



# THE 2019 NORTH AMERICAN GLAMPING REPORT

A general population survey of the  
North American glamping market  
conducted by Cairn Consulting Group  
*Sponsored by Kampgrounds of America, Inc.*



“...And into the  
forest I go, to lose  
my mind and  
find my soul.”

John Muir





Scottish-American naturalist John Muir certainly knew what he was talking about back in the early 1900s.

Ironically, not much has changed.

North Americans are still in a constant search for inventive ways to connect to the outdoors and experience nature. Never has this been so obvious as today, as the massive millennial generation takes the lead in adopting “glamping” as another avenue to the outdoors.

Glamping – a word manufactured by the combination of “glamorous” and “camping” – brings together nature and modern luxury to create an outdoor experience not previously provided to leisure travelers in North America.

As with any new phenomenon, glamping comes with a fresh set of questions. Just how popular is glamping? Is it a passing fad, or is it here to stay? And what exactly do “glampers” want from their outdoor experiences?

This first-of-its-kind North American Glamping Report – sponsored by Kampgrounds of America, Inc. – brings answers to those and many more questions. The North American Glamping Report shows glamping is a travel trend on the rise, fueled by high levels of participation among young, diverse leisure travelers.

Glamping also appeals to experienced travelers in search of something new. They like their surroundings to be comfortable, but they also yearn for adventure.

Accommodations that fit into leisure travelers’ definitions of glamping are many and varied. The North American Glamping Report finds survey respondents identifying glamping accommodations as canvas “safari” tents, covered wagons, teepees, yurts, tree houses and even cabins. The availability of these accommodations is growing rapidly, including at traditional campgrounds across North America.

Is glamping here to stay? Undoubtedly. It’s the perfect solution to a surging desire among a growing demographic to connect with nature... but on their own terms. It’s a “dialed up” outdoor experience that appeals to a huge, younger group of leisure travelers.

For many, glamping will be their introduction to the outdoors.

Once that initial introduction is complete, a long, blossoming relationship is practically a given.

## TABLE OF CONTENTS

### 2 About this Report

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### SUMMARY OF KEY FINDINGS

- 3 Glamping is a Travel Trend on the Rise
  - 4 Factors Fueling the Glamping Trend
  - 8 Glamping as a Unique Vacation Option
  - 10 A New Type of Experience for Those Who Travel the Most
  - 13 Getting Outdoors to De-stress – in Comfort
- 

### THE GLAMPING EXPERIENCE

- 15 Accommodations
  - 16 Amenities and Services
- 

### THE FUTURE OF THE GLAMPING MARKET

- 19 Glamping’s Bright Future
- 

### METHODOLOGY

- 20 Background and Households Results
  - 20 Incidence
- 

### GLOSSARY

- 21 Research Terms
- 

“In every walk with nature, one receives far more than he seeks.”

John Muir, famed naturalist known as the “Father of the National Parks”



# ABOUT THIS REPORT

A first-of-its-kind report, the 2019 North American Glamping Report provides insights into the growing travel trend of glamping among leisure travelers throughout the U.S. and Canada.

The findings summarized in this report represent the sentiment and preferences of general leisure travelers (comprised by general travelers and campers who indicated they had glamped in the past two years), in the U.S. and Canada. The following definition of glamping was presented to respondents: “Glamping” is defined as a form of camping involving accommodations and facilities more luxurious than those associated with traditional camping. This could include unique types of accommodations such as tree houses, ‘safari-style’ tents with comfortable beds, or even accommodations with full bathrooms and kitchens or other services and amenities to enhance the outdoor experience.

For more information on the methodology of the North American glamping survey, see the Methodology section at the end of this report. For questions or to learn more about the findings of the survey, visit [KOAPressRoom.com](https://www.koapressroom.com).



# Glamping is a Travel Trend on the Rise

Over the past two years, 30 percent of all leisure travelers have taken a trip that they self-define as glamping.

## INCIDENCE OF GLAMPING AMONG ALL LEISURE TRAVELERS\*



*\* Respondents were asked whether they had taken a trip over the past two years that included glamping, but were not provided with a definition of glamping prior to answering the question. Thus, results of this question are self-defined by the respondent.*





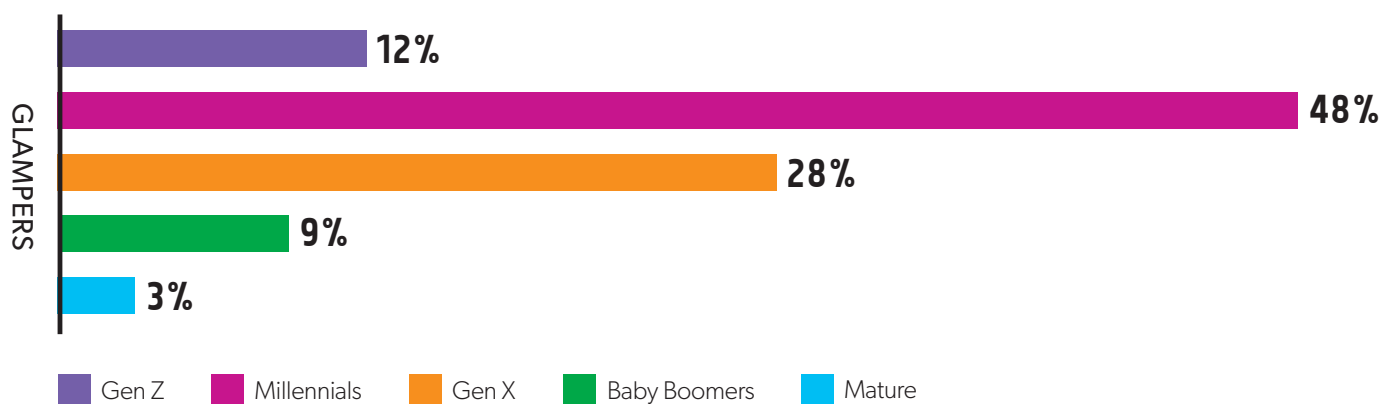
## SUMMARY OF KEY FINDINGS

# Factors Fueling the Glamping Trend

Overall participation in glamping, much like the results observed in the North American Camping Report, is being driven by higher levels of participation among a younger, more diverse group of leisure travelers, including young families.

Sixty percent of leisure travelers who have glamped in the past two years are from the millennial or Gen Z age groups.

## LEISURE TRAVELER PARTICIPATION IN GLAMPING BY GENERATION



See Glossary of Terms on page 21



Glampers  
represent a young  
demographic  
profile.





Couples with children represent close to half of all glampers.





## SUMMARY OF KEY FINDINGS

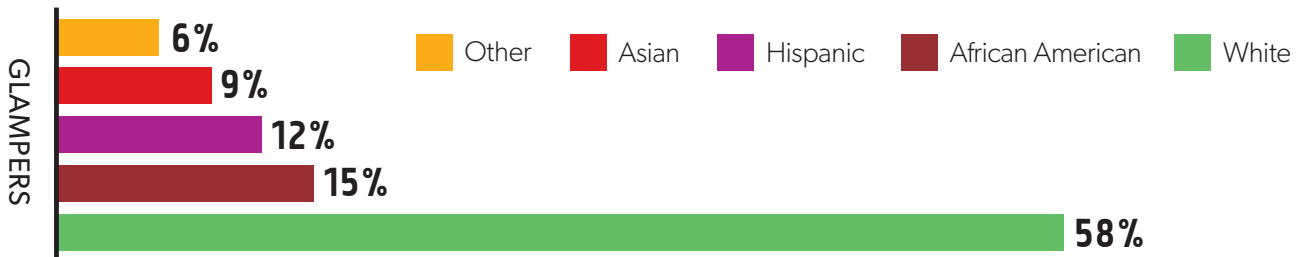
Couples with children represent close to half of all glampers, compared to just over one-fourth of non-glampers.

### LEISURE TRAVELER PARTICIPATION IN GLAMPING BY HOUSEHOLD COMPOSITION



Of travelers who glamp, 42% are non-white.

### LEISURE TRAVELER PARTICIPATION IN GLAMPING BY ETHNICITY





## SUMMARY OF KEY FINDINGS

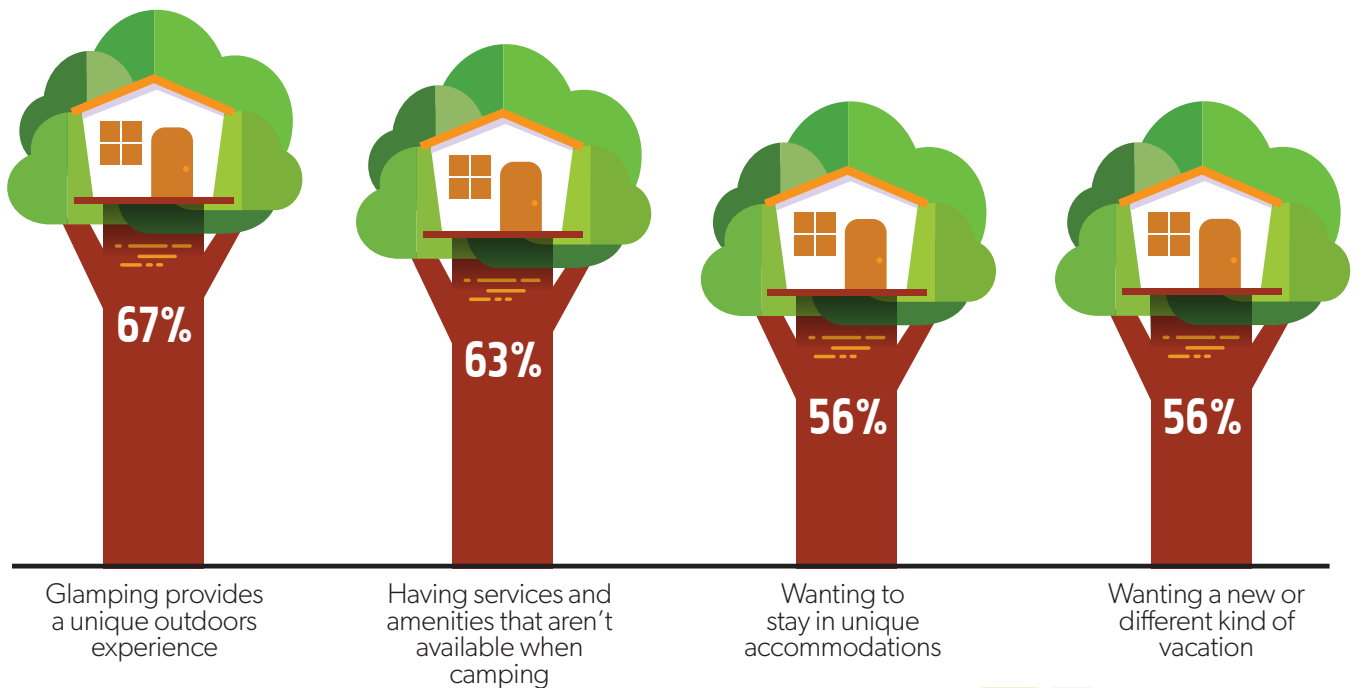
# Glamping as a Unique Vacation Option

Glamping appears to be fulfilling travelers' desire for a unique vacation option – 67% of travelers agree that glamping is a unique vacation experience.

Travelers who are interested in glamping – including those who have already glamped, and those who have not yet glamped but say they would like to try it – say that interest stems from their desire for a unique outdoors experience (67%). This group wants their glamping experience to come with services and amenities that aren't available with traditional camping (63%).

Also driving travelers' interest in glamping are the accommodation options themselves: 56% of travelers say they want to stay in unique accommodations such as treehouses, yurts, teepees or covered wagons during a vacation.

## TRAVELERS' VIEWS TOWARD GLAMPING AND UNIQUE VACATION EXPERIENCES (% "Agree")





67% of travelers agree that glamping is a unique vacation experience.





## SUMMARY OF KEY FINDINGS

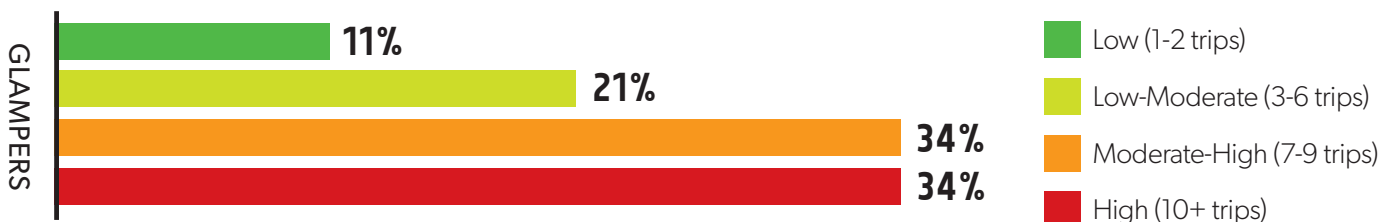
# A New Type of Experience for Those Who Travel the Most

Those who have glamped are much more likely to include high frequency travelers (those who take the greatest number of trips which includes 10 or more trips annually). Indeed, two-thirds of glampers (68%) are travelers who take seven or more trips annually.

It's not surprising that the appeal of glamping as a new, unique travel experience is even more pronounced among these high-frequency leisure travelers. This group will have many destinations and experiences under their belt, and are looking for new travel experiences they haven't tried before.

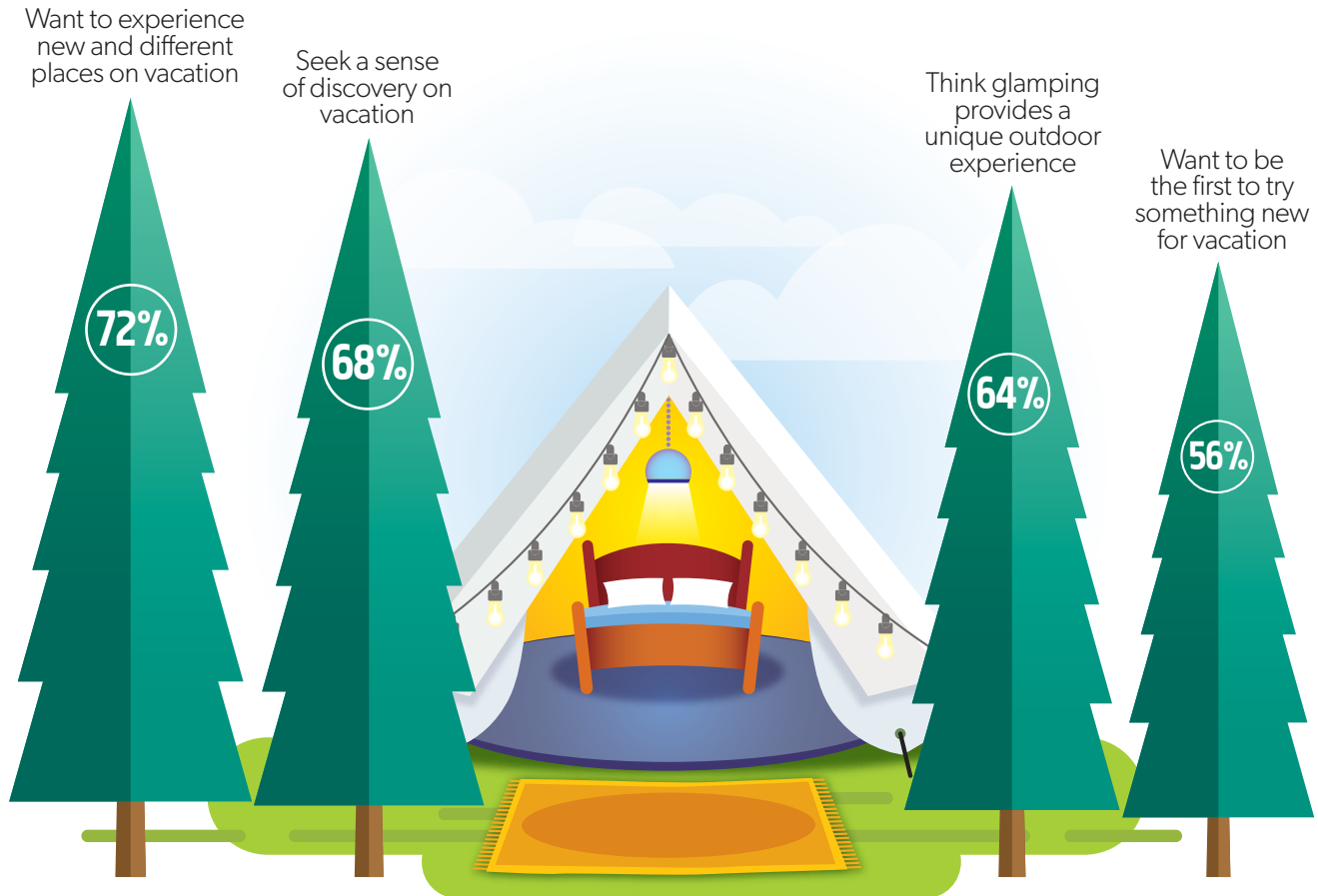
- This set of high frequency travelers not only takes the greatest number of trips each year, but also have the highest variety of travel experiences (four or more different experiences in the past two years) and express interest in the greatest number of different trip types they want to experience in the coming year (three or more).
- This group of travelers is most likely to view themselves as adventurous, anchored by a strong majority (72%) wanting to experience new and different places while on vacation.
- Close to two-thirds express an interest in glamping. Combined with their intent for taking new types of trips in the future, this suggests that these travelers are highly likely to seek new and different vacation options.

## FREQUENCY OF VACATION TRIPS AMONG GLAMPERS





### HIGH FREQUENCY TRAVELERS' VIEWS TOWARD UNIQUE VACATION EXPERIENCES





Glamping is particularly appealing to travelers who want to spend time outdoors, but who don't want to camp in the traditional sense.

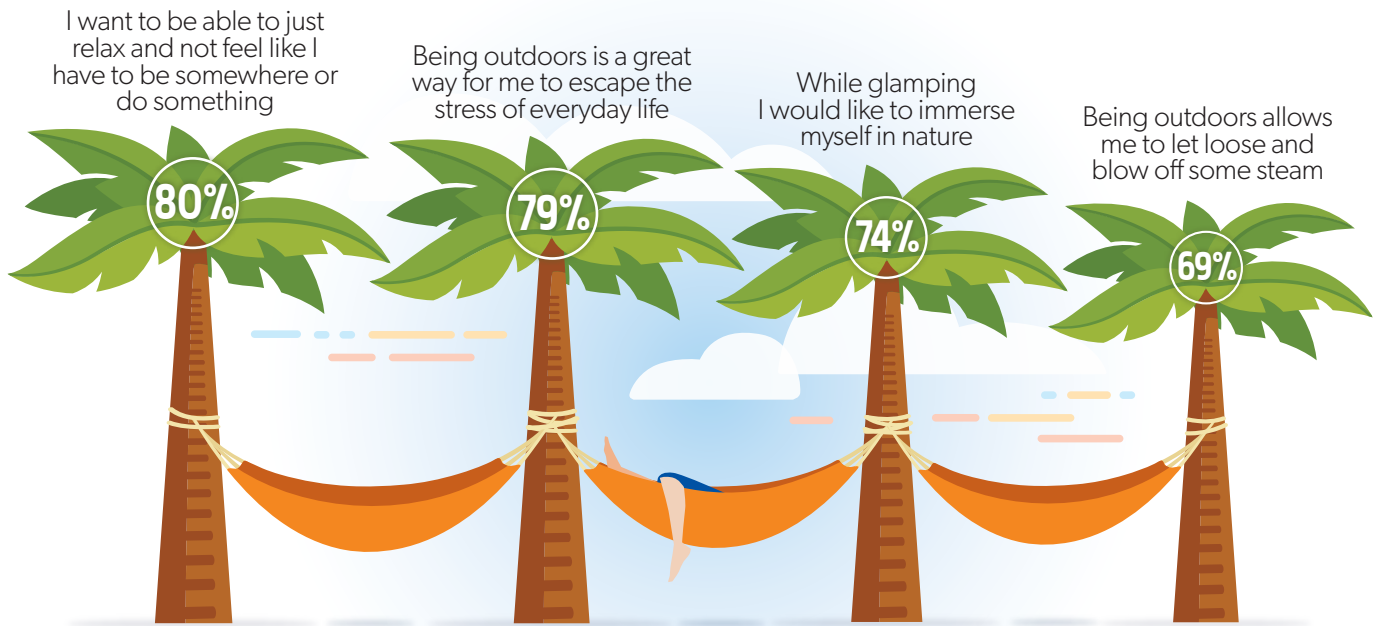




# Getting Outdoors to De-stress – in Comfort

Travelers' are seeking the outdoors as a way to escape – using it as a place where they can relax and recharge away from the stresses of everyday life.

## VIEWS TOWARD VACATION EXPERIENCES THAT ALLOW FOR STRESS REDUCTION, AMONG TRAVELERS INTERESTED IN GLAMPING



Glamping is particularly appealing to travelers who want to spend time outdoors, but who don't want to camp in traditional ways. Travelers who do not camp say that glamping allows them to experience the outdoors in comfort (83%), have the services and amenities not associated with traditional camping (63%), and alleviates some of the "work" associated with more traditional forms of camping (27%).

Additionally, it appears that glamping is meeting the needs of this group (non-campers) when it comes to gaining the de-stressing benefits of spending time outdoors but with the comforts akin to a hotel or resort – 81% of those who have already tried glamping are open to the possibility of trying it again.





Cabins stand out as the preferred way to glamp.





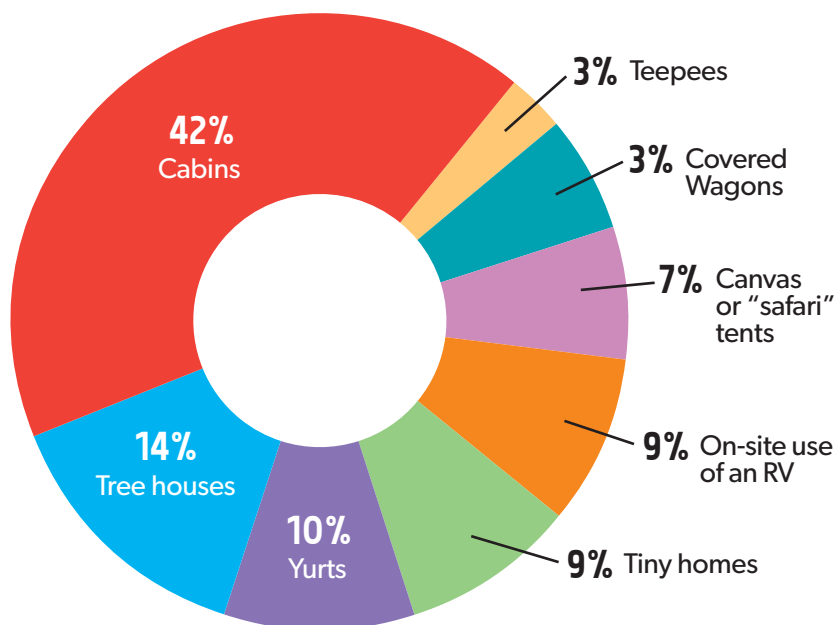
### Accommodations

With a wide range of glamping experiences and different types of accommodations available across North America, cabins stand out as the preferred way to glamp among travelers who seek a glamping experience.

When asked what type of accommodation best fit their definition of glamping, 64% of travelers said cabins, followed by tree houses (58%) and tiny homes (55%).

When asked what type of accommodation they would seek for their own personal glamping experience, travelers again selected cabins most frequently at 42%.

ACCOMMODATIONS SOUGHT BY TRAVELERS INTERESTED IN A GLAMPING EXPERIENCE



# THE GLAMPING EXPERIENCE

## Amenities and Services

Travelers interested in glamping want services and amenities associated with that of hotels or resorts. They prioritize services and amenities that include social activities, Wi-Fi, a full kitchen and private restrooms – and they want them in a family-friendly, laid back atmosphere that offers a mix of activities and peace and quiet.

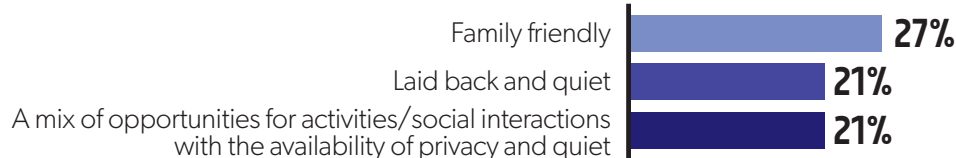
### TRAVELERS' PREFERRED GLAMPING SERVICES



### TRAVELERS' PREFERRED GLAMPING AMENITIES



### TRAVELERS' PREFERRED GLAMPING ATMOSPHERE

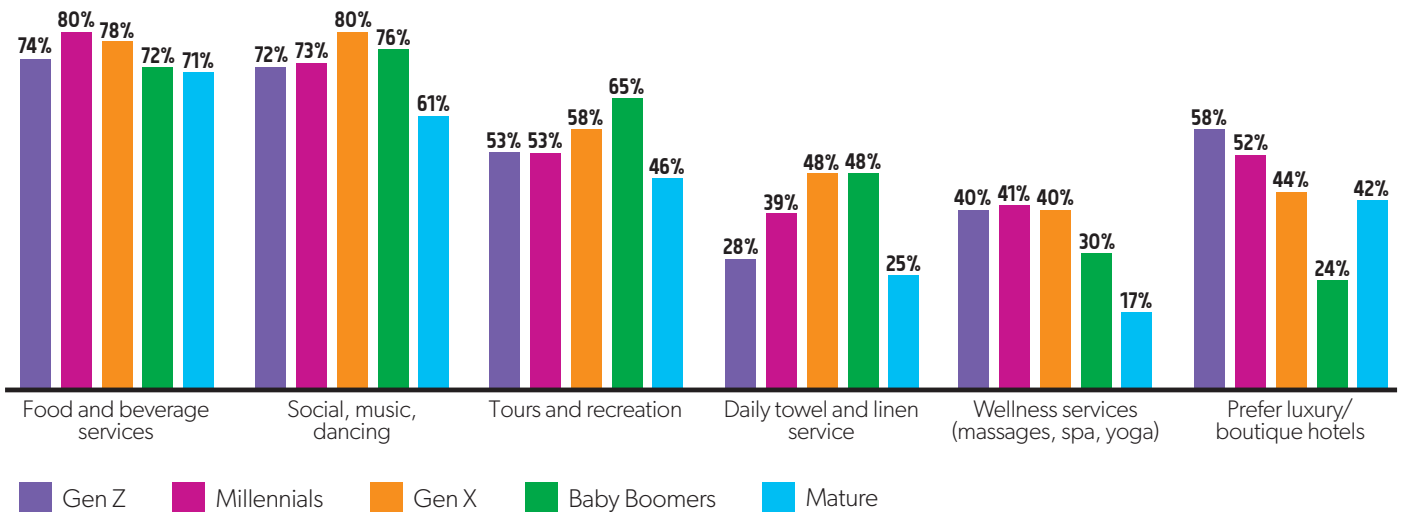




## THE GLAMPING EXPERIENCE

Gen X, millennial and Gen Z travelers are more likely to seek the services and amenities associated with health and wellness (e.g., spa treatments, yoga, etc.), compared to older leisure travelers. Of all the age bands, Gen Z travelers are the most likely to say they prefer a more high-end, luxury vacation experience.

### TRAVELERS' PREFERENCES FOR GLAMPING SERVICES AND AMENITIES, BY GENERATION



See Glossary of Terms on page 21





The glamping market is well positioned for continued growth.





## Glamping's Bright Future

Desire among leisure travelers to take a glamping trip in the future is highest among leisure travelers who have had a prior experience with glamping (77%). Demographically, the greatest interest expressed is among Gen X and millennial travelers, and especially those with children.

Interest in glamping in the future is also high across all ethnic groups. Given that young, non-white travelers are also more likely to have already tried glamping and are saying they'd do it again, and considering that these groups represent large segments of the U.S. population, this is an important indicator of whether glamping is a trend that will come and go, or one that's here to stay.

With the young, diverse set of travelers – and especially families – expressing a strong interest to either take a glamping trip for the first time or to make it part of their regular vacation plans, the results of this research indicate that the glamping market is well positioned for continued growth in coming years.

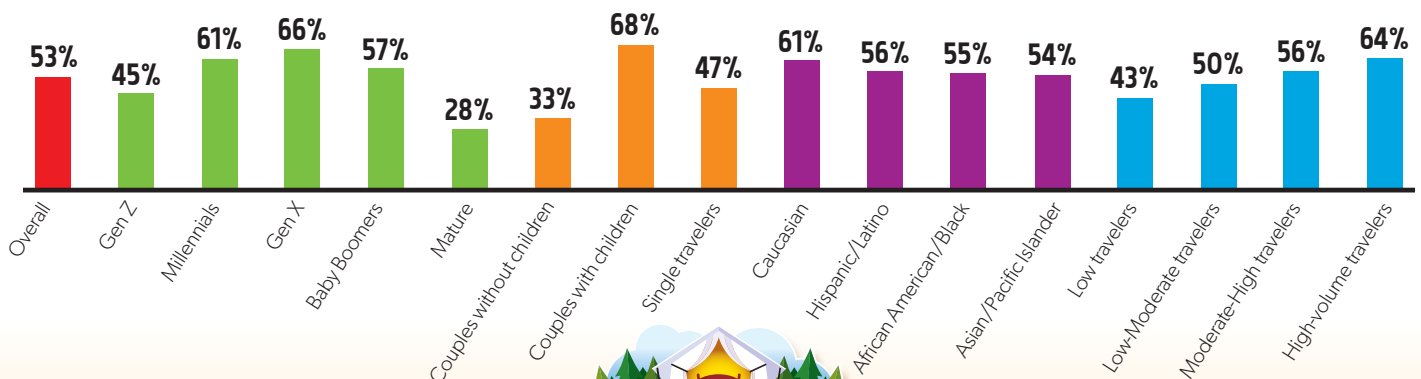
Glamping also represents an opportunity to introduce a sector of leisure travelers to the outdoor experience, primarily among those who do not currently engage in more traditional forms of camping. Of note, 44% of leisure travelers who do not camp express at least some level of interest in taking a glamping trip in the future. And with the growing popularity of camping, even more campers say that they are interested in having a glamping experience (57%).

*These results suggest that glamping not only taps into a segment of travelers who do not camp, but also offers a new type of outdoors experience among the set of current campers.*

## INTEREST IN GLAMPING IN THE FUTURE (AMONG GLAMPERS, CAMPERS AND TRAVELERS WHO HAVEN'T GLAMPED OR CAMPED)



## INTEREST IN GLAMPING IN THE FUTURE





## METHODOLOGY

### BACKGROUND AND HOUSEHOLDS RESULTS

The North American glamping 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 July 2019. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households. Sampling was designed to obtain  $n=4,034$  completed survey among representative U.S. households and representative Canadian households.

A sample of  $n=3,554$  U.S. households is associated with a margin of error of  $\pm 1.66\%$ . Among Canadian households, a sample of  $n=500$  is associated with a margin of error of  $\pm 4.37\%$ .

All surveys were completed online via an outbound solicitation sent to a randomly selected cross-section of U.S. and Canadian households.

### 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 for age, gender and ethnicity.





## Research Terms

**Baby Boomer** – Born 1946 to 1964

**Boutique Hotel** – A hotel that typically has between 10 and 100 rooms in unique settings with upscale accommodations and individualized unique selling points.

**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.”

**Generation X** – Born 1965 to 1980

**Glamping** – Glamping is defined as a form of camping involving accommodations and facilities more luxurious than those associated with traditional camping. This could include unique types of accommodations such as tree houses, ‘safari-style’ tents with comfortable beds, or even accommodations with full bathrooms and kitchens or other services and amenities that enhance the outdoor experience.

**High-Frequency Traveler** – A traveler who takes 10 or more trips annually

**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.

**Luxury Hotel or Resort** – Such as a Four Seasons, St. Regis, or Park Hyatt

**Mature** – Born prior to 1946

**Mid-range Hotel or Resort** – Such as Marriott or Hilton

**Millennial** – Born 1981 to 1996





