

2017 North American Camping Report Released

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CAMPING IS UP IN THE U.S., TREND EXPECTED TO CONTINUE AS MILLENNIALS SEEK THE POSITIVE HEALTH IMPACTS OF TIME SPENT OUTDOORS

Half of U.S. Campers Intend to Head to the Outdoors to Camp More in 2017;
Future Outlook Positive with 90 Percent of Teen Campers Intending to Camp as Adults

BILLINGS, Mont. (March 15, 2017) – An estimated 13 million U.S. households plan to camp more in 2017 than they did in 2016, and more than 1 million new households have started camping each year since 2014. Millennials are driving this growth as they take to the outdoors in greater numbers, and they have no intention of letting up. This is according to the results of the 2017 North American Camping Report, an annual independent study supported by Kampgrounds of America, Inc. (KOA).

Millennials now account for 38 percent of the 75 million active camper households in the U.S., up from 34 percent in 2016, and 51 percent say they plan to increase their camping this year. Results of the survey indicate that these younger campers are using camping to add more balance to their lives. Their key reasons for camping include spending more time with friends and family, being physically active and improving their overall emotional well-being and health.

Their attitudes about camping are reinforced by their behaviors and, with the influx of younger campers, this is changing the camping landscape overall. Camping is becoming a more social activity, and outdoor recreation while camping is shifting to more physically active activities. In this year's results, hiking outranked fishing as the most popular type of camping recreation for the first time since the first iteration of the North American Camping Report. Kayaking and mountain biking also saw significant increases.

"Camping continues to grow in popularity, with more Americans starting to camp and people taking more frequent trips each year," said KOA COO Toby O'Rourke. "Year-over-year people consistently say camping allows them to relax, spend time with family and friends, be active and contributes to their emotional well-being. The significant growth in camping underscores Americans' enthusiasm and growing desire to get outside. Camping—whether it's traditional tent camping, RVing or staying in a full-service cabin—will continue to fulfill that need."

In an even more promising outlook for the future of camping and outdoor recreation in America, Generation Z teens (ages 13-17) are highly enthusiastic about camping and place a great deal of importance on people their age spending time outdoors. The findings for this group, which are new to the North American Camping Report this year, indicate that teens share their adult counterparts' feelings about the benefits and emotional connections to camping. This suggests that as more families experience the outdoors, the more likely they are to continue those activities and consequently, this will result in continued increased overall incidence of camping nationally, and particularly among families.

"We're seeing that once these younger campers experience the outdoors and the benefits of camping, they become hooked on it and it becomes part of their lifestyle. As parents bring their children along, we're already seeing their love of camping being passed on to the next generation," added O'Rourke.

Key findings and trends based on the results of the 2017 North American Camping Report include:

Millennials are driving the growth of camping in America

- Currently, 61 percent, or 75 million, of U.S. households are active campers. This is up from 58 percent in 2014. The number of highly avid campers is growing even more rapidly, with the number of campers who take three or more trips per year growing by 36 percent since 2014.
- Millennials now account for 38 percent of active camper households in the U.S., up from 34 percent in 2015 (millennials comprise 31 percent of the overall population). Gen Xers account for 34 percent of campers, up from 28 percent in 2015 (Gen Xers account for 27 percent of the population). Millennials make up nearly half of all new campers who started camping in 2016 (48 percent).

2017 season forecast: Americans will head outdoors to camp more this year

- Overall, 13 million U.S. households say they plan to camp more in 2017 (49 percent; number of households is based on net). In 2016, 37 million households camped at least once, and of those, 14 million camped three or more times.
- For the second year in a row, millennials are the most likely to report that they intend to camp more often in 2017, with 51 percent saying they plan to take more camping trips and 57 percent saying they plan to spend more nights camping.

Seeking greater balance: Millennials, and campers in general, are discovering the emotional and physical health benefits of time spent outdoors

The positive impacts of camping are consistently up from past results, suggesting that as campers discover the emotional and physical health benefits of time spent outdoors, they are seeking it more and more.

- Americans who camp, and especially those in the millennial age group, say that it has a great deal of impact on reducing stress (45 percent of U.S. campers, as well as 45 percent of millennials), contributing to their emotional well-being (41

- percent of U.S. campers, 43 percent of millennials), overall health improvement (39 percent of U.S. campers including 39 percent of millennials) and leading a healthier lifestyle (36 percent of U.S. campers, and 37 percent of millennials).
- According to millennials, the key reasons they camp include spending more time with friends and family (43 percent strongly agree), being physically active (33 percent) and blowing off steam (33 percent).
- A majority of millennials (60 percent) and Gen X (51 percent) campers say that they are more physically active than others in their age group.
- Self-described physical fitness is highest among millennials, with 7-in-10 stating that their physical fitness is either excellent or very good (72 percent).
- 81 percent of millennials say spending more time with friends and family is the top reason they plan to camp more in 2017. This was also the number one factor impacting their decisions to camp in 2016, with 80 percent saying it had a great deal of impact. Socioeconomic factors also played a role in millennials' camping behaviors last year, with 70 percent reporting more free time and 68 percent reporting a change in their personal financial situation had a great deal of impact on their decision to camp.
- In the U.S. market, 3-in-10 campers indicate that camping allows them to spend more time vacationing each year.

Younger campers are changing the camping landscape

The influx of younger campers is changing the camping landscape overall, from who is camping to how people are experiencing the outdoors.

- In line with their strong enthusiasm for camping with family and friends, millennials tend to camp in the largest groups. The average group size for millennials is 10.7, compared to 8.5 for Gen Xers and 7.9 for baby boomers.
- Camping is becoming more of a family event, with 51 percent of campers reporting they have children in the household, up from 41 percent in 2014. Younger parents are the most likely to say children are enthusiastic about camping (53 percent of millennial parents).

Not only are these younger campers highly social, but they also are more physically active and more likely to gravitate towards recreation such as mountain biking, hiking, running and adventure sports.

- As a result, more physically active types of recreation are increasing in popularity overall, with mountain biking (+6 percentage points), hiking/backpacking (+4 percentage points), canoeing/kayaking (+5 percentage points) and biking (+5 percentage points) and all gaining popularity since 2014.
- While fishing remains a popular activity, for the first time in this survey's history, hiking (50 percent) outranks fishing (44 percent) as the most popular form of recreation.
- 41 percent of both millennials and Gen Xers say that onsite recreation is important to them. The driving factor for these younger campers is that they're likely to be camping with children.
- 70 percent of Gen Z teens say they want to stay at campgrounds with a lot of onsite activities. While fishing appears to be in decline overall (-14 percentage points since 2014), it may experience a resurgence in the coming years as it is extremely popular among teen campers, with 8-in-10 stating that they go fishing while camping.

Younger campers are much more diverse, which is contributing to an increasingly multicultural camping landscape overall.

- Of the 1 million U.S. households that started camping in 2016, 4-in-10 were either Hispanic (13 percent of new campers, 16 percent of the population), African American (12 percent of new campers, 12 percent of the population) or Asian American (14 percent of new campers, 5 percent of the population).
- This is a continuing trend driven by younger campers, as a full 30 percent of non-white millennial campers report that they've started camping in just the past few years, compared to 15 percent of white millennials.
- There has been a large influx of Asian American campers over the past couple of years, and it doesn't appear to be slowing. According to this year's survey results, the proportion of new Asian American campers is nearly triple what would be expected from overall population figures. This increase is most prevalent among younger Asian American campers with 43 percent only having started camping in the past couple of years.

Gen Z teens are highly enthusiastic about camping, and many see it as an opportunity to unplug

- Teen campers assign a great deal of importance on getting outside and being active, with 81 percent saying it's very important for people their age to spend time outdoors participating in activities such as camping, fishing, hiking, kayaking, rock climbing, etc.
- 58 percent of teen campers surveyed said they are very enthusiastic about camping, and virtually none reported low levels of enthusiasm. All the teens surveyed said they enjoyed their camping trips and 62 percent said they want to camp more in the coming year (33 percent said the same amount). Only 13 percent said they would rather go to an amusement park than go camping.
- Teens' favorite thing about camping is being able to spend time with their family and spending time outdoors.
- Teens enjoy being active while camping, with 70 percent saying they like to stay at campgrounds where there are a lot of activities. With childhood obesity being 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.
- 90 percent of Gen Z teens say that they intend to camp as adults and 93 percent claim that if they have kids of their own, they will take them camping as well.

Even though many adults have the view that teens are "glued" to their phones, teens are no more likely to use technology than their adult counterparts. While most teens bring smartphones with them while camping, not surprisingly and like their adult counterparts, an overwhelming majority say they would still want to go camping if they could not stay in touch with others using their phones or computers.

- 71 percent of teen campers say they would still want to go camping even without access to 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).
- Half of teens surveyed (52 percent) say that camping offers them an opportunity to "unplug" from technology.

Campers are using technology to spend more time outdoors

Access to technology is freeing up time among young campers who, in all likelihood, are able to check work emails and check in with work via phone when needed.

- Technology is allowing a large bloc of campers (37 percent) — including at least 43 percent of millennials — to spend more time camping. This group is also the most likely to check and send email while camping (45 percent), which likely includes work emails.
- This group takes an average of almost two additional vacation days to camp each year.

- While nearly all U.S. campers bring some type of technology with them while camping, they are evenly split in their opinions regarding whether technology enhances or detracts from their camping experiences. This holds true even among millennials, with 38 percent saying technology detracts from their camping experience and 36 percent saying it enhances it.
- Among campers who say that access to technology allows them to camp more often, 57 percent state that technology also enhances their trips, suggesting that the ability to access technology improves the quality of the experience simply by allowing them to camp more often.

America's Public Parks

- The desire to visit state and national parks has increased over 2015, and 3-in-10 U.S. campers say the National Park Service's 100th anniversary in 2016 got them to visit a park they would not have otherwise visited. Millennials were the most likely to claim this (40 percent). This suggests that a growing camper constituency will continue to place high demand on these lands.
- One-third of U.S. campers say that they now feel more welcome at national parks than they did several years ago. Large blocs of Hispanic (45 percent) and African American (42 percent) campers say they feel more welcome when compared to the past.

SURVEY METHODOLOGY

U.S. and Canadian Household Results: This 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 in January 2017. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households. Sampling was designed to obtain n=2,426 completed survey among representative U.S. households and n=508 completed surveys among representative Canadian households. A sample of n=2,426 U.S. households is associated with a margin of error of +/- 1.99 percent. Among Canadian households, a sample of n=508 is associated with a margin of error of +/- 4.37 percent.

Teen Survey Results: The results are based on a total of 401 surveys completed among a random sample of U.S. households with children between the ages of 13 and 17. Each survey was completed with a teen respondent whose parents gave prior permission. A sample of n=401 teen campers is associated with a margin of error of +/- 4.9 percent.

All surveys were completed online via an outbound solicitation sent by Survey Sampling International to a randomly selected cross-section of U.S. and Canadian households. 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 for age, gender and ethnicity.

ABOUT KAMPGROUNDS OF AMERICA

For more than 55 years, Kampgrounds of America (KOA), the world's largest system of open-to-the-public family campgrounds, has provided millions of campers with fun, memorable adventures. KOA was born in 1962 when founder Dave Drum constructed a campground on the banks of the Yellowstone River in Billings, Mont. Since then, KOA has grown to more than 500 locations in the U.S. and Canada. KOA's family of properties offers diverse camping experiences, while maintaining the excellent standards and family-friendly atmosphere the company is known for. For more information, visit www.KOA.com or www.KOAPressRoom.com.

ABOUT CAIRN CONSULTING GROUP

Cairn Consulting Group is a market research firm with extensive experience in the hospitality and services industries. For the past several years, Cairn Consulting Group has worked with organizations in both indoor and outdoor hospitality, including the gaming/casino areas, food services/restaurant space, accommodations, travel/tourism and the products and services that are a part of the hospitality industry. The organization also serves clients in branding/brand positioning efforts, evaluating consumer behavior, public opinion & policy and product development.

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