

Celebrating a decade of industry-leading research, Kampgrounds of America, Inc. will release a new series of supplemental reports to further examine the dynamic landscape of camping and outdoor hospitality. These reports will provide deeper insights and exploration following this top line overview.

Top Level Overview



Camping in Canada



Glamping

Outdoors and Wellness











Camper Profile

Economic Impacts

Campground Modernization

Families and Kids

Accessibility













STAYING AHEAD OF THE CURVE

A decade ago, when Kampgrounds of America, Inc. (KOA) began surveying campers in North America, no one could have predicted how much the landscape of outdoor travel would change. While camping has always been a popular activity enjoyed by millions of outdoor enthusiasts, in the past decade, it has emerged as much more than a way to get outside. Through our research, and engagement with campers, we've seen camping evolve from simply being considered an outdoor activity to becoming a formidable segment of the travel marketplace.

KOA's first survey in 2014 revealed the potential for growth within the camping market. Over the next several years, this growth actualized as more people sought experiences in the great outdoors. As the market grew, so did the offerings. Campgrounds added new accommodation types, creating more ways to explore. RV sites modernized amenities, from deckedout patios to private pet enclosures. The rise of glamping, a segment largely unknown in 2014, opened the great outdoors to a whole new set of travelers.

Then, there was a pandemic. Something unimaginable when our research began, COVID-19 left indelible marks on the last decade. As other travel sectors stalled, camping surged, accelerating growth exponentially. Travelers who would never consider themselves campers found their way outdoors, discovering a new travel option. Through this dramatic, unexpected growth, Kampgrounds of America, Inc.'s research broadened to include all travelers, understanding the need to look holistically at outdoor hospitality as more immersive experiences began allowing deeper connections to place and people.

This year, we're further expanding our research to show the changes over the last decade and bringing greater focus to the future of camping and outdoor hospitality. KOA is celebrating a decade of industry-leading reporting by introducing a new series of reports. Each will offer a deeper look into all aspects of the outdoor hospitality industry.



Despite all of the changes over the last 10 years, one thing remains constant: even more people see the importance of connecting with nature.

Heeding the call, outdoor hospitality offers countless ways for a broad range of travelers to have one-of-a-kind experiences with those that matter most.



Over the past decade, the camping and outdoor hospitality landscape has undergone significant transformations. During this time, the number of overall camping households increased by 23%, while active camping households surged by an impressive 68%. This uptick in camping interest was further evidenced by the dramatic growth in households who venture out three or more times (98%). Demographically, campers have become younger (close to half of campers since 2022 are under the age of 35, compared to 30% in 2014) and more diverse compared to 10 years ago (39% of campers are non-white versus 23% 10 years ago).

These statistics indicated a robust and sustained interest in camping, underscoring its growing popularity among a wide range of individuals and solidifying the importance of outdoor hospitality.

The camping and outdoor hospitality sector has seen other changes that have drawn in a new set of leisure travelers representing nearly every demographic segment. While camping and outdoor hospitality grew steadily throughout the first six years of KOA's research, the onset of the COVID-19 pandemic resulted

in a massive influx of new guests. This new guest profile was more familiar with leisure travel and luxury accommodations.

These changes helped dramatically boost the popularity of glamping. In fact, glamping was not included as a sub-category in the early iterations of KOA's annual survey but is now a solid part of the mix of camping accommodations, accounting for 15.6 million new entrants in the past five years.

Camping households (those who identify as campers) have increased by 16.5 million additional households

23% INCREASE

The number of active camping households (camped in the past year) has increased by a whopping 21.6 million additional households

68% INCREASE

All types of accommodations have seen an increase in use:

Tent usage is up 56%

9.6 MILLION

RV usage is up 96%

6.4 MILLION

Cabin/Glamping usage is up 101%

7.0 MILLION

New campers represent an average of

9% OF GUESTS

each year, with 2020 (21%), 2021 (16%), and 2022 (11%) showing the greatest increases.

Since 2014, there has been a

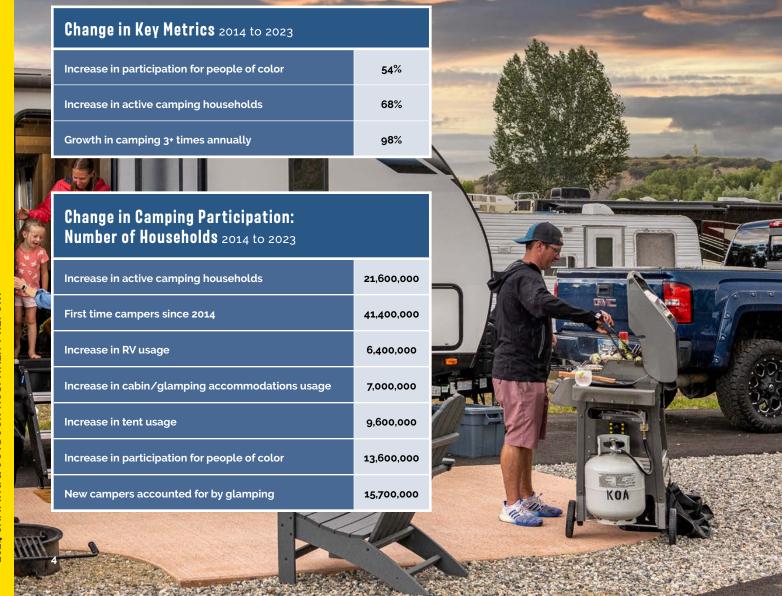
98% INCREASE

in the number of households who camp three or more times annually.

Over time, the guest experience and growing expectations resulted in an evolving way of exploring the outdoor hospitality experience. Since the survey's inception, these changes include:

- The emergence of new camping experiences, such as glamping and overlanding.
- An increase in the importance of and reliance on technology such as Wi-Fi, AI, and other trip-planning tools.
- Expanded camping location options, reflected in the increased popularity of boondocking, dispersed camping, and peer-to-peer rentals.
- An expansion of services and amenities to better meet guest expectations.
- Significant increase in RV ownership, especially during the pandemic; peer-to-peer rentals more than doubled.
- Marked increase in households who camp with children.

These shifts contributed to one of the more global changes in the framing of KOA's research, as it became evident that camping had expanded, it was important to begin measuring and identifying a new category, "outdoor hospitality."

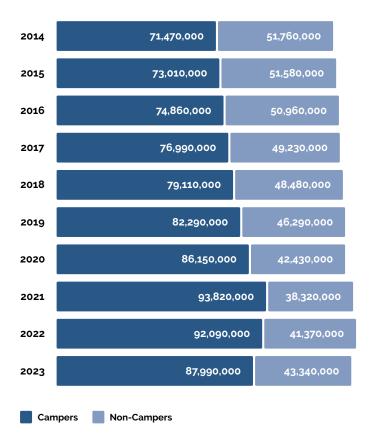


Camping Incidence

Over time, there has been steady growth in the number of households who identify as campers, with the most recent findings in line with the overall growth trend since the inception of the report.

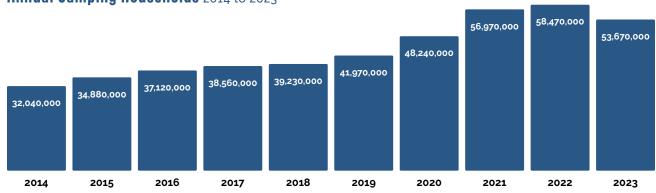


Camping Households 2014 to 2023



Among households who actively took a camping trip in 2023, camping saw a drop from the last two years, continuing the growth expected prior to the pandemic.

Annual Camping Households 2014 to 2023



SECTION 2

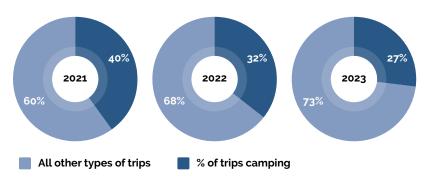
CAMPING & OUTDOOR HOSPITALITY'S PLACE WITHIN LEISURE TRAVEL



Camping has always retained a well-established place within leisure travel; its presence has only bolstered over the past 10 years. Camping accounted for four out of every 10 leisure trips in 2021 due to the direct impact of the COVID-19 pandemic. A look back to 2014 shows that even at that time, six out of 10 U.S. households identified themselves as campers (even if they did not camp every year). That rate has grown over time and would have continued regardless of the impact of the pandemic.

During the COVID-19 pandemic, camping was one of the few options available to leisure travelers. These travelers readily embraced the respite offered by an outdoor experience, accounting for four out of every 10 leisure trips in 2021 and currently constitutes more than a third of all leisure trips.

Share of Leisure Trips 2021 to 2023



Interestingly, a new or rarely reported trend emerged in 2023: 80% of campers participated in "Blended Travel" by integrating camping with other travel forms, such as stays at hotels or resorts, lodges, or vacation homes, reflecting the versatility of camping trips in a traveler's tool set.



Defining Outdoor Hospitality

Kampgrounds of America, Inc. began using the term outdoor hospitality in the early 2000s and has since used our industry-leading research, including thousands of surveys and in-depth interviews, to create a market-driven definition of outdoor hospitality:

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Outdoor hospitality is distinguished by its accommodations (e.g., tents, RVs, cabins, or glamping structures), venue types (e.g., campgrounds and outdoor resorts), proximity to outdoor recreation, and an emphasis on facilitating guest interaction and outdoor experiences (e.g., by providing communal fireside seating). What unifies these elements is the incorporation of staff, guides, or experts who are, at the very least, available for assistance and guidance, or actively engaged in delivering support, information, and instruction.

Accommodations & Services Associated with Outdoor Hospitality

According to campers, outdoor hospitality includes four primary pillars: accommodations (e.g., campgrounds, outdoor resorts, lodges), self-guided recreation using a service (e.g., rentals, skiing/snowboarding, etc.), guided experiences (fishing, hunting, foraging, overlanding), or food services (e.g., barbecues, farm-to-table). For the outdoor hospitality participant, their views on what comprises outdoor hospitality are inclusive of one or more of the offerings included in these categories.

Share of Leisure Trips: 2021 to 2023

Accommodations

60%

Camping at privately owned and operated campground

39%

Staying at an outdoor resort

33%

Staying at a hunting or fishing lodge

26%



The Expansion of Outdoor Hospitality

Over just a few short years, outdoor hospitality became an important and distinct category in the travel industry, offering a unique blend of outdoor activities with the comfort and services of traditional hospitality. Notably, private campgrounds rank first when asked to choose providers of outdoor hospitality. The significance of the human element to outdoor hospitality cannot be overstated; 87% of leisure travelers agree that outdoor hospitality must incorporate a human touch of some sort, whether it's simply having staff available if needed or directly involved in the experience, highlights the essential role of personal interaction.

Millennials, often perceived as technophiles, are particularly vocal about the need for active staff involvement in outdoor hospitality, with 47% stating that staff should be actively involved and 59% preferring staff to be available as needed.

These figures underscore a broader trend where modern travelers, especially younger generations, seek a balance between self-guided adventure and accessible, humancentered service.

To leisure travelers, the defining aspects of outdoor hospitality, setting it apart from standard hospitality, include a majority of time spent outdoors (50%), the presence of typical camping amenities such as fire pits and outdoor seating areas (48%), and accommodations that reflect traditional camping environments, whether in tents or RVs (43%) – making a fascinating contrast between the responsibilities of the participant and the provider to create outdoor hospitality.

As we look to 2024, preference is shifting toward more structured outdoor hospitality experiences, with 36% of guests interested in glamping resorts and 33% leaning toward service-rich campgrounds. This evolution in outdoor hospitality shows a growing market for experiences that marry the rustic appeal of camping with the amenities and comforts of traditional hospitality, all while maintaining that crucial human connection, highlighting its importance in the broader travel landscape.



The Human Elements Included in Outdoor Hospitality

Staff who are available when needed, but do not need to be actively involved

55%

Staff who are actively involved by offering assistance, guidance, information, etc

41%

Other guests involved in the experience

27%

Other 4%

None of these, there is no need for a human element in outdoor hospitality

13%



Over the course of this research, the market has welcomed 39 million new campers, averaging 4.4 million new campers annually. Even before the COVID-19 pandemic, camping brought over 2 million new households annually, representing a consistent upward trend in participation. The desire for outdoor experiences and the benefits of spending time outdoors continue to be the primary draw for new participants and are the best predictor of future participation.

Despite a decrease in the percentage of new campers in 2023, this group still accounted for 7% of campers last year. The rate of new camper entry has remained higher than pre-pandemic levels, underscoring sustained interest in camping amid increasing focus on outdoor hospitality. One-third of new campers opted for glamping accommodations, while tent usage continued its steady decline as a first-time accommodation, potentially a result of access to increased accommodation options.

The new camping base has continued to be more diverse than the overall camping market, with nearly half of new campers in the U.S. and over half in Canada being non-white.

Over half of new campers in 2023 chose campgrounds with extensive services and amenities, marking a substantial 24-point increase over 2022. This preference correlated with a 17-point rise in new campers describing their first camping experience as "Great," a link between enhanced outdoor hospitality and positive camping experiences.

During pandemic travel years, camping saw a significant uptick in urban, younger, and high-earner households entering into camping. Last year, most of

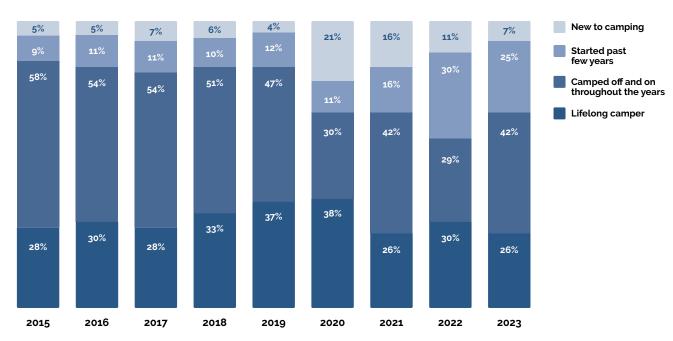


these new campers were from families earning less than \$100,000, predominantly from suburban and rural areas. The past year also saw a higher proportion of baby boomers, 59% of whom were retired and on fixed incomes, and a lower-income Gen Z group.

Additionally, a drop in the participation of millennials, who are currently at peak earning years, significantly influenced the new camper dynamics. These changes have continued to highlight the evolving nature of the camping market and the fluidity it can withstand.

With the inclusion of outdoor resorts, more than half of all new guests in 2023 started at a campground with a lot of services and amenities or an outdoor resort. Over time, more and more new guests have opted to stay at locations with more amenities.

Camper Experience Level 2015 to 2023





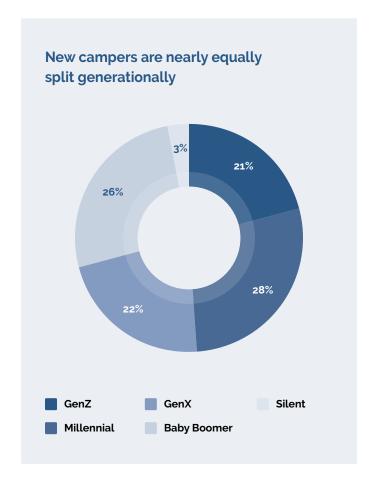
New Camper Profile 2023

64% of new campers do not have children in the household

Nearly 1 in 4 new campers have a household income over \$100K

Nearly 2/3 of new campers are from suburban or rural areas

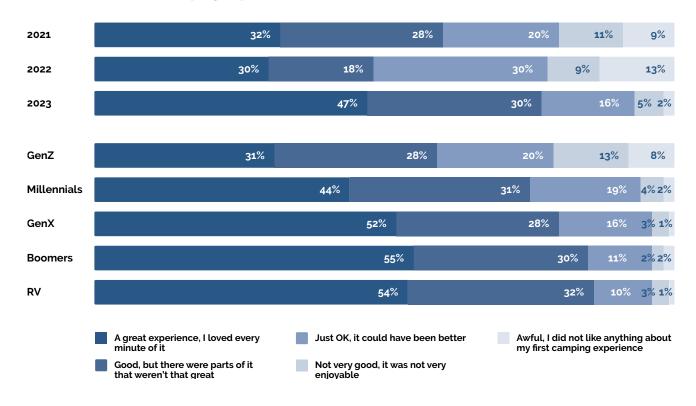
45% of new campers are from diverse backgrounds





In a major jump over the past two years, nearly half of new guests reported having a great first outdoor experience, a result driven by entry-level participants staying at locations with more developed amenities. Gen Z campers were least likely to have a great first experience.

Views Toward First Camping Experience



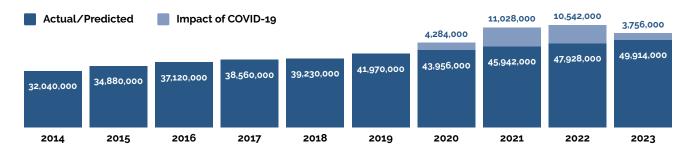
SECTION 4

RETAINING CAMPERS



Before the COVID-19 pandemic, the set of active campers grew around 7% annually, adding about 2 million new households year-to-year. While the results of the research demonstrate a certain degree of attrition, mostly among that set of new campers from 2020 to 2022 who expressed a desire to return to their previous travel habits, there has been a degree of retention among these guests. Approximately 3.8 million additional highly engaged camper households would not have been included in 2023 figures (based on pre-2020 trends) without the impact of COVID-19.

Growth in Camper Households: Actual vs. Projected Without the Impact of COVID-19



While an increasing number of guests have tried and stayed camping, as the outdoor hospitality and camping sector evolves, it's crucial to understand the "at-risk camper." This allows for a deeper understanding of the motivations and barriers that affect camping decisions and increases the number of lifelong camping enthusiasts.

In 2024, the top reasons for not camping include a range of concerns: 21% of potential campers prefer other accommodations, financial constraints hinder 19%, another 19% cite a lack of safety and security, 18% prefer different types of vacations, and overcrowded campgrounds deter 17%. These factors have some telling insights that could point to macroeconomic trends related to post-COVID-19 travel returning, stress from an election year, economic well-being, war, and supply chain worries.

Encouragingly, "at-risk campers" have seen a yearover-year decline, dropping from 45% to 28%. However, certain groups are more likely to not participate in camping in 2024. These include 37% of Gen Z individuals, 41% of Black guests, 46% of Asian guests, and a notable 48% of households without children. Baby boomers also show significant reluctance, with 58% less likely to camp - possibly related to retirement and fixed incomes. Additionally, 66% of individuals who did not have any new camping experiences in 2023 fall into the "at risk" category. These statistics reveal the varied reasons behind the reluctance to camp and underscore the importance for outdoor hospitality providers to tailor their experiences and marketing strategies. By doing so, they can convert these "at risk" individuals into regular, enthusiastic campers.



Barriers to Camping 2021 to 2023	2021	2022	2023	Change
Prefer other types of vacations	17%	20%	18%	-2
Prefer other types of accommodations	10%	19%	21%	2
Do not have anyone to camp with	6%	17%	12%	-5
Cannot afford to travel	22%	15%	19%	4
No camping destinations nearby where I live	4%	15%	13%	-2
Did not get along with travel companions	3%	15%	15%	-0
Did not have the right gear	10%	14%	10%	-4
Transportation	7%	14%	12%	-2
Campgrounds were overcrowded	5%	14%	17%	3
Bugs/pests	17%	13%	10%	-3
No interest in camping/lost interest	20%	13%	9%	-4
Work obligations	14%	13%	13%	o
Other family members do not want to camp	19%	12%	15%	3
Had a negative camping experience	9%	11%	12%	1
Did not feel safe and secure	7%	8%	19%	11
Health issues	N/A	4%	11%	7



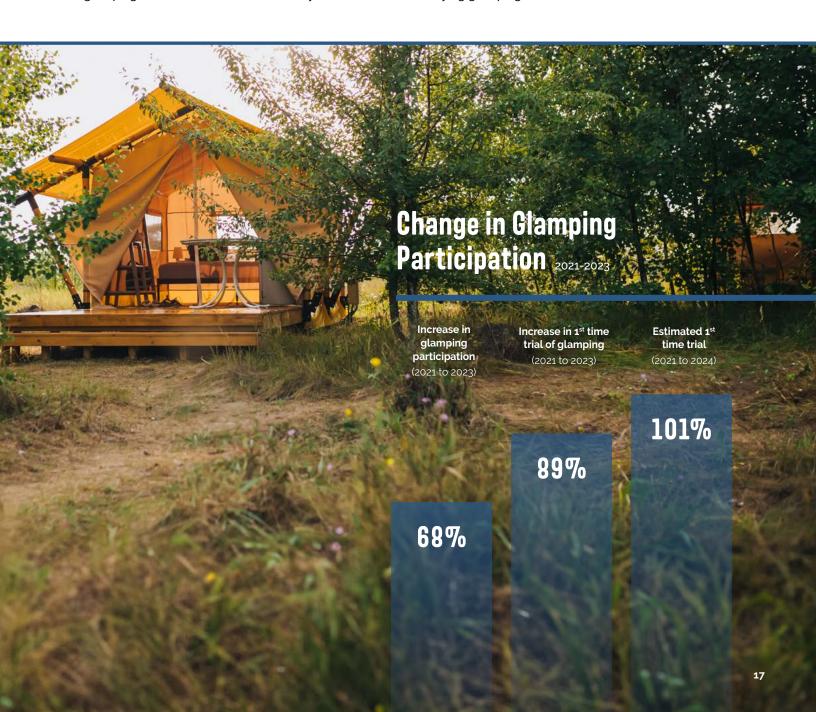
Glamping: An Emerging Outdoor Hospitality Trend

Since 2014, glamping has gone from a somewhat fringe mode of exploration to a household word holding a solid place within the mindset of those seeking an outdoor hospitality experience. Momentum for glamping has taken hold since the COVID-19 pandemic when it offered a respite for the leisure traveler seeking a travel experience when many other forms of hospitality (e.g., hotels, motels, resorts) were closed or limited.

In 2017, a survey of campers found that three out of 10 campers had no exposure to or awareness of the word glamping. About one-third had what they considered

to be a glamping experience. Additionally, their expectations of what would be included in a glamping experience were what can be found at many full-service private campgrounds (e.g., Wi-Fi, a bed in the cabin/structure, outdoor grill, outdoor recreation).

This past year, it is notable that 58% of all campers say that they have been glamping, with the rate of participation up 52% from 2022 to 2023. First-time trial of glamping has grown from 18% in 2021 to 32% in 2023. In 2023, 34% of new guests are self-identified glampers. Looking ahead to this year, 36% of guests are interested in trying glamping for the first time.





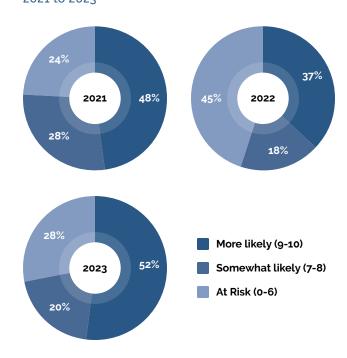
Over the past decade of measuring leisure traveler sentiment, there has been a great deal of favorable growth in camping and outdoor hospitality. The outlook for 2024 is similarly optimistic as the views and behaviors of the leisure traveler are placed into the context of the overall travel picture.

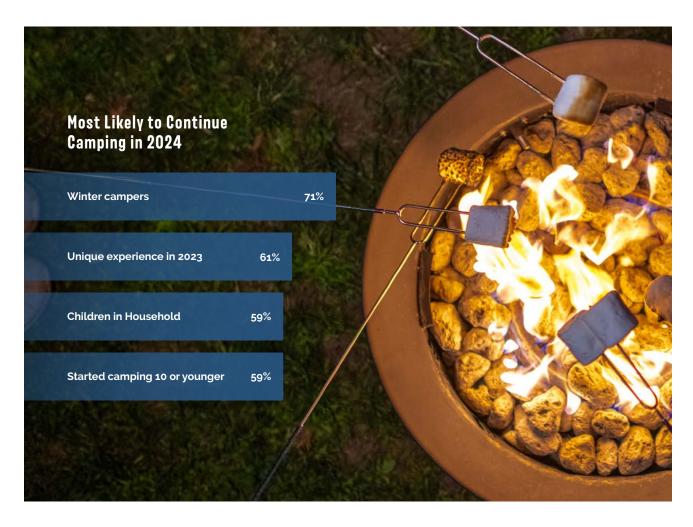
First noted last year, travelers are looking for more ways to explore the outdoors and have unique experiences in 2024. This exploration can include simply slowing down, experiencing nature (and natural events), disconnecting (even if only briefly), and seeking convenience in the type of travel they choose.

To take a more historical perspective, in the 2023 North American Camping and Outdoor Hospitality Report, it was noted that there could be attrition among campers who had started camping during the COVID-19 pandemic, which resulted in a minor decline in participation in camping (but not leisure travel overall). However, compared to 2022, the outlook for 2024 is similar and would suggest a robust 2024.

Looking ahead, over half of campers are more likely to keep camping in 2024, a 15% increase over 2023 (and a corresponding decrease in the at-risk segment). With optimism rising, assuming fewer external factors such as major weather or natural disaster events, 2024 should reflect a consistent increase over 2023 results.

Likelihood of Camping in the Coming Year 2021 to 2023

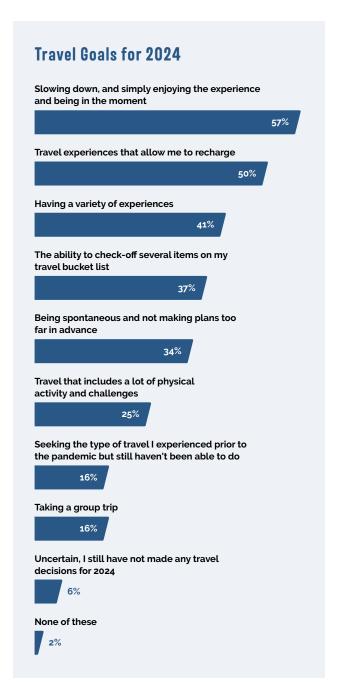




2024 Travel Experiences

In 2024, the top travel goal is to slow down and enjoy experiences, a priority for 57% of travelers. Additionally, 50% say they will seek travel that allows them to "recharge." There's a noticeable shift towards health and wellness in travel choices, with half of travelers gravitating towards water-based trips for their physical and emotional wellbeing, underlining a broader trend towards more holistic and varied travel experiences.

Among travelers who mention slowing down during their trips, 79% say they plan to use forest immersion, meditation, yoga, and/or mindful strolls during their trips. With the influx of new guests in the past few years and a perceived need for longer-term planning, one-third of campers want to be spontaneous in their travel. Spending time with family and friends is an important consideration for 2024 travel among campers and non-campers alike.

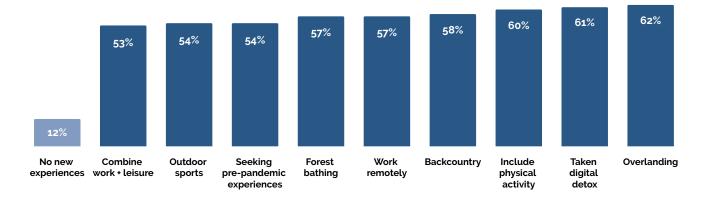


New camping and travel experiences continue to garner interest among travelers, with first-time trial of glamping continuing to climb among new and existing guests. By contrast, experimenting with full-time RVing continues to decline, while first-time trial of backcountry camping nearly doubled from 17% to 31%.

New travel experiences are driving continued interest and participation in camping. When considering whether these new experiences impact future intent to camp, there are some striking differences based on the type of trip taken. If a guest had no exposure to new experiences in 2023, their intention to spend more time camping or glamping in 2024 is significantly lower than those who had any type of new experience. Among the different kinds of experiences, overlanding, taking time for a digital detox, and including physical activity in their trips prompts guests to seek more outdoor travel this year.



Percent Intend to Camp More in 2024 by New Camping Experiences



All campers are strongly interested in natural attractions, and 2024 will be no different in terms of their popularity. Food tourism and visiting small towns also appeal to campers. One-fourth of campers plan to combine work and leisure travel experiences, and a similar proportion would like to experience an all-inclusive resort.

Travel Experiences Planned for 2024				
Natural events	50%			
Food tourism	31%			
Visiting small towns	29%			
Combining work + leisure travel	27%			
An all-inclusive outdoor resort vacation	25%			
Less focused on activities, more on enjoying the surroundings	23%			
Agritourism	21%			
Engage with the local community	20%			
Adventure travel	20%			
Wellness retreats	17%			
Unique outdoor experiences	17%			
Wild swimming	13%			
Eco-tourism	12%			
Volunteer work	12%			
Solo leisure travel (other than camping)	11%			
Leading or taking part in a group on a youth trip	6%			
Trips that include both business and pleasure trips	5%			
None of these	6%			





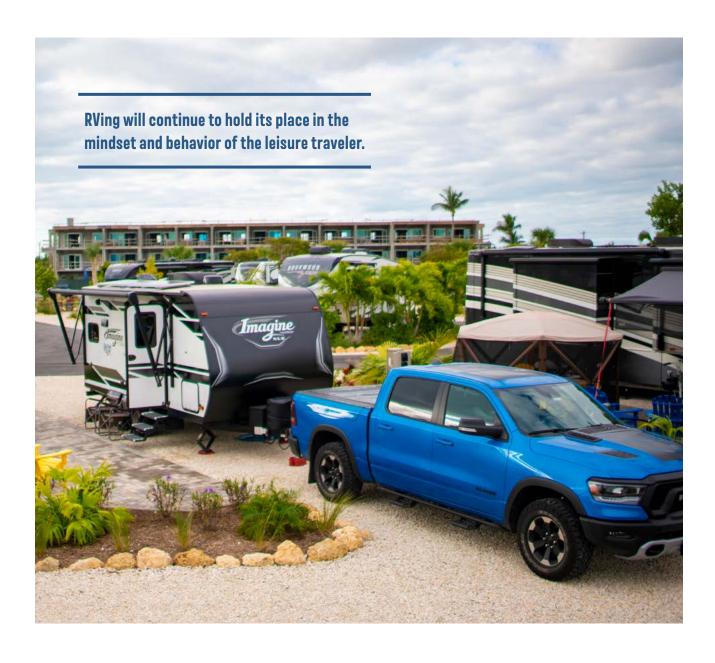
Using the past ten years as a guide, the next ten will see some changes in the camping and outdoor hospitality landscape. Recent trends prioritize the level of services and amenities offered, especially at full-service campgrounds and outdoor resorts. This evolution has captured a new set of guests from the traditional leisure travel sector who previously stayed at hotels and resorts yet want an outdoor experience. The array of services and amenities will likely continue to develop and evolve, blending the more traditional type of campground/outdoor resort with offerings of traditional resorts.

Other segments of the outdoor hospitality sector will likely focus on a more rustic experience, that is less-connected and closer to nature. Purveyors of outdoor hospitality will benefit from leisure travelers' desire to escape the crowds and noise of their daily lives by offering a more tranquil environment. This ties to the growing interest in backcountry experiences and the desire for wilderness immersion and isolation in areas less traveled.

RVing will continue to hold its place in the mindset and behavior of the leisure traveler. Many RVers will seek to experience the spontaneity of pre-pandemic RVing while exploring with their own set of amenities on board. RVers and those interested in the lifestyle will continue to enjoy the benefits of having their own space that offers travel safety and security mixed with flexibility.

Travel planning and booking will continue to evolve. With the advent of AI, blended travel will become even more popular as processes are simplified and customized. Travelers will have all of the information and resources they need for their trip planning at their fingertips, allowing for more agility and less worry.

The pull of nature will always ensure that outdoor hospitality maintains a solid place in the mindset of the leisure traveler. Even with rapid change in some sectors of outdoor travel, that pull will ensure a healthy and vital segment of leisure travel and hospitality.





METHODOLOGY

Background

This report represents the tenth annual installment of a detailed reporting comparing 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. 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, 2020, 2021, 2022, and 2023.

U.S. and Canadian Household Results

The results of the most recent iteration of the Camping & Outdoor Hospitality Report are based on a total of 4,100 surveys completed among a random sample of U.S. (n=2,900) and Canadian (n=1,200) households. Within the U.S. sample of households, results are stratified by Census Region: Northeast (n=725), Midwest (n=725), South (n=725), and West (n=725). Overall, a sample of n=2,900 U.S. households is associated with a margin of error of +/- 1.82 percentage points, while a sample of n=1,200 Canadian households is associated with a margin of error of 2.83 percentage points. All surveys were completed only 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.

For questions regarding usage, please email newsroom@koa.net.

GLOSSARY

Research Terms

Baby Boomer - Born 1946-1964

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 firepits.

Generation X (Gen X) - Born 1965-1980

Generation Z (Gen 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 rooftop 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

