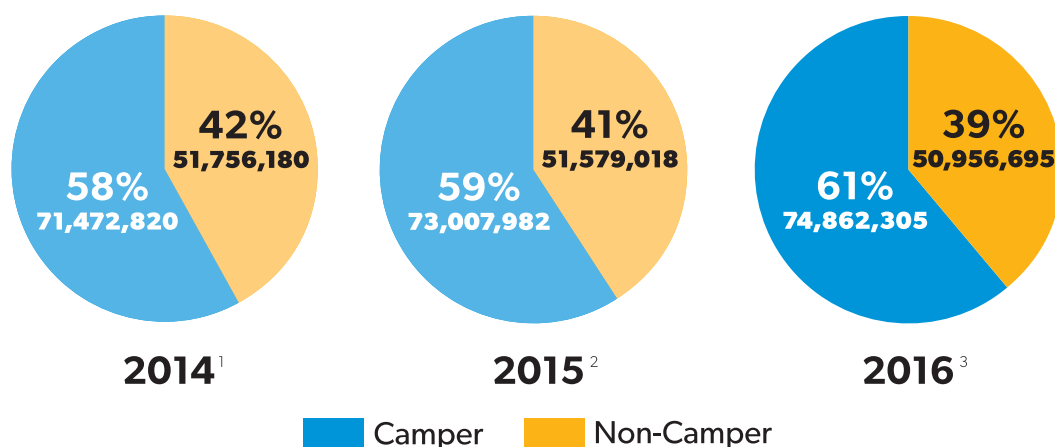
WHO IS CAMPING?

Active Camper Households

The popularity of camping is growing. Overall camping incidence among U.S. households has trended upward since the first iteration of the North American Camping Report. Currently, 61 percent of U.S. households camp at least occasionally, up from 58 percent three years ago.

In the last year, it is estimated that more than 37 million households went camping at least once. Of those households, 14 million camped three or more times.

CAMPING INCIDENCE AMONG ALL U.S. RESIDENTS

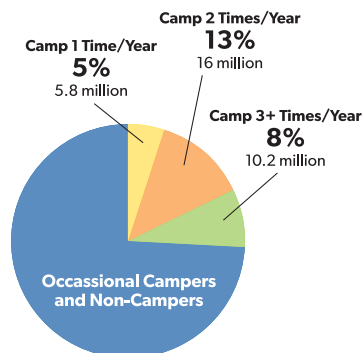


¹ 2014 results based on U.S. Census estimates of 123 million households

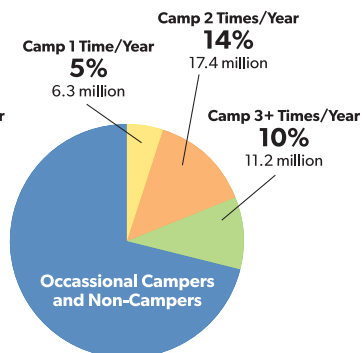
² 2015 results based on U.S. Census estimates of 125 million households

³ 2016 results based on U.S. Census estimates of 126 million households

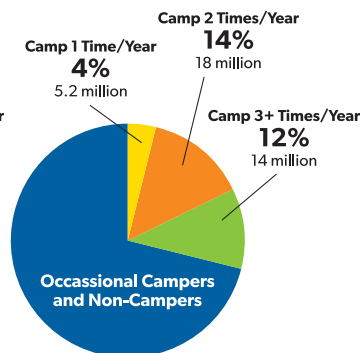
2014 ANNUAL CAMPERS: 32 MILLION OR 26% OF ALL U.S.



2015 ANNUAL CAMPERS: 34.9 MILLION OR 29% OF ALL U.S.



2016 ANNUAL CAMPERS: 37.1 MILLION OR 30% OF ALL U.S.

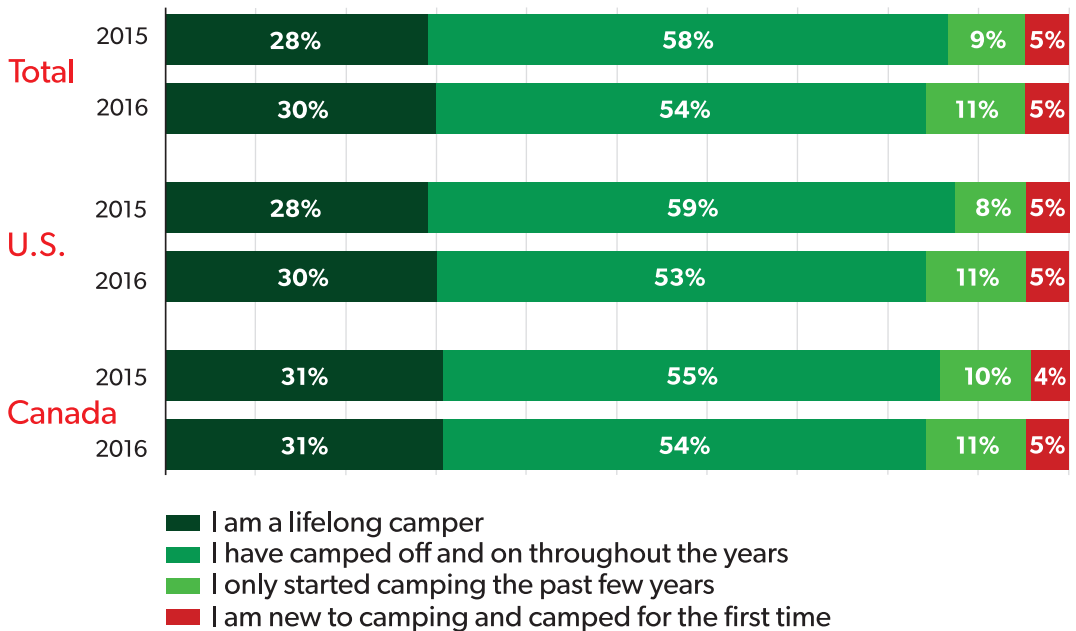


New Campers

Similar to 2015, there was a net increase of 5 percent new campers in 2016. Among these new camper households, 31 percent would like to increase their camping trips in 2017. This indicates there will be little drop off among new campers.

Since 2014, well over 1 million households have started camping each year. In fact, it's estimated that 3.4 million households became new campers over the last three years.

In Canada, where overall camping incidence is higher when compared to the U.S., there are consistently slightly fewer new campers each year.



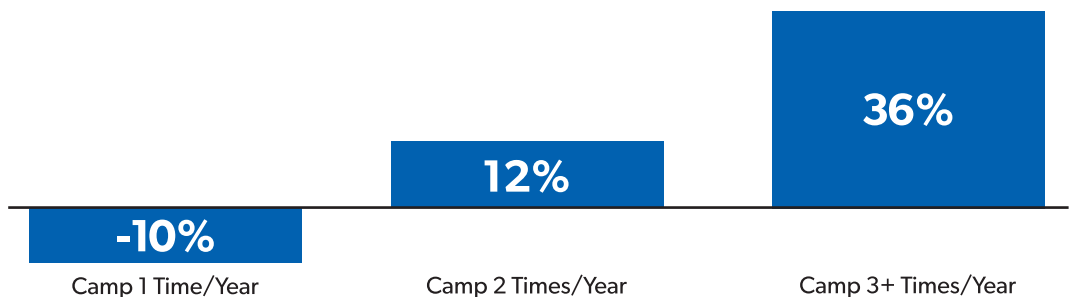
Frequency of Camping

While overall camping incidence continues to show incremental growth, the real growth in camping is at the individual level where campers are migrating from annual camping trips to taking multiple trips each year.

In the past three years, the number of campers who take three or more trips each year has grown 36 percent while the number of campers taking just one trip a year has dropped 10 percent.

These results indicate that once a person experiences camping, it's highly likely that they will camp more in order to gain the personal and familial benefits associated with camping.

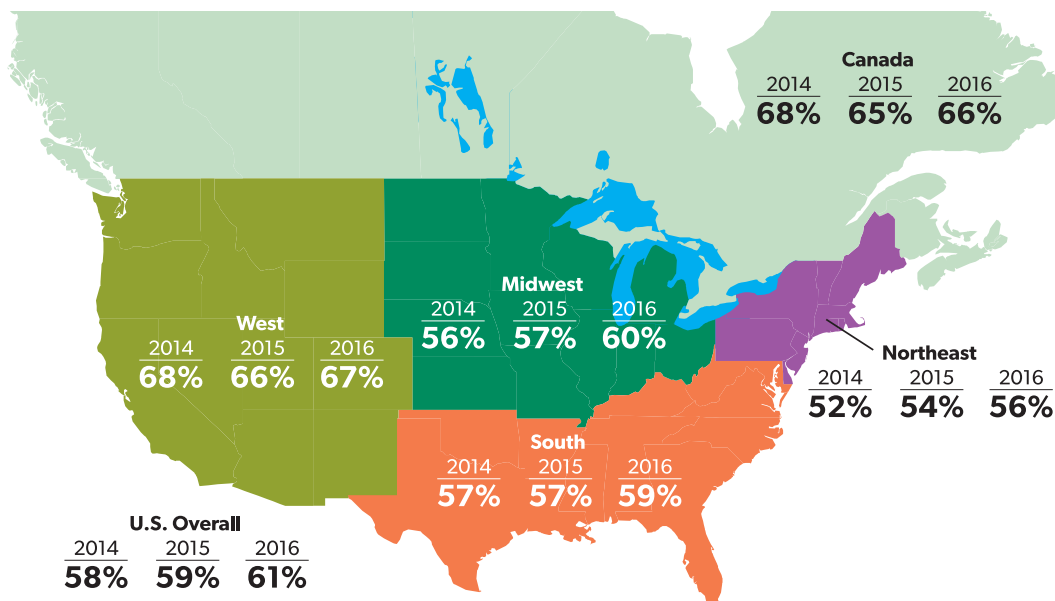
GROWTH IN THE FREQUENCY OF CAMPING: 2014 TO 2016



Demographics

Since 2014, both the Northeast and Midwest regions have shown steady growth in camping incidence, while overall incidence continues to be highest in the West and Canada.

RESIDENTS WHO CAMP AT LEAST OCCASIONALLY - BY REGION



A CLOSER LOOK AT CANADA

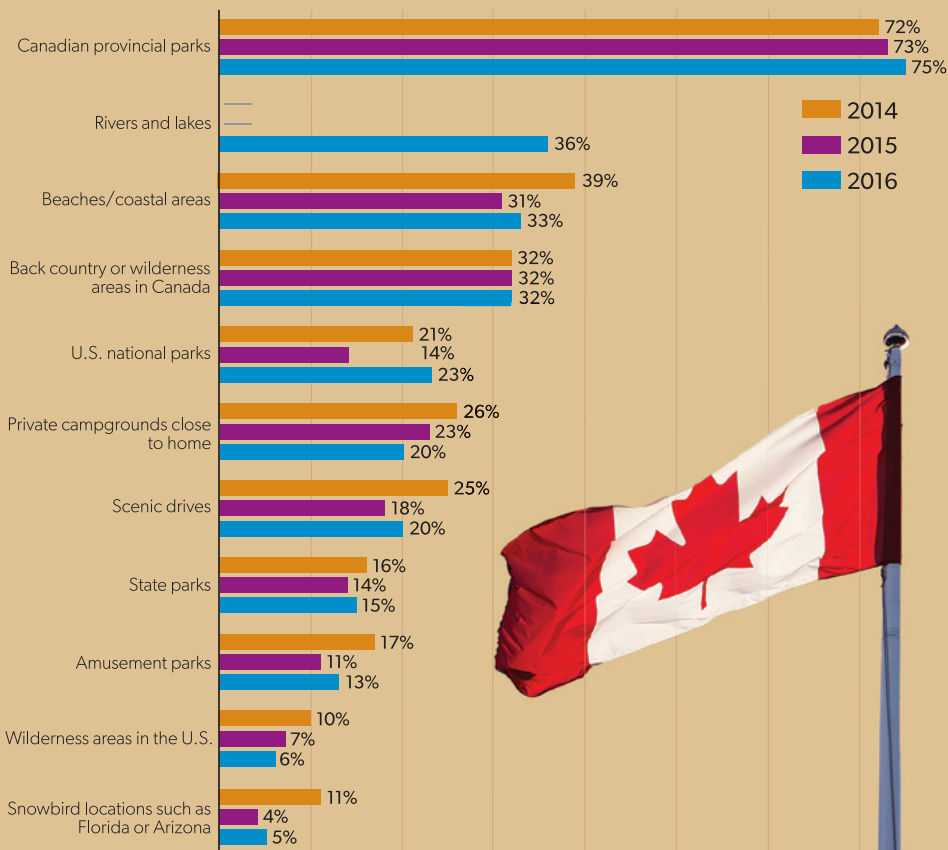
The incidence of camping among Canadian residents remains relatively stable when compared to last year, and continues to exceed the overall incidence observed among U.S. residents.

Even though Canadian campers were somewhat less optimistic about their plans for 2016, their camping patterns appear to be relatively stable with few changes in reported number of trips, planned trips or where they are planning to stay in 2017. More than half (57 percent) state that they did not change their camping this past year, or intend to do so in 2017 (50 percent).

Campground location is important to Canadian campers. They are also more likely to be destinations campers and are less likely to stay at multiple locations during a trip. Their trips are more likely to include weekend getaways (52 percent) or visits to friends and relatives (37 percent).

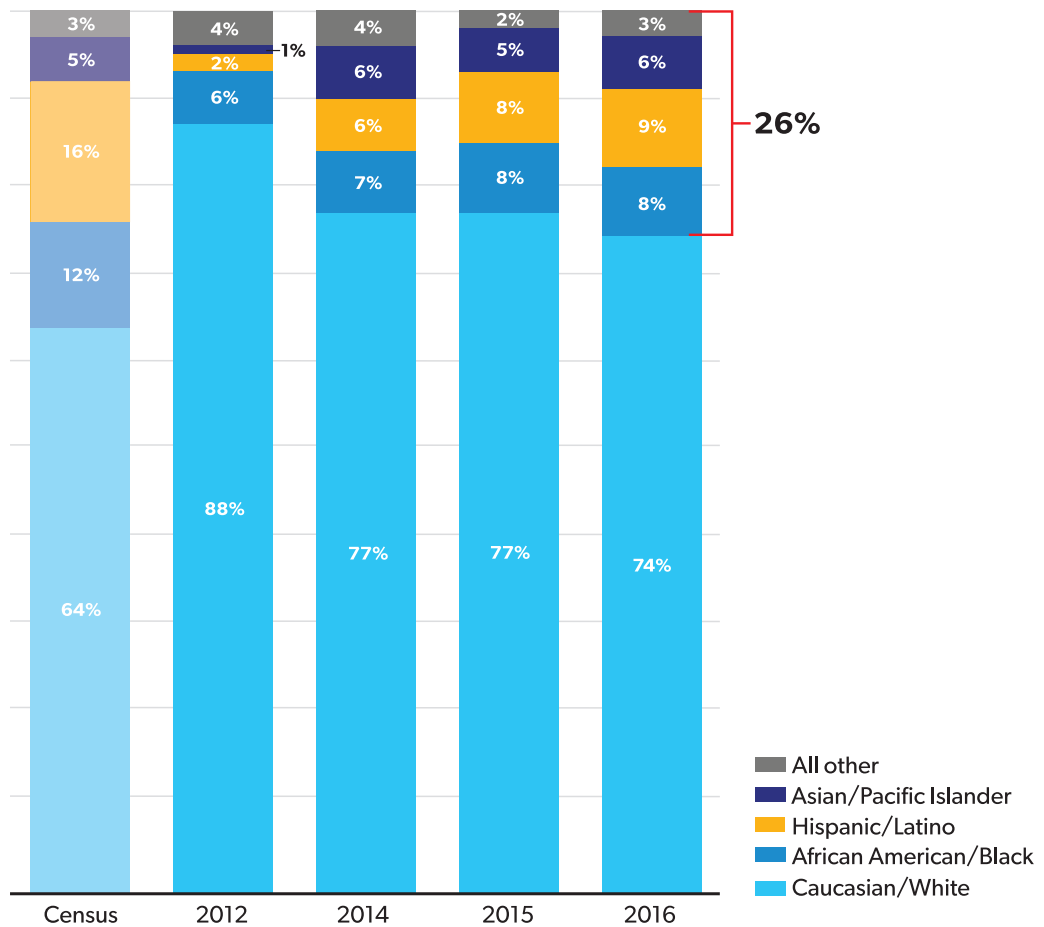
Canadian campers continue to overwhelmingly say that they plan to visit provincial parks, and visits to other locations may be rebounding after a drop-off in 2015. Consistently, about one-third of Canadian campers report that they intend to visit backcountry or wilderness areas, a rate well above what is intended by U.S. campers.

DESTINATIONS PLANNED FOR THE YEAR AHEAD



INCIDENCE BY ETHNICITY

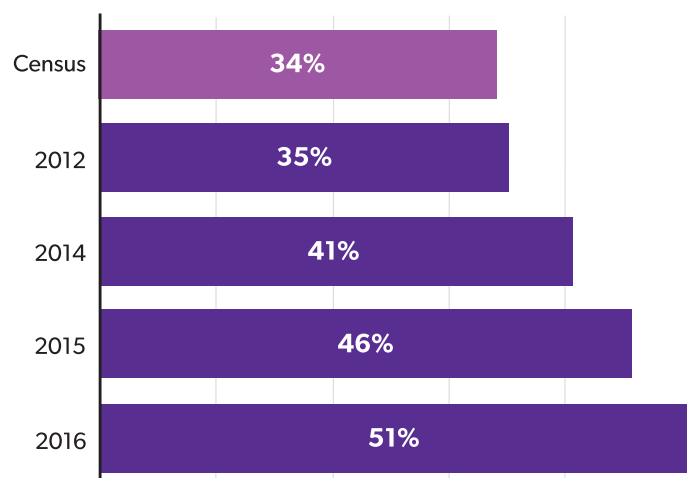
The incidence of camping among Hispanics, African American/Blacks and Asians continues to increase, with non-white campers now comprising one-fourth of all campers. That rate has doubled since first being measured in 2012.



CHILDREN IN HOUSEHOLD

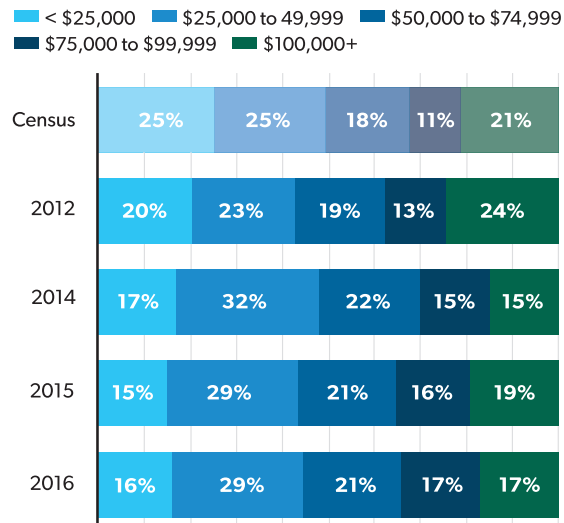
Over time, camping appears to be more and more of a family event, with fully half of all campers reporting that there are children in their households.

A changing demographic that includes a larger proportion of younger campers, many with children in the household, is also contributing to this result. In other words, as younger people start camping in greater numbers, and older campers begin to fall out, then the natural composition would include more campers with children due to the younger demographic.



INCOME

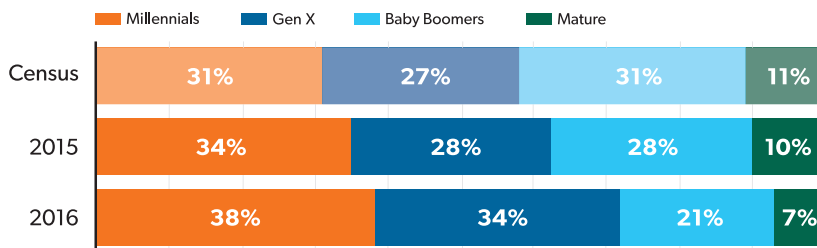
Consistent with the 2016 survey results, campers tend to be solidly middle income. The proportion of campers in the lowest income bracket has dropped over time, while the proportion of campers in the highest income bracket has also dropped 7 percentage points since 2012. The proportion of campers in the \$25,000 to \$100,000 income categories had a net increase of 13 percentage points over the past four years (from 55 percent in 2012 to 68 percent in 2016).



AGE

Currently, millennials and Generation Xers are somewhat overrepresented among all campers. This may indicate a changeover in the demographics of campers.

This is not surprising given that many campers in the older age groups currently report they do not intend to camp in the coming year, while younger campers intend to increase the amount they camp.

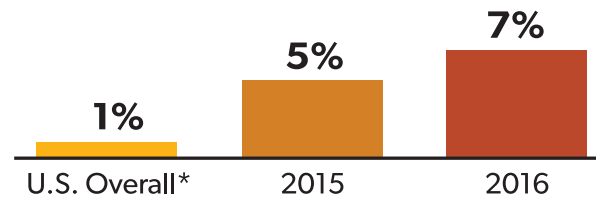


CAMPING AND SAME-SEX HOUSEHOLDS

The number of same-sex households who camp is up slightly from last year, but continues to hover well above the overall rate for same-sex households in the U.S.

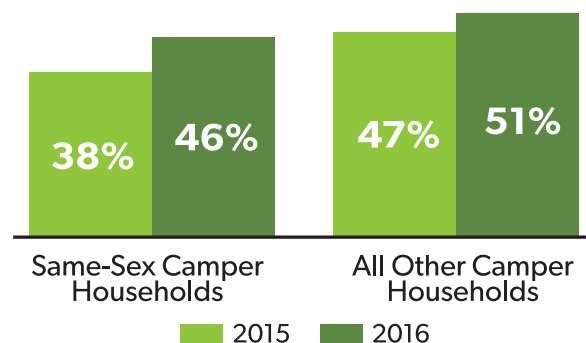
Among same-sex households, those who camp with children has also increased year over year, with now close to half sharing their camping trips with children. This suggests that no matter the household composition, camping is a draw for all families and seems positioned to continue to grow among all family types.

PERCENTAGE OF SAME-SEX HOUSEHOLDS



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

HOUSEHOLDS WHO CAMP WITH CHILDREN





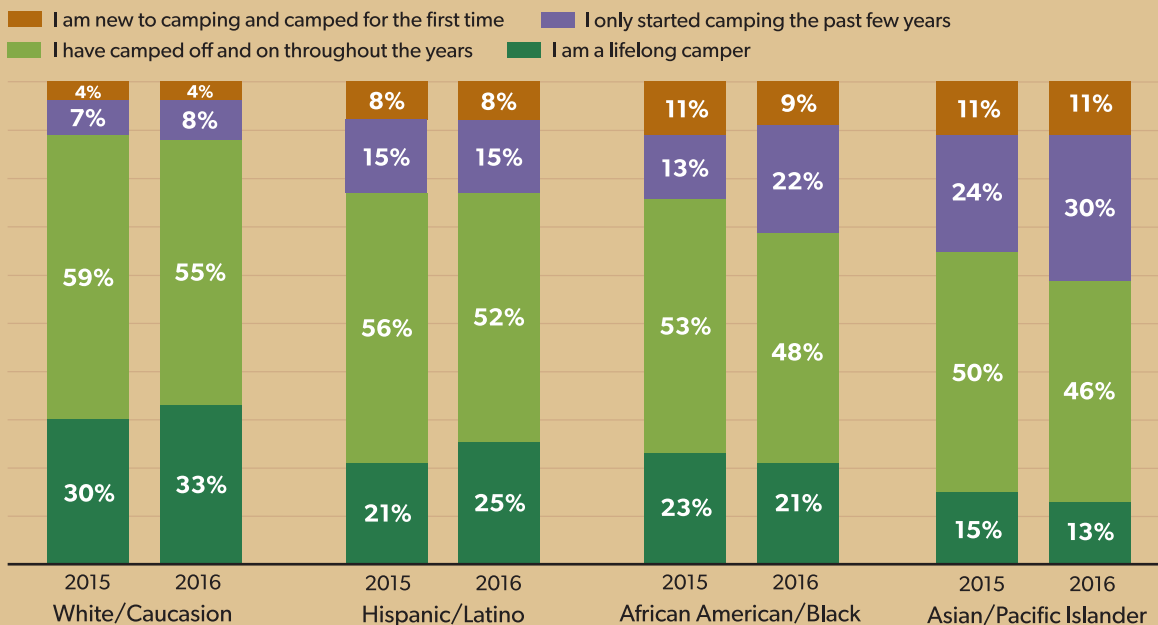
Overview

Over time there has been an increasing proportion of Hispanics, African Americans/Blacks and people of Asian descent who are introduced to camping, driven mostly by a younger generation of campers.

Six-in-10 non-white campers are millennial, compared to nearly 4-in-10 white campers.

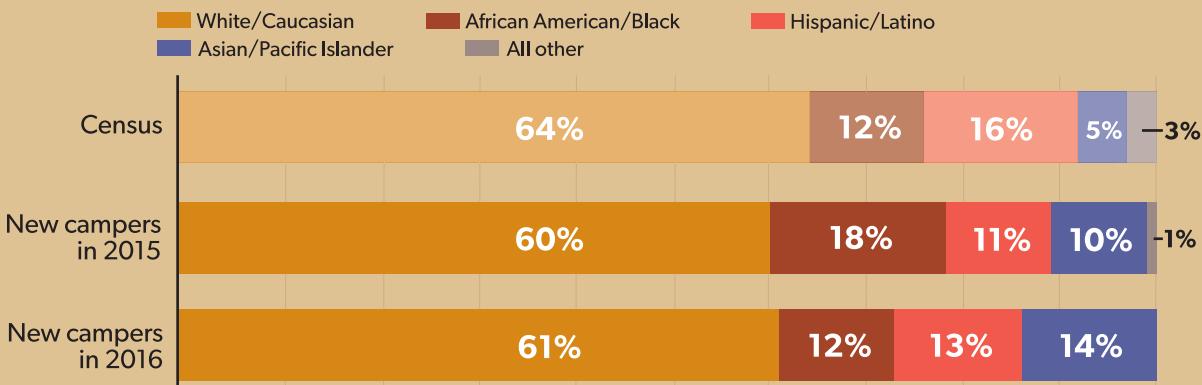
Non-white groups are continuing to show a greater interest in camping. Non-white campers, and especially campers of Asian descent, are most likely to be new to camping, with fully 40 percent of Asian/Pacific Islander campers reporting that they have started camping the past few years. Twenty-two percent of Hispanic campers, 31 percent of African American/Black campers and only 12 percent of white campers have started camping within the past couple of years.

NEW CAMPERS



Also similar to 2015, among new campers for 2016, incidence of camping more closely matches census figures for whites, African Americans/Blacks and Hispanics. Asian/Pacific Islanders, however, are the only group to exceed (nearly triple) what would be expected compared to census figures.

INCIDENCE BY ETHNICITY



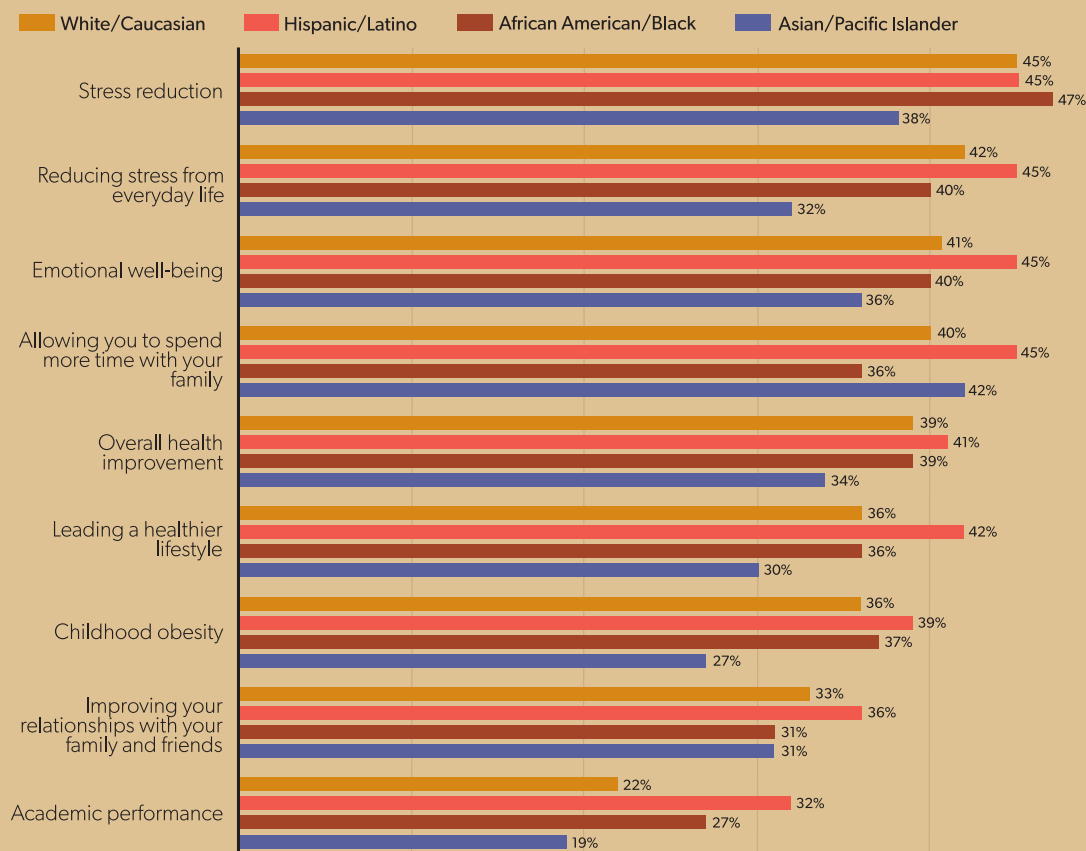
Why People Are Camping

It appears that some of the differences observed in the past across different ethnicities are beginning to wane, though there are still some differences worth considering.

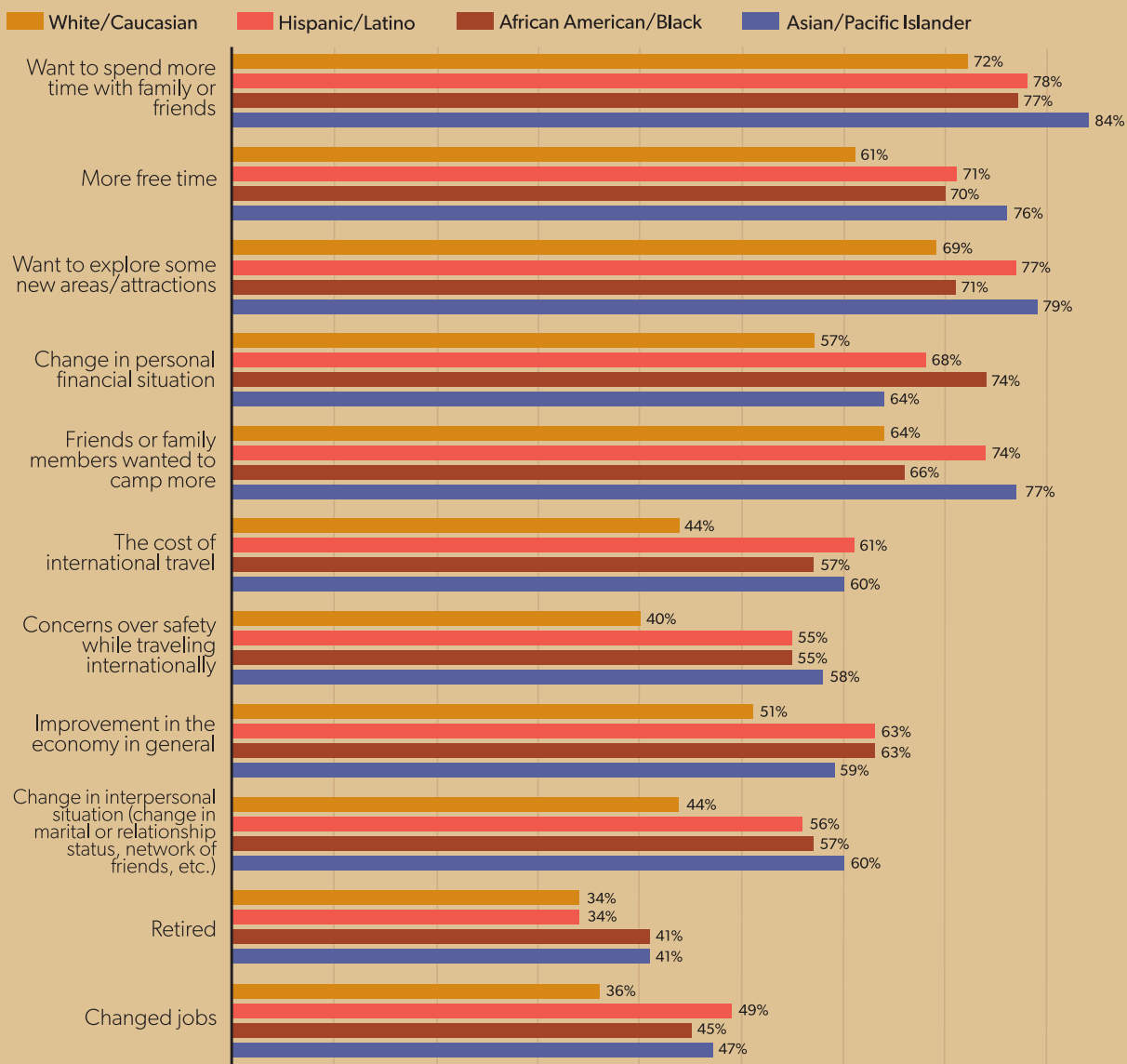
In 2015, there were large differences in the self-reported benefits between white and non-white campers. However, in 2016, these differences have flattened dramatically with the influx of a younger, more diverse – and now more experienced – camper base.

In a departure from past iterations of the survey, Asian campers are expressing much stronger opinions about their connections to camping, including the desire to spend more time with family and friends.

IMPACT/BENEFITS OF CAMPING BY ETHNICITY (% REPORTING A GREAT DEAL OF IMPACT)



IMPACT ON CAMPING DECISION BY ETHNICITY (% REPORTING A GREAT DEAL OF IMPACT)



ETHNICITY AND CAMPING



Where and How People Are Camping

Destinations

Campers of Asian descent are most likely to visit national parks, with nearly 70 percent stating that they intend to visit a national park in 2017. By comparison about 47 percent of white, Hispanic and African American/Black campers intend to visit a national park.

White and African American/Black campers are most likely to stay in a private campground. In 2016, growth in the proportion of nights at privately owned campgrounds increased substantially among both Hispanic (+8 percentage points) and African American/Black campers (+7 percentage points).

Accommodations

Hispanic and Asian campers appear to be gravitating more toward cabins and RVs, while African American/Black campers are increasing their preference for tent camping.

With this newness to camping, non-white campers are more likely to report that they are trying new accommodations (68 percent vs. 50 percent). This is most likely to include a tent (38 percent), though substantial blocs of non-white campers tried RVing for the first time (26 percent) or staying in a cabin (20 percent).

Trial of new accommodations in 2016 was highest among Hispanics (70 percent), with tents being the primary new accommodation. Hispanic campers were also the most likely to stay in a full-service cabin, with 1-in-5 staying in a full-service cabin for the first time this past year.

When asked what types of accommodations they would like to try for the first time in 2017, nearly half of all non-white campers said they want to try an RV (including 51 percent of African American/Black campers). Among those who say they want to try an RV, 1-in-5 specifically mention a camping van.

Technology and Camping

Over time, there are fewer differences in the use of technology across the different ethnicities, though white campers in general are less likely to bring their smartphone camping and Asian campers most likely.

Recreation and Group Camping

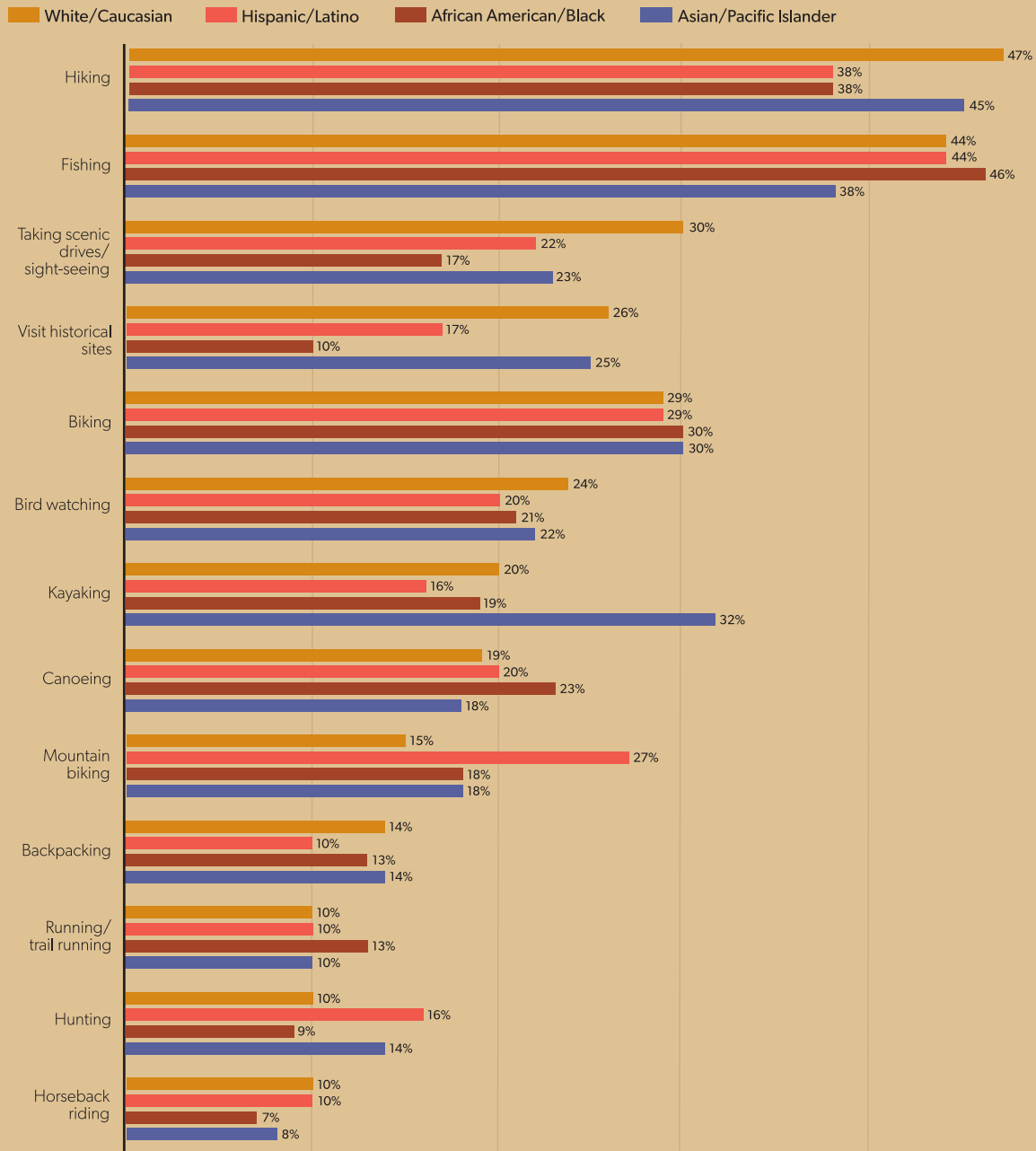
Recreation is an important part of campers' experiences. Hiking and fishing tend to be prevalent among all campers. Nearly a third of Asian campers say that they kayak. Biking/mountain biking appears to be a popular among Hispanic campers.

When camping as part of a large group, Asian campers report the largest group sizes (13), compared to African American/Black (11), Hispanic (11) and white (9) campers.

As was first noted in 2015, Hispanic campers are still the most likely to camp with multiple generations.



RECREATION WHILE CAMPING



ETHNICITY AND CAMPING



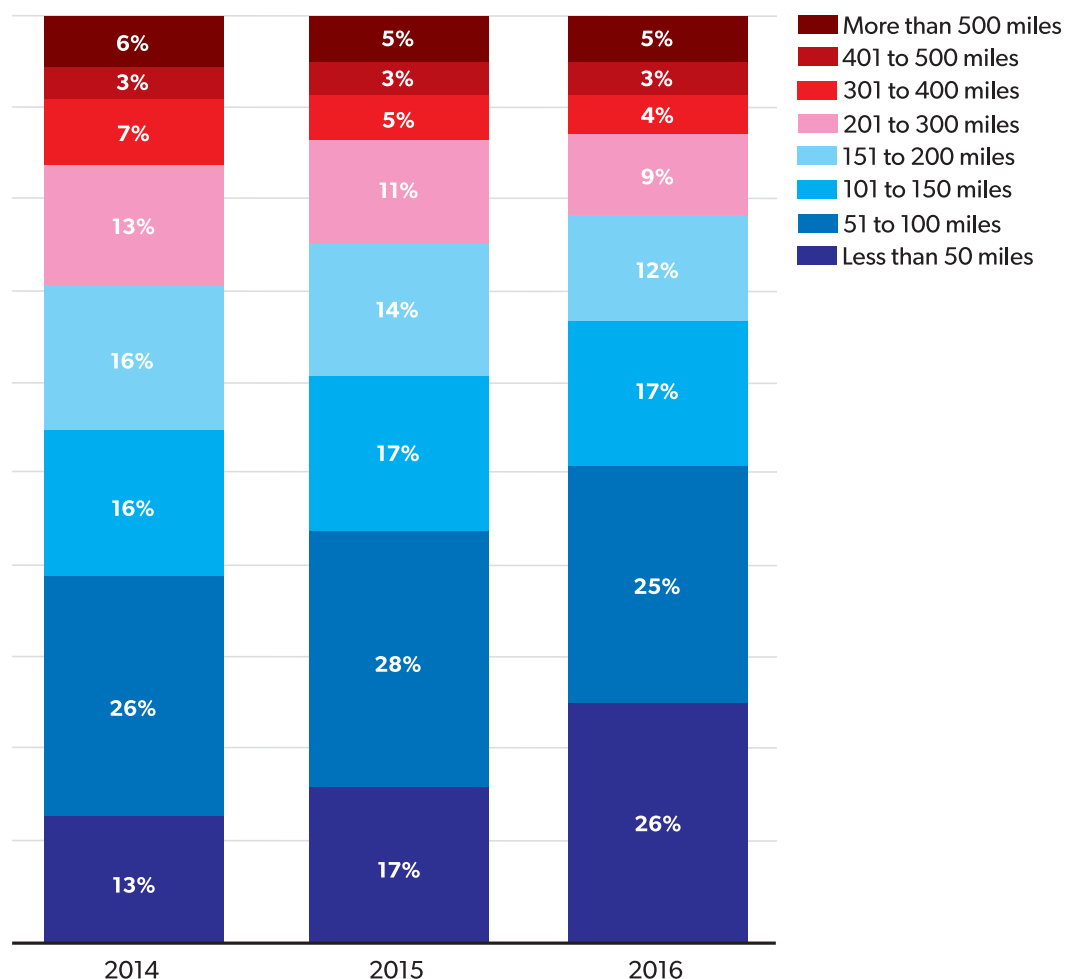
WHERE PEOPLE ARE CAMPING

Distance from Home

Campers who typically travel mid-range distances may have shortened their trips last year, while long-term travel remains relatively consistent with past results.

Even though gas prices remain low compared to several years ago, recent uncertainty about the economy and gas prices may have contributed to campers staying closer to home last year. With gas prices predicted to remain at the same levels or potentially increase, it's unlikely that the half of campers who stay within 100 miles of home will venture further out in 2017.

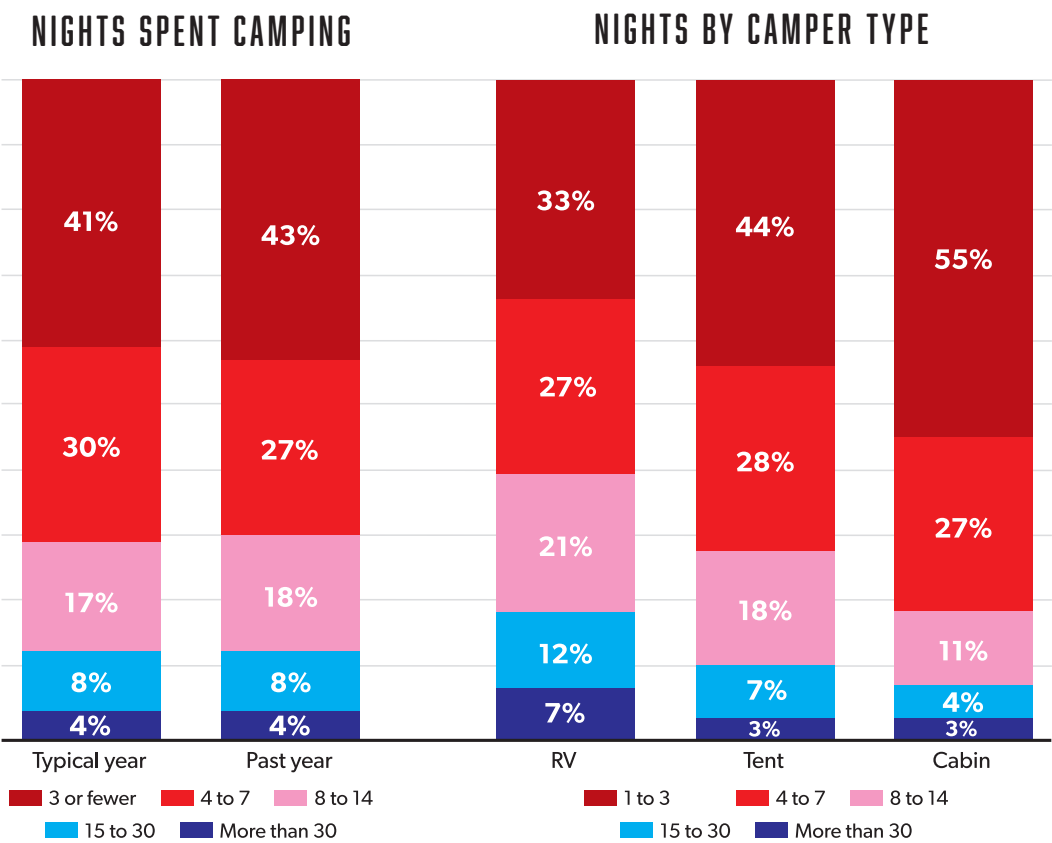
TRAVEL DISTANCES FOR CAMPING



Camping Nights

As campers establish their camping habits, their future plans are in line with their experiences the previous year.

RVers continue to spend the most camping nights annually. Cabin campers spend the fewest nights camping.

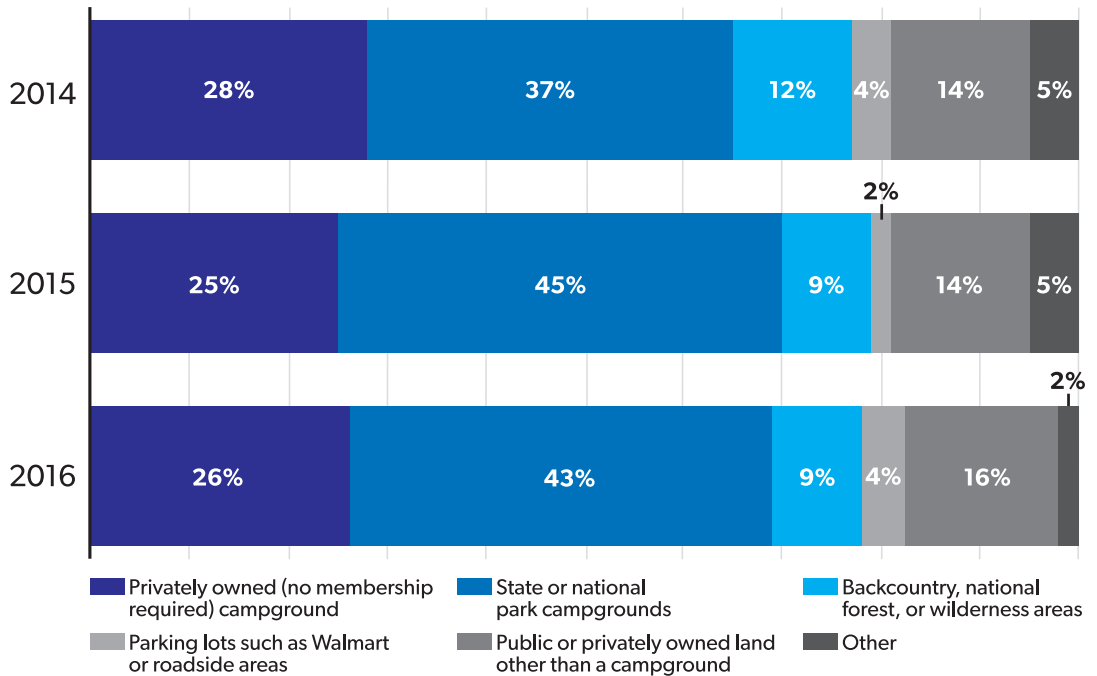


Campers spent the same proportion of their camping nights at state and national park campgrounds in 2016 as they did in 2015.

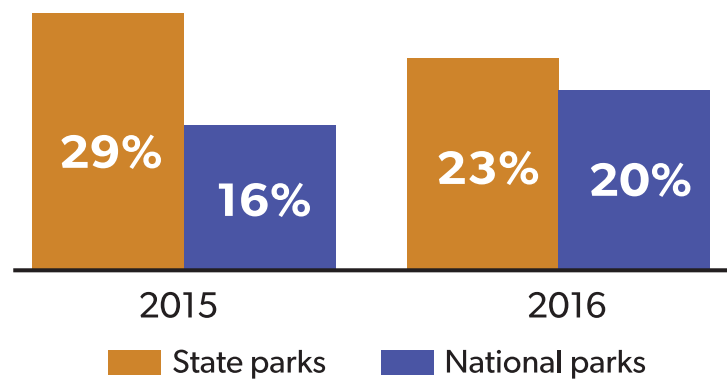
The proportion of camping nights spent in national parks has improved in 2016 compared to 2015 (from 16 to 20 percent), but with a corresponding drop in the proportion of camping nights spent in state parks. Overall, campers report spending about 58 percent of their camping nights on some type of public land.

Tent campers are spending less time in state or national parks, while cabin campers are increasing their stays at these locations.

WHERE ARE CAMPING NIGHTS SPENT?



CAMPING NIGHTS SPENT IN NATIONAL AND STATE PARKS



Millennials and Camping

It was noted last year that millennials may begin to resemble Generation Xers. That change is already taking place, with millennials camping more often with children and showing preferences to the same services and amenities as Gen Xers. Both millennials and Gen Xers:

- Camp about the same amount each year and have the same intentions for camping
- Are almost equally likely to camp in tents, RVs and cabins
- Are equally likely to want to try out a full-service cabin in 2017
- Have few differences in their views toward sharing RV ownership, transportation and gear
- Show equal levels of affinity toward camping

These changes in demographics are going to impact traditional camping, as it appears younger campers are more aggressively seeking different types of accommodations. While millennials and Gen Xers are most likely to camp in tents, they are experimenting with different types of accommodations and say they want to try something new. In 2017, millennials and Gen Xers each express a desire to try out at least two different types of accommodations which are likely to include a full-service cabin with a bathroom, or a smaller RV.

Group Camping

Younger campers are also more likely to camp in the largest size groups (10+) and say that they are “much more likely” (51 percent) to seek campgrounds that can accommodate their groups. Group sizes tend to be somewhat larger among millennials and non-white campers when they go on trips with others outside of their immediate family.

Millennials are seeking campgrounds that can provide group areas for campers with different accommodations. However, they are least likely to report that campgrounds are able to accommodate the needs of their groups. The sectors that serve the camping industry will need to adjust to serve this new generation of campers who have different behaviors, attitudes and perceptions when it comes to time spent outdoors.

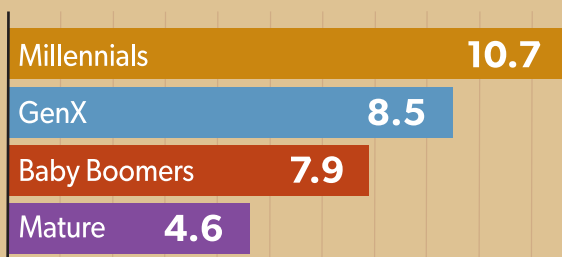
Millennial and Multicultural

With new campers, who are both younger and more diverse, representing a larger proportion of campers overall, differences in opinion between campers across ethnicities are beginning to lessen. There are a few differences between white and non-white millennials in their motivations for camping, how camping impacts their lives, how it impacts children, and the types of destinations they prefer.

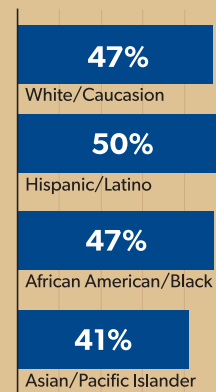
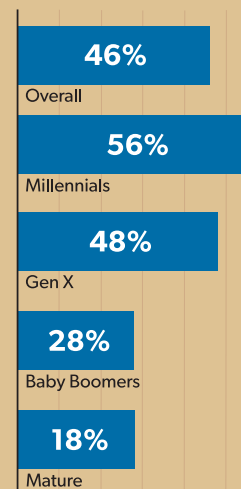
Differences do exist when it comes to the types of accommodations both white and non-white millennials would like to try. White millennials (45 percent) want to try full-service cabins compared to 34 percent for non-white millennials. This may be due in part to non-white millennials already being exposed to full-service cabins at a higher rate than white millennials.

Non-white millennials are also more likely to say their interest in camping was sparked by a love of the outdoors and a desire to get away from crowds and noise.

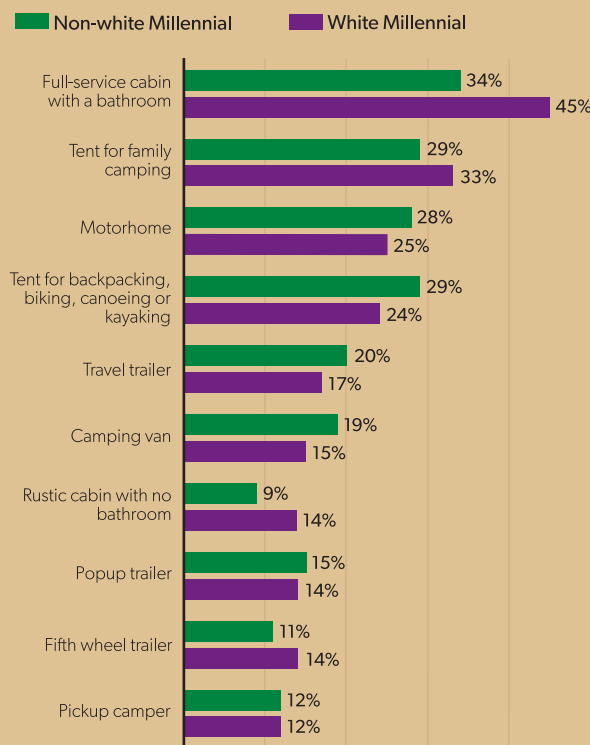
AVERAGE GROUP SIZE



I PLAN TO CAMP MORE NIGHTS



TYPES OF ACCOMMODATIONS I WOULD LIKE TO TRY THIS COMING YEAR





HOW PEOPLE ARE CAMPING

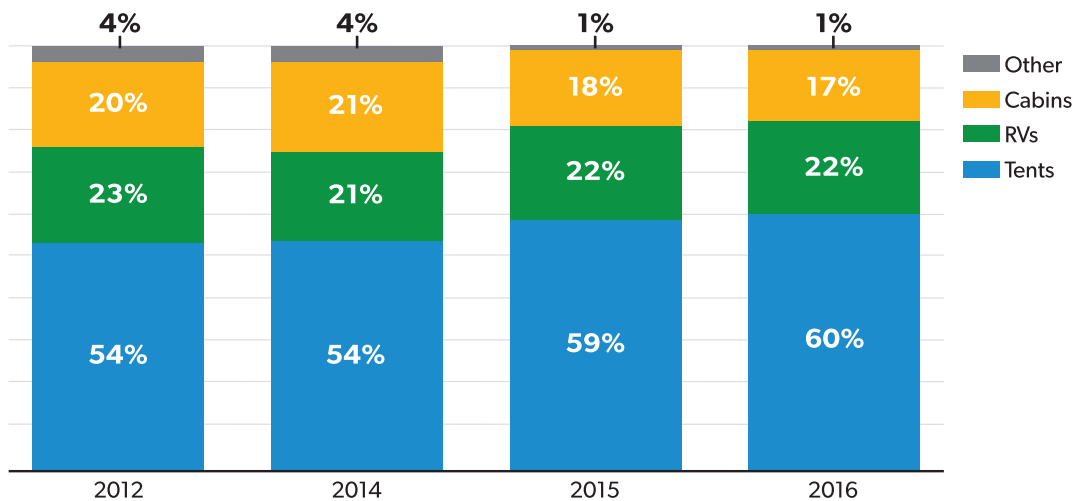
Accommodations

Tent camping is the most popular type of camping accommodation. However, with an influx of new campers and a desire for different types of camping experiences, new campers are gravitating toward other types of accommodations.

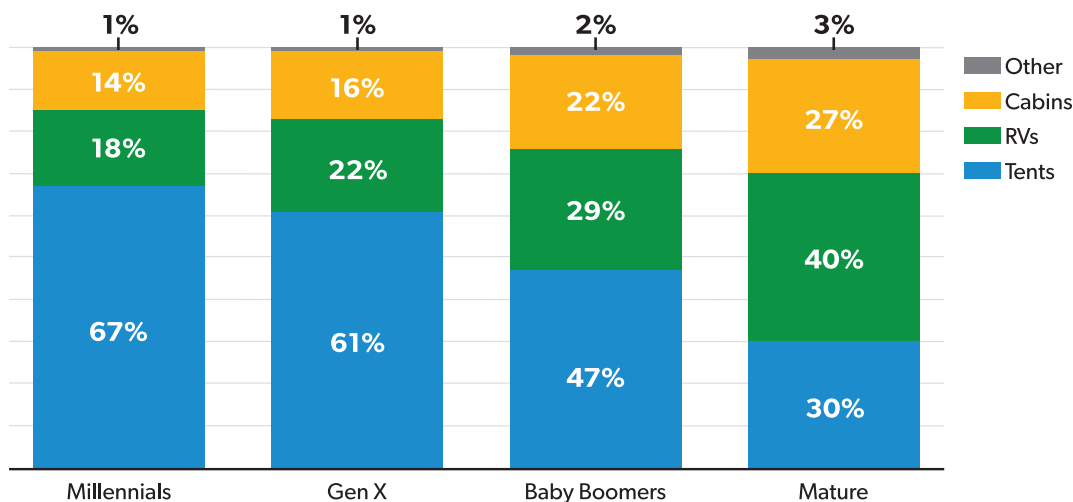
Six-in-10 campers are staying in tents, with 1-in-5 reporting they may primarily use an RV. There is a direct line between tent usage and the age of the camper. Two-thirds of millennials use tents compared to only 30 percent of older campers who are much more likely to stay in RVs and cabins.

A more granular view of the different types of accommodations reveals that while use of family tents is stable, since 2014 there is an increase in campers who are using smaller, more portable tents.

PRIMARY ACCOMMODATIONS

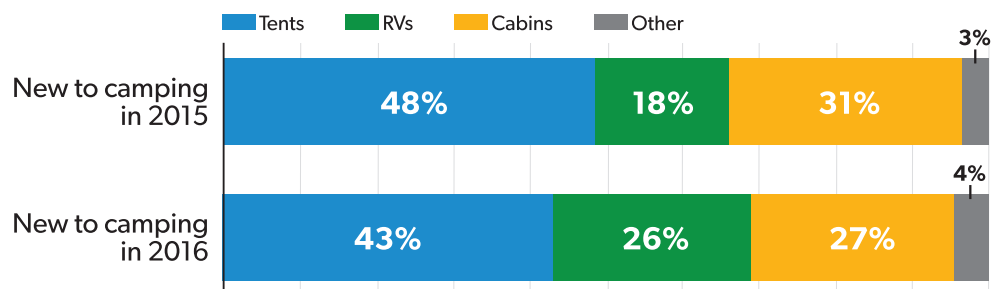


ACCOMMODATION TYPE BY AGE (2016 ONLY)



Growth in the RV industry is starting to pay dividends among the set of new campers, with one-fourth of new campers saying that they camped in an RV in 2016.

PRIMARY ACCOMMODATIONS FOR NEW CAMPERS

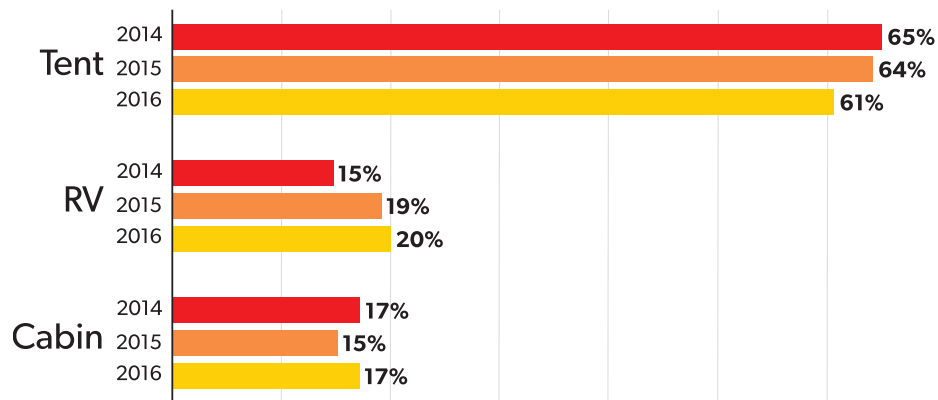


Introductory Accommodations

New campers in 2016 are less likely to have started camping in a tent, with one-third stating that they camped in some type of cabin.

Though campers continue to start their camping experiences in tents, the rate is dropping and those introduced to camping in RVs and cabins continues to edge upward. This may indicate turnover in how campers are introduced to camping.

INTRODUCTORY CAMPING ACCOMMODATIONS (AMONG ALL CAMPERS)



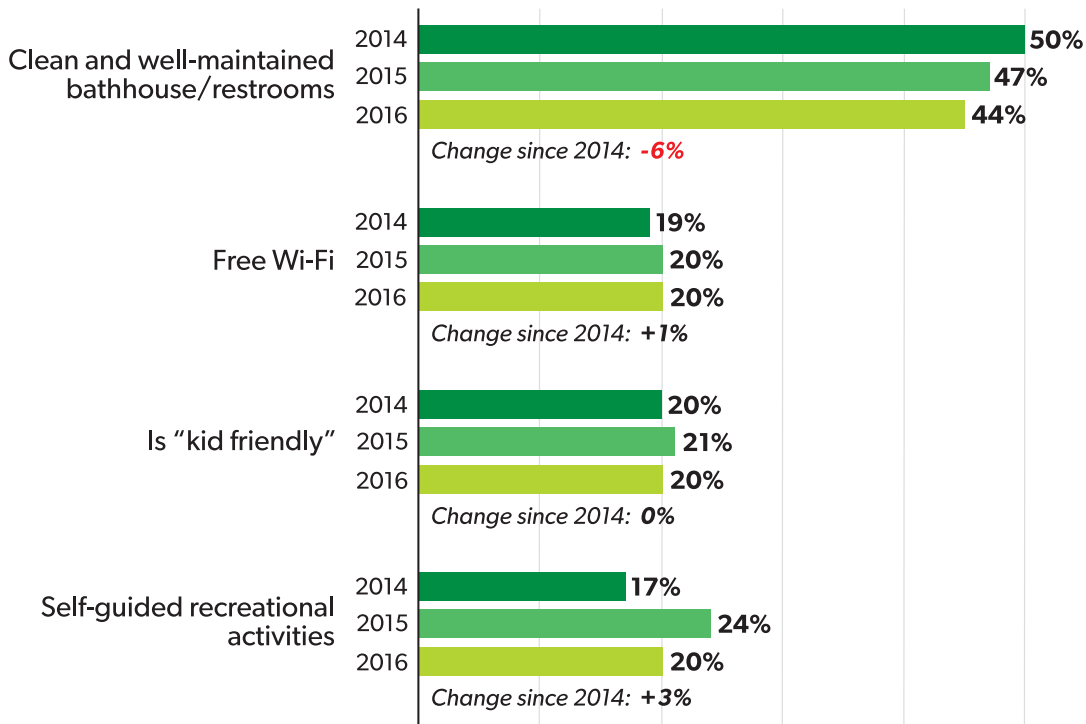
Campground Offerings

Clean bathrooms remain the most important aspect of a camper's stay, though the importance is declining. After clean bathrooms, campers rank free Wi-Fi, being kid-friendly and recreation as the most important campground attributes.

While clean bathrooms are important to all campers, older campers, being comprised of a higher proportion of RVers, place greater importance on the type and quality of the RV sites as well as having cabins. This is likely because most RVers have traveling toilets.

There is an increasing preference for self-guided recreation activities at campgrounds.

WHAT ARE THE TOP THREE OFFERINGS THEY VALUE IN A CAMPGROUND?

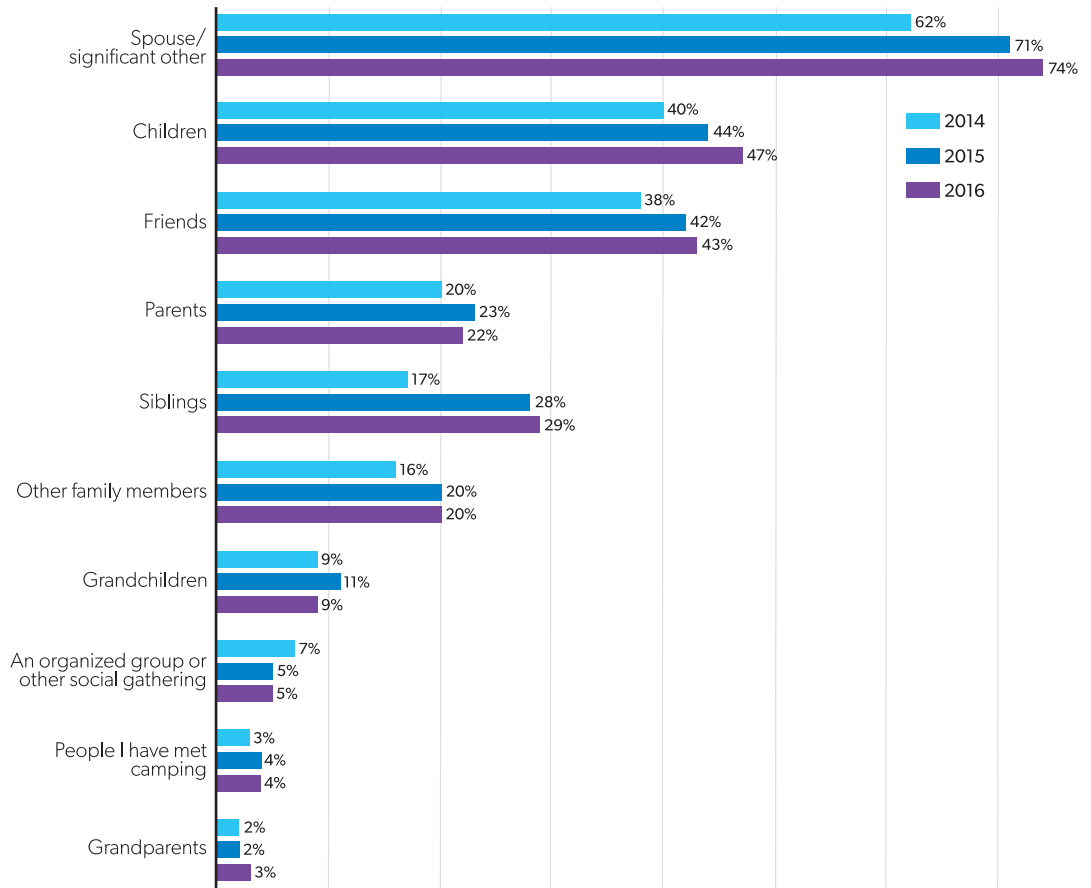


Who They Are Camping With

Couples form the group of campers most likely to share their camping experiences, and overall, camping appears to be gaining among familial groups.

In another result that is likely tied to the changing demographic of campers, campers are more likely to take trips that include other family members as well as friends and extended family.

WHO THEY'RE CAMPING WITH



Multi-generational camping rose from 56 percent in 2015 to 59 percent in 2016.

MULTI-GENERATION CAMPING





Generation Z Teens and Camping

Camping appears to hold a strong appeal for the teens who are exposed to all that camping has to offer. Overall, camping offers teens the opportunity to participate in something that they have in common with adults.

Teen campers express strong opinions about camping in general. Not only are they highly engaged in the planning, but are enthusiastic about their trips, and strongly identify with the benefits of camping for them and their peer group.

Teens' favorite things about camping are being able to spend time with their family and spending time outdoors. Their least favorite thing about camping is bugs.

Teen campers are incredibly social, with virtually all the teens surveyed saying that they like to camp as part of a group including friends and family. They are also likely to identify camping as a way to relax and unwind, with several teens mentioning that it is important for them to get away from the noises of the city, the rules, and homework. Much like adult campers, they view camping as a way to escape from their everyday lives.

Some teens also say that camping is a way for their parents to relax, which in turn adds to their enjoyment.

Teens enjoy being active while camping. An overwhelming majority of teen campers (70 percent) say that they like to stay in campgrounds that have lots of activities, such as swimming pools, bikes and other activities geared towards their age group.

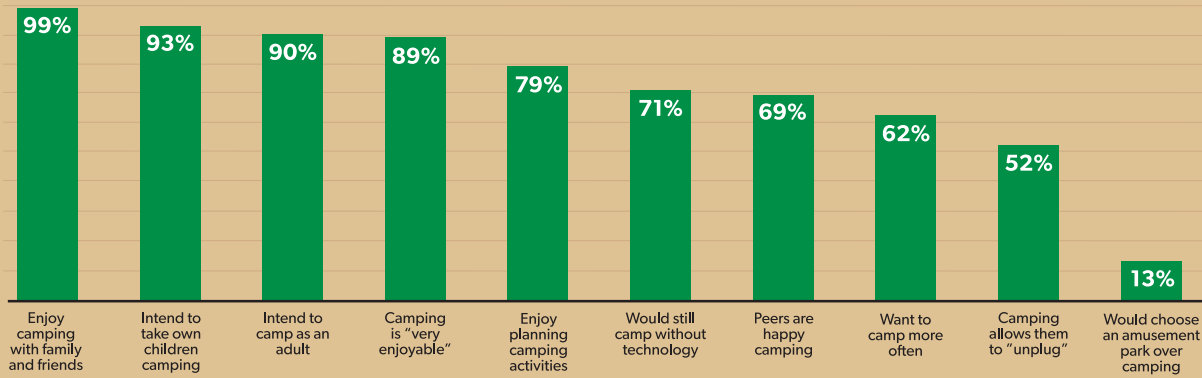
With childhood obesity an ongoing problem, it is also important to consider that about 6-in-10 teen campers (58 percent) say that they are more physically active than others in their peer group. Of note, 60 percent of millennial campers – the generation ahead of Generation Z – say that they are more physically active than their peers.

When it comes to planning a camping trip, teens find a great deal of enjoyment in finding the activities to participate in while camping. Even though fishing has waned as an activity among adult campers, it is extremely popular among teen campers with 8-in-10 stating that they go fishing while camping.

Only 13 percent of teens would rather go to an amusement park than go camping.



CAMPING TEENS



Teens, Technology and Camping

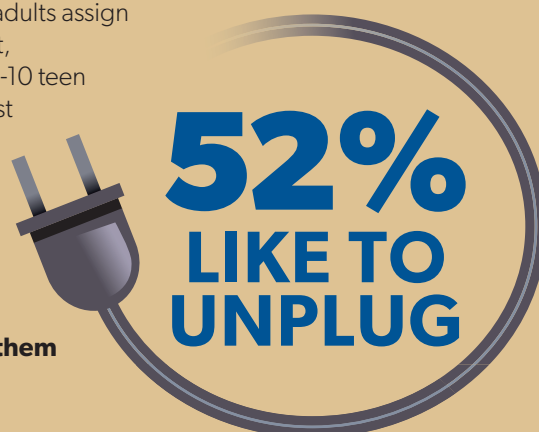
Even though many adults have the view that teens are "glued" to their phones and cannot pull away from technology, teens are no more likely to use technology than adult campers. In fact, teen campers go online at the same frequency as their adult counterparts (83 percent vs. 84 percent). Teens tend to take the perspective that technology makes their camping trips better (40 percent). Only 15 percent say it worsens their experience, and importantly, the remaining 45 percent say that technology does not make a difference.

Teens' online behaviors are somewhat different when compared to adults. Teens are much more likely to go online to check social media (46 percent vs. 29 percent), while adults are more likely to check emails (39 percent vs. 21 percent).

A majority of teen campers (54 percent) say it's very important to have cell service while camping, while 42 percent of adult campers say it's very important. Teens and adults assign somewhat less importance to Wi-Fi (37 percent and 24 percent, respectively). Departing from digital entertainment, almost 9-in-10 teen campers state that they play board games or card games at least occasionally while camping.

And only 6 percent of teen campers say that they would not go camping if they did not have access to technology. An overwhelming majority (71 percent) say that they would still go camping if they did not have access to technology (23 percent say it depends on the trip).

Still, half of the teens surveyed say that camping offers them an opportunity to "unplug" from technology.





WHAT PEOPLE DO WHEN THEY'RE CAMPING

Activities

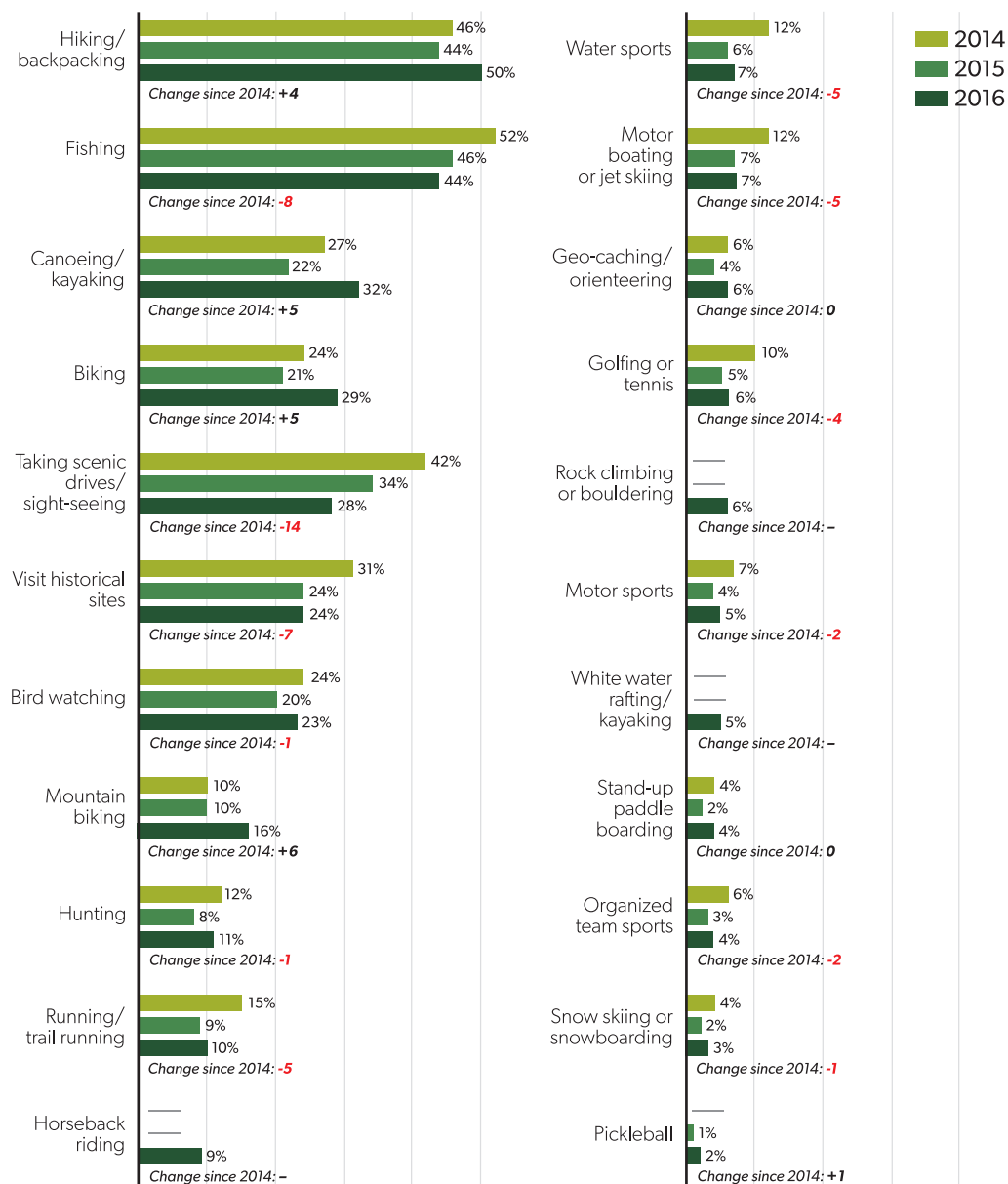
An influx of younger, more physically active campers is changing the recreation landscape as it relates to camping. These campers are more likely to gravitate towards recreation such as mountain biking, hiking, running and adventure sports.

As a result, more physically active types of recreation such as hiking, backpacking, biking and mountain biking are increasing in popularity overall.

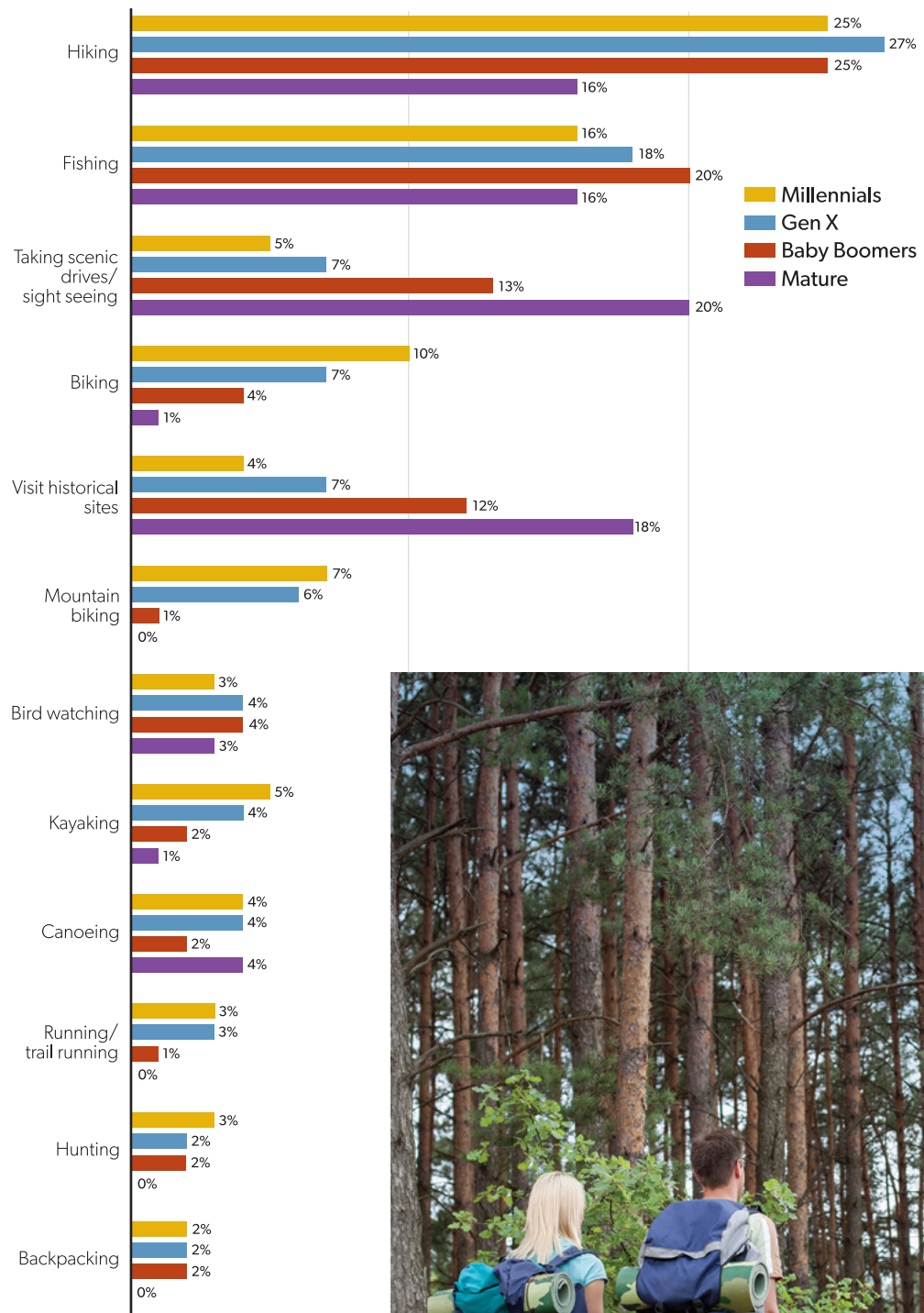
Both hiking and fishing cross all generations, while sightseeing and visiting historical locations tend to be more closely associated with campers from the older generations.

While fishing remains a popular activity, in 2016 for the first time hiking outranks fishing as the most popular form of recreation.

TYPES OF RECREATION WHILE CAMPING



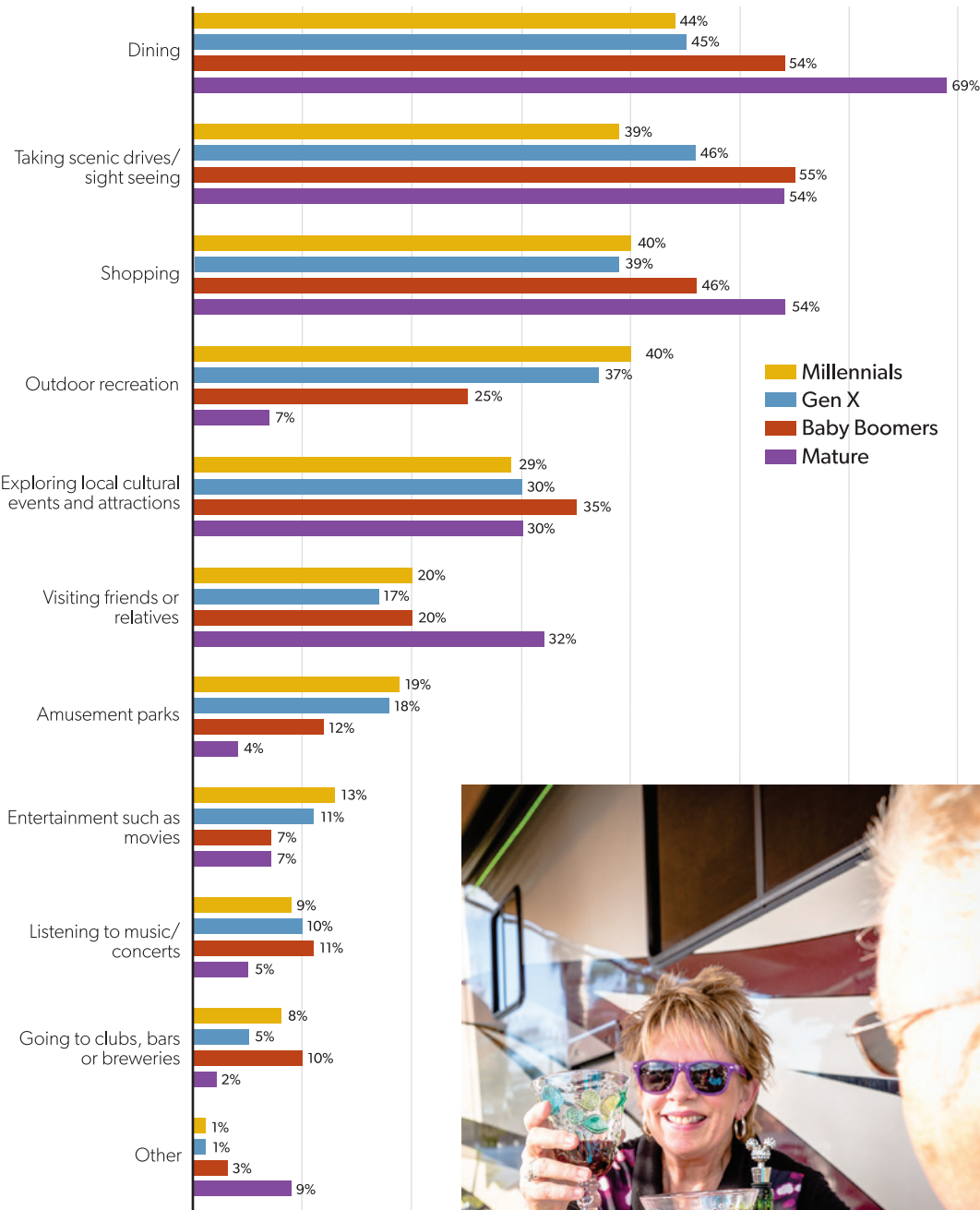
TYPES OF RECREATION CAMPERS PARTICIPATE IN MOST OFTEN WHILE CAMPING, BY AGE



While having recreation on-site at a campground is important, campers are also highly likely to leave the campground for recreation and/or entertainment.

Millennials and Generation Xers are most likely to leave a campground to participate in a variety of activities. Baby Boomers and mature campers are most likely to take drives, dine out or shop.

WHAT TYPES OF ACTIVITIES DO YOU LEAVE THE CAMPGROUND TO PARTICIPATE IN MOST OFTEN?





Sharing Camping Equipment and Gear

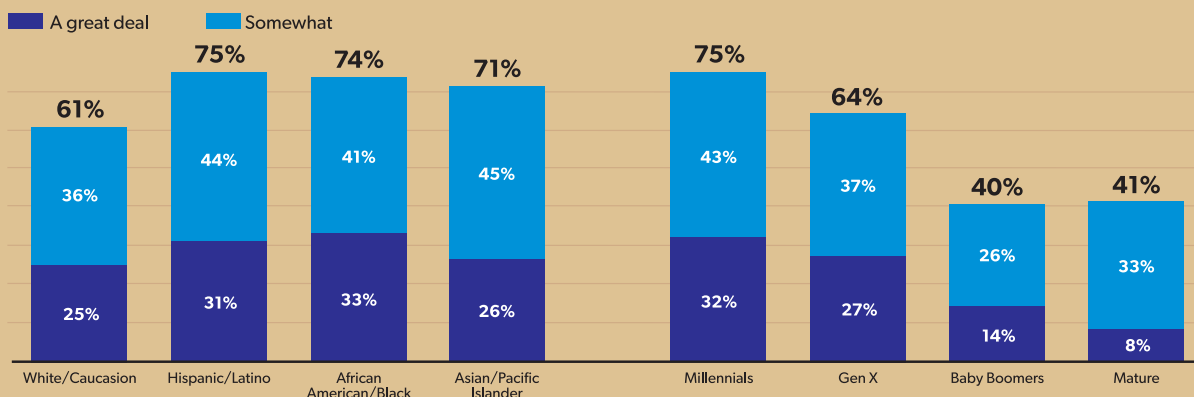
The ability to share recreational vehicles and camping equipment is popular and could impact campers' ability to camp more often.

The ability to share transportation and gear holds strong appeal for about 3-in-10 U.S. campers, who report that sharing would have "a great deal of impact" on their ability to camp more often and at least some impact for two-thirds of all U.S. campers.

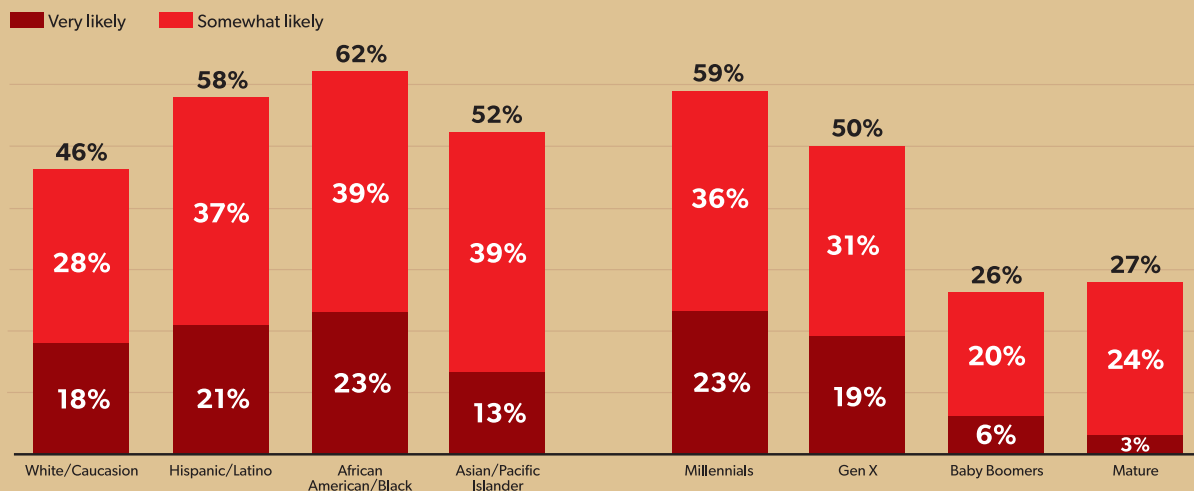
Additionally, half of all U.S. campers (52 percent) would consider sharing in RV ownership, and an even greater proportion of millennial campers, African American/Black and Hispanic campers would consider shared RV ownership.

The opportunity to share equipment or transportation could potentially impact three-fourths of millennial campers and two-thirds of Generation Xers. In particular, fully 6-in-10 millennial campers would consider shared RV ownership with only 2-in-10 unlikely to consider this type of arrangement. All non-white camper groups suggest that sharing would contribute at least somewhat to their ability to camp more often. And shared ownership has the highest levels of consideration among African American/Black and Hispanic campers.

IMPACT OF SHARING TRANSPORTATION AND GEAR ON CAMPING MORE OFTEN



LIKELIHOOD TO CONSIDER SHARED RV OWNERSHIP



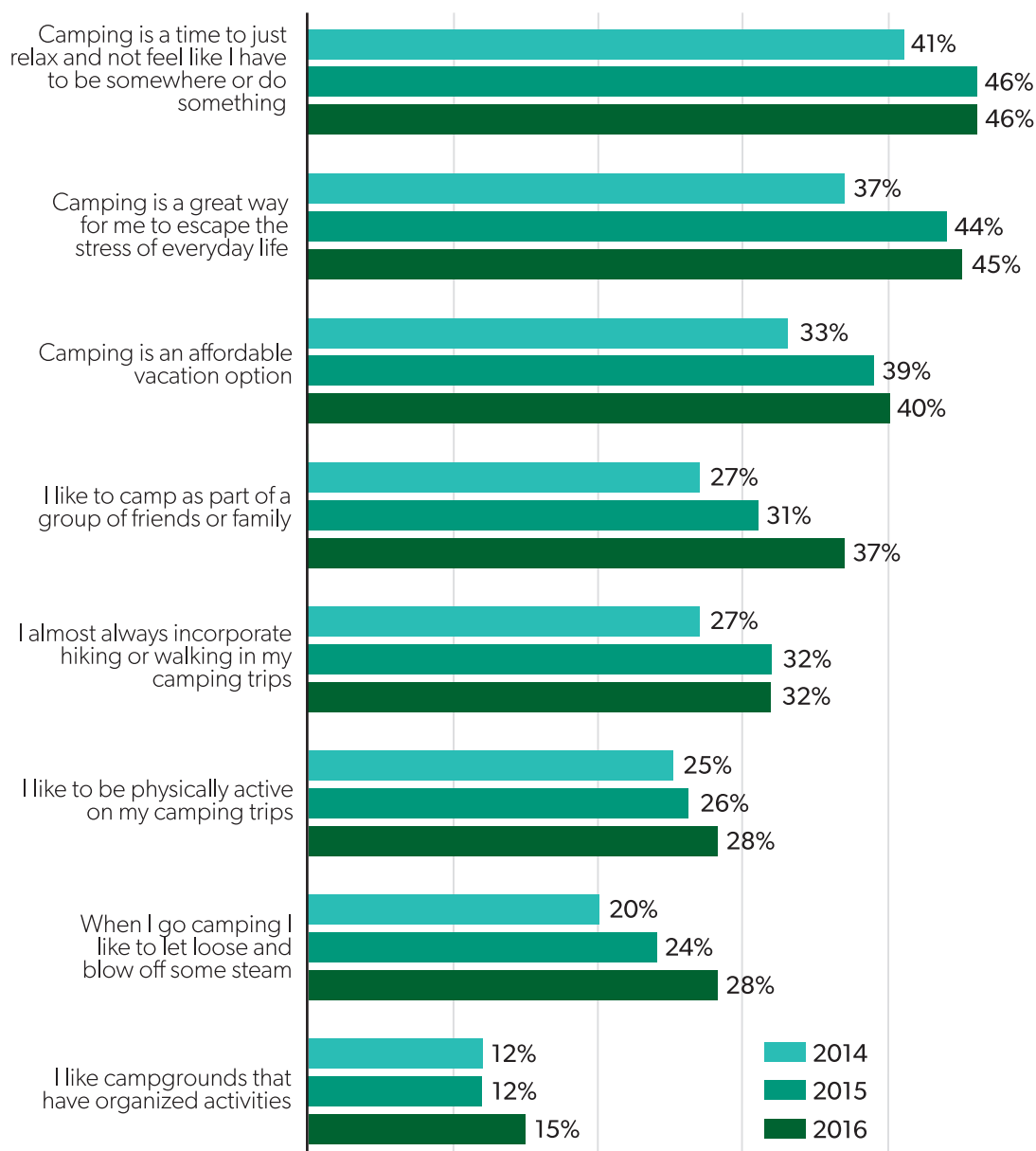
WHY PEOPLE ARE CAMPING AND THE IMPACT/BENEFITS

Escaping Stress and Relaxing

Over time, the benefits of camping are becoming much more strongly embedded in the camper mindset. Campers have strong opinions about camping, primarily the relaxation and stress relief they associate with being outdoors.

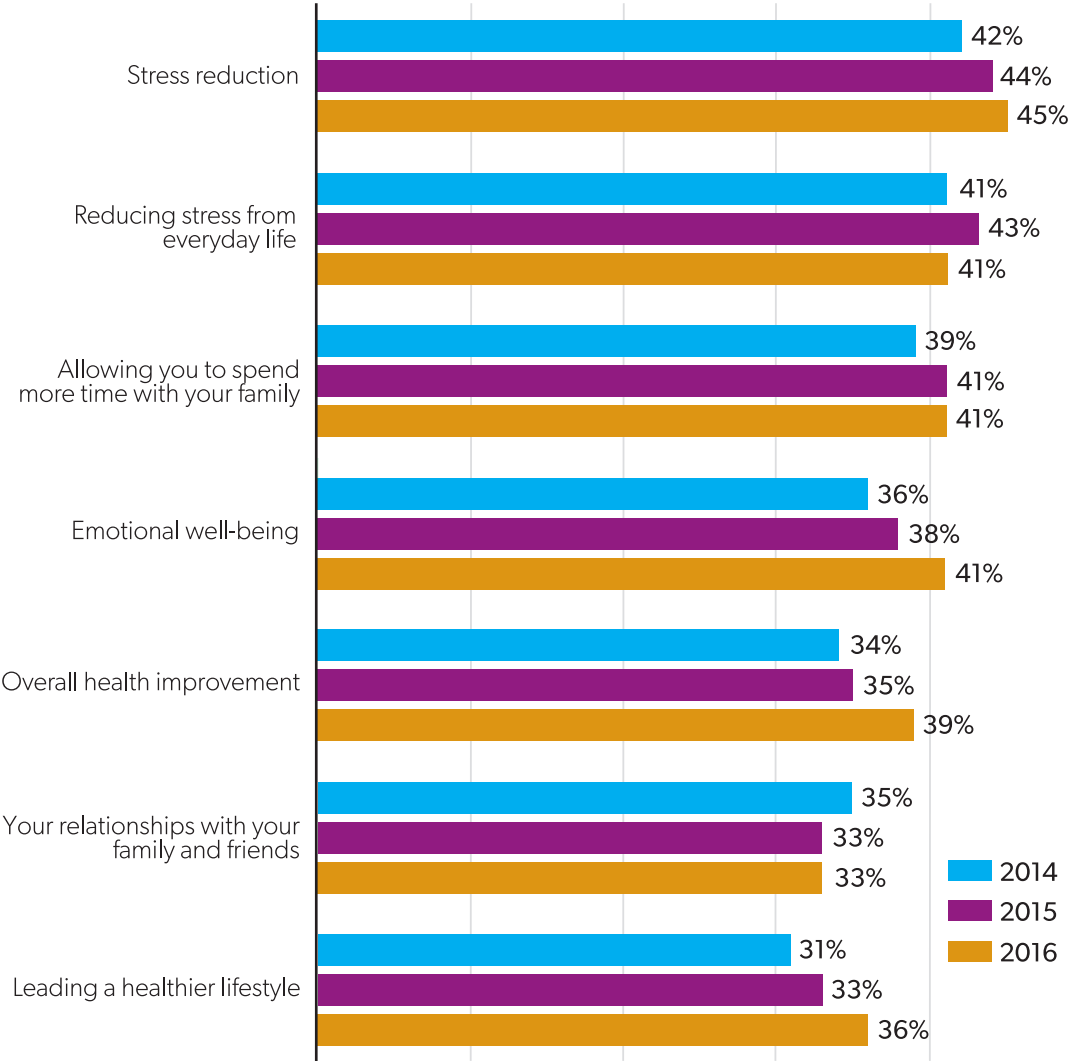
When looking at key reasons for camping by age, millennials are more likely to feel strongly about camping as part of a group (43 percent strongly agree), being physically active (33 percent) and blowing off steam (33 percent).

KEY REASONS FOR CAMPING (% STRONGLY AGREE ABOUT CAMPING)



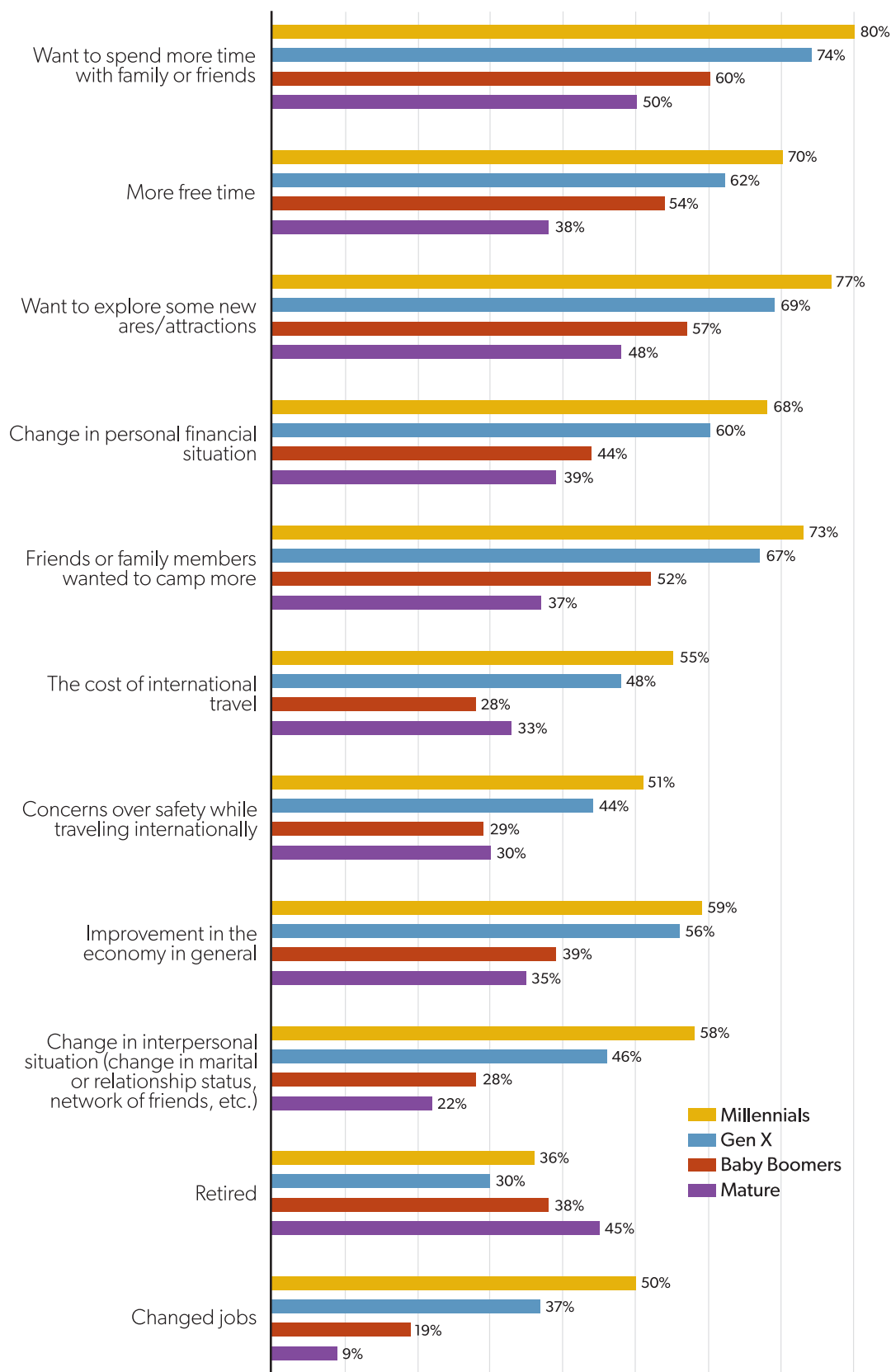
Consistently up from past results, campers suggest that camping has “a great deal of impact” on reducing stress, contributing to their emotional well-being, improving health and leading a healthier lifestyle.

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





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

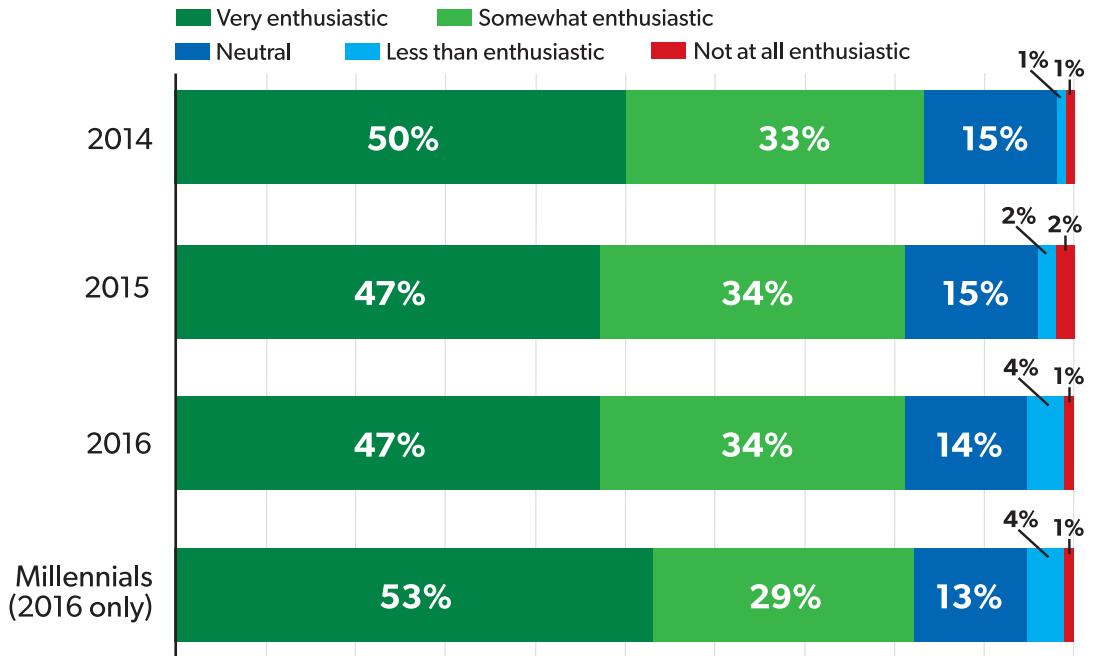


Campers with Children

Overall, parents have strong enthusiasm for camping. This is especially true among younger parents.

More than 80 percent of adults say it's important for kids to spend time outdoors.

ENTHUSIASM ABOUT CAMPING AMONG CHILDREN (AS REPORTED BY THOSE WHO CAMP WITH CHILDREN)

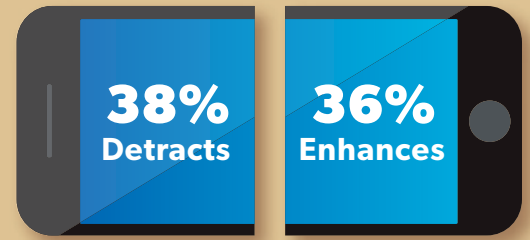




Technology and Camping

Campers love technology and report they are still highly influenced by it. Nearly all campers (95 percent) state that they bring some type of technology with them while camping. However, campers are evenly split in their opinions regarding whether technology enhances or detracts from their camping experiences.

Even among millennials, opinion is split on how technology impacts their experiences with 38 percent saying technology detracts from their camping experience, and 36 percent saying it enhances it. Non-white campers are more likely to suggest that technology enhances their camping experiences.



Compared to 2014, campers are significantly more likely to report going online at least occasionally. There is a linear relationship between going online and age, with younger campers – both millennials and Generation Xers – most likely to go online once a day or more. Generation Z teen campers go online at least occasionally at the same frequency as their adult counterparts (83 percent vs. 84 percent).

Up from 2015, campers are using social media the most for sharing photos or videos.

Technology, Mobility and Vacation Days

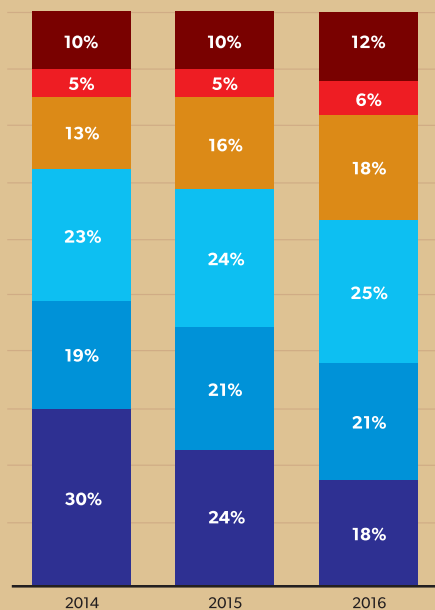
Access to technology is allowing a substantial bloc – 37 percent – of U.S. campers to spend more time outside. Specifically, access to technology is freeing up more time among younger campers who, in all likelihood, are able to check work emails and check in with work via phone when needed.

Among campers who say access to technology allows them to camp more often, almost 60 percent say Wi-Fi is an important consideration when selecting a campground. This same group is also the most likely to check and send emails while camping (45 percent), which likely includes work emails.

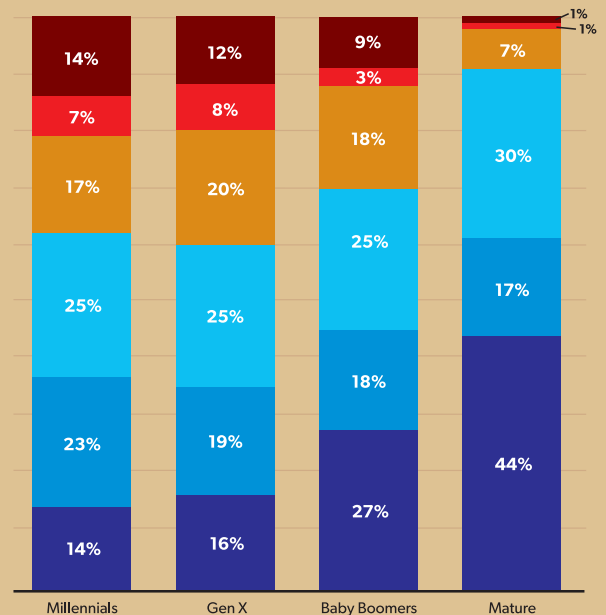
Additionally, campers who say that technology allows them to spend more time camping take an average of almost two additional vacation days to camp.

FREQUENCY OF LOGGING ON IN CAMPING:

ALL CAMPERS

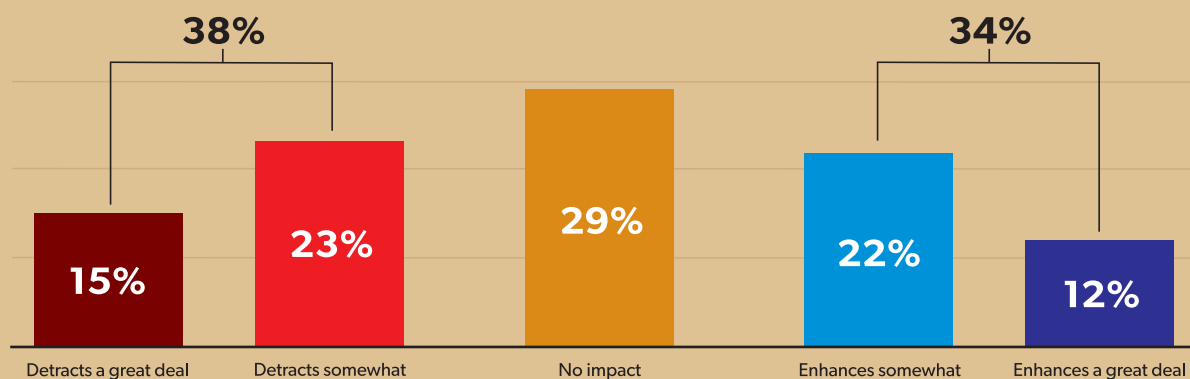


BY AGE (2016 ONLY)

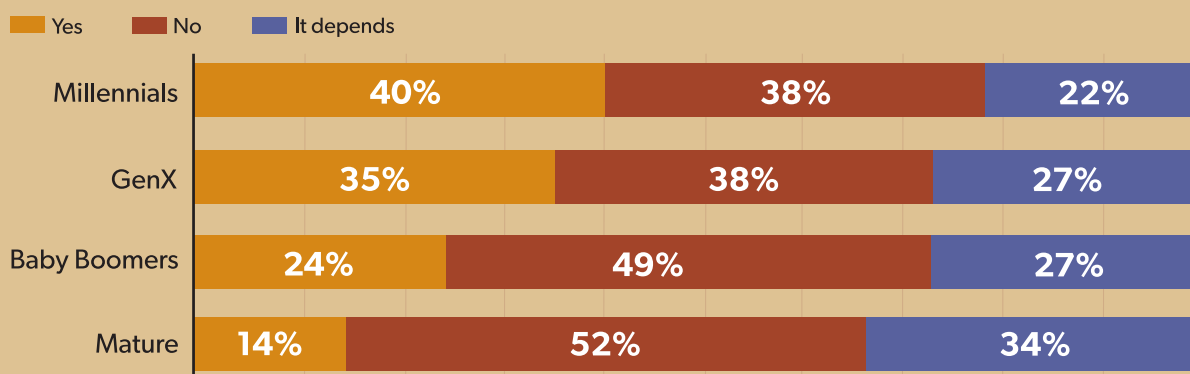


More than 5 times a day 4 or 5 times a day 2 or 3 times a day Once a day About every other day or less Never

IMPACT OF TECHNOLOGY ON ENJOYMENT OF CAMPING TRIPS



DOES TECHNOLOGY ALLOW CAMPERS TO SPEND MORE TIME CAMPING?



Canadian Campers and Technology

Canadian campers continue to use and rely less on technology, with more than one-fourth stating that they never go online while camping compared to 16 percent of U.S. campers.

They are also significantly less likely to expect free Wi-Fi at a campground or to be influenced by the presence of free Wi-Fi (25 percent vs. 37 percent), and are much more likely to say that technology detracts from their camping experiences (50 percent vs. 38 percent).

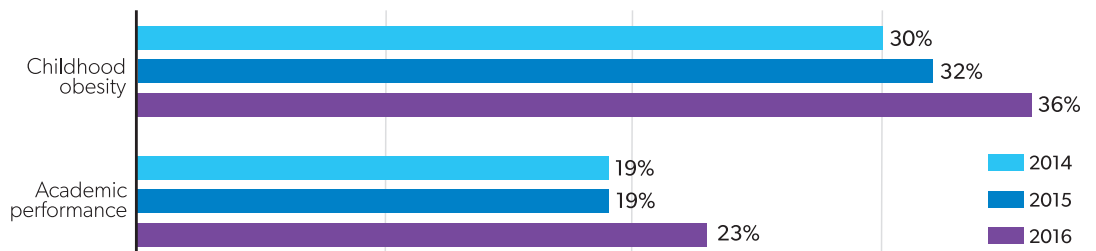


Camping and Public Health Issues

Adult campers report that camping impacts important public health issues, such as childhood obesity and academic performance, among children who participate in camping.

The proportion of adult campers who say that camping has a “great deal of impact” on important public health issues has climbed consistently since 2014, suggesting that the powerful positive impacts of camping are becoming more widespread in the mindset of campers.

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

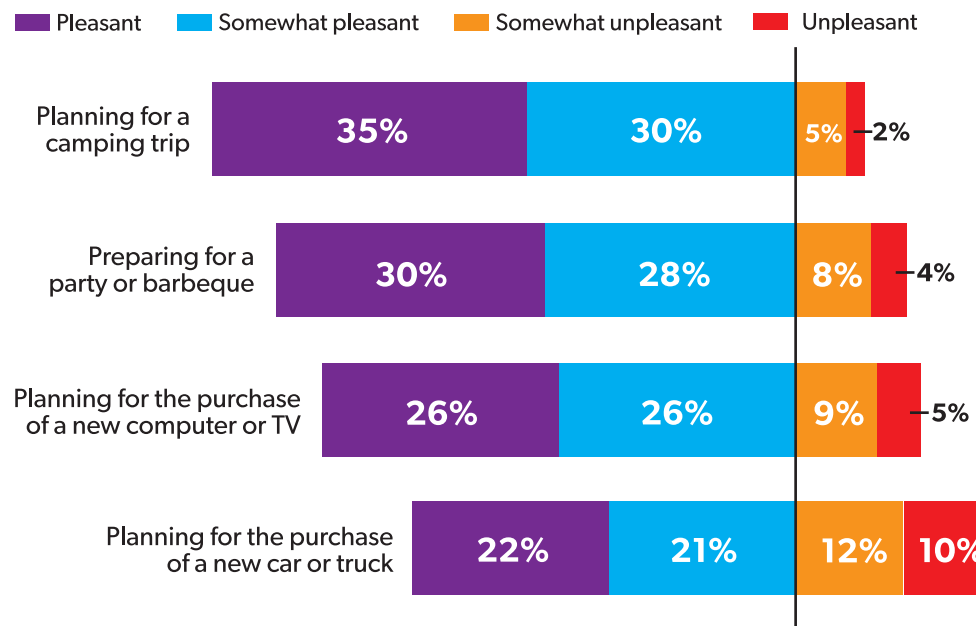


Campers and Travel Planning

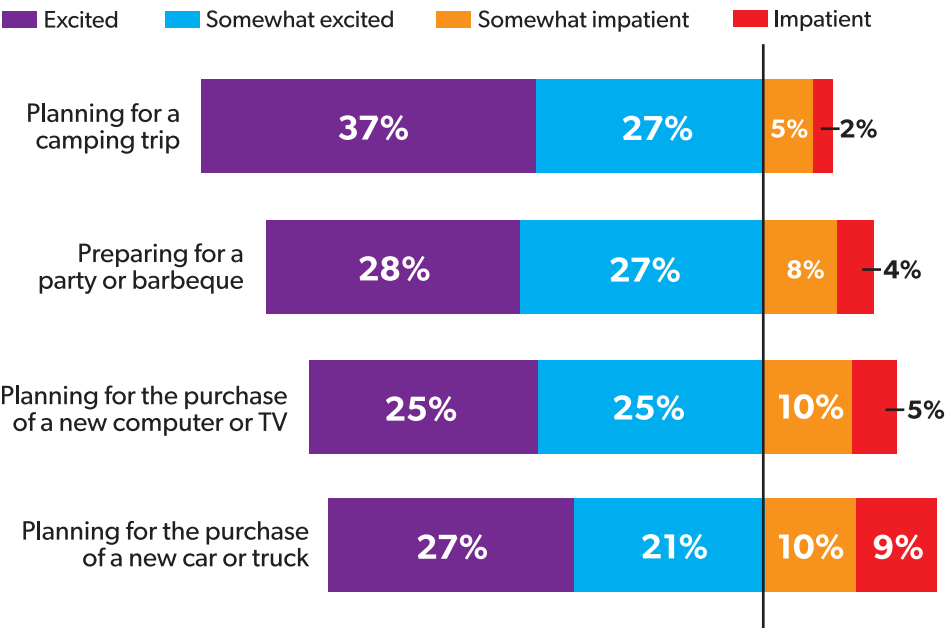
The excitement and joy associated with an upcoming camping trip starts well before the trip even begins. Campers are highly likely to say that they find the planning and preparation as pleasant and exciting as the trip itself.

Almost two-thirds of campers say that planning a camping trip is at least somewhat pleasant, which is well above other types of planning for purchases. By contrast, almost one-fourth of campers find the planning for purchasing a new vehicle relatively unpleasant.

ENJOYMENT IN TRAVEL AND EVENT PLANNING



ANTICIPATION OF TRAVEL AND EVENT PLANNING



America's National Parks and Camping

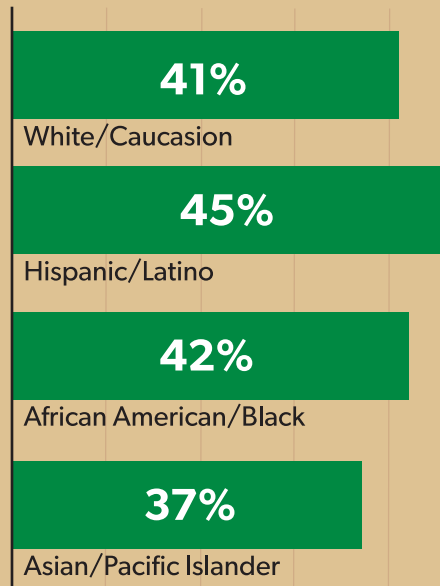
The National Park Service's 100th anniversary and the corresponding outreach efforts appear to have succeeded in getting more people to visit parks in 2016.

Overall, 3-in-10 U.S. campers say that the Centennial Celebration of the U.S. National Park Service in 2016 got them to visit a park they would not have visited otherwise. The anniversary also impacted about a third of Hispanic and African American/Black campers.

Building on these efforts, one-third of all U.S. campers say that they now feel more welcome at national parks than they did several years ago. Large blocs of Hispanic and African American/Black campers say that they feel more welcome when compared to the past.

% OF CAMPERS WHO FEEL "MORE WELCOME" AT NATIONAL PARKS

Compared to five years ago, do you now feel more welcome, less welcome or just as welcome at the U.S. national parks?



In addition to visiting national parks, U.S.-based campers are highly likely to use America's public lands for camping, and in fact devote a majority of the nights they camp to some type of public land.

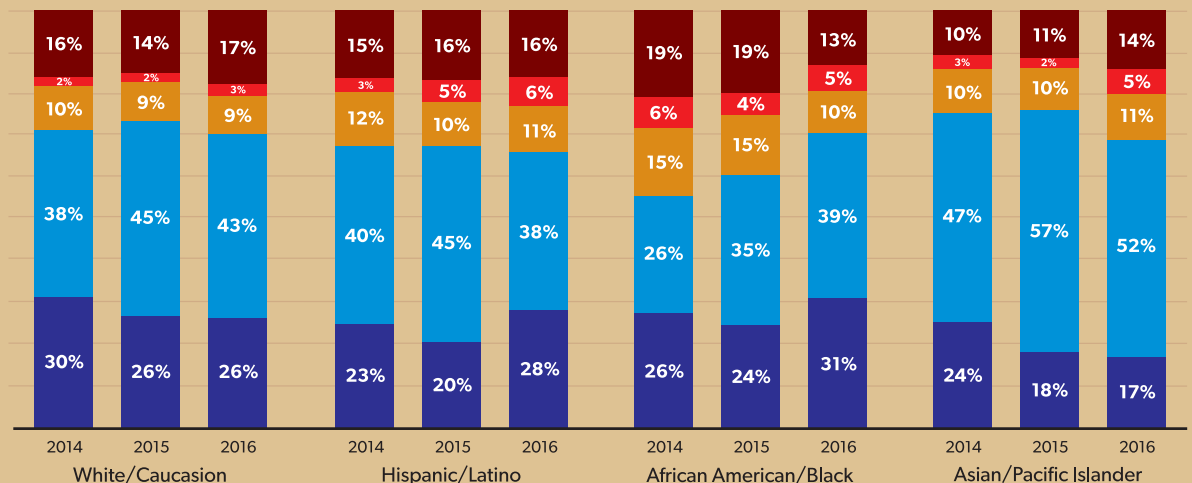
Campers on average devote almost 60 percent of their camping nights to public lands and/or campgrounds. This suggests that a growing camper constituency will continue to place higher demands on these lands.

Within the different camper segments, campers of Asian descent spend the greatest percentage of their camper nights on public lands and campgrounds. Older campers and African American/Black campers spend the least nights on public lands, but even as the lowest users, they are still spending at least half of their nights camping on public lands.

A closer look at state and national park camping reveals that African American/Black campers are the only group to demonstrate an increase in the proportion of nights spent at both state and national parks.

WHERE ARE CAMPING NIGHTS SPENT

■ Public or privately owned land other than a campground
 ■ Parking lots such as Walmart or roadside areas
■ Backcountry, national forest or wilderness areas
 ■ State or national park campgrounds
■ Privately owned (no membership required) campgrounds





THE FUTURE OF CAMPING

Summary

When considering the future of camping, the future is now.

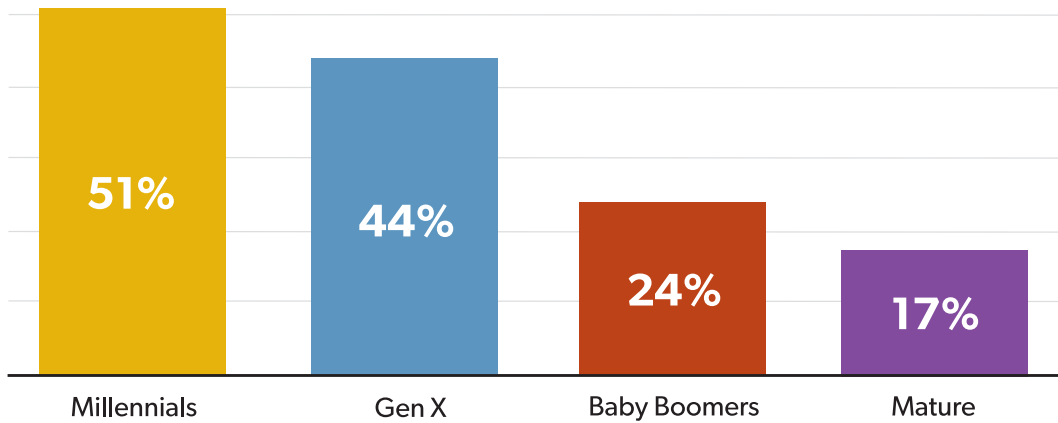
Enthusiasm is stronger among younger campers when compared to older campers, and this new generation of campers has no intention of letting up. Millennials are taking to the outdoors in greater numbers than what would be expected from the overall population, and more than half of them intend to camp more in 2017. Looking further out, younger campers are generally optimistic about their camping even into their 50s and 60s where about half suggest they plan to camp the same amount or more often. More than half of all campers are now camping with children.

As millennials become more experienced campers – and as they begin to build their families and wealth – they are impacting the camper market overall. For example, millennials are most likely to camp in the largest sized groups and consequently are seeking campgrounds that can provide group areas for campers with different accommodations. In addition to being highly social, they are participating in more physically active recreation and seek a variety of accommodation options – from tents to smaller RVs, to full-service cabins. This also impacts how the different sectors that serve the camping industry will adjust to this change.

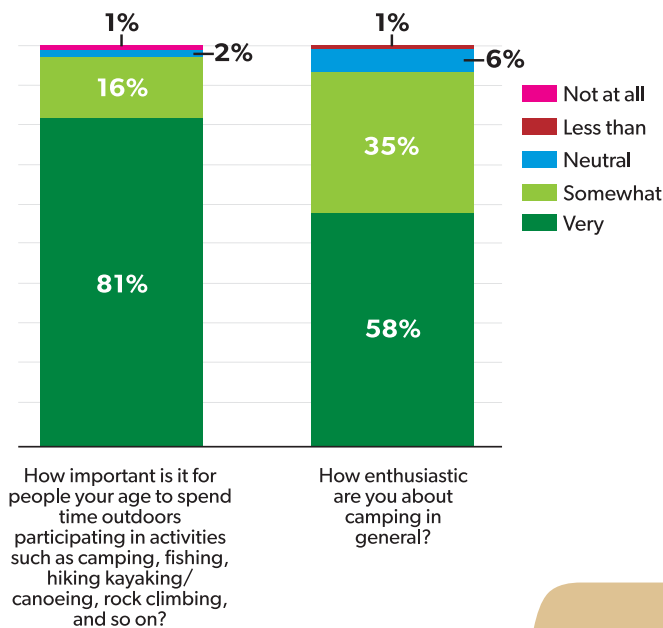
What may be the most poignant result and indicator for a bright camping future, this year's survey of Generation Z teen campers demonstrates that teens are highly enthusiastic about camping. Not only are they happy to go camping and place a great deal of importance on getting outside and being active, Gen Zers are seeking more camping experiences and enjoy participating in the trip planning process.



INTENT TO INCREASE CAMPING



GEN Z'S ENTHUSIASM ABOUT CAMPING



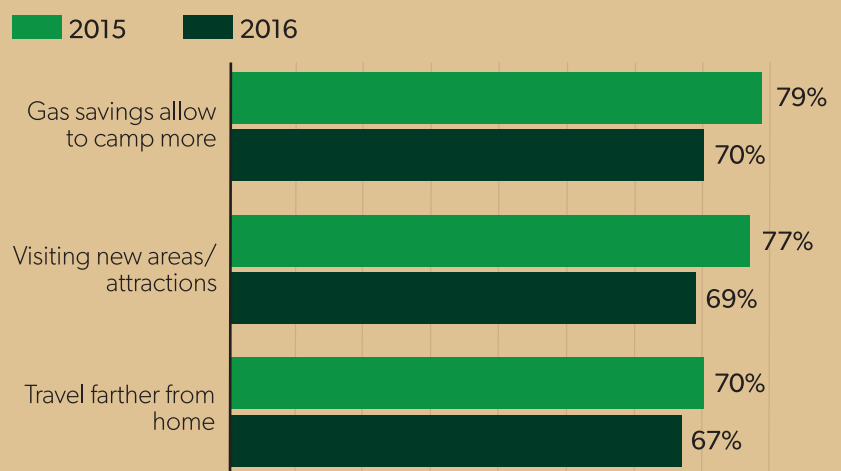
GAS PRICES

Fuel prices are exerting less of an influence on camping, which may be attributed to recent stability in gas prices nationally.

Gas prices, even if they remain stable, would have a lessened impact as campers adjust their camping and travel plans to the pricing levels. Without a major price decrease, it would be expected that fewer campers would increase their camping and exploration.

Millennials tend to be more influenced by gas prices in general, and are more likely to say that fuel prices have an influence on how much time they are able to spend camping.

IMPACT OF GAS PRICES ON PAST TRIPS





THE YEAR AHEAD

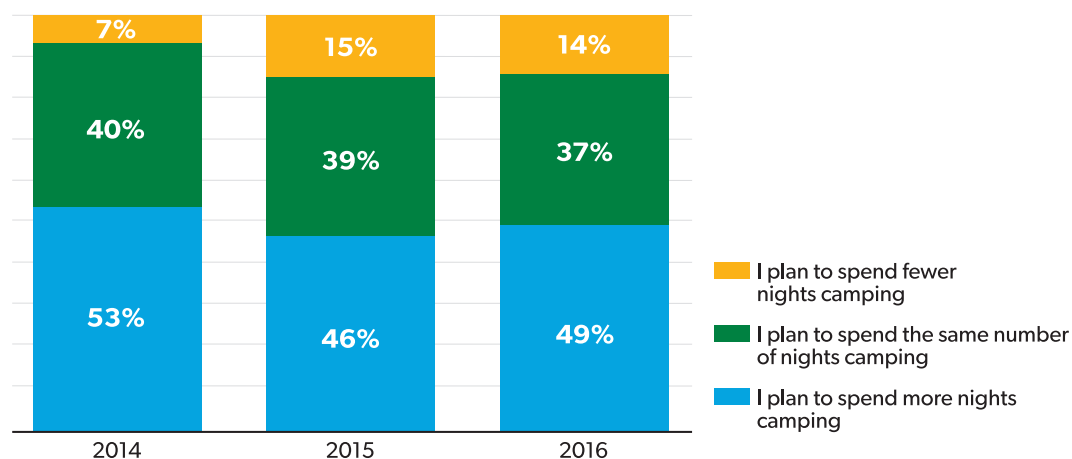
FORECAST: 2017 CAMPING SEASON PLANS

Plans for the Upcoming Year

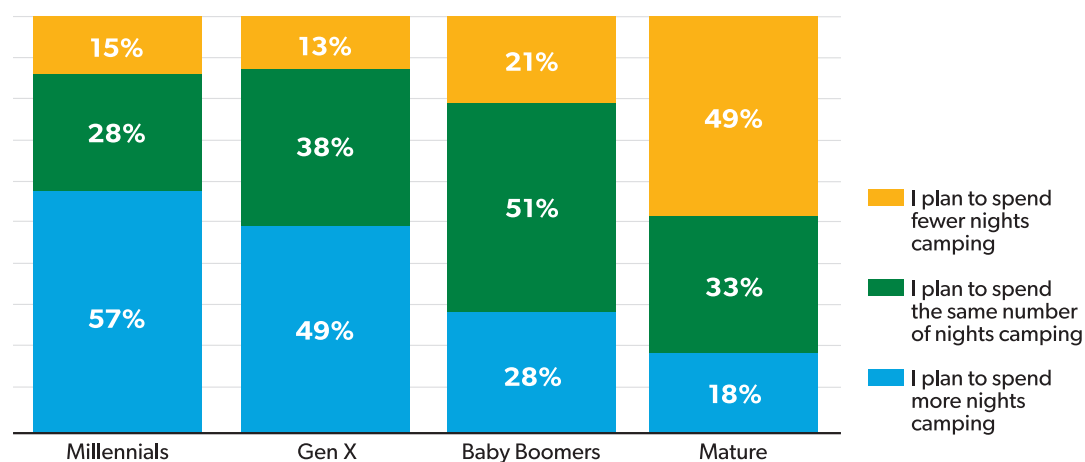
Overall, about half of all campers intend to spend more nights camping in 2017 and few say that they intend to camp fewer nights this coming year.

This is a common theme over the last three years, with findings for 2015 and 2016 relatively consistent. Year to year, campers were equally likely to say that they plan to increase their camping nights in the coming year. Also identical to 2016, millennials are the group most likely to report that they intend to camp more often in 2017.

CAMPING NIGHTS PLANNED FOR THE YEAR AHEAD



CAMPING NIGHTS PLANNED BY AGE FOR 2017



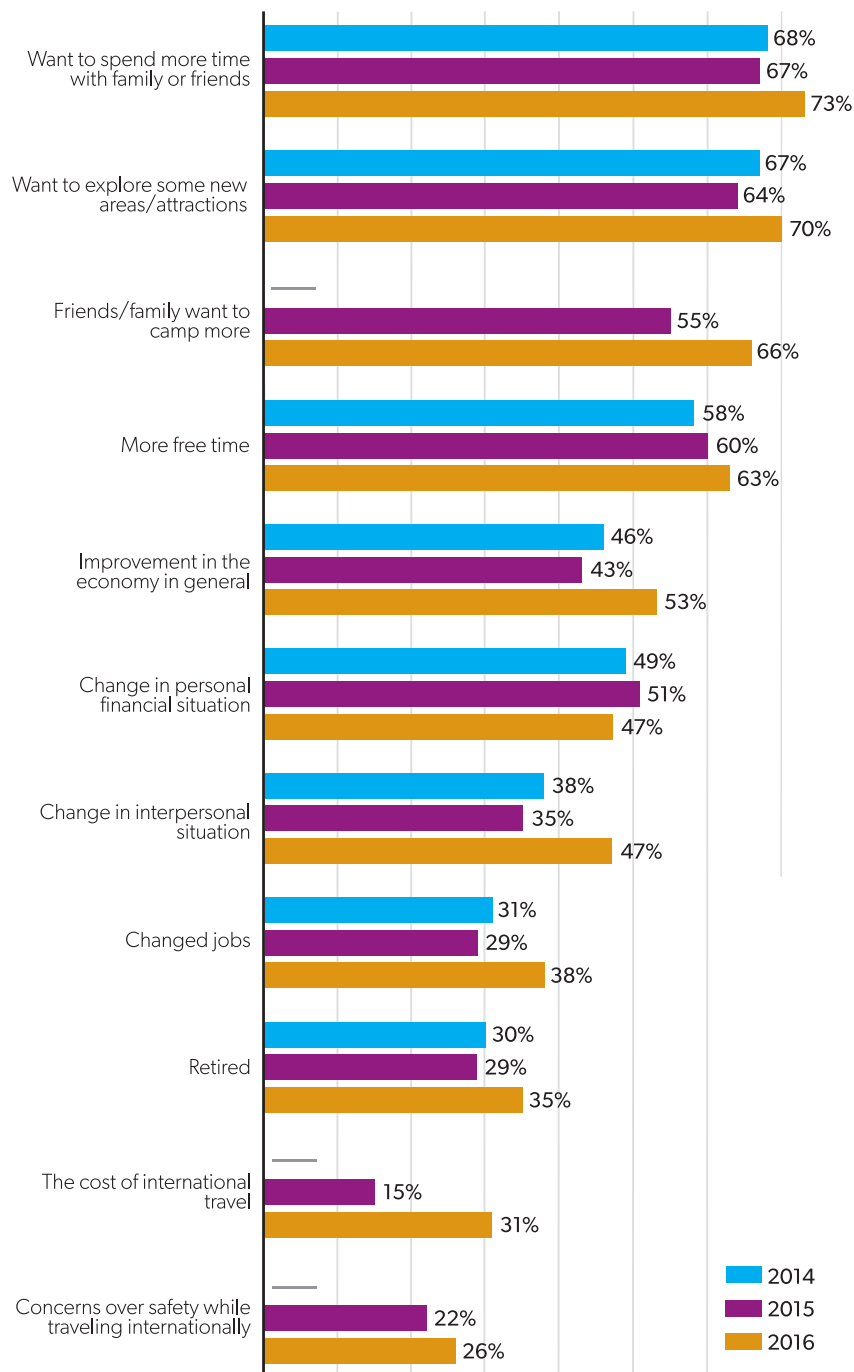
Reasons for Camping More in 2017

Camping is widely viewed as a way to spend time with family and friends, and is the most commonly cited reason for enjoying camping among Generation Z and their adult counterparts.

This motivation holds true for campers' intentions to camp more in the year ahead. Among campers who intend to increase their camping trips, top reasons include exploring new areas and spending time with family and friends.

Younger campers are most likely to be impacted by spending more time with friends or family members, as well as a desire to explore new areas and having more free time. Additionally, a change in interpersonal situations (e.g., marriage, divorce) has increased substantially over the past two years which could potentially be attributed to a younger camping demographic.

REASONS FOR CAMPING MORE IN 2017 (% REPORTING A GREAT DEAL OF IMPACT)

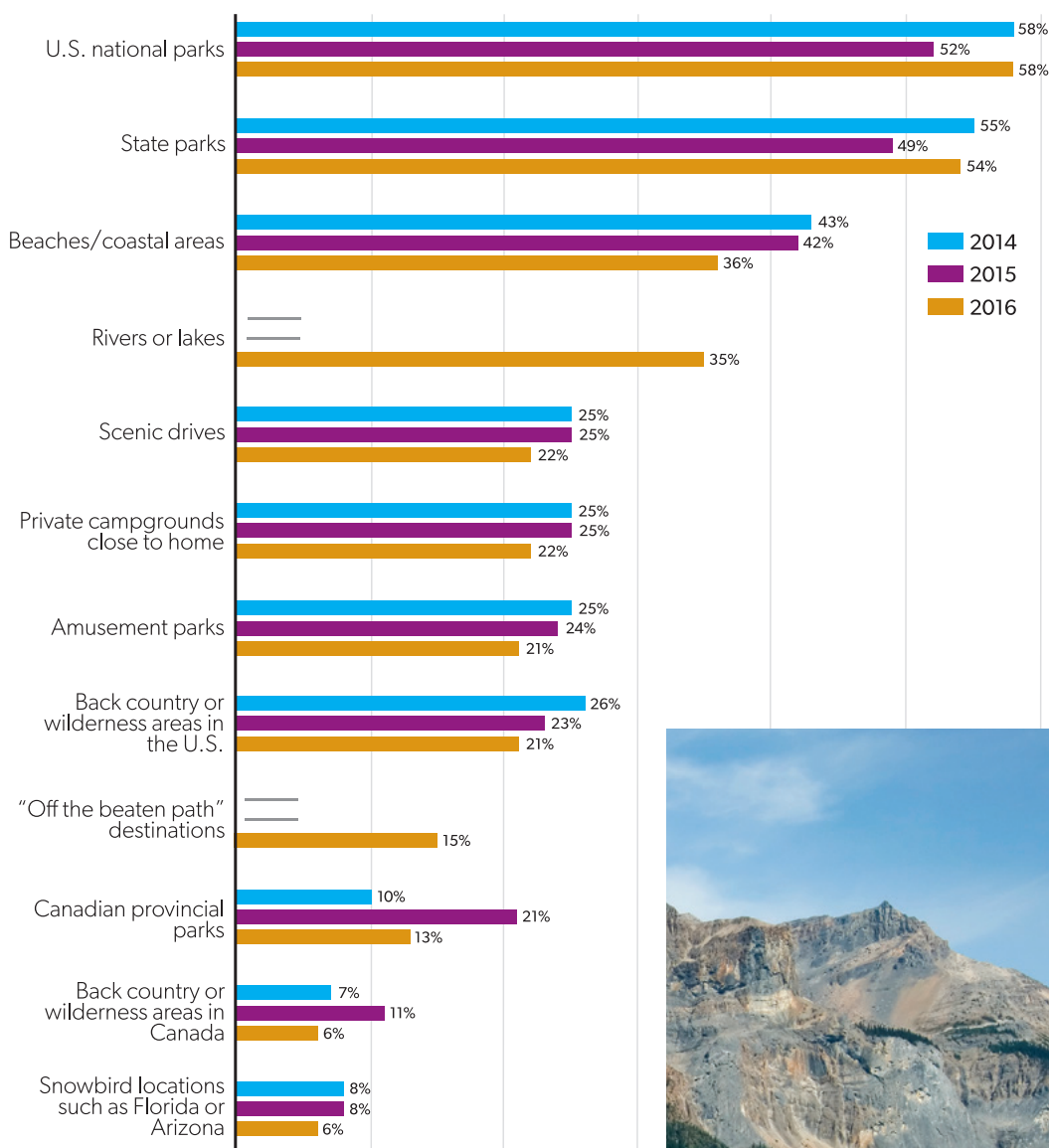


2017 Camping Destinations

Among U.S. campers, camping plans for 2017 include national and state parks, at a rate above what was observed in campers' plans for 2016. This may be a result of the continued push to increase visits to these locations. Asian American campers are most likely to seek out U.S. national parks.

Canadian campers continue to overwhelmingly say that they plan to visit provincial parks in the year ahead.

DESTINATIONS PLANNED FOR 2017



METHODOLOGY

Background

This report represents the third annual installment of a detailed reporting that will compare the latest iteration of the North American Camping 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 and now for 2016.

U.S. and Canadian Household Results

The results presented in this most recent iteration of the North American Camping Survey is based on a total of 2,934 surveys completed among a random sample of U.S. (n=2,426) and Canadian (n=508) residents.

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

Northeast (n=605)

Midwest (n=607)

South (n=607)

West (n=607)

Overall, a sample of n=2,426 U.S. residents is associated with a margin of error of +/- 1.99 percent, while a sample of n=508 Canadian residents is associated with a margin of error of +/- 4.37 percent.

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.

Teen Survey Results

The results presented in this new section of the North American Camping Survey is based on a total of 401 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=401 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.”

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

Generation X – Born 1965 to 1982

Generation Z Teens – Born 1999 to 2003

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

Mature – Born prior to 1946

Millennial – Born 1981 to 1997

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

Types of RVs

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



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



Type A Motorhome



Type B Motorhome



Type C Motorhome

Pick-up Camper / Truck Camper –

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



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



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



“Types of RVs” credit: GoRVing.com

