



HE 2021

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The fact is, camping is booming. Whether you're a new camper or camp often, pitching a tent or rolling up in an RV, camping is one of North American's favorite ways to travel and explore.

In a time of uncertainty across countries and industries, more people than ever identify as campers in North America. The 2021 North American Camping Report finds the number of active U.S. households (meaning households that identify as campers, but may not necessarily camp each year) grew by a record 3.9 million households in 2020.

In many ways, the unexpected onset of the COVID-19 pandemic in 2020 created an overwhelming need for reflection, connection, and nostalgia. From music to clothing to television, this desire to connect with what's familiar is reflected in an array of products and services.

And we saw that in camping, too.

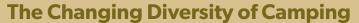
Connecting to the outdoors. Connecting to each other. Connecting to a simpler time amidst one that is most challenging. Getting out and going camping is big.

An Influx of First-time Campers

What drives this flood of first-time campers? An interest in the outdoors, new experiences and the COVID-19 pandemic.

While both new and experienced campers cite many reasons for choosing camping, the effects of COVID-19 cannot be ignored. Camping provides an affordable and safe way for leisure travelers to vacation and they are using those facts to their advantage. More than half (55%) of first-time campers' reasons for planning a trip in 2020 can be directly tied to concerns surrounding the pandemic.

The good news is that many of those who tried camping due to COVID-19 are likely to continue enjoying the camping lifestyle into the future. While some attrition is expected, two-thirds of first-time campers are likely to camp or are at least considering it in 2021. Largely, those who plan to return to camping enjoyed stays at campgrounds with more amenities and services that made their stays easier and more comfortable - like those found at private campgrounds.

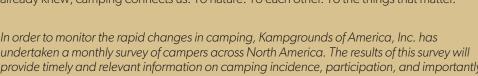


As camping attracts new guests, its audience not only becomes more interested in enhanced amenities, but also becomes more diverse. In fact, 6-in-10 first-time campers are now from non-white groups and the overall representation of campers in the U.S. is very closely aligned to Census figures. The "average" camper is evolving and with it we are seeing more people from backgrounds of all types finding their own space in the great outdoors.

And as more people from all walks of life try camping, expectations, amenities and services are evolving too. While the heart will stay the same - campfires, s'mores, connecting with friends and family – the ways in which people camp are starting to include new experiences like glamping or full-time RVing.

All of this points to a very healthy future for camping as we begin to emerge from a time of uncertainty. Millions of campers – both new and returning – will continue to find what they already knew; camping connects us. To nature. To each other. To the things that matter.

In order to monitor the rapid changes in camping, Kampgrounds of America, Inc. has undertaken a monthly survey of campers across North America. The results of this survey will provide timely and relevant information on camping incidence, participation, and importantly, the factors that impact camping in the coming months.





KEY FINDINGS

Campers are more diverse than ever. In a continuing trend, campers are becoming more representative of many diverse populations and communities of people. What's more, a full 60% of first-time campers in 2020 are from non-white groups, the highest rate since the inception of this report.

The proportion of first-time campers exploded in 2020. At a rate five times that observed in 2019, this influx of first-time campers can likely be attributed to the COVID-19 pandemic and the sentiment that camping is a safe, socially-distanced way to travel.

Not only are more people camping, they're also camping more often. Campers are reporting an increase in camping nights compared to past years and, similarly, those planning to spend more nights camping in 2021 have also increased.

Across the board, couples with children are driving the enthusiasm and interest in camping. Whether it's new camping families who joined the fold in 2020 and intend to keep camping (63%) or campers with kids who plan to camp more in 2021 (64%), couples with children are camping's best advocates. In fact, 63% indicate they would recommend camping to others as a way to travel and explore. Couples with children are also fueling interest in RV experiences.

With few travel options, the interest in trying new camping experiences increases. Campers of all experience levels are craving unique ways to get outdoors in 2021, whether it's a new camper interested in RVing (58%) or a veteran camper wanting to try a glamping experience (48%).

Interest in RVs and the RV lifestyle is at an all-time high. Continuing a growing trend, the use of RVs as a primary way to camp has grown steadily since the inception of this report in 2014 and now reflects an all-time high of approximately 13 million households. Most notably, among RV campers, ownership has risen a dramatic 12 percentage points since 2019, which can largely be attributed to concerns related to COVID-19.

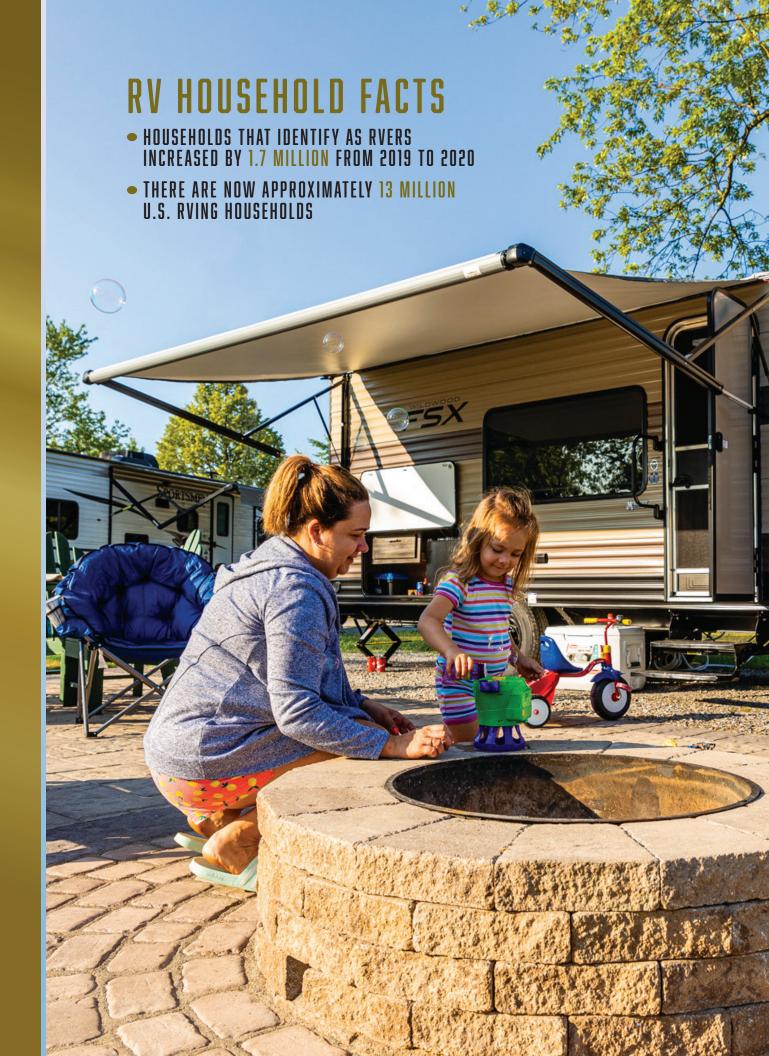
RV owners also have an increased interest in upgrading their RV in the coming year, especially those who are new to the lifestyle (52%). This further supports the increase we saw in 2020, especially as campers take more trips and find their rig may not meet their current camping style.

The growth of remote work and virtual schooling due to COVID-19 makes access to technology while camping more important than ever. Particularly among first-time campers (57%), whose decision to camp is likely a direct result of the pandemic, the ability to stay connected impacts the length of camping trips. On average, access to cellular and Wi-Fi service generates six additional camper nights.

COVID-19 and the distribution of the vaccine will continue to impact camping in 2021. Two-thirds of all camper households indicate the availability of vaccines will allow them to camp more and take different types of trips. In fact, 39% of campers say the COVID-19 vaccine will allow them to camp more in 2021. Overall, vaccines have a positive impact on campers' desire to get out more often in the year ahead.







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SUMMARY OF SURVEY RESULTS

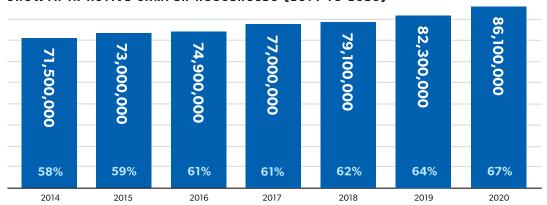
WHO IS CAMPING

Active Camper Households

With the onset of the COVID-19 pandemic, camping – already growing in popularity each year – demonstrated aggressive growth across the U.S. This is reflected by 67% of North American households stating that they camp at least occasionally, an increase of almost 10 percentage points from the first year of The North American Camping Report in 2014.

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.

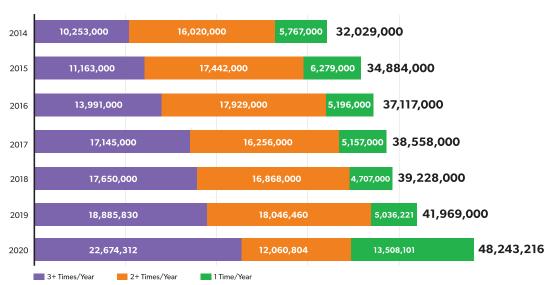
GROWTH IN ACTIVE CAMPER HOUSEHOLDS (2014 TO 2020)



Frequency of Camping

It is estimated that 48 million households went camping in 2020 – up over 6 million since 2019 – including a larger proportion who camped three or more times. This figure also includes a large number of households who may have "experimented" with camping, thus taking a single trip in 2020. Over half of those who only took one trip indicated they are likely to continue camping in 2021.

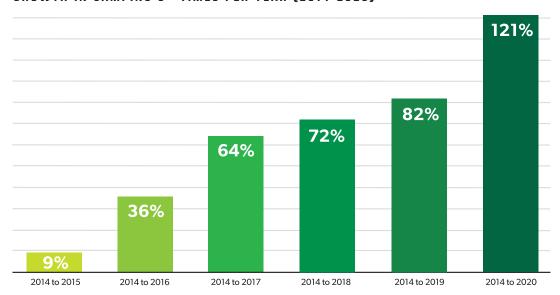
FREQUENCY OF CAMPING (2014 TO 2020)



Since 2014, the growth of camping can be closely tied not only to further reach across the array of U.S. households, but also within the current set of campers who report a greater number of trips annually when compared to previous results.

Unlike previous results, first-time campers were just as likely to take three or more trips in 2020. This could be closely related to higher rates of working and/or schooling while camping, allowing them to take more frequent camping trips.

GROWTH IN CAMPING 3+ TIMES PER YEAR (2014-2020)

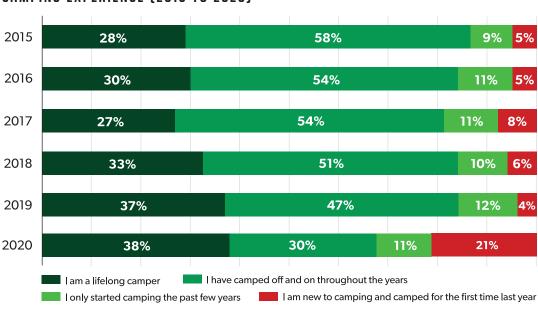


First-Time Campers and Lifelong Campers

The proportion of first-time campers exploded in 2020 to 21%, a rate five times that observed in 2019. As noted previously, a large portion of this can be accounted for by the COVID-19 pandemic. It is also worth noting, however, that lifelong campers continued to get outdoors in 2020 and represent a growing portion of the camping community that will help ensure greater stability within the industry in the coming years.

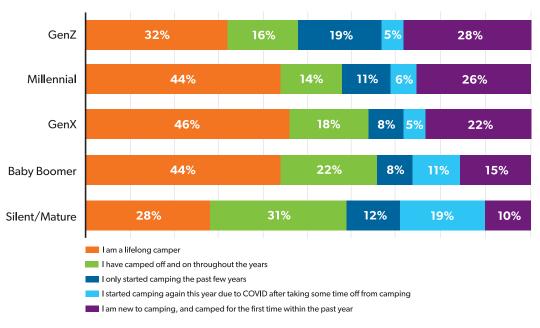
In 2020, it is estimated that there were over 10.1 million households that were new to camping.

CAMPING EXPERIENCE (2015 TO 2020)



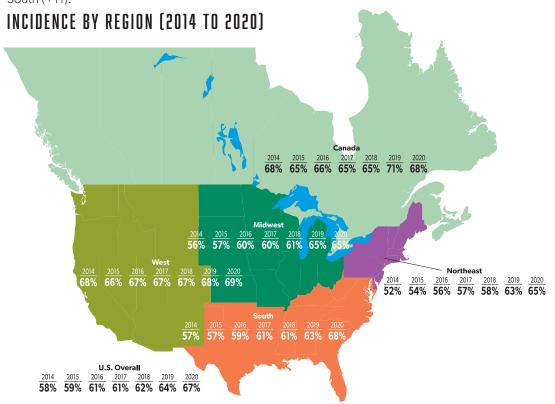
It is not surprising that younger campers are much more likely to be new to camping. It's also worth noting that within the oldest age cohort, 1-in-5 started camping again in 2020 due to COVID-19 after having taken time off from camping.

CAMPING EXPERIENCE BY GENERATION (2020)



Demographics

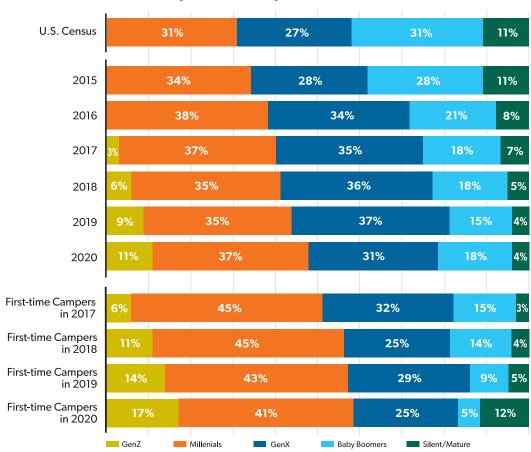
Since 2014, camping growth in the U.S. has been most aggressive in the Northeast (+13) and South (+11).



Participation in camping among millennials and GenZ has grown steadily over time, and continues to exceed what is observed in the general population. It is notable, however, that 2020 also saw an increase in camping among the mature demographic.

Despite this uptick in older campers, first-time campers in 2020 continue to trend younger overall.

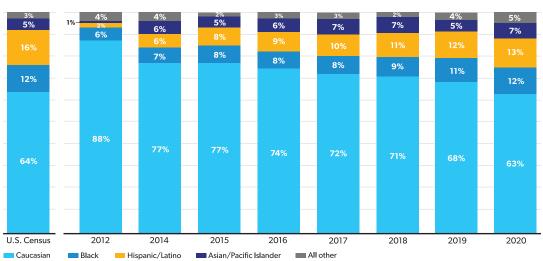
GENERATION OF CAMPERS (2015 TO 2020)



The incidence of camping among non-whites now aligns much closer with national representation. This trend has been closely documented since the inception of the North American Camping Report and has demonstrated the appeal of camping across the spectrum of U.S. residents.

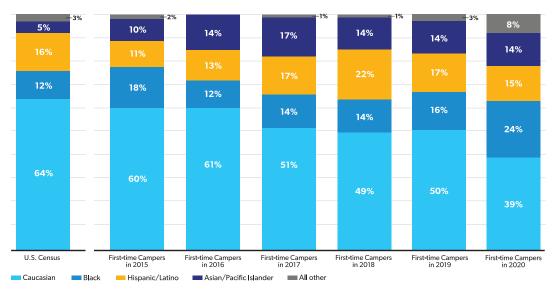
Non-white representation among campers was 37% for 2020 – 1 percentage point over the census.

ETHNICITY AMONG ACTIVE CAMPER HOUSEHOLDS (2012 TO 2020)



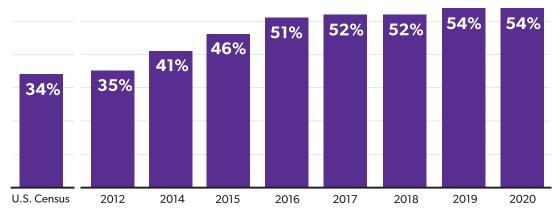
Six in 10 first-time campers in 2020 are from non-white groups, the highest rate since the inception of the report. The draw of camping among diverse camping households in the midst of the pandemic has resulted in continued increases in representation since 2015.

ETHNICITY AMONG FIRST-TIME CAMPER HOUSEHOLDS (2015 TO 2020)



Similar to the past four years, a majority of campers report having minor children in the household.

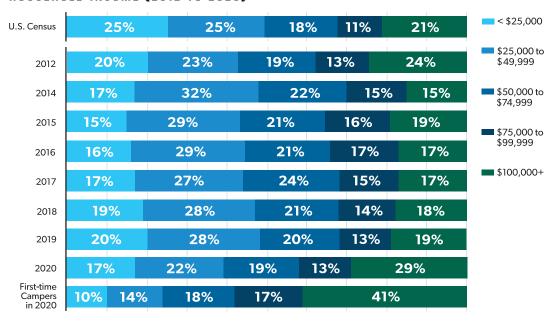
CHILDREN IN THE HOUSEHOLD (2012 TO 2020)





In a departure from past results, household income among campers includes a higher percentage from the highest income category. This could indicate that higher income earners, who in the past might have taken other types of trips, decided to camp in 2020. In fact, first-time campers in 2020 are significantly more likely to come from higher income households (41% making \$100,000 or more vs. 29% of all campers).

HOUSEHOLD INCOME (2012 TO 2020)





FIRST-TIME CAMPERS DRIVEN BY THE IMPACT OF COVID-19

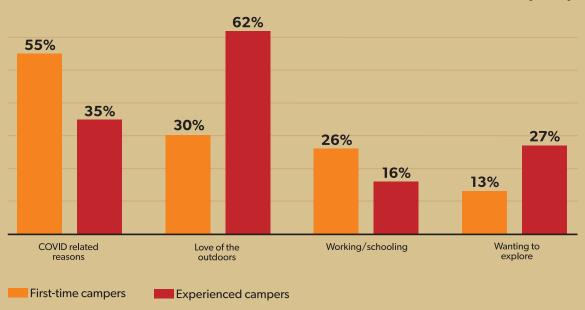
The proportion of first-time campers – those who went camping for the first time, or started camping again after having been away from the activity – exploded in 2020 at a rate five times than observed in 2019. Twenty-one percent of those who camped in 2020 classified themselves as new to camping (10.1 million first-time campers), compared to 4% in 2019. The COVID-19 pandemic was a key driver behind the influx of these first-time campers.

COVID-19 EFFECT ON FIRST-TIME CAMPERS (2020)



It is worth noting that more than half of first-time campers (55%) cite reasons that can be directly tied to concerns surrounding COVID-19 as a reason to start camping in 2020 (compared to almost two-thirds in the COVID-19-related Fall 2020 Update to the North American Camping Report who said that concerns over COVID-19 prevented prospective campers from trying camping). Two-thirds of first-time campers (66%) also state that they stayed at campgrounds with a great deal of enhanced amenities, or provide at least some amenities such as a bath house with running water, electric hook-ups, etc. These amenities allow them to work and/or school while camping, which, again, has increased as a result of the COVID-19 pandemic.

REASONS FOR FIRST CAMPING TRIP BY FIRST-TIME VS. EXPERIENCED CAMPERS (2020)



Who are These First-Time 2020 Campers?

The first-time camper in 2020 is diverse and young. Here's what else we know about them:

- Nearly 60% are under the age of 40.
- 6-in-10 are from non-white groups.
- One-fourth are Black.
- 41% have a household income of \$100,000 or more.
- Three-fourths are households with children.
- 6-in-10 purchased some type of camping gear for their first camping trip.
- Two-thirds stayed at campgrounds with at least some amenities and services.

Having a "Great" First Camping Experience

For first-time campers, a great initial experience impacts whether they will continue to camp in the future. Three-fourths who had a "great" first experience in 2020 indicate they are likely to continue camping. Retaining the influx of new campers is highly dependent on providing amenities and services that make the experience easy and enjoyable such as those offered at private campgrounds.

The following is a look at first-time campers who had a great experience and are thus more likely to return to camping. This group includes:



Glamping of Special Interest to First-Time Campers

Camping as it exists in campgrounds with more amenities, a new generation of RVs and glamping in particular, removes many of the barriers to entry in a time of uncertainty.

First-time campers in 2020 were significantly more likely than first-time campers in 2019, or when compared to experienced campers, to have started camping in a glamping accommodation. Glamping is defined as a camping experience that includes a greater number of services and amenities, and is also a more upscale type of experience. Glamping also involves staying in accommodations such as cabins, glamping tents, teepees, yurts, treehouses, and even covered wagons. Of first-time campers, 28% said that they started their camping experiences in some type of glamping or unique accommodation (compared to only 11% of experienced campers, and 14% of first-time campers in 2019).

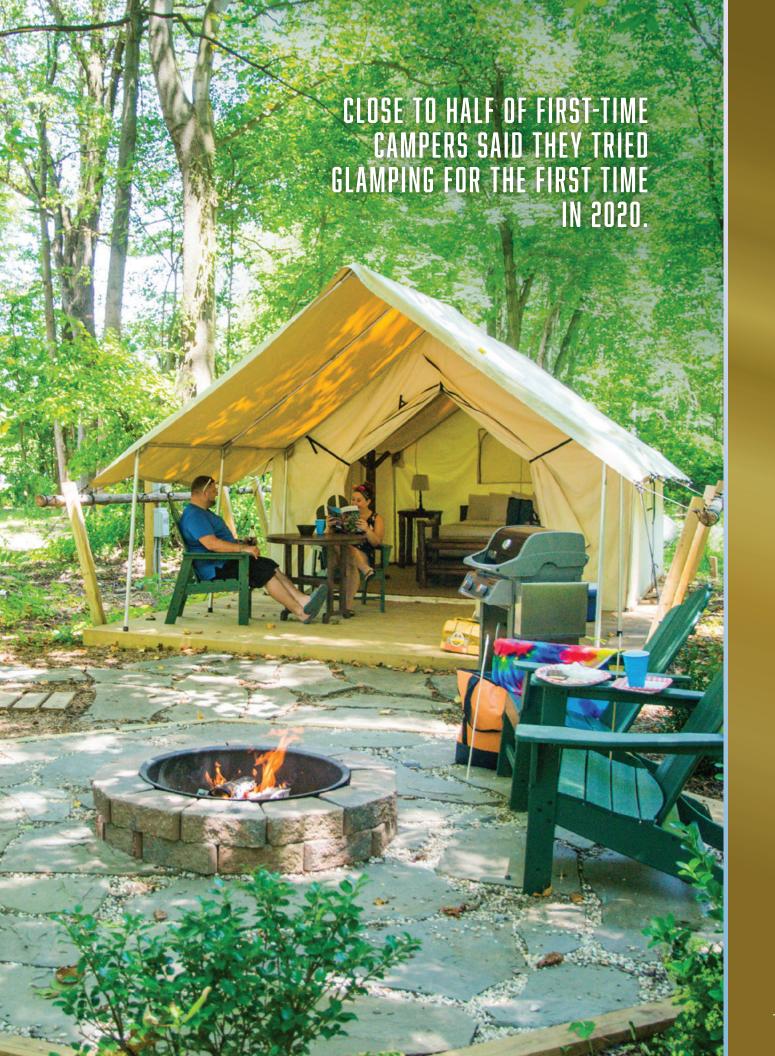
Additionally, close to half of first-time campers said that they had a glamping type of experience for the first time in 2020 (up from 3-in-10 in 2019). Among those, 3% use unique accommodations (other than cabins) such as yurts, treehouses, teepees, and glamping tents as their primary camping accommodation.

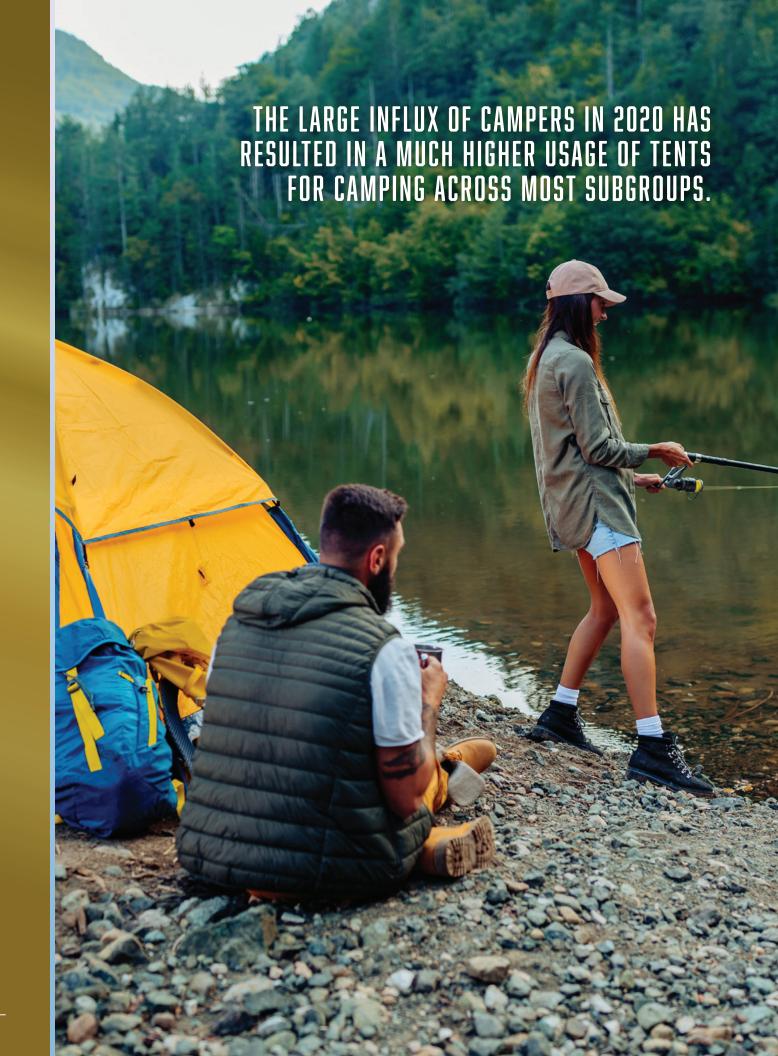
Overall, it is estimated that about 4.7 million of the additional camping households in 2020 can be accounted for by at least some level of exposure to glamping.

NEW CAMPER HOUSEHOLDS WITH EXPOSURE TO GLAMPING (2019 AND 2020)

2019 **1,259,055**

2020 4,761,605





THE 2021 NORTH AMERICAN CAMPING REPORT

HOW CAMPERS ARE CAMPING

Accomodations

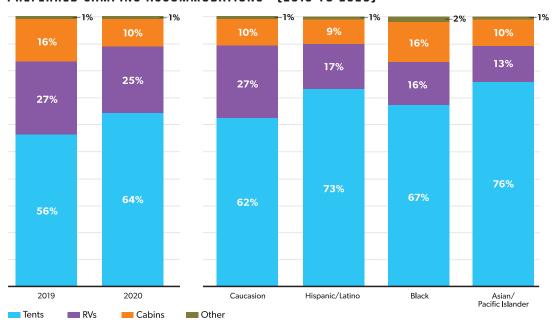
Since 2014, usage of RVs as a primary camping accommodation has demonstrated steady, though moderate, growth from 21% in 2014 to 25% in 2020.

It is estimated that even though there is a two-percentage point drop in the proportion of campers who use RVs as their primary camping accommodation since last year, the number of households that identify as RVers has increased by almost two million additional households from 2019 to 2020 (approximately 11 million to 13 million RVing households).

The large influx of first-time campers in 2020 has resulted in a much higher usage of tents for camping across most subgroups, with usage among Hispanic (+16 percentage points) and Black campers (+13 percentage points) increasing even more. As an easy and affordable entry point to camping, it is not surprising that tenting increased this year.

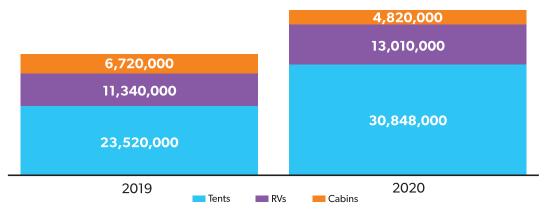
The decrease in cabin camping in 2020 may be associated with the accommodation type being most closely related to hotels and likely more impacted by COVID-19.

PREFERRED CAMPING ACCOMMODATIONS* (2019 TO 2020)



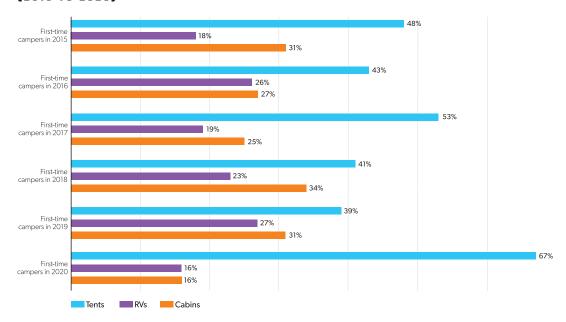
^{*}Note: Preferred accommodation is defined as the type of camping accommodation that campers stay in most often during their trips.

NUMBER OF CAMPING HOUSEHOLDS BY PREFERRED ACCOMMODATION



First-time campers are historically more likely to prefer tents as their primary camping accommodation, regardless of how they started camping. The spike in 2020 can potentially be attributed to the true solitude and social distance a tent or tent site can offer campers.

PREFERRED CAMPING ACCOMMODATIONS AMONG FIRST-TIME CAMPERS (2015 TO 2020)



Campers' behavior between how they start (introductory accommodation) and how they continue (preferred accommodations) camping can change based on life shifts and as first-time campers find their preferred camping style.

While 79% of first-time campers in 2020 who started camping in a tent continue to camp in a tent, only 31% who started in a cabin/glamping accommodation continue to camp in a cabin.



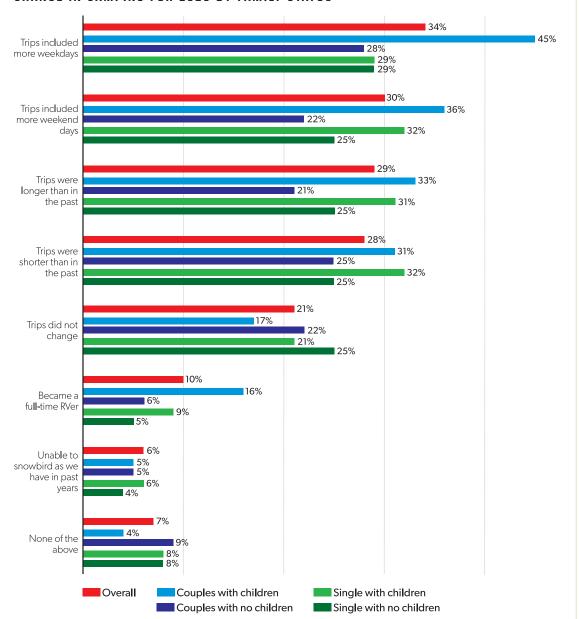
How Camping Changed in 2020

Because of the impact of the COVID-19 pandemic on all forms of travel, over 80% of campers changed their camping habits in 2020. One of the most dramatic changes was an increase in the number of weekday trips likely related to an increase in the ability to work/school while camping. Over one-third of campers said that their trips included more weekdays.

Overall, those who camped more often in 2020 took more weekday trips (54%). Campers who expanded weekday camping were also more likely to endorse camping among non-campers. This group is also more likely to continue camping in 2021 which may suggest that less busy times, such as weekdays, impact campers' overall experience.

In general, most campers reported camping more in 2020 with the greatest increases among couples with children. While some noted taking less camping trips, net-growth was positive.

CHANGE IN CAMPING FOR 2020 BY FAMILY STATUS



THE RV BOOM OF 2020

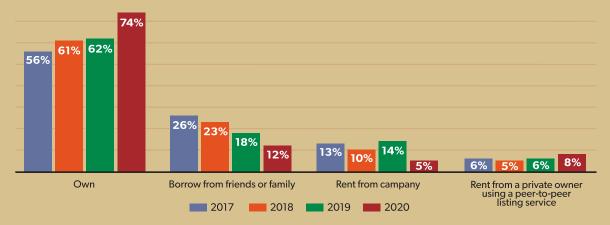
Over the past several years, preferences for RVing remain relatively stable in terms of the proportion of all campers, yet demonstrates a substantial jump in actual ownership rates (versus borrowing or renting) as well as the number of RVing households in the U.S. Among the subset of campers who prefer to camp in an RV, three-fourths own the RV they use most, which is up 12 percentage points since last year. Rates of borrowing, in comparison, have dropped by half since 2017.

Increase in RV ownership in 2020

The increase in RV ownership can be closely tied to the COVID-19 pandemic, with close to 6-in-10 new RV owners saying that RVing was a safer way to travel in light of the pandemic. Two-thirds of new RV owners also claim that their first camping experience was "great" compared to renters (21%) who are most likely to say that their first experience was "just OK" (43%).

RV owners are more likely than those who rent – especially those who rent from peer-to-peer services – to say that several aspects of their first camping trip were easier, whether it is driving and parking the RV, avoiding pests, getting a good night's sleep, or organizing and packing their gear.

RV USAGE: OWNERSHIP, RENTING, AND BORROWING (2017 TO 2020)



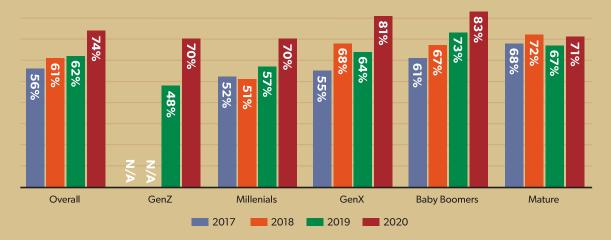
RV USAGE AND OWNERSHIP (2019 AND 2020)



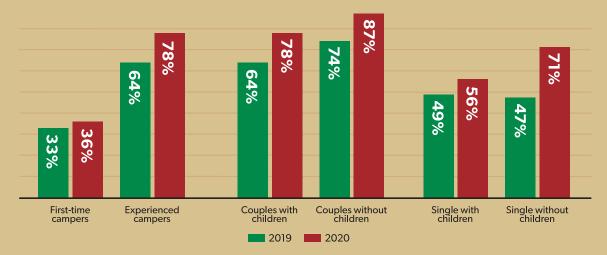


Ownership has increased across all generations, but is being driven by couples without children, baby boomers, and GenXers. It is also worth noting that new RV campers in 2020 are unlikely to own an RV (even though they prefer to camp in an RV), and instead are more likely to rent (46%) or borrow (17%) an RV for their camping trips.

RV OWNERSHIP BY GENERATION (2017 TO 2020)

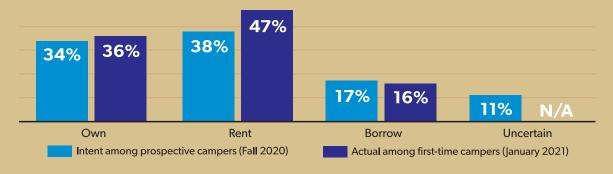


RV OWNERSHIP BY CAMPER TYPE AND FAMILY STATUS (2019 AND 2020)



In the Fall 2020 Special Edition of the North American Camping Report, about one-third of prospective campers said that if they were to start camping, they would purchase an RV. Reality shows that among the set of new RV campers in 2020 (surveyed in January of 2021) that the actual rate of ownership is just over one-third.

RV OWNERSHIP AMONG PROSPECTIVE AND FIRST-TIME CAMPERS

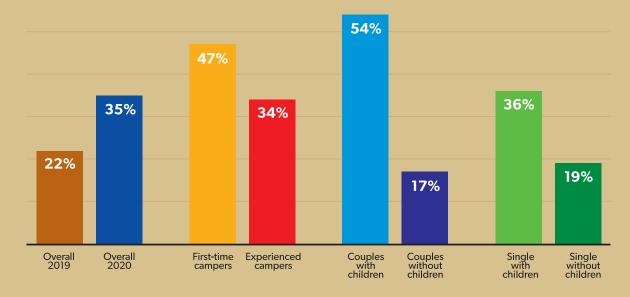


RV Purchase Intent in the Coming Year by Camper Type and Family Status

Up substantially from 2019, about one-third of non-RV owners indicate that they would like to purchase an RV in the coming year. In particular, nearly half of new non-RVing campers say that they plan to purchase an RV and more than half of couples with children indicate plans for future RV purchases. Asian American campers have the highest increase in intent to purchase an RV this coming year.

Overall, more than half of non-RV owners (54%) who would consider purchasing an RV cite COVID-19 as the impetus for purchase consideration. In fact, across all sub-groups, this is the largest driver of intent.

PLANS TO PURCHASE AN RV BY CAMPER TYPE AND FAMILY STATUS (2020)





RV Owners Making Upgrades: What We May See in 2021

Pointing to continued interest in RVing, intent to upgrade or replace existing RVs is high. Interestingly, this trend is seen across those experienced with RVs and those who are first-time RVers.

About six-in-ten current RV owners say that they plan some type of change or upgrade to their RV, though one-in-five are uncertain of what the changes might be; one-fourth plan to upgrade their RV. New RV owners are twice as likely as experienced RV owners to want an upgrade this year and notably, one-third are considering selling their RV.

RVers with children – whether it's an RVing couple or single parent – are more likely than RVers without children to desire an RV upgrade, strongly reflecting on how the presence of children impacts RV preferences.

Among RV owners who plan to make some type of change in 2021, one-third want a bigger RV while another 3-in-10 want more and/or better amenities.

RVers with children are most likely to want a bigger RV or make a change due to concerns over COVID-19. This also impacts new RV owners. Single RV owners are seeking better amenities.

- Top Changes Planned -



Move to a bigger RV



Find an RV with more or better amenities



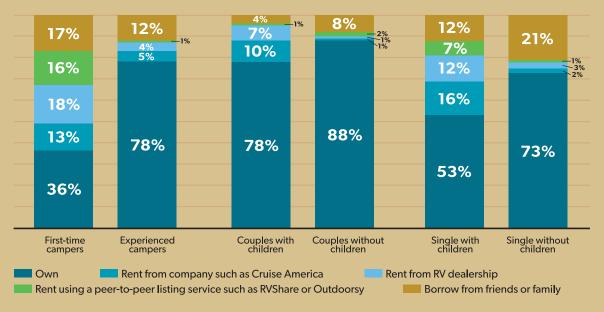
Want an upgrade



Peer-to-Peer Rental Behavior Sees Continued Growth Among First-Time Campers

The peer-to-peer rental market and its growth are good indicators of the overall health of the RV market and an interest in trial. First-time campers in 2020 with a preference for RVing are much more likely to experiment with RVing via renting or borrowing from others; ownership is higher among households without children.

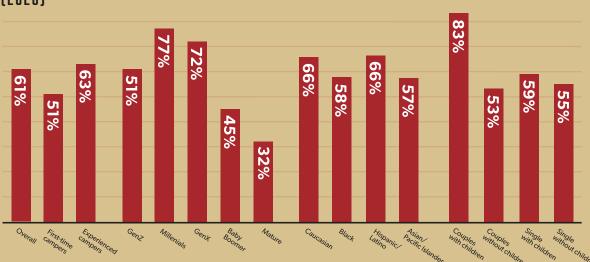
OWNERSHIP VS. RENTAL BY CAMPER TYPE AND FAMILY STATUS (2020)



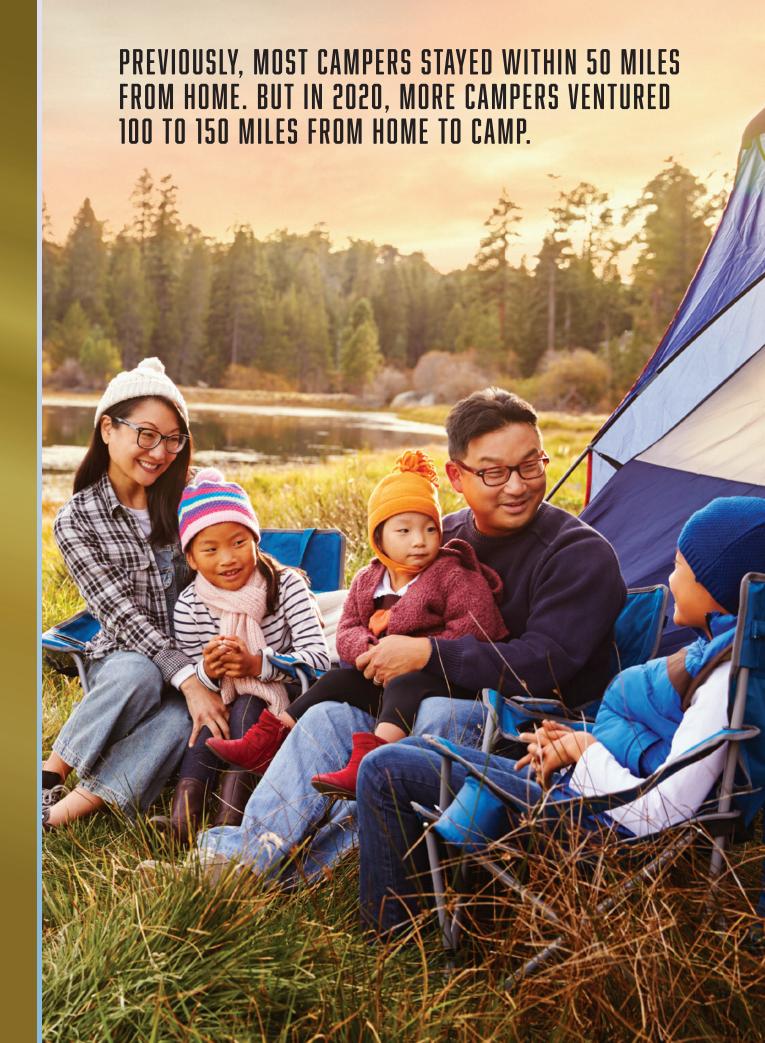
Relatively consistent with last year, 6-in-10 non-RV owners indicated that they would consider renting an RV from a peer-to-peer service, with couples with children (82%) most likely to be receptive to this approach. An ever-increasing proportion of millennial and GenX non-RVers are receptive to renting an RV from a peerto-peer service. Similarly, an increased percentage of Hispanic non-RVers are now stating that they are "very likely" to rent an RV from a peer-to-peer service; likelihood to rent has dropped among both Black and Asian American non-RVers.

New RV owners are overwhelmingly likely to say that they listed their RV on a peer-to-peer site, potentially a contributing cohort to overall drivers of RV sales in 2020. Receptiveness toward peer-to-peer RV rentals is relatively robust, but dropped somewhat in the past year. Couples with children followed by millennials and GenXers are most likely to be receptive to peer-to-peer rentals.

LIKELY TO CONSIDER RENTING FROM PEER-TO-PEER SERVICE AMONG NON-RV OWNERS [5050]







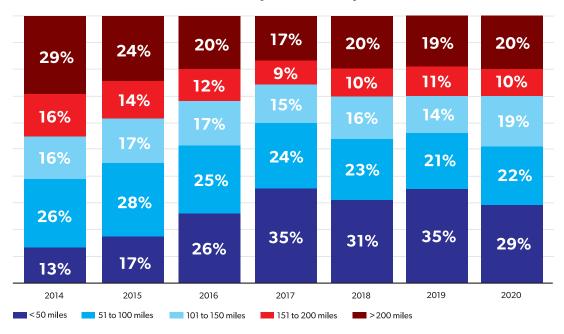
THE 2021 NORTH AMERICAN CAMPING REPORT

WHERE CAMPERS ARE CAMPING

Distance from Home

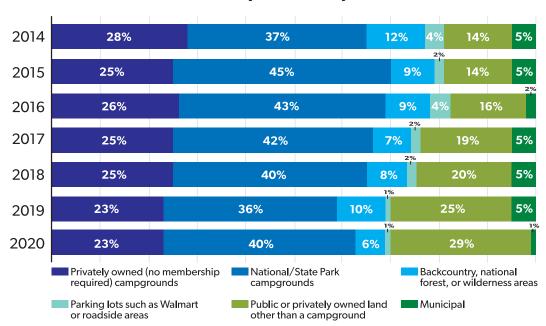
Following a three-year decline in distanced-traveled, campers are somewhat more likely to travel a little farther in 2020. Where previously most campers stayed within 50 miles, this year more ventured 100 to 150 miles from home. Older campers are the biggest driver of this change.

TRAVEL DISTANCE FOR CAMPING TRIPS (2016 TO 2020)



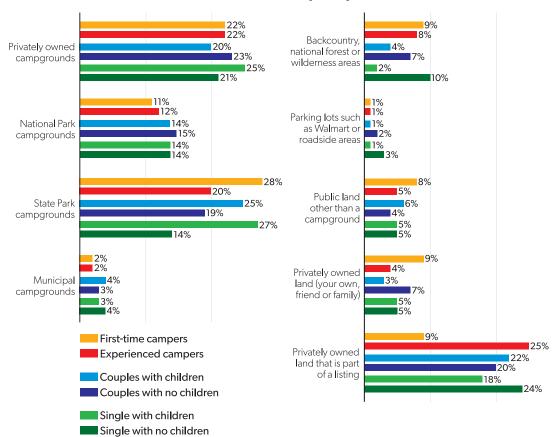
Campers staying at national and state park campgrounds has increased since 2019 (after a steady drop over a 4-year span), yet over time, a greater proportion of camper nights are being spent on public or private land (other than campgrounds). For this year, this may be a result of some locations such as private campgrounds having less capacity and/or being unable to open to the public.

WHERE CAMPING NIGHTS ARE SPENT (2014 TO 2020)



First-time campers are more likely to say that they spend a larger proportion of their nights camping at state parks with more experienced campers opting for privately owned land that is part of a listing. Households with children are also more likely to spend more nights camping at state parks.

PERCENTAGE OF CAMPER NIGHTS BY LOCATION (2020)





Campground Selection and Offerings

Similar to 2019, safety and security is the top consideration of campers when selecting a campground regardless of their preferred type of accomodation. When comparing these considerations per year, campers in 2020 appear to have a wider set of considerations, which can be attributed to the influx of first-time campers.

First-time campers are also most likely to say that safety and security are their top priority at a campground, but are also likely to rank family style bathrooms, safety lighting, and allowing pets/pet area in the top three. Gen Z ranks having a pool as their highest consideration followed by other onsite amenities such as a campground store.

— Top Considerations When Staying at a Campground —



Safety and security (36%)



Campground atmosphere (29%)



Clean and well-maintained bathhouse/ restrooms

(29%)



Allows pets and has pet areas (29%)



Is kid-friendly (28%)



Family-style bathrooms (with bathroom and shower) (26%)



Full-service RV sites (26%)



Cabins (25%)



Easy-in/easyout pull-thru sites (25%)



A campground store (24%)



CAMPERS ARE MAKING THE MOST OF VACATION DAYS

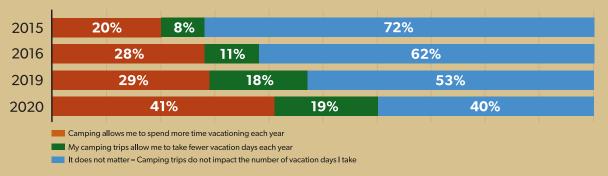
In a continuing decline compared to past results, on average, campers are reporting fewer vacation days yet appear to be spending a higher proportion of those days camping (which has remained constant) and fewer on other types of vacations. On average, campers are leaving about seven vacation days unused.

VACATION DAYS AND CAMPING (2015 TO 2020)



Since 2015, camping is having an ever-increasing impact on how campers are using their vacation days. In particular, camping trips allow campers to take fewer of their vacation days each year (which is important in the context that campers are reporting having fewer vacation days available). Significantly, and in a large increase over 2019, 4-in-10 campers indicate that camping allows them to spend more time vacationing.

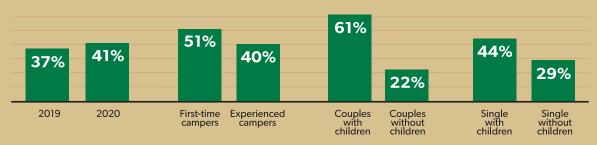
IMPACT OF CAMPING ON VACATION DAYS TAKEN (2015 TO 2020)



Up somewhat from last year, 4-in-10 campers say that they sometimes or always work while camping, with more than half of first-time campers stating that they work on their camping trips (compared to 4-in-10 experienced campers). Far exceeded other camper segments, 6-in-10 couples with children (61%) work during their camping trips.

In total, 8.2 million households have at least one person who always works while camping, 11.6 million households have at least one person who sometimes works while camping and overall, 19.8 million households have someone who sometimes or always works during their camping trips.

"ALWAYS" OR "SOMETIMES" WORK WHILE CAMPING (2019 AND 2020)



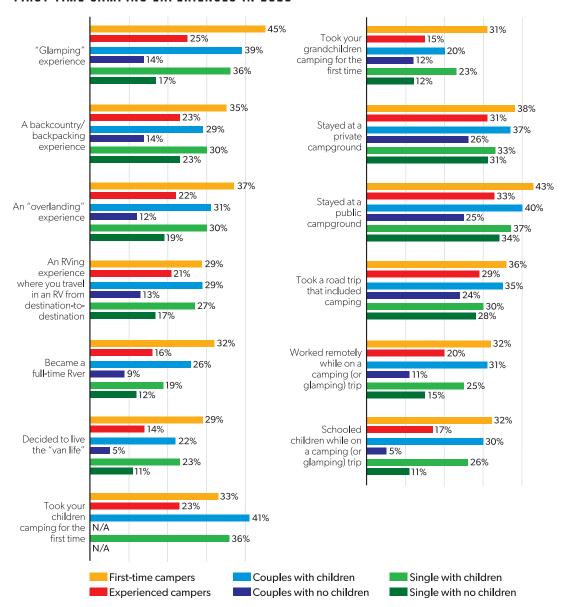
CAMPING EXPERIENCES IN 2020

In 2020 campers are likely to have tried new experiences whether it was staying at a different type of campground than normal, a road trip, or even a glamping experience.

It appears that campers are gravitating toward experiences that include some type of adventure and/or exploration, yet still want to have comforts during their travels, whether it's a glamping experience or experimenting with full-time RVing.

First-time campers report participating in a variety of camping experiences in 2020 with glamping highest at 45%, followed by staying at a public campground (43%). Couples with children are highly likely to have tried new experiences in 2020 as well, including 41% who took kids camping for the first time, 40% who went to a public campground, and 39% who glamped.

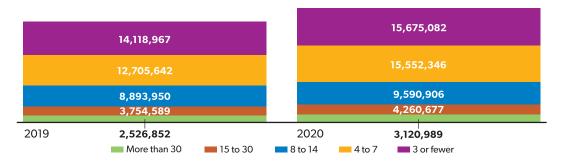
FIRST-TIME CAMPING EXPERIENCES IN 2020



Camping Nights

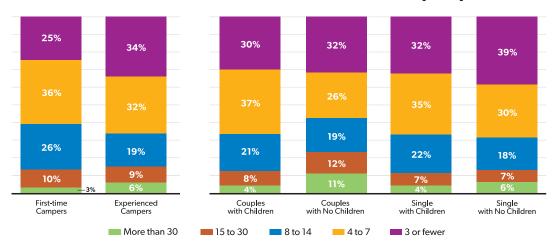
The number of households who camped for 15 nights or more increased by more than one million additional households from 2019 to 2020.

NUMBER OF CAMPER HOUSEHOLDS BY CAMPING NIGHTS SPENT (2019 AND 2020)



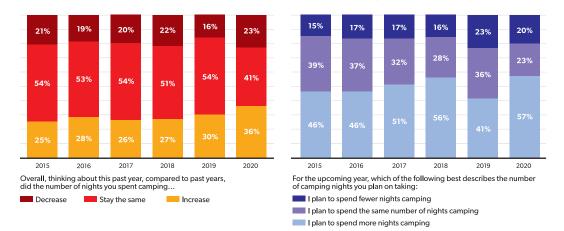
Couples without children are more likely than other couples or individuals with children to have camped more than two weeks in 2020. Not surprisingly, because of having a greater amount of free time, boomers (23%) and silent/mature campers (26%) were most likely to camp 15 or more nights in 2020.

CAMPING NIGHTS BY CAMPING EXPERIENCE AND FAMILY STATUS (2020)



Representing an all-time high, campers reported an increase in camping nights compared to past years. Additionally, there has been a rebound in the proportion of campers who intend to spend more nights camping in the coming year.

CHANGE IN CAMPING NIGHTS: TYPICAL AND PROJECTED (2015 TO 2020)



GENZ CAMPERS

While Highly Impacted by COVID-19 Pandemic, GenZ's Interest in Camping Remains Strong

GenZ represents the youngest age group of campers surveyed through the North American Camping Report born in the mid-to-late 1990s through the early 2010s. Emerging into adulthood and entering the workforce the group has greater limits on their time and financial resources than more experienced campers. However, just as the rest of the world watches their consumer habits and preferences unfold, so does the camping and outdoor recreation industry.

Unfortunately, GenZ campers faced unique challenges during the COVID-19 Pandemic that greatly affected their ability to get outdoors. While they camped a similar number of nights and trips, when compared to millennial and GenX campers in 2020, GenZ also indicates limited income, employment and school commitments have a large impact on their ability to venture out.

Overall, GenZers are significantly less likely to increase their camping nights or trips in the year ahead when compared to other age demographics. They are similarly less likely to show interest in RVing and working remotely while camping, which could be attributed to their life stage. It's notable that COVID-19 vaccines are least likely to affect GenZ's travel plans in 2021; 42% say access to vaccines will have no effect on their travel plans.

- Fast Facts About GenZ Campers



Most likely of all age groups to camp with friends, 43% say they camp with peers, but the same number also camp with significant others or their family.



Biking is the most popular activity among GenZers while camping (43%), but overall, they tend to be less active while camping when compared to millennials.



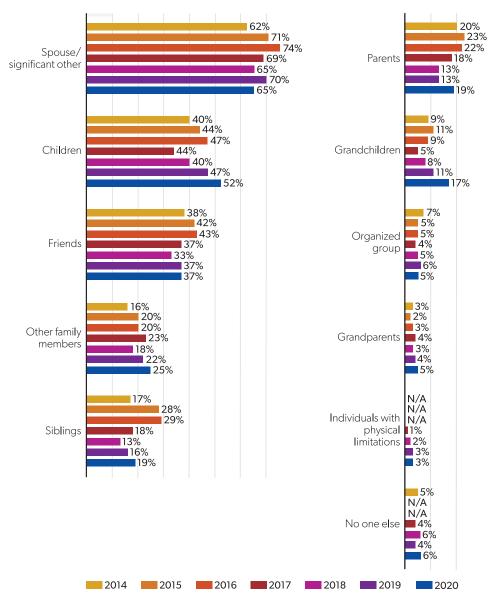
The group shows little interest in high-speed Wi-Fi while camping (13%) and are most likely to prefer a moderate connection that allows them to stay connected to social media (38%).



WHO CAMPERS ARE CAMPING WITH

Couples and minor children continue to form the group of campers most likely to camp together. Also, first-time campers are significantly less likely to camp with a spouse or significant other, which is highly impacted by the youngest set of campers who are least likely to camp with a spouse or significant other (and least likely to be married).

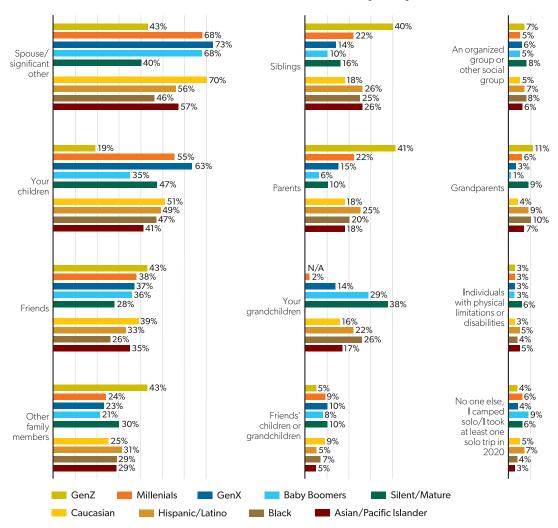
CAMPING COMPANIONS (2014 TO 2020)





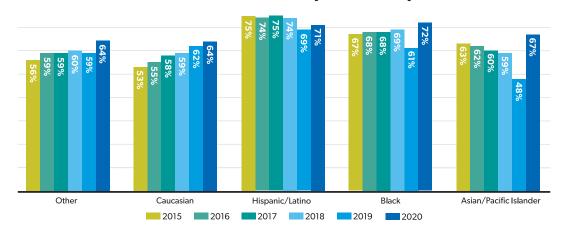
Camping with other family members and grandchildren are rising in occurrence. GenXers are most likely to camp with a spouse/significant other and their children; 4-in-10 Mature and 3-in-10 boomers camp with grandchildren.

CAMPING COMPANIONS BY GENERATION AND ETHNICITY (2020)



Multi-generational camping overall has increased somewhat compared to past iterations of the report with 7-in-10 Hispanic and Black camper households taking at least one camping trip with multiple generations. First-time campers are more likely than experienced campers to camp with multiple generations; boomers are least likely.

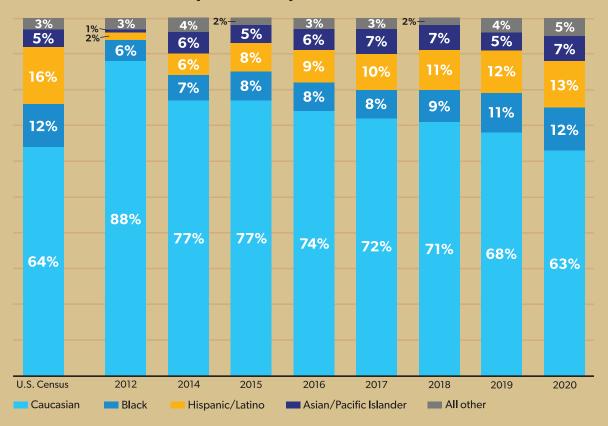
MULTI-GENERATIONAL CAMPING BY ETHNICITY (2015 TO 2020)



DIVERSITY IN THE GREAT OUTDOORS

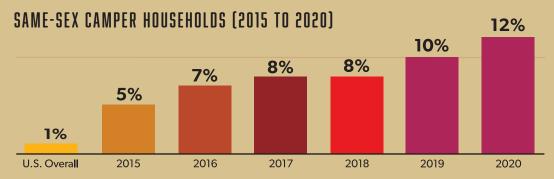
Campers are diverse, and that diversity – including ethnicity and sexual orientation – continues to grow and align or exceed U.S. Census representation.

DIVERSITY AMONG CAMPERS (2012 TO 2020)



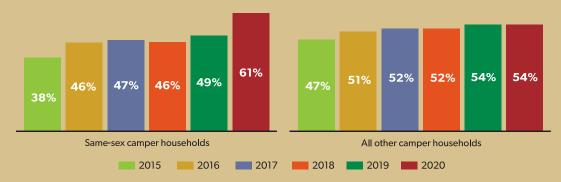


Growth in same-sex households among campers has increased moderately over the past few years, yet continues to far exceed the overall rate for same-sex households in the U.S.



Notably, same-sex households that camp with children have grown dramatically year-over-year, with 6-in-10 camping with children.

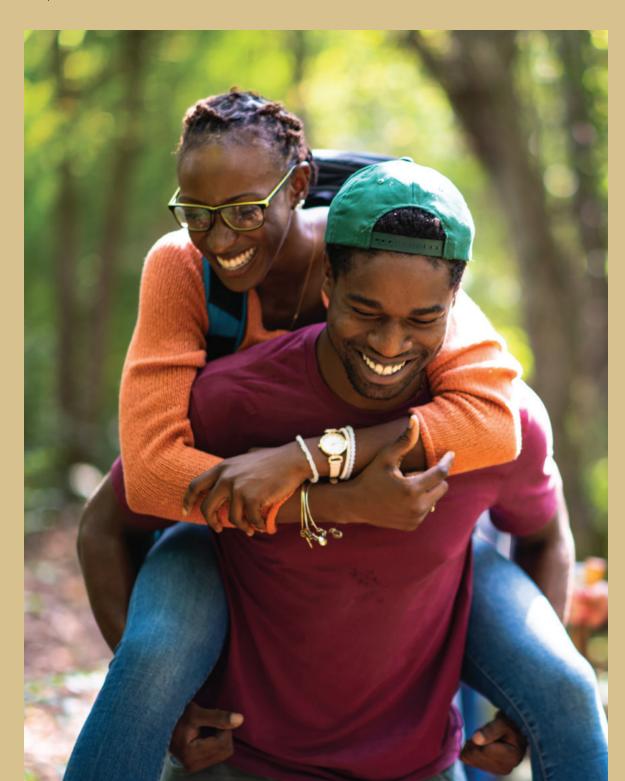
CHILDREN IN THE HOUSEHOLD AMONG SAME-SEX HOUSEHOLDS (2015 TO 2020)



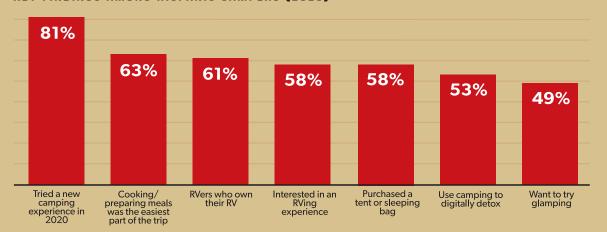


Importantly, the grassroots efforts of many different outdoor advocacy groups seem to be contributing to elevating awareness for outdoor recreation opportunities and affecting participation rates among diverse communities. Many barriers to entry are also being addressed across these groups, and are at the forefront of industry, brand and government organizations. But there is still much work to do.

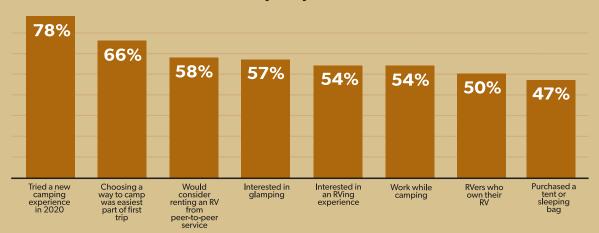
Although there is important work ahead in terms of continuing to cultivate and expand diversity in camping and outdoor recreation, it is exciting to see first-time campers represent a more diverse cross-section of the population. In the U.S., 60% of first-time campers in 2020 represent non-white groups, the highest rate since the inception of the North American Camping Report (and compared to 41% reported in 2015). Almost half of the Black (49%) and Hispanic (47%) campers indicated that they started camping due to reasons directly related to COVID-19, compared to only about 35% of white campers and 42% of Asian/Pacific Islander campers.



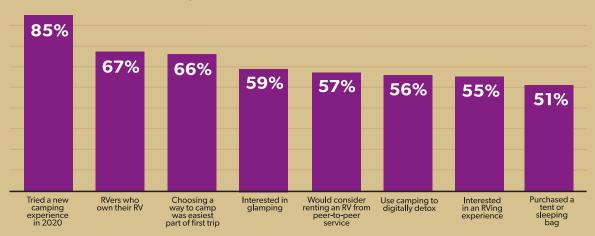
KEY FINDINGS AMONG HISPANIC CAMPERS (2020)

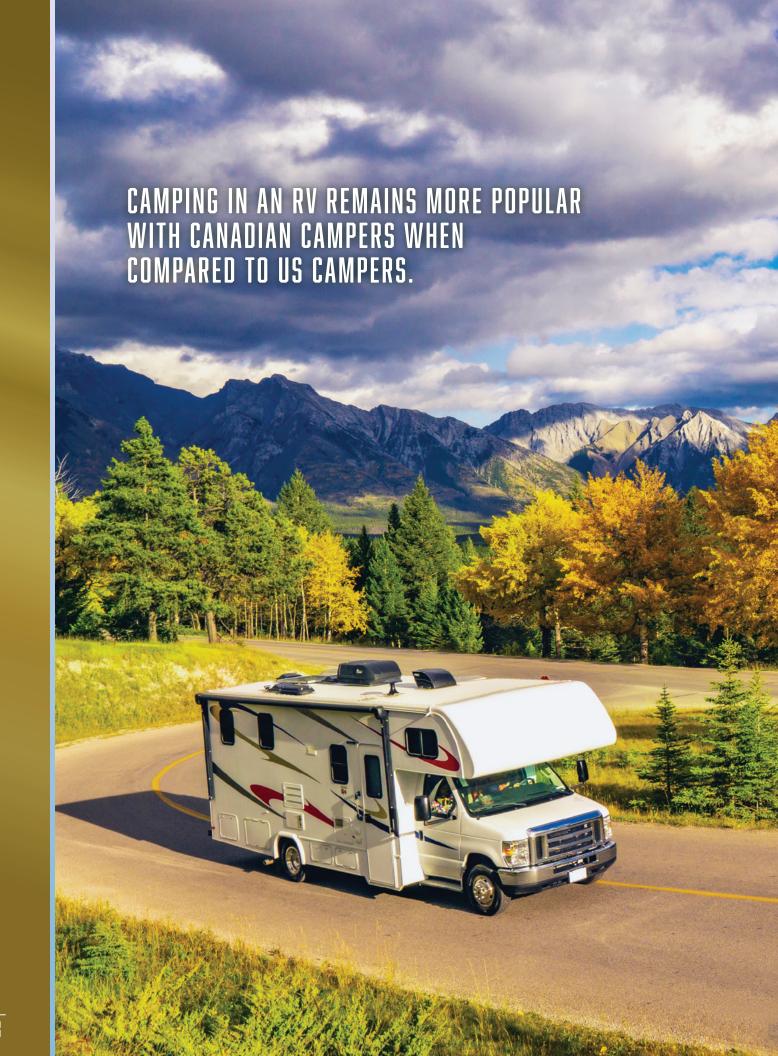


KEY FINDINGS AMONG BLACK CAMPERS (2020)



KEY FINDINGS AMONG ASIAN/PACIFIC ISLANDER CAMPERS (2020)





A LOOK AT CANADA

Facing more stringent restrictions due to the COVID-19 pandemic than their American neighbors, the Canadian camping market's ongoing stability took a direct hit. However, optimism for future camping trips is up among this country of campers – 57% intend to camp more in 2021.

Here's a look at how Canadian campers habits were affected by the pandemic:

- 7-in-10 reported some type of change to their trips in 2020.
- While the number of camping nights was relatively unchanged from 2019 to 2020, nearly equal proportions of campers increased (30%) and decreased (27%) nights spent camping.
- Lifelong campers were more likely to go camping in 2020 (45% versus 36% in 2019).
- A larger proportion of younger campers caused a corresponding increase in tent usage (61%, up from 49% in 2019).

It's also notable that Canada did not experience the influx of first-time campers that ventured out to American campgrounds. Only 5% of campers were new in 2020 compared to 21% in the United States.

Cautious Optimism Amidst Continued Challenges

While the year ahead is likely to also be a challenging one, Canadian campers still have optimism for the 2021 camping season. Fully, 57% intend to spend more nights camping in 2021. Only 13% report planning fewer nights. Even more notable, 39% plan to increase both nights and the number of trips this year.

Canadian campers are also craving new experiences in 2021 at levels higher than those prior to the pandemic, likely due to pent-up demand. In fact, fully half are seeking an RVing and/or glamping experience.

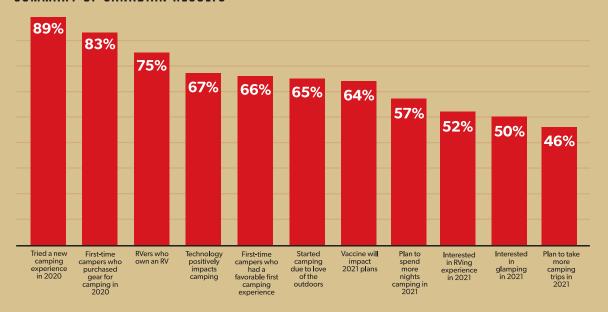
That being said, 2021 plans are still being impacted by COVID-19 and associated restrictions. Nearly 6-in-10 Canadian campers admit that their plans will be impacted by the pandemic. One of these concerns is the status of the Canadian/American border crossing with 4-in-10 saying it will impact their plans. This finding aligns with the fall edition of North American Camping and the Effects of COVID-19 special report.

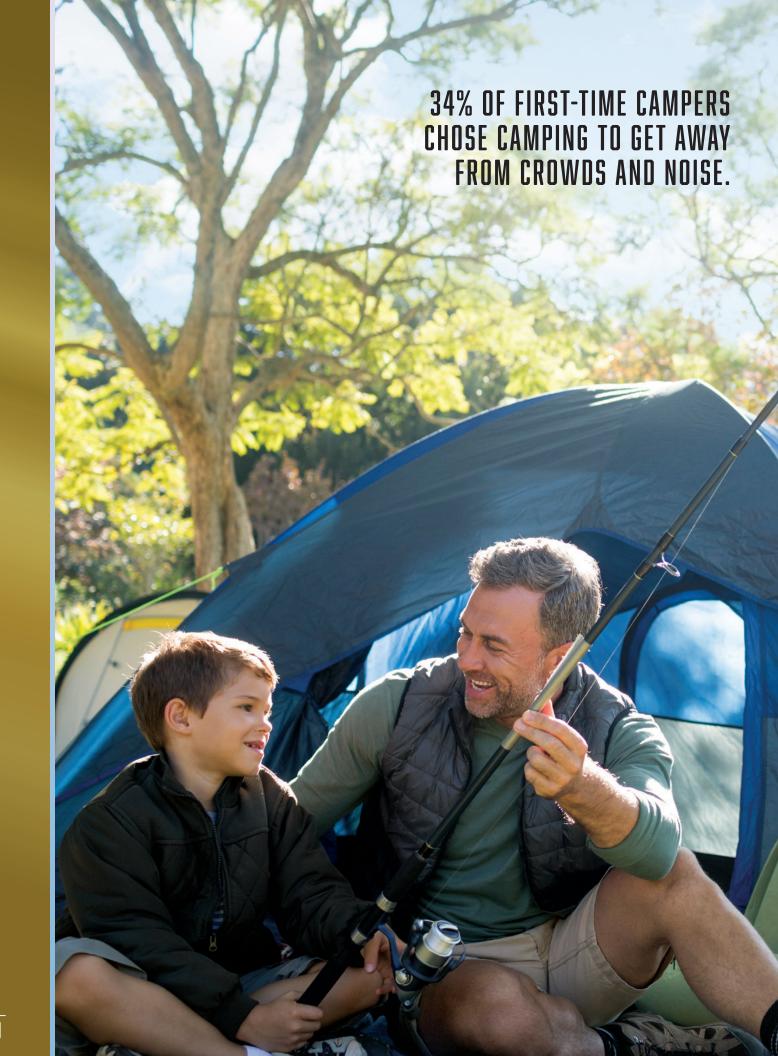
The Canadian RVer

RVing remains more popular among Canadian campers when compared to US campers, with one-third (34%) preferring to camp in an RV. While this has not increased substantially, more RVers report owning RVs. The rate of RV ownership is at 75% compared to 62% in 2019. Compared to the U.S., Canadian RV owners are less likely to upgrade or change their RV this year (53% versus 67% in the U.S.). They also have less intent to purchase an RV in 2021 with only 14% in the consideration set versus the State's 35%

Some of these differences within the RV market of the two countries are also likely tied to the more stringent Canadian COVID-19 restrictions.

SUMMARY OF CANADIAN RESULTS

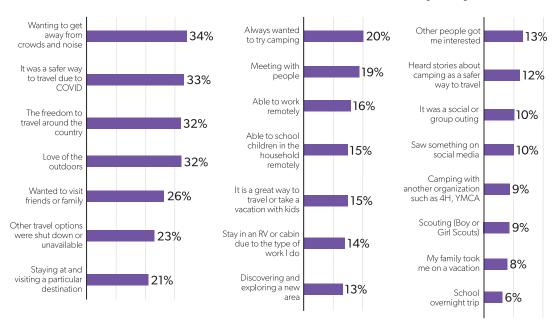




WHY CAMPERS ARE CAMPING

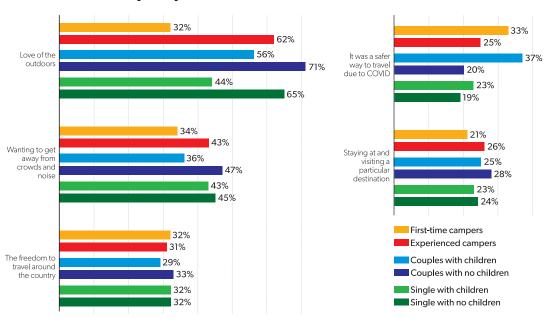
When asked what first prompted their interest in camping, love of the outdoors represents the key driver of campers overall (and is highest for 2020 when compared to previous years). Being part of a social or group gathering experienced a notable drop which could be attributed to COVID-19 and associated concerns.

INTRODUCTION TO CAMPING: REASONS FOR FIRST CAMPING TRIP (2020)



Among first-time campers, the reasons for starting to camp were to avoid crowds and noise or identify it as a safe way to travel, both of which are related to the COVID-19 pandemic. They are less likely to say their family took them on a camping vacation (-29 percentage points) or that other people got them interested (-22 percentage points).

INTRODUCTION TO CAMPING: REASONS FOR FIRST CAMPING TRIP BY CAMPER TYPE AND FAMILY STATUS (2020)

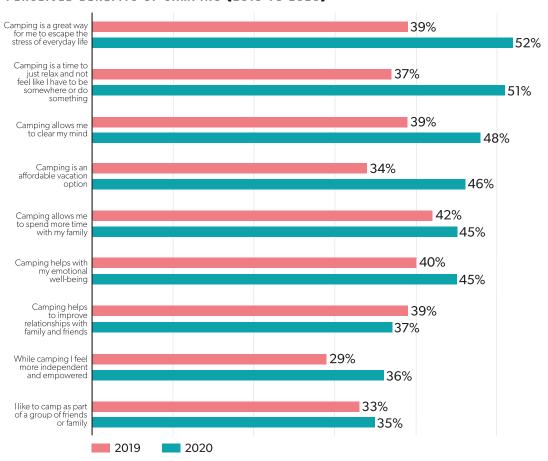




The Benefits of Camping

Perhaps as a result of the pandemic including the stressors of lifestyle changes and isolation, campers are more likely to identify the health and mental health benefits of camping than in past years. In particular, the results show significant increases in benefits associated with escaping stress, relaxing, clearing their minds, or seeing camping as an affordable vacation option.

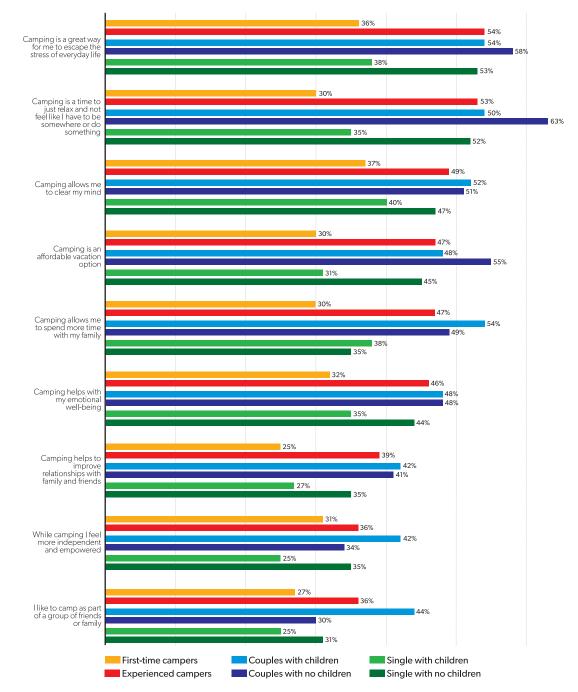
PERCEIVED BENEFITS OF CAMPING (2019 TO 2020)





First-time campers – having fewer opportunities to experience the benefits of camping over a longer stretch of time – are less likely to view camping as a way to relax or escape. Though, campers without children are more likely to agree that camping is relaxing.

PERCEIVED BENEFITS OF CAMPING BY CAMPER TYPE AND FAMILY STATUS -% STRONGLY AGREE (2020)



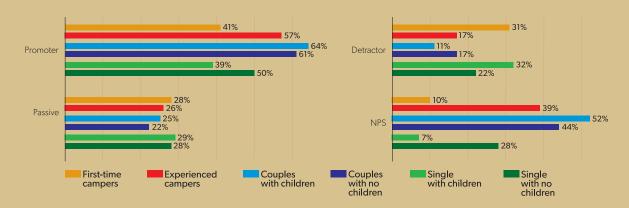


THE ORGANIC GROWTH OF CAMPING (NPS)

As a measure of advocacy, campers were asked to rate the likelihood that they would recommend camping to someone who does not currently camp, indicating the depth of alignment campers have with their travel choice.

The results show that the most engaged set of campers are couples, and especially couples with children, who are overwhelmingly likely to recommend camping to others. First-time campers are relatively split on whether they would advocate for camping, and it is interesting to note that single campers with children are least likely to endorse camping for others. Boomers and GenXers are the most avid advocates for camping within their peer groups, while GenZ and silent/mature campers score lowest on NPS. The potential for word-of-mouth growth among Black and Asian/Pacific Islander campers is relatively low as well.

Additionally, first-time campers whose first camping experience was at a campground with a great deal of services and amenities have a significantly higher NPS (+38) when compared those who stayed at campgrounds with fewer amenities (-3) or a campground with minimal facilities (-13). This suggests that staying at a campground with more amenities will contribute to further growth and participation in camping.



A Net Promoter Score® for Camping

In order to identify the depth of engagement among campers, Net Promoter Score® (NPS®) categories are used as an overall measurement of a camper's likelihood to recommend camping to someone else, thus providing a proxy measure for potential word-of-mouth growth.

	Detractors						Passives		Promoters	
Not at all likely	1	2	3	4	5	6	7	8	9	Very likely

The score is derived by subtracting the percentage of consumers who are considered Detractors (0-6) from those who are Promoters (9-10).

(% of Promoters - % of Detractors) = Net Promoter Score®

One of the key indicators of the hold camping has currently, and will continue to have on the lifestyle of leisure travelers, is whether the participants advocate for camping as a choice for those who do not currently participate in camping.



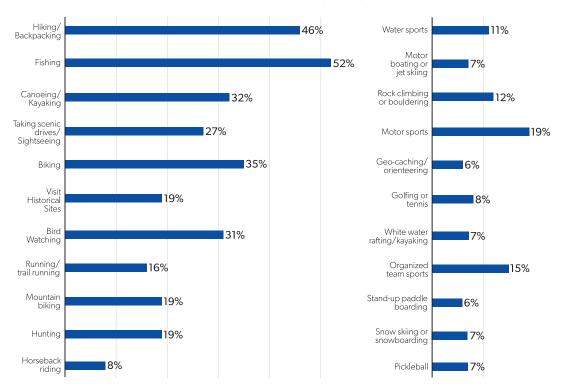
What Campers Do When They're Camping

Virtually unchanged since 2014, hiking/backpacking and fishing are the most popular recreation types among campers. However, it is worth noting that these activities are less popular among firsttime campers and most popular among older campers which could indicate future changes.

As a new generation of campers makes their way outdoors, more sedentary pastimes are being replaced by more physically active and extreme pursuits such as mountain biking, rock climbing and motor sports.

Historically, hiking/backpacking and fishing are the most popular recreation activities which remain virtually unchanged since 2014.

PARTICIPATION IN RECREATION WHILE CAMPING (2020)







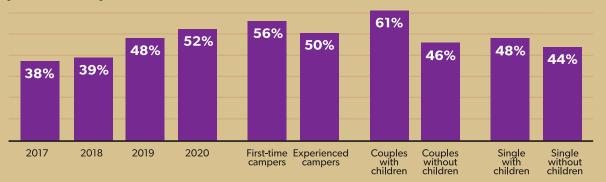
THE IMPACT OF TECHNOLOGY ON CAMPING

Up slightly from 2019 (but showing steady growth since 2017), more than half of all campers say that access to cell or Wi-Fi service has "a great deal of impact" on the length of their trips. First-time campers and couples with children are most likely to say that Wi-Fi influences their ability to camp more often.

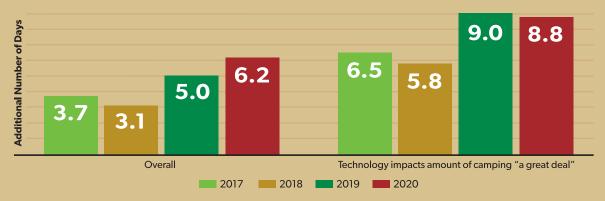
Those who say that access to technology has a "great deal of impact" on their trips state that they are able to spend nine extra days camping. On average access generates six additional camper nights, a rate that has doubled since 2018.

First-time campers are significantly more impacted by access to technology, attributing nine additional days of camping to Wi-Fi access (compared to six for experienced campers). This likely results from the new bloc of campers who started camping due to COVID and subsequently being able to work/school remotely.

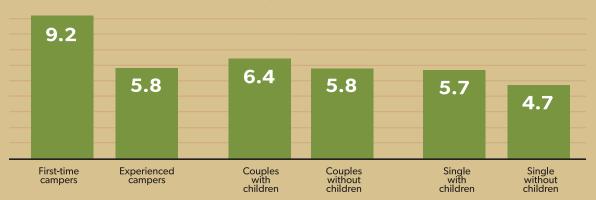
INFLUENCE OF WI-FI ON ABILITY TO CAMP MORE - % "A GREAT DEAL OR "SOMEWHAT" [2017 TO 2020]



ADDITIONAL DAYS CAMPING DUE TO THE INFLUENCE OF TECHNOLOGY (2017 TO 2020)



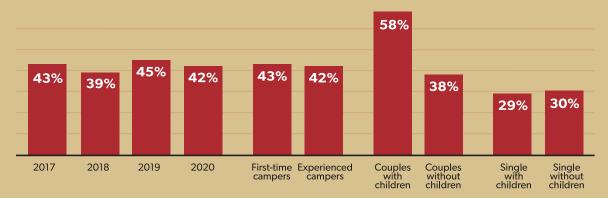
ADDITIONAL DAYS CAMPING DUE TO THE INFLUENCE OF TECHNOLOGY BY CAMPER TYPE AND FAMILY STATUS (2020)



Growing in importance over the past three iterations of the survey, and currently representing an all-time high, more than one-fourth of all campers (27%) say it's "very important" to have Wi-Fi while camping and four-inten (42%) assigning at least some level of importance to Wi-Fi.

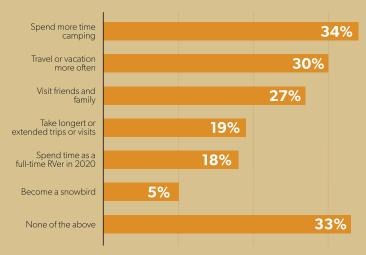
While there is essentially no difference in the importance of Wi-Fi between new and experienced campers, couples with children are significantly more likely to say that Wi-Fi is "very important" to them.

IMPORTANCE OF WI-FI WHILE CAMPING - % "SOMEWHAT" OR "VERY IMPORTANT" (2020)



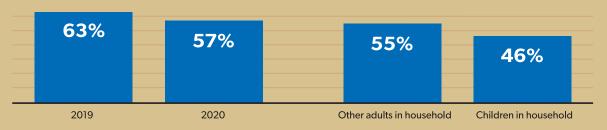
More than a third of all campers say that having the ability to work or school remotely allowed them to spend more time camping in 2020 and another 3-in-10 mention traveling or vacationing more often. As noted throughout the results, couples with children – being the most actively engaged segment of campers – are significantly more likely to say that being able to work or school remotely allowed them to camp more often this past year.

IMPACT OF WORKING OR SCHOOLING REMOTELY ON CAMPING (2020)



Down slightly from last year, close to 6-in-10 campers sometimes or always use camping to "digitally detox." About half of those with children in the household (46%) say that they sometimes or always use camping to digitally detox.

"ALWAYS" OR "SOMETIMES" USE OF CAMPING TO "DIGITALLY DETOX" (2019 AND 2020)



THE FUTURE OF CAMPING

The options for camping are becoming more varied and specialized, whether it is different options for glamping, overlanding/boondocking, campground amenities, private land listings, or boutique campgrounds. The increase in the options and ways to camp complement interest and growth of campers seeking different experiences and options.

At the individual campground level, there will be more and more campgrounds offering diverse and unique accommodations and service offerings.

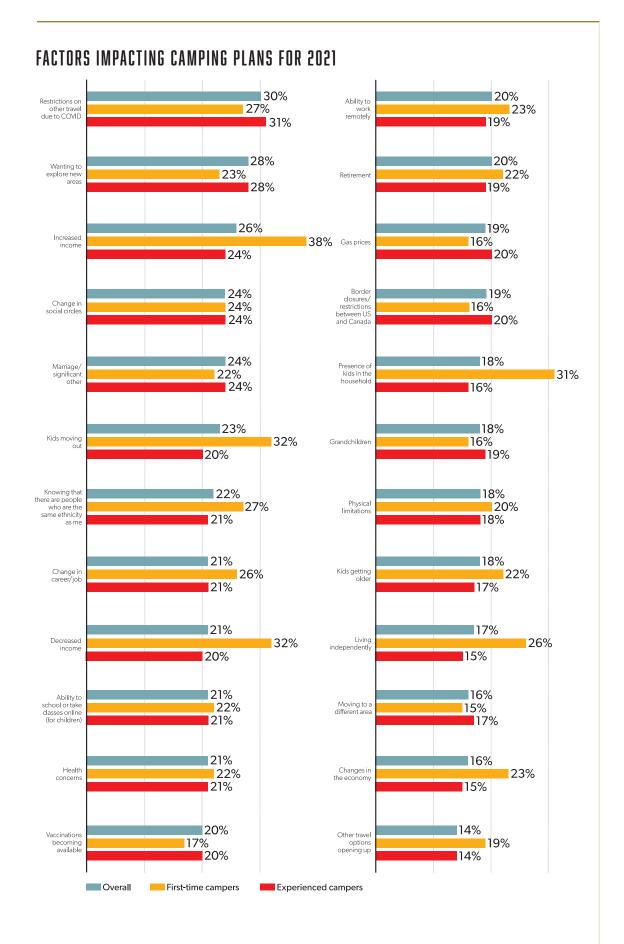
Technology is also an area that is contributing to future growth. Campers currently want the option to stay connected while they camp as it allows them to work and/or school remotely in ways that were not available previously. This results in camping locations seeking to deliver the best quality Wi-Fi to help keep campers happy and camping longer during their stays.

Looking ahead, campground infrastructure will need to keep pace with camper demand, pushing the industry forward and suppliers innovating the array of services and options they are providing.

As the new generation of campers bring along their families, work remotely from campgrounds, children attend classes online, all in a safe and secure environment, campgrounds will be challenged to respond to these demands, thus ensuring long-term growth and cultivation of this new generation of campers.

In the near term, first-time campers anticipate their camping in 2021 to be most impacted by potential income changes, and children being present in the home. Still top-of-mind, COVID-19 restrictions are impacting about 30% of campers overall.





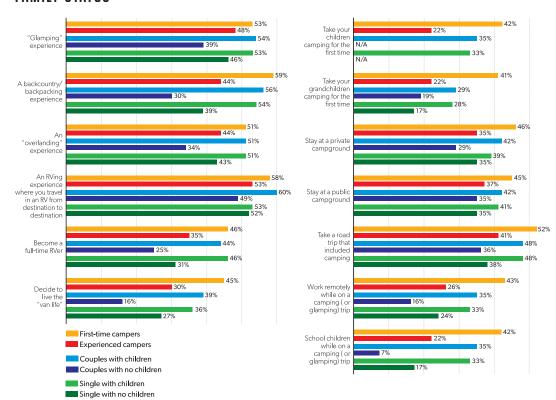
Interest in New Camping Experiences

Interest in new experiences is spiking for 2021, especially an RVing experience (53%) or glamping (49%).

First-time campers in 2020 are most interested in trying a backcountry or RVing experience in 2021, while 60% of couples with children are interested in RVing.

Millennials, GenXers, and Hispanic campers are most interested in an RVing experience; Asian American and Black campers are most interested in glamping.

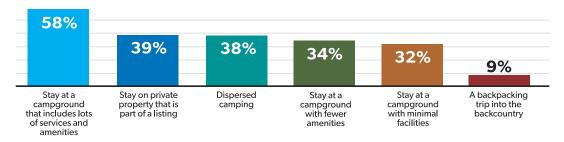
INTEREST IN TRYING NEW CAMPING EXPERIENCES IN 2021 BY CAMPER TYPE AND FAMILY STATUS



The type of camping experience a new camper participates in for their initial camping trip appears to have a significant outcome on whether they will continue camping into 2021. Most notably, if a camper stays at a campground that has a great deal of services and amenities, they are significantly more likely to say that then intend to camp in 2021, compared to those who had other types of camping experiences whether it's staying on private or public land, or campgrounds with fewer facilities. Few campers whose first experience was backpacking are likely to continue camping.

These results demonstrate that the level of comfort – both physically and emotionally – a camper has during their first experience is a strong predictor of future camping behavior.

LIKELY TO CONTINUE CAMPING IN 2021 AMONG FIRST-TIME CAMPERS BY TYPE OF FIRST CAMPING EXPERIENCE



THE 2021 NORTH AMERICAN CAMPING REPORT

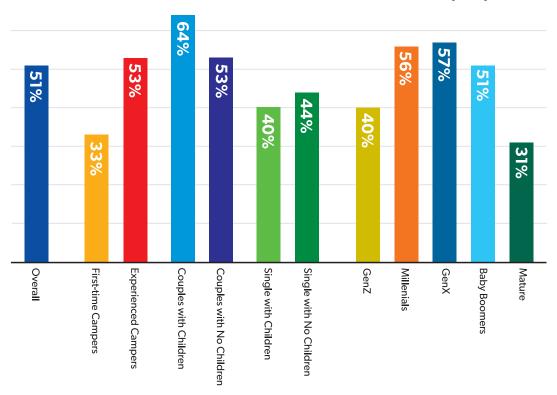
THE YEAR AHEAD

FORECAST: 2021 CAMPING SEASON

As the world continues to deal with the COVID-19 crisis into 2021, North American campers intend to continue camping.

Campers intend to increase their trips in the coming year. This result is most prominent among GenX and millennial campers, though the biggest improvement over 2019 is observed among boomers.

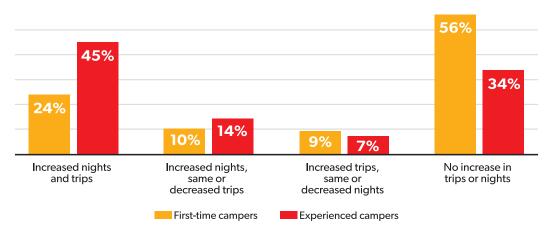
PERCENTAGE WHO PLAN TO INCREASE CAMPING TRIPS IN THE NEXT YEAR (2021)





Among all campers, close to half of experienced campers say that they intend to increase both the number of camping trips they take as well as spend more nights camping.

CHANGE IN CAMPING TRIPS AND CAMPING NIGHTS FOR 2021 AMONG ALL CAMPERS



Couples appear to be the segment of campers whose intentions to camp in 2021 are highest (about two-thirds are highly likely to continue camping). Others who are most likely to continue camping into 2021 include those who use camping to "digitally detox" (75%), campers who always work while camping (67%), and RVers (64%, including 69% of RV owners).

LIKELY TO CONTINUE CAMPING IN 2021 BY CAMPER TYPE



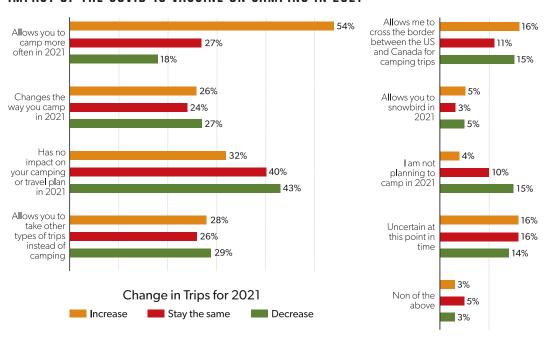


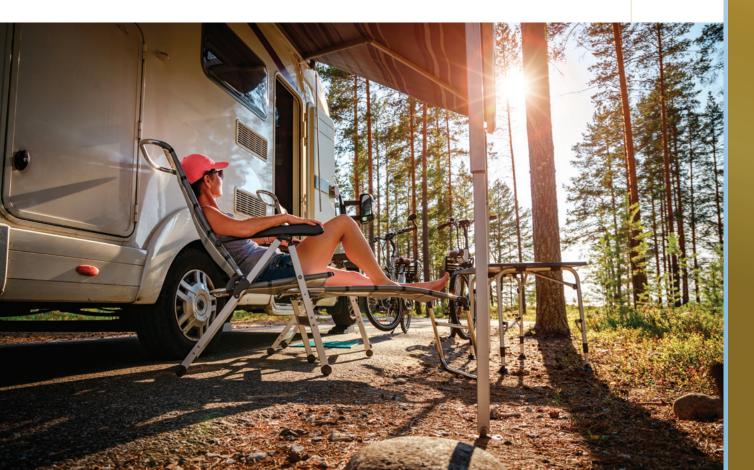
The Impact of the COVID-19 Vaccine on Camping

Overall, 40% of campers say that the COVID-19 vaccine will allow them to camp more often in 2021, which is up substantially from the Fall 2020 survey where only 16% of campers said that the vaccine would enable them to camp more often in 2021. The availability of the vaccine appears to have the greatest impact on couples with children (who are most likely to work and/or school while camping), millennial and GenX campers.

More than half of the campers who intend to increase their trips in 2021 say that the vaccine will allow them to camp more often this year.

IMPACT OF THE COVID-19 VACCINE ON CAMPING IN 2021





METHODOLOGY

Background

This report represents the seventh annual installment of a detailed reporting that will compare the latest iteration of the North American Camper Survey to the previous results. The survey, commissioned by Kampgrounds of America, Inc. (KOA), is designed to provide a detailed accounting of the U.S. and Canadian camping markets including the incidence of camping overall, a description of who is camping in the U.S. and Canada, how they are camping, what prompted them to start camping, what keeps them camping, and other key descriptive areas such as media preferences and use of technology. This effort, on an overall basis, will be compared to a benchmark camping incidence study conducted in 2012, followed up in 2014, 2015, 2016, 2017, 2018, 2019 and 2020.

U.S. and Canadian Household Results

The results of the most recent iteration of the North American Camper Survey are based on a total of n=3,926 surveys completed among a random sample of U.S. (n=2,436) and Canadian (n=1,500) households. Within the U.S. sample of households, results are stratified by Census Region: Northeast (n=609); Midwest (n=608); South (n=610); and West (n=609). Overall, a sample of n=2,436 U.S. households is associated with a margin of error of ± 1.99 %, while a sample of n=1,500 Canadian households is associated with a margin of error of 2.53%. 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 2021 North American Camping Report include:

2020 North American Camping Report: Sponsored by Kampgrounds of America, Inc. and available at KOApressroom.com

North American Camping and the Effects of COVID-19: In response to the 2020 Coronavirus pandemic, two Special Editions of the 2020 North American Camping Report were released in May and September 2020. These reports detailed survey responses from North American leisure travelers.

2021 North American Camping Report Citation Information

For use in third party news sources or other material, please cite the source as: The 2021 North American Camping Report sponsored by Kampgrounds of America, Inc. Please remember that while the report name reflects 2021, the data for each year reflects behavior for the previous camping season. 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 – 1980

Generation Z - Born 1997 - 2012

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.

Millennial - Born 1981 - 1996

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.

Peer-to-Peer RV Rental – A rental that occurs between a private RV owner and a renter. Generally this is facilitated by a designated marketplace.

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.

Silent/Mature - Born prior to 1946

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

Types of RVs

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



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.



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



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



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



"Types of RVs" credit: GoRVing.com

