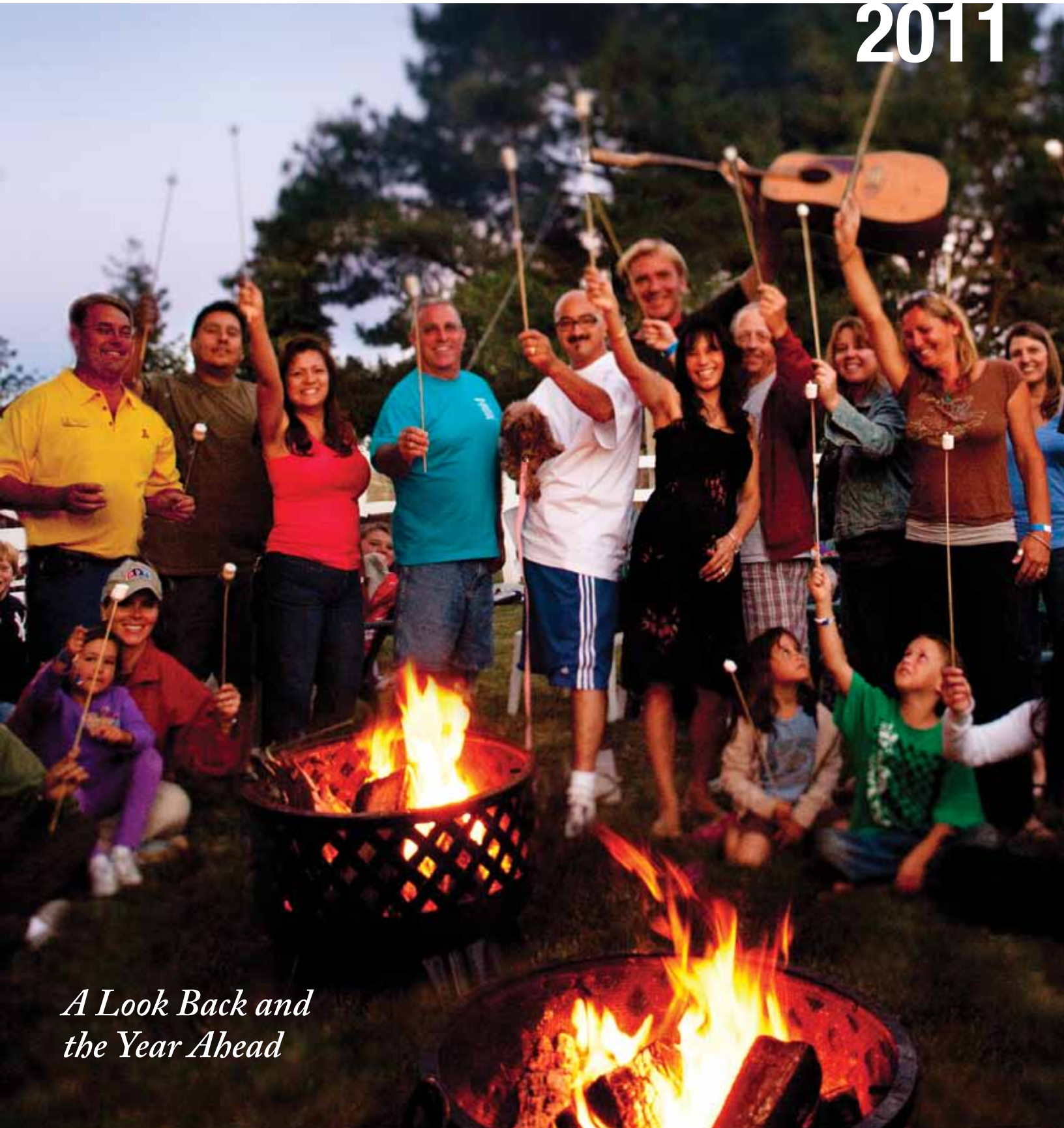


SPECIAL REPORT ON CAMPING 2011



*A Look Back and
the Year Ahead*

A Partnership Project of:





TABLE OF CONTENTS

Introduction	1
Key Findings	3
Camping Participation	5
Profile of a Camping Trip	17
Profile of a Camper	29
Buying Behavior	41
The Future of Camping	47
Method	55

INTRODUCTION

Year over year, camping continues to shine as an American tradition—evolving to accommodate any lifestyle and giving access to any outdoor experience. This 54-page, extended Special Report on Camping provides data and analysis on camping in the United States, presenting detailed information on overall participation as well as motivations, barriers, preferences and buying behavior. Also, for the first time, the Special Report breaks down the camping experience by type of trip as well as by season. In addition, the Report offers an exclusive look at camper profiles—providing valuable psychographic information never before offered in this study. Finally, the publication looks ahead at opportunities and offers a glimpse into the overall future of camping.

A Look Back: Overall Trends

The Report shows that while participation rates were down slightly in 2010, camping over the last several years has maintained its popularity. Approximately 40 million Americans participated in camping in 2010—almost 15 percent of all Americans over age six. Traveling near or far, staying in tents, cabins, RVs or yurts, these campers made a total of 514.8 million outings. On average, each camping participant spent almost 13 days enjoying camping. And these enthusiasts are hooked. More than three-quarters are planning three or more camping trips in the next year—demonstrating the enduring passion Americans have for this activity in good times and bad.

In fact, despite instability in the economy, camping continues to be a major part of the American experience. In hard times or in plenty, camping gives people an escape from the normalcy of everyday life—a bird’s chirp instead of an alarm clock, an open flame instead of an oven, the glow of a flashlight instead of a computer screen...

In addition to providing rest, relaxation and rejuvenation, camping is viewed as being extremely flexible, which keeps it in high demand. It adjusts to personal preferences and economic variables. Camping can provide an affordable alternative to a hotel stay, trips can be taken close to home or further afield and campers can chose between luxury cabins, convenient RVs, cozy tents, rugged bivys and more.

Due to this flexibility, camping is considered by many experts to be recession-proof. According to Rick Newman, Chief Business Correspondent for *U.S. News & World Report*, camping and camping gear are among the top ten recession-proof segments of the economy. Camping gear provides a way for Americans to cut corners but still enjoy a familiar pastime.

The Year Ahead: Future Opportunities

As Millennials come of age in an uncertain economic climate, the accessibility, affordability, diversity and flexibility of camping experiences will prove invaluable. In fact, trend expert Marian Salzman is so bullish on camping, she recently said that the only businesses in which she would consider investing right now are soup and camping.

Her reasoning is that Americans will be looking to escape the long-term economic turmoil and constant barrage of the media by returning to low-cost, simple activities that involve the entire family. In addition, Salzman sees a growing group of “soft rugged” consumers who desire safe outdoor experiences, luxury accommodations and quality meals.

Indeed, research by private campgrounds supports Salzman’s claims. When KOA Campgrounds measured the number of nights campers stayed in lodges during the winter, they saw a 34-percent growth rate from 2010 to 2011, and during the summer, lodging nights were up almost 16 percent.

Recreational vehicle camping offers another “soft rugged” camping opportunity that may be increasing in certain segments. In fact, during a recent speech, Secretary of the Interior Ken Salazar noted a 10-percent jump in RV camping in National Parks from 2008 to 2010.

The Millennial Generation is another area of opportunity, offering a largely untapped audience with great future growth. In fact, Michael Wood, senior vice president at TRU, a research company focused on youth, sees great potential for the camping and outdoor community in appealing to Millennials by communicating camping’s authentic values through action. For example, he suggests increasing investments in sponsoring community outdoor activities such as camping and raising awareness through philanthropy.

When selling a product or just the love of camping, Americans should be engaged in a memorable, exciting experience, recommends Joe Pine, co-author of *The Experience Economy*. Understanding the research in the Special Report on Camping will help tap into the psyche of campers and non-campers alike. The insights will help the outdoor industry, government agencies and civic and nonprofit organizations provide the unforgettable experience that develops Americans into life-long campers.

Note: This in-depth Special Report on Camping is the first of its kind. The Outdoor Foundation and its partners will continue conducting research to determine long-term camping trends.

Key Findings

Overview of Camping Participation

- Almost 40 million Americans went camping in 2010 for a total of 514.8 million outings. This is down slightly from 2009’s 44 million campers and 580.7 million outings.
- Although camping participation increased slightly among adolescents, other age groups lost participants.
- The Mountain Region has the highest camping participation rate with a quarter of its population identifying themselves as campers.
- Seventy percent of all campers are married or living with a domestic partner.
- Nineteen percent of adults with children in their households participate in camping, while only 10 percent of adults without children in their households participate in the activity.
- Over three-quarters of campers participate in multiple outdoor activities.

Profile of a Camping Trip

- Summer is the most popular season for camping. During the summer months, campers typically went on three trips and stayed for three nights.
- Summer trips have longer planning horizons, with over 50 percent of summer campers making the decision to go more than a month in advance.
- Of those summer campers who choose to make campsite reservations, the average booking time is 77 days prior to the trip.
- Seventy percent of all trips are taken with friends, showing the social aspect of camping.
- Family members are the most popular camping companions for 35 to 54 year olds—more than half of their trips include immediate family members.
- More than 50 percent of campers are motivated to go on a camping trip simply because they enjoy the act of camping.
- Ninety-two percent of campers hiked during their last in-season trip.

Profile of a Camper

- Various attitudes toward camping include those who are motivated by family fun, hanging out with friends, enjoying luxuries and pushing one’s own limits.
- “Extreme” campers go camping most often, taking 6.26 trips per year.
- Participants that associate camping with family and kids are most likely to stay at public campgrounds.

Buying Behavior

- Younger campers are most likely to buy backpacks, while older campers are most likely to buy propane lighting. Frequent campers buy the most products.
- Sixty-one percent of campers say they spend about the same amount of money on recreation in 2010 as they did in 2009.
- Campers will spend more on travel to sports and recreation next year than they spent on these things during the previous year.
- Most new and replacement camping purchases are planned at home before taking a camping trip.

Future of Camping

- Campers are planning an average of 5.07 trips next year, down slightly compared to the 5.52 trips made during the previous year.
- Nearly a quarter of frequent campers say their camping trips over the last three years have become longer and more frequent.
- The most cited reason for reducing the number of camping trips are a lack of time due to work and family commitments.
- Almost half of all respondents say their fathers took them camping for the first time. Boy Scouts or Girl Scouts came in a distant second at 17 percent.
- Half of respondents were under the age of seven when they went camping for the first time. Only nine percent of first time campers were 19 or older.



CAMPING PARTICIPATION

Almost 40 million American participated in camping in 2010—14.1 percent of all Americans over age six. Traveling near or far, staying in tents, cabins, RVs or yurts, these campers made a total of 514.8 million outings. On average, each camping participant spent almost 13 days enjoying camping.

Although camping numbers are still strong, overall participation is down. Among various age groups, the difficult-to-reach adolescent group gained a modest amount of participants while all other age groups lost participants.

Understanding the demographics, motivations, behaviors and barriers of camping participants is critical for increasing participation rates and growing the activity. The following section provides a detailed look at camping participation in the United States.

\$75,000+

Forty percent of camping participants have an annual household income of \$75,000 and more.

25%

A quarter of those living in the Mountain Region participate in camping.

Children

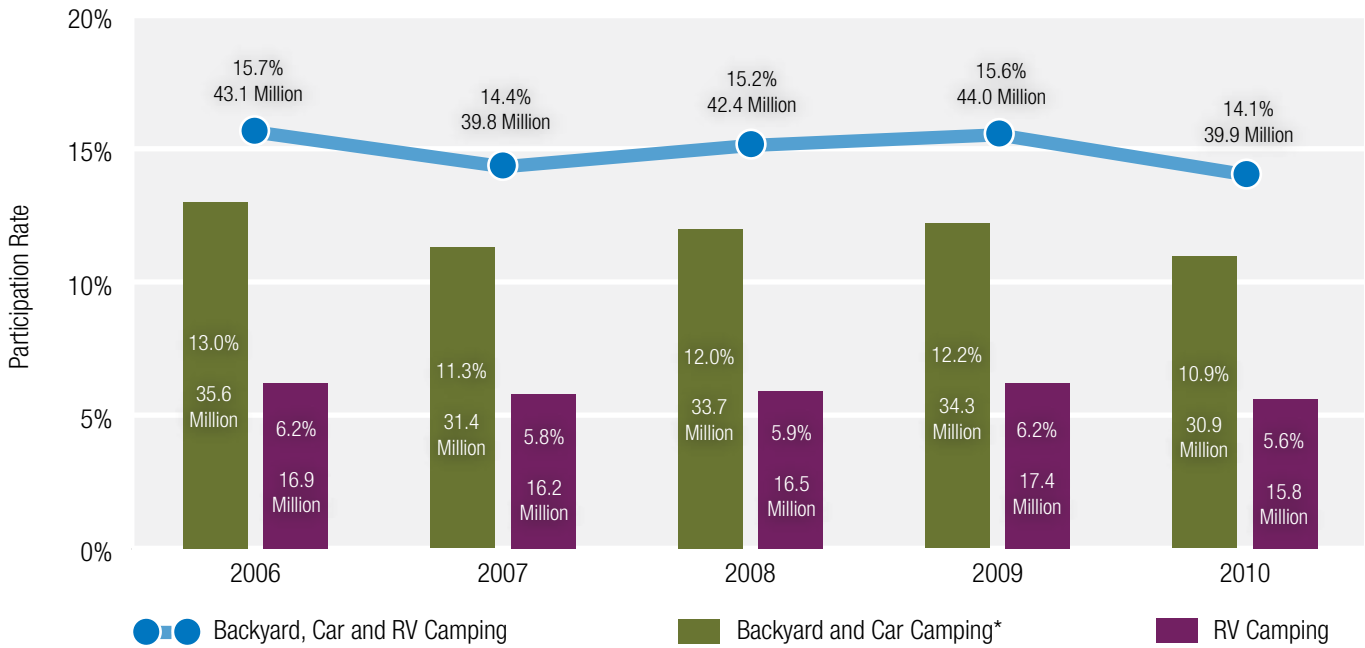
Adults with children in the household participate in camping at a higher rate than those without children in the household.

Overall Camping Participation

Camping participants averaged 13 camping days each in 2010 for a total of 514.8 million days.

Participation in Camping by Year

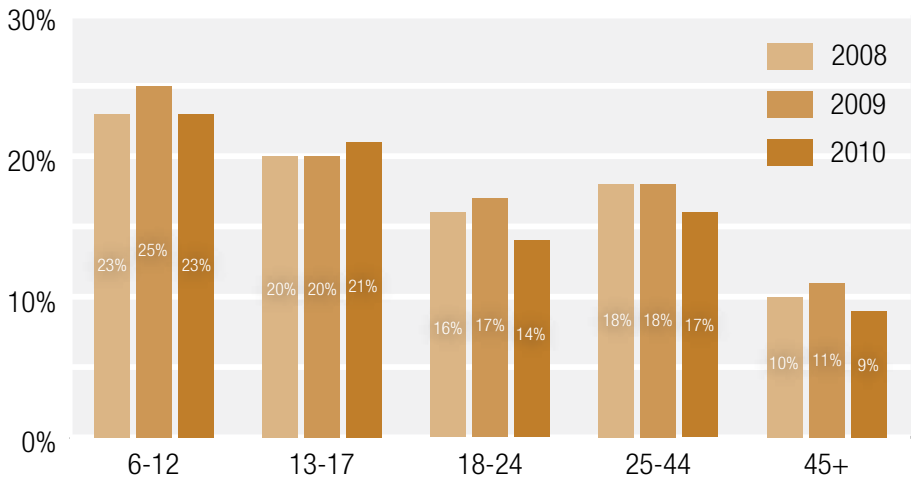
All Americans Ages 6+



* Defined as participation in "Camping within 1/4 mile of vehicle/home"

Participation in Camping by Age

All Americans Ages 6+ from 2008 to 2010



The life cycle of camping participation is similar to the life cycles of other outdoor activities. Youth participation is initially high but declines in adolescence and young adulthood. Participation recovers slightly among adults ages 22 to 44 before falling again.

In 2010, the adolescent age bracket gained a modest amount of participants while all other age brackets lost participants.

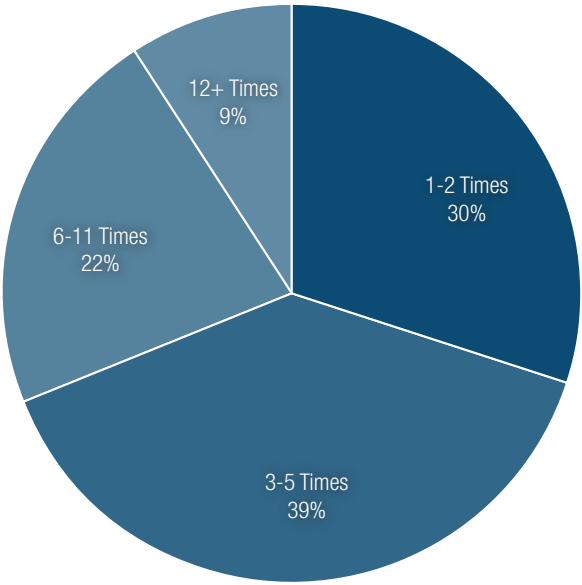
DEMOGRAPHICS OF CAMPING PARTICIPANTS

Annual Outings

In 2010, camping participants made 514.8 million outings, down slightly from 2009's 580.7 million. For some participants, this meant getting out once a season, and for others, once a month or week.

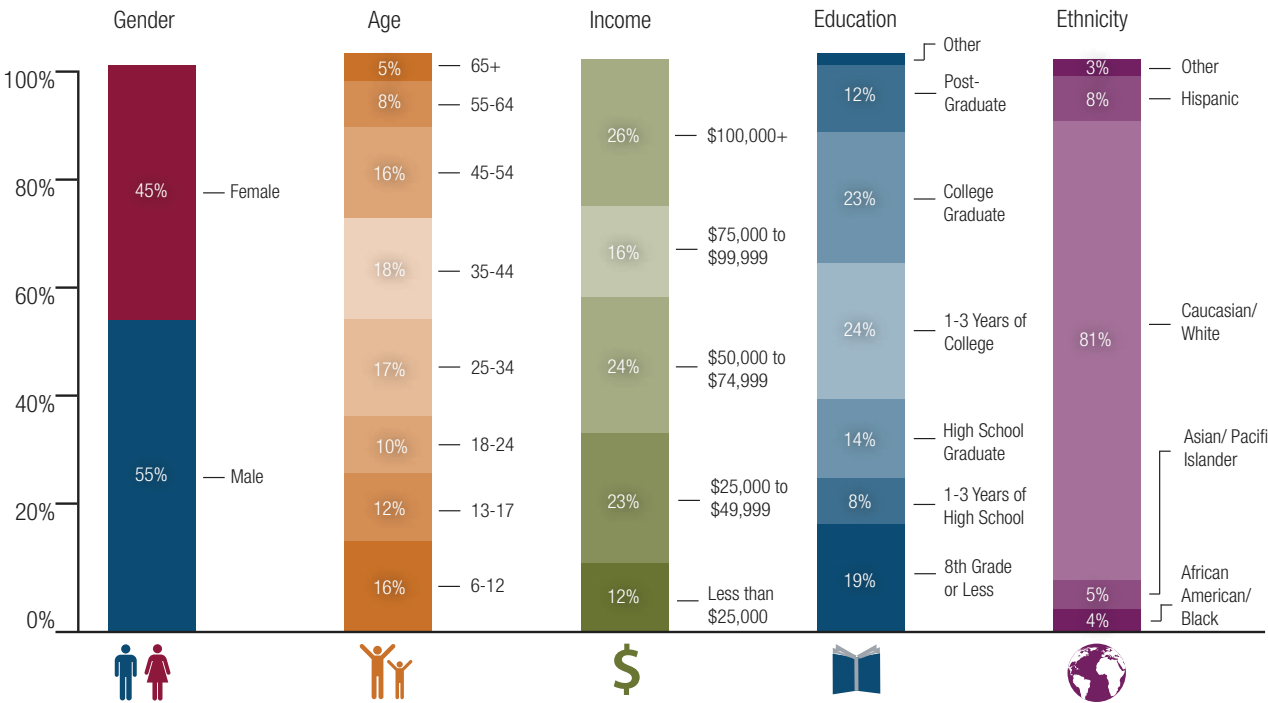
12.9 days

The average camper went camping for a total of 12.9 days in 2010.



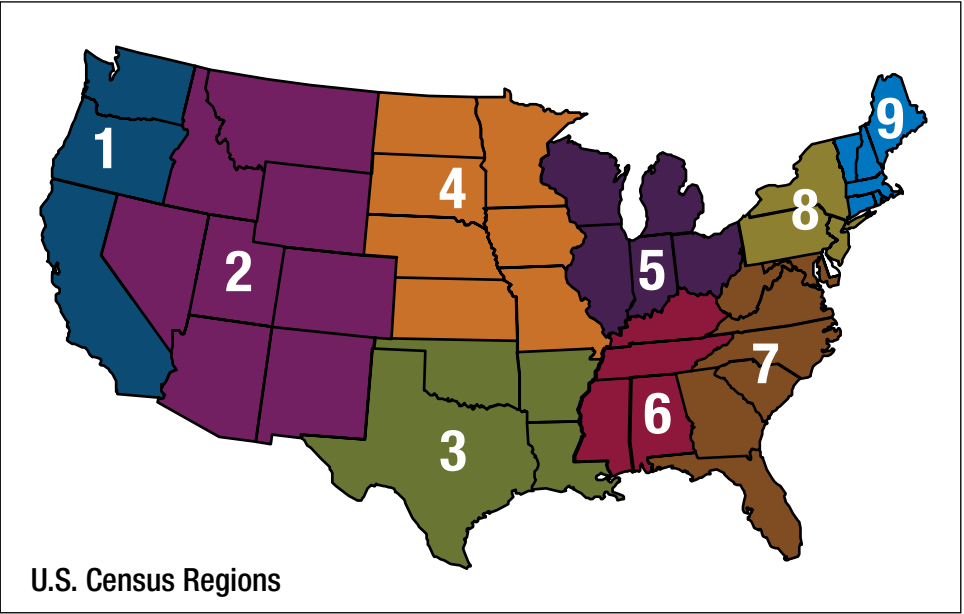
Demographics

Division of Camping Participants by Demographic



Geography of Camping Participants

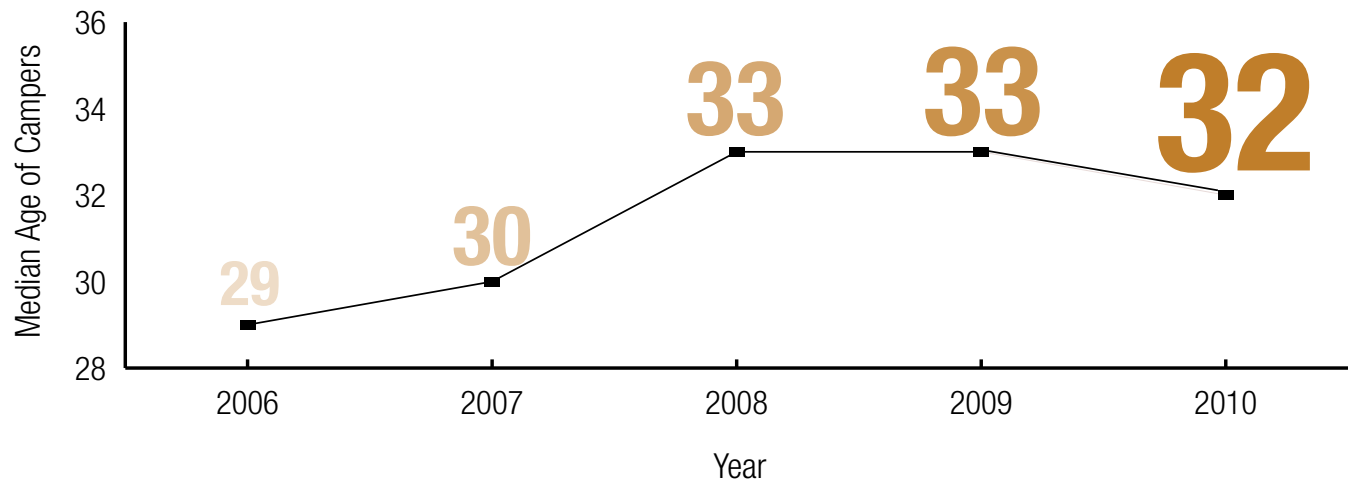
Camper's Ages 18+



- 1. Pacific**
Participation Rate by Region: 16%
Percent of US Participants: 18%
- 2. Mountain**
Participation Rate by Region: 25%
Percent of US Participants: 13%
- 3. West South Central**
Participation Rate by Region: 13%
Percent of US Participants: 10%
- 4. West North Central**
Participation Rate by Region: 17%
Percent of US Participants: 8%
- 5. East North Central**
Participation Rate by Region: 16%
Percent of US Participants: 17%
- 6. East South Central**
Participation Rate by Region: 12%
Percent of US Participants: 5%
- 7. South Atlantic**
Participation Rate by Region: 9%
Percent of US Participants: 13%
- 8. Middle Atlantic**
Participation Rate by Region: 11%
Percent of US Participants: 11%
- 9. New England**
Participation Rate by Region: 14%
Percent of US Participants: 5%

Median Age of Campers, 2006-2010

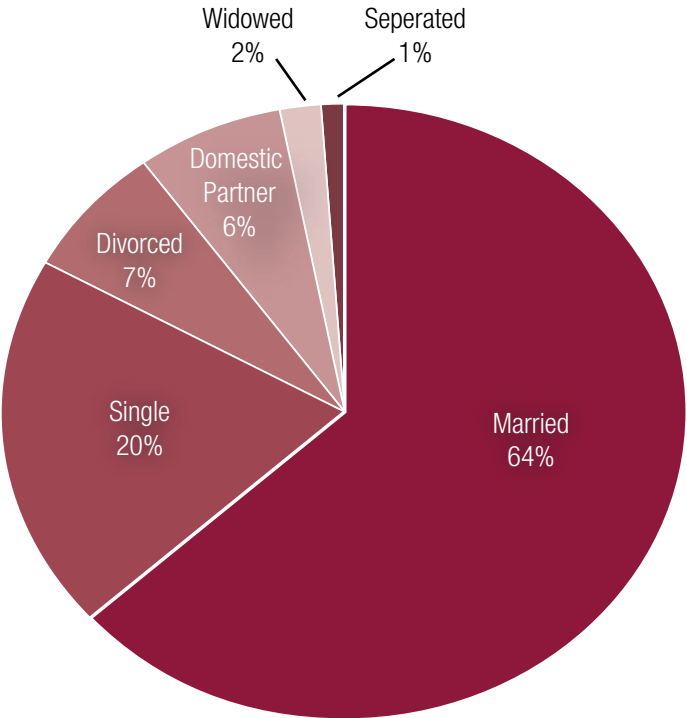
Campers Ages 6+



Participation in Camping by Marital Status

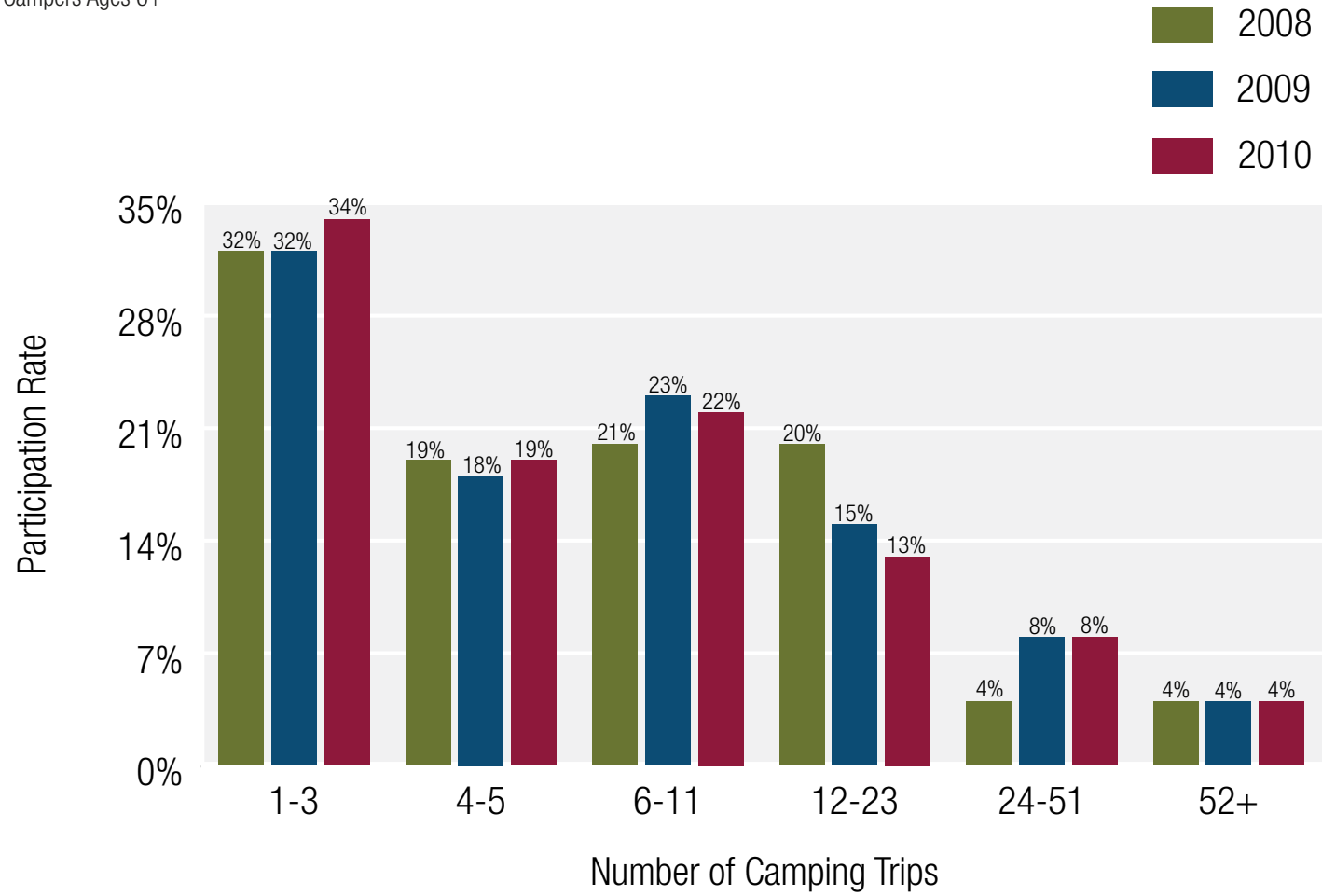
Campers Ages 6+

Among camping participants, 70 percent are married or living with a domestic partner, suggesting that camping is a family-friendly activity. Only 30 percent are not currently in a relationship.



Number of Camping Trips, 2008-2010

Campers Ages 6+

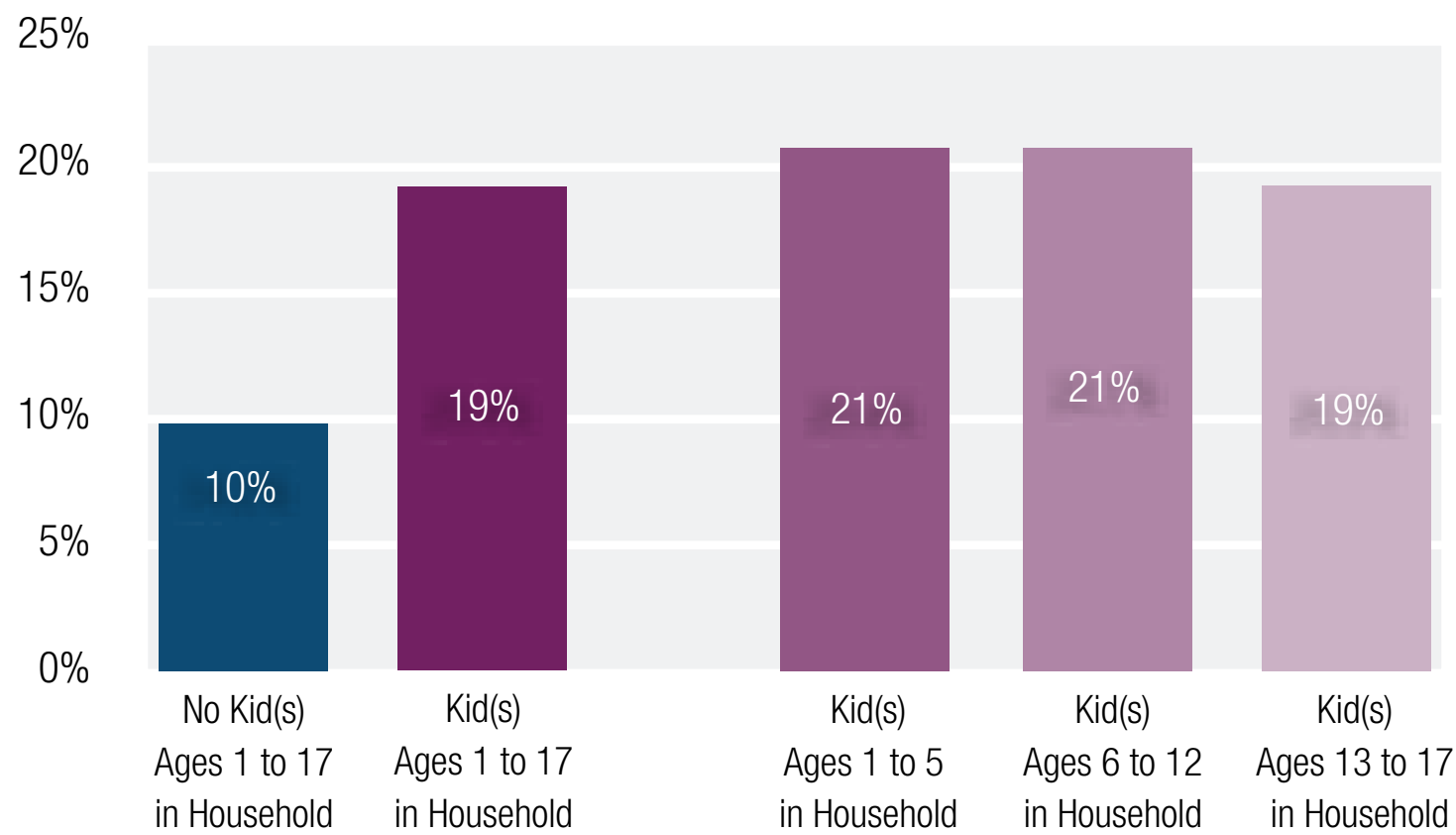


Participation in Camping Among Adults with Youth in Their Households

Campers Ages 18+

Despite the responsibilities and time commitments associated with having young children in the home, adults 18 and older with children in their households participate in camping at higher levels than adults without children in their households.

Nineteen percent of adults with children in their households participate in camping, while only 10 percent of adults without children in their households participate.

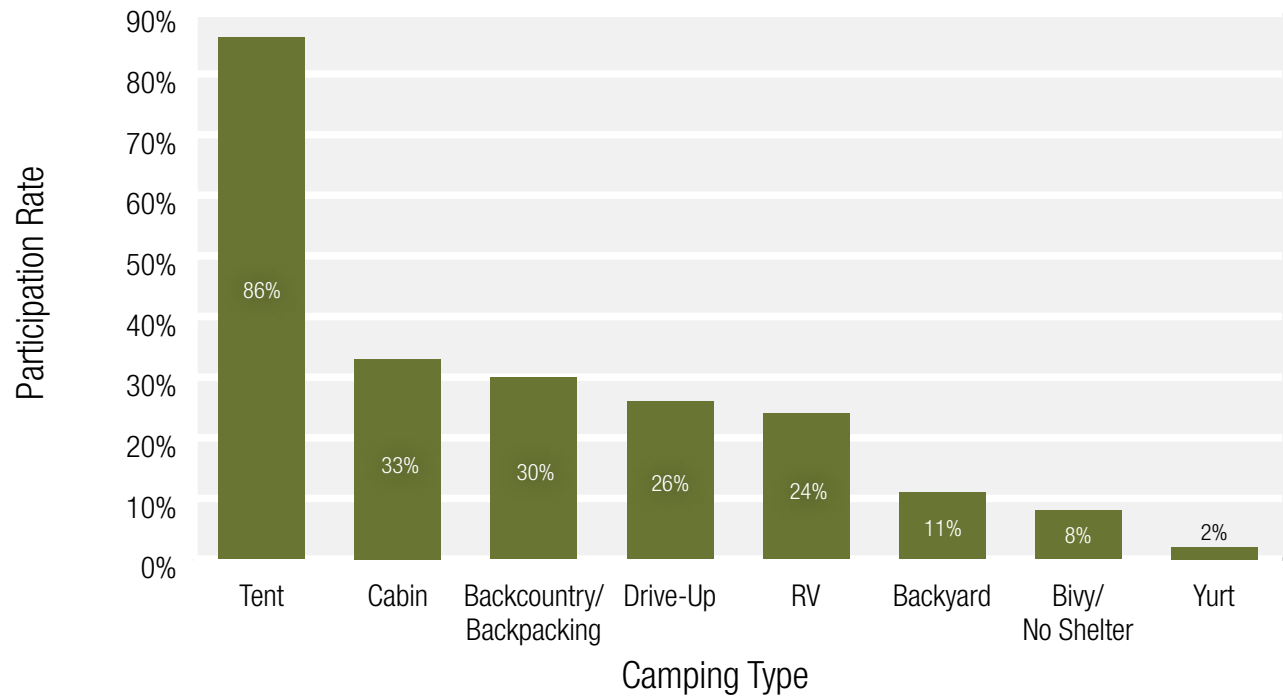


Types of Camping Participation

All Campers**

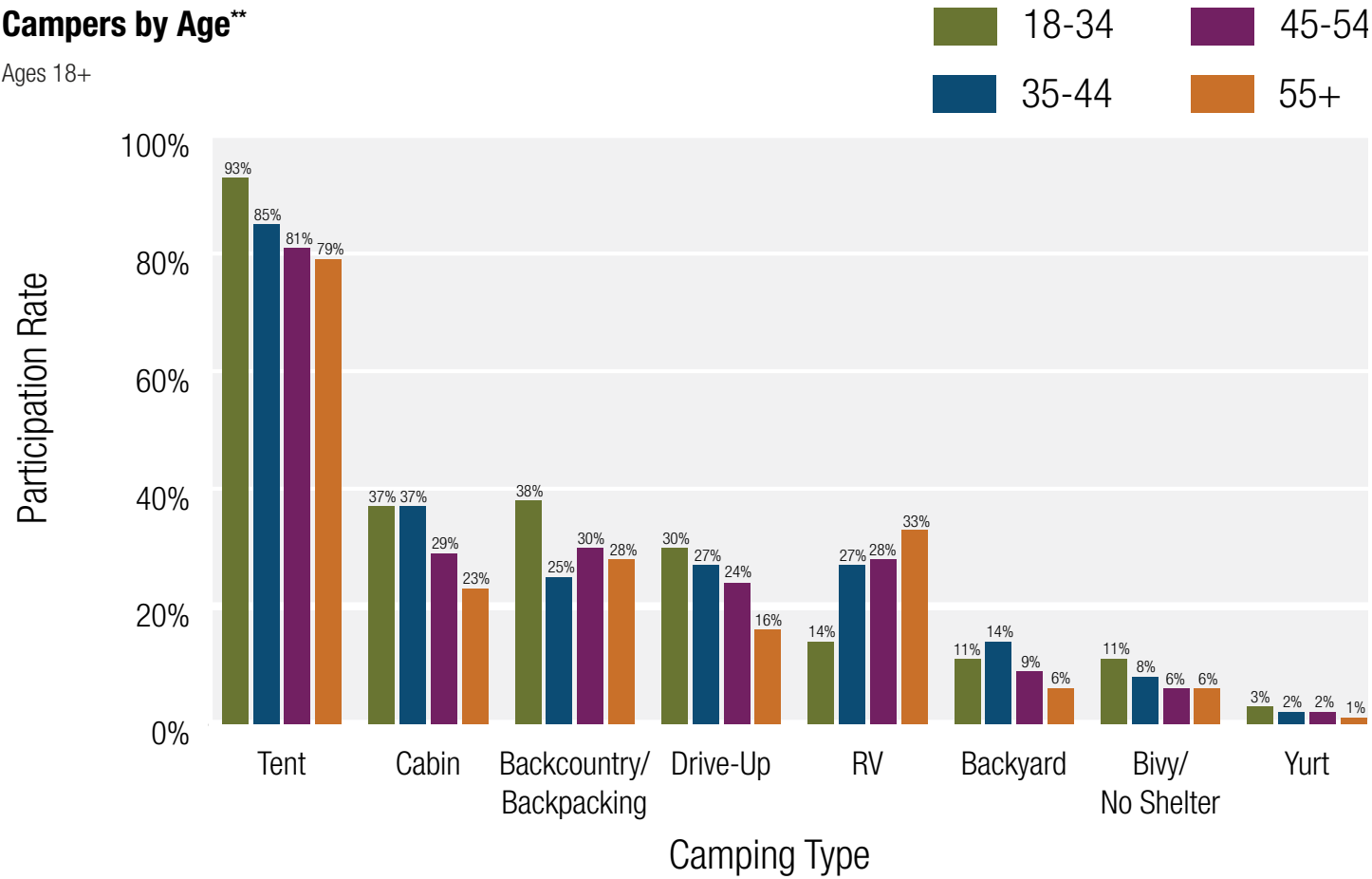
Ages 18+

Tenting is the most popular type of camping, with an 86-percent participation rate. Because many campers participate in multiple types of camping, the data suggests that tenting is a popular crossover form of camping. Those that tent are also likely to participate in another type of camping.



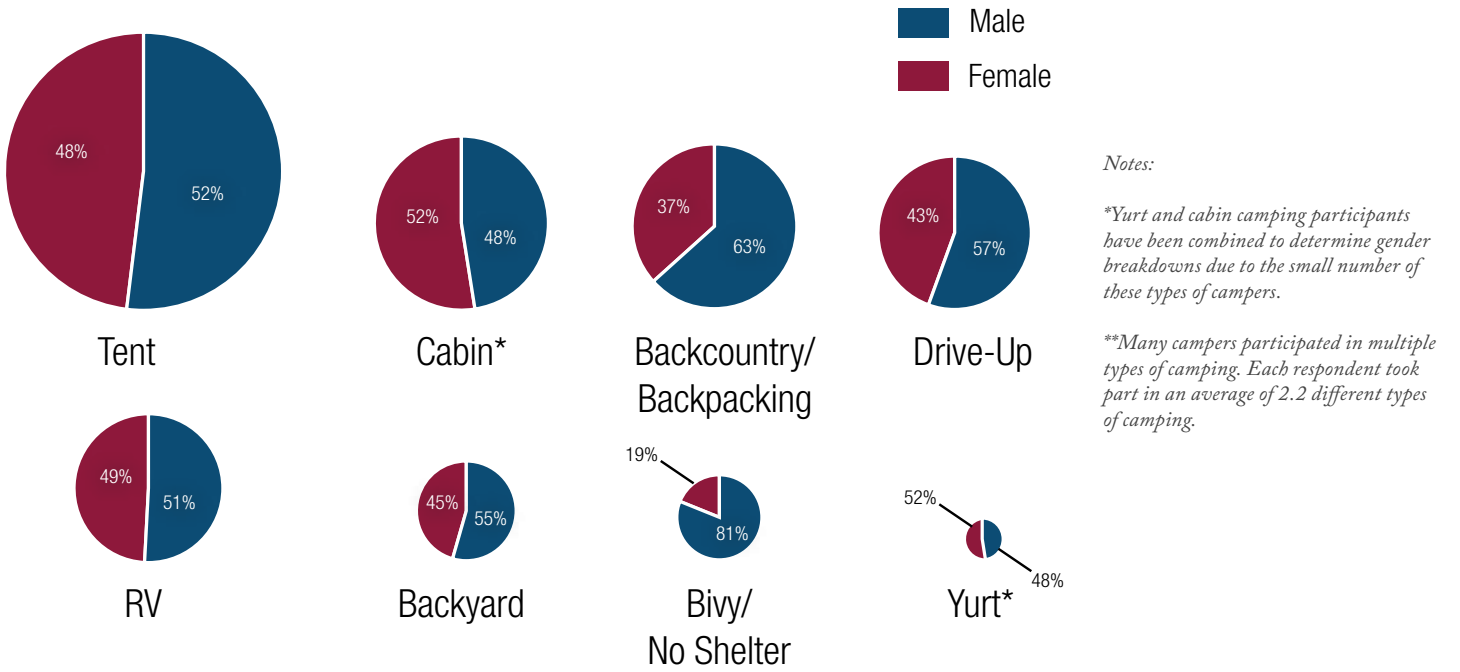
Campers by Age**

Ages 18+



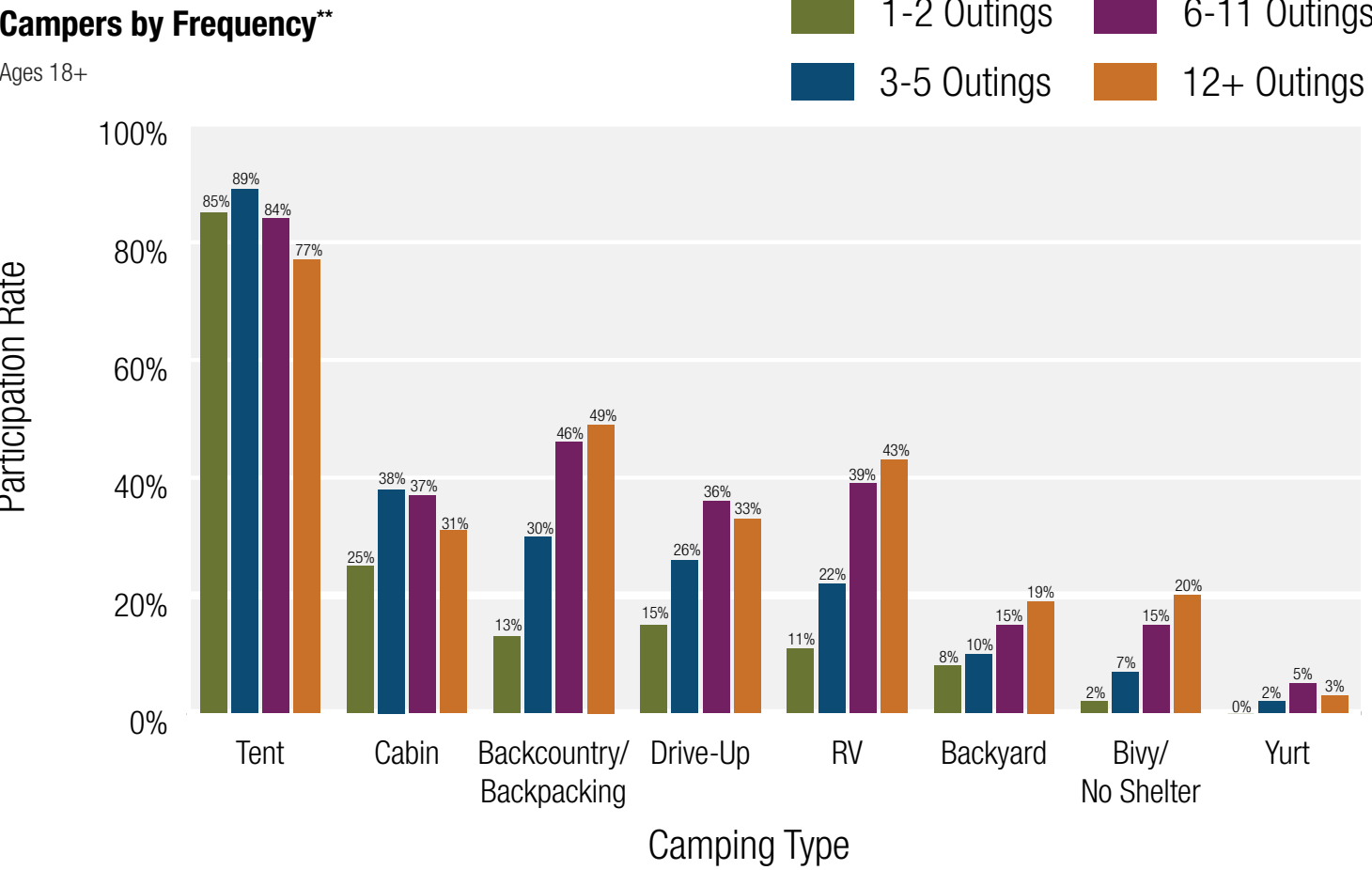
Campers by Gender**

Ages 18+



Campers by Frequency**

Ages 18+



Words Associated with Camping

Campers Ages 18+



Words Least Associated

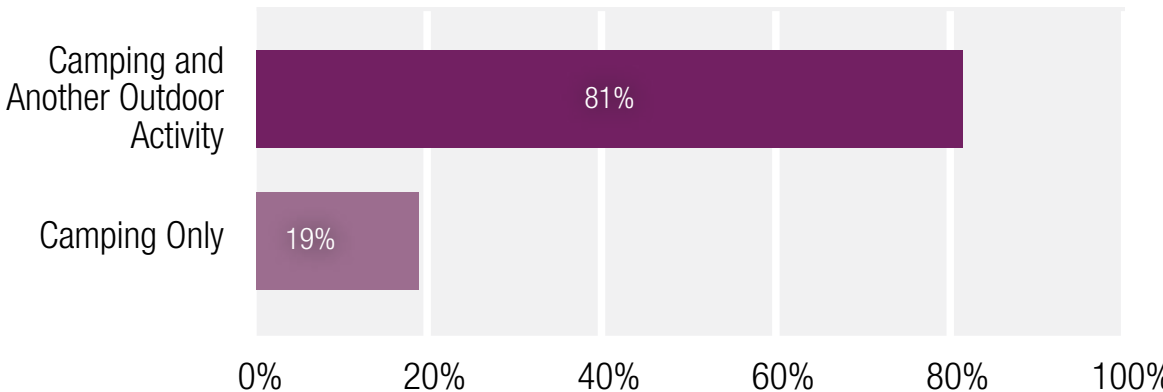
- Playground 8%
- Intense 8%
- Public 8%
- Electricity 7%
- Difficult 6%
- Teenagers 6%
- Swimming Pool 4%
- Close to Home 4%
- Discomfort 4%
- Wireless Internet 3%
- Expensive 1%

A Gateway to the Outdoors

Participation in outdoor recreation often begins with specific “gateway” activities. These activities are popular, accessible and often lead to participation in other outdoor activities. Camping is one of the most popular of these influential activities. Over three-quarters of camping participants participate in multiple outdoor activities (81 percent up slightly from 80 percent in 2009). Only a small percentage participates in camping alone.

Participation in Camping by Age

Campers Ages 6+



PROFILE OF A CAMPING TRIP

Age **35**

Eighty-three percent of those under age 35 camp with friends.

The most popular venues for camping are public campgrounds, such as a local, state or national park campgrounds. The most popular season for camping is during the summer, with 86 percent of all campers taking their last trip during the summer months. Most campers choose to camp in tents during their summer trips with 28 percent of all camping nights spent in a tent during the summer months of June, July and August.

Campers plan ahead for summer camping trips—typically more than a month in advance. Of those that choose to make a reservation at a campsite, the average booking time in the summer is 78 days prior to the trip. Spring and fall trips are usually more spontaneous.

Most camping trips, regardless of the season, are taken with friends. The younger age bracket is especially social with 83 percent camping with friends, compared to 70 percent of all campers. While camping, the favorite activity is hiking with 92 percent of campers hiking during their last trip.

Summer

Summer is the most popular season to camp with 86 percent of campers taking a summer trip in the last year.

92%

Ninety-two percent of campers went hiking while camping, making it the most popular sports and leisure activity during camping trips.

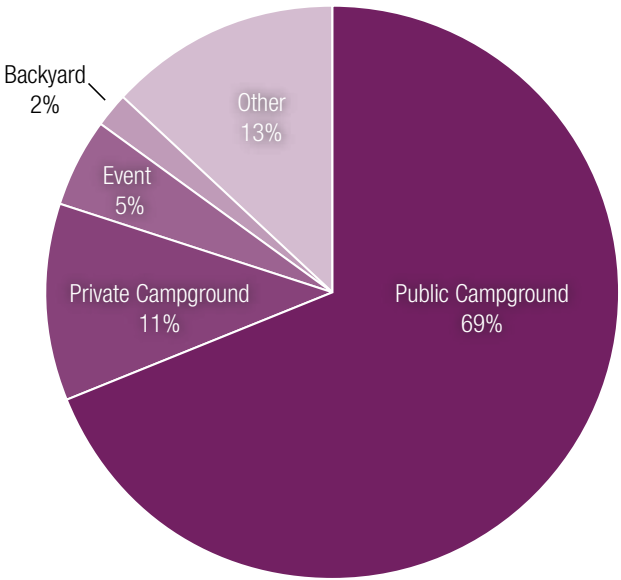
Camping in the last 12 months...

Camping Trip Venue

In 2010, 69 percent of camping participants camped the most in public campgrounds, which include local, state and national park campgrounds.

5.52 times

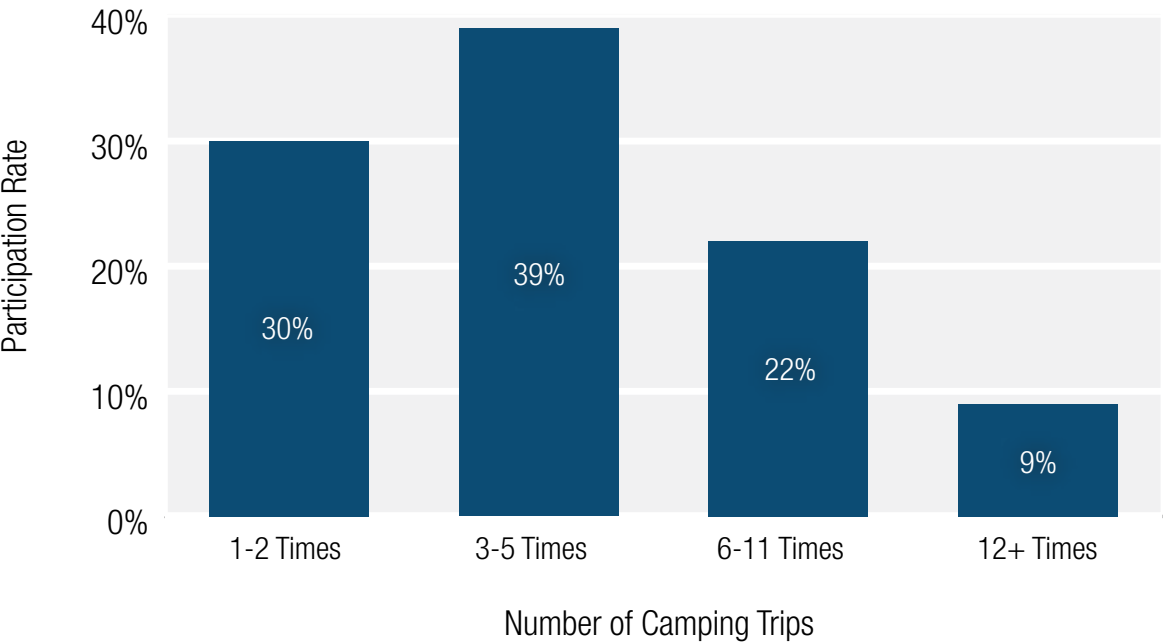
The average camper went on 5.52 camping trips in 2010.



Campers Ages 18+

Frequency of Camping Trips

Campers Ages 18+

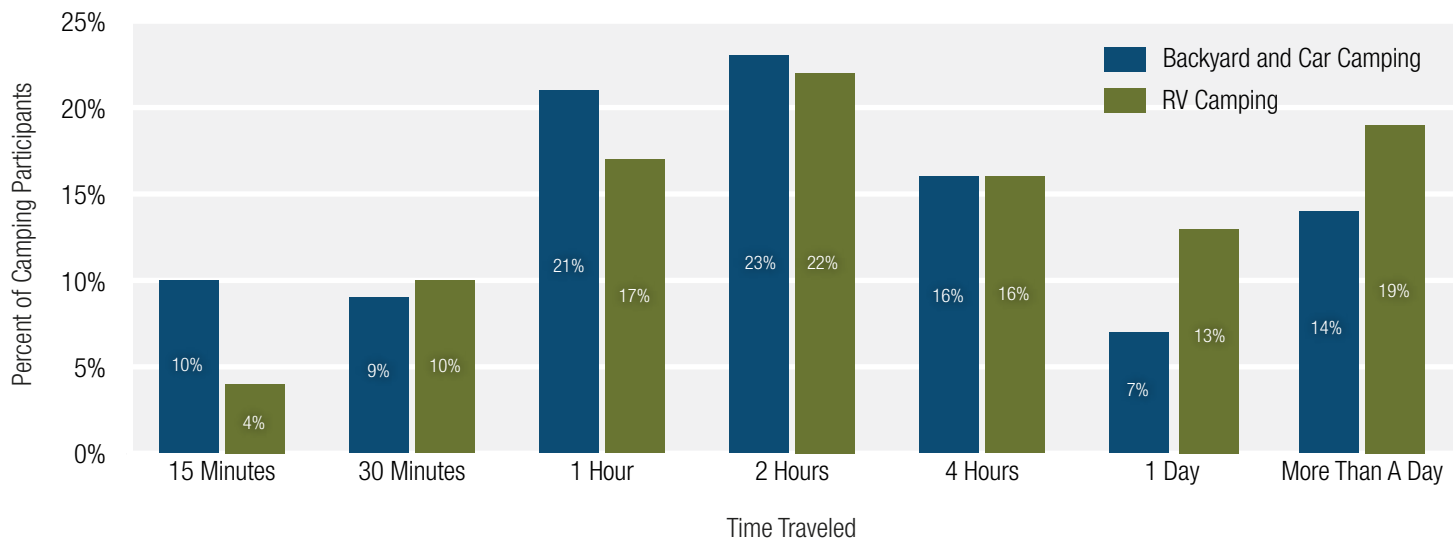


Time Traveled for Camping Trip

Time RV and Backyard/Car Camping Participants Traveled from Home on Their Last Camping Trip, Ages 6+

Camping participants travel anywhere from a few minutes to a few days from home to go camping. Surveying the time camping participants traveled on their last in-season trip demonstrates how far they usually travel to camp, and comparing the activities of different types of campers reveals different travel patterns.

Sixty-three percent of backyard and car camping participants travelled two hours or less on their last camping trip. RV camping participants went on more distant excursions. Seventy percent of RV campers travelled two hours or more on their last trip.

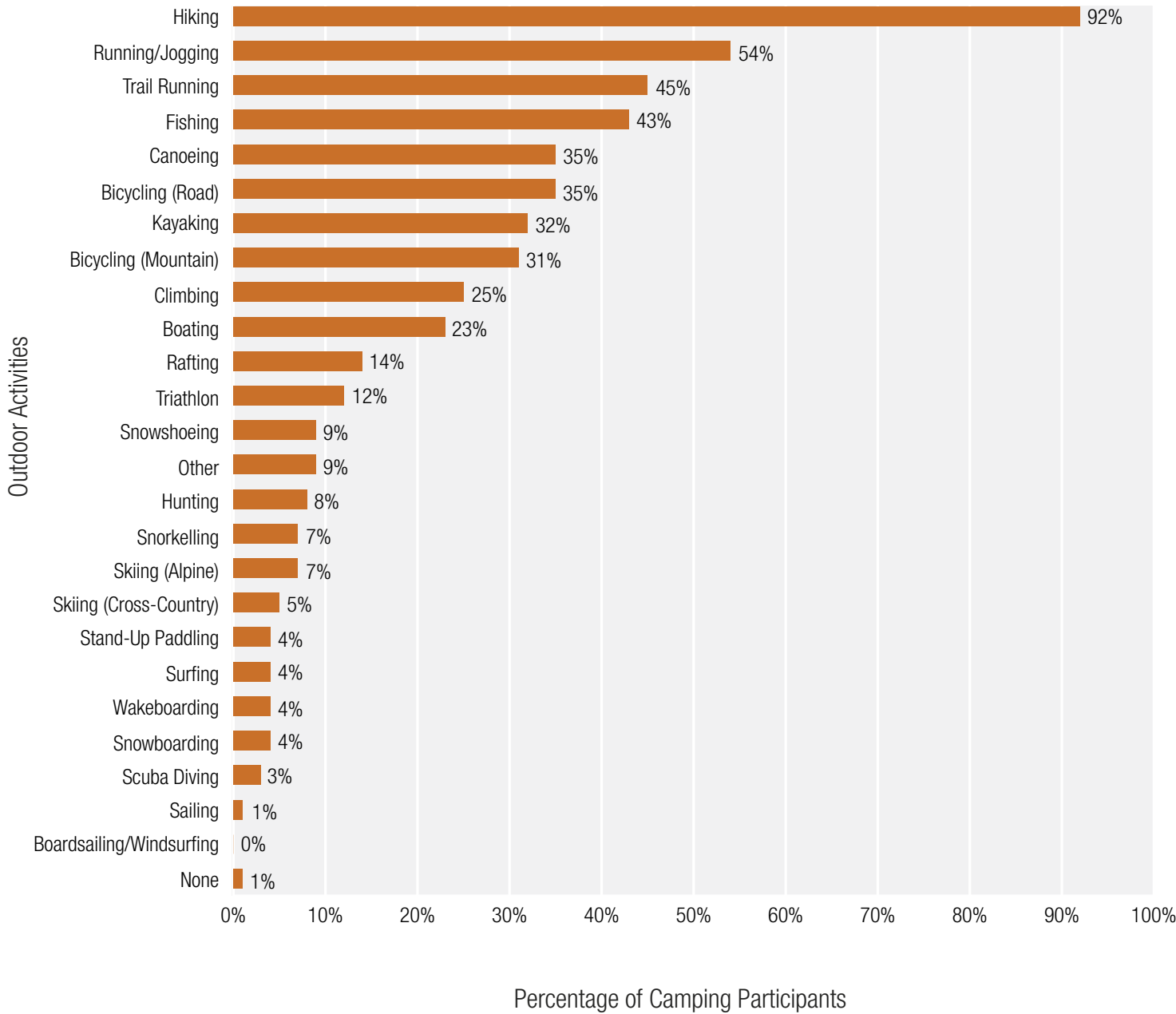


Camping in the last 12 months...

Participation in Other Activities While Camping

Campers Ages 18+

Requiring little gear and accessible for all ages, hiking is by far the most popular sports and leisure activity to participate in while camping. Ninety-two percent of camping participants said they went hiking during camping trips in 2010. Running or jogging is the second most popular activity with 54 percent participation.



Camping in the last 12 months...

Camping Companions

Campers by Age

Seventy percent of all camping trips are taken with friends, showing the social aspect of camping. The youngest age bracket is the most social with 83 percent of their trips taken with friends.

Family is the most popular camping companion for 35 to 54 year olds—more than half of their trips include immediate family members. In fact, 48 percent of the 35 to 44 year olds travelled with children under age eight.

“With whom have you camped in the last 12 months?”	Under 35	35-44	45-54	55+	All Ages
Friend(s)	83%	67%	65%	53%	70%
Spouse/Significant Other Only	58%	61%	53%	62%	58%
Immediate Family	36%	55%	53%	42%	48%
Extended Family	20%	21%	22%	16%	21%
Kids Aged 2-8	17%	39%	16%	20%	25%
Kids Under 2 Years Old	9%	9%	4%	2%	7%
Kids Aged 9-14	8%	36%	32%	16%	25%
Kids Aged 15-17	2%	15%	27%	11%	14%
Co-Workers	1%	0%	0%	0%	0%
Other Individual/Group	1%	1%	3%	0%	2%
Bicycle Group	0%	0%	1%	1%	0%
Church Group	0%	1%	0%	1%	0%
Scouts	0%	2%	5%	2%	2%
Team	0%	0%	0%	1%	0%
Dog	0%	1%	0%	1%	1%
Alone	0%	1%	1%	2%	1%
Other Groups	2%	0%	1%	4%	1%

Motivation for Camping

Campers Ages 18+

“What is the main motivation for camping?”	Ages 18+
Camping Itself	54%
Equal Mix of Camping and Sports Activities	34%
Other Sports or “Active” Pursuits	9%
To Stay Close to an Event (Music Performance, Festival, Family Event) without a Hotel	3%
Other	0%

The simple act of camping is the biggest motivation for taking a camping trip. Fifty-four percent of camping participants camp just because they enjoy it, which is a strong indicator that camping is here to stay.

Decision Making

Campers by Gender

“In general, who decides to go camping most often?”	Male	Female
Me	77%	54%
Spouse/Significant Other	12%	26%
Friends	7%	13%
Children	2%	1%
Family Decision	1%	1%
Joint Decision (Self and Spouse)	0%	2%
Parents	0%	1%
Scouts	0%	0%
Group Decision	0%	1%
Other	0%	0%

Of camping participants surveyed, most say they make the decision to go camping themselves. Spouses or significant others came in a distant second.

Campers by Age

“In general, who decides to go camping most often?”	Under 35	35-44	45-54	55+
Me	60%	67%	69%	68%
Friends	18%	9%	4%	5%
Spouse/Significant Other	17%	17%	22%	24%
Children	1%	2%	2%	0%
Family Decision	1%	1%	1%	0%
Parents	1%	0%	0%	0%
Group Decision	1%	1%	0%	0%
Joint Decision (Self + Spouse)	0%	1%	1%	3%
Scouts	0%	1%	0%	0%
Other	0%	1%	0%	0%

Although all camping participants say they make the decision to go camping most often, there are some differences among age groups. Those under age 35 are more dependent on friends than any other age group. Those over age 55, on the other hand, are more dependent on a spouse or significant other.



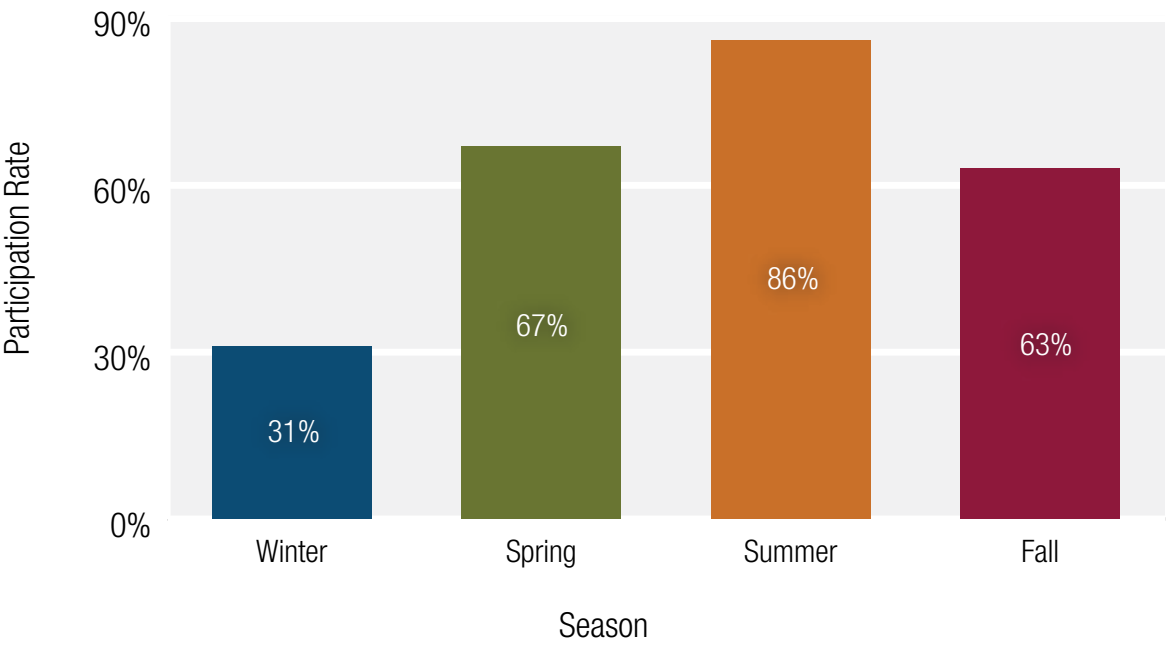
CAMPING PROFILE

BY SEASON

Camping in the last 12 months...

Season of Camping Trips

Campers Ages 18+



Venue of Camping Trip

Campers by Season

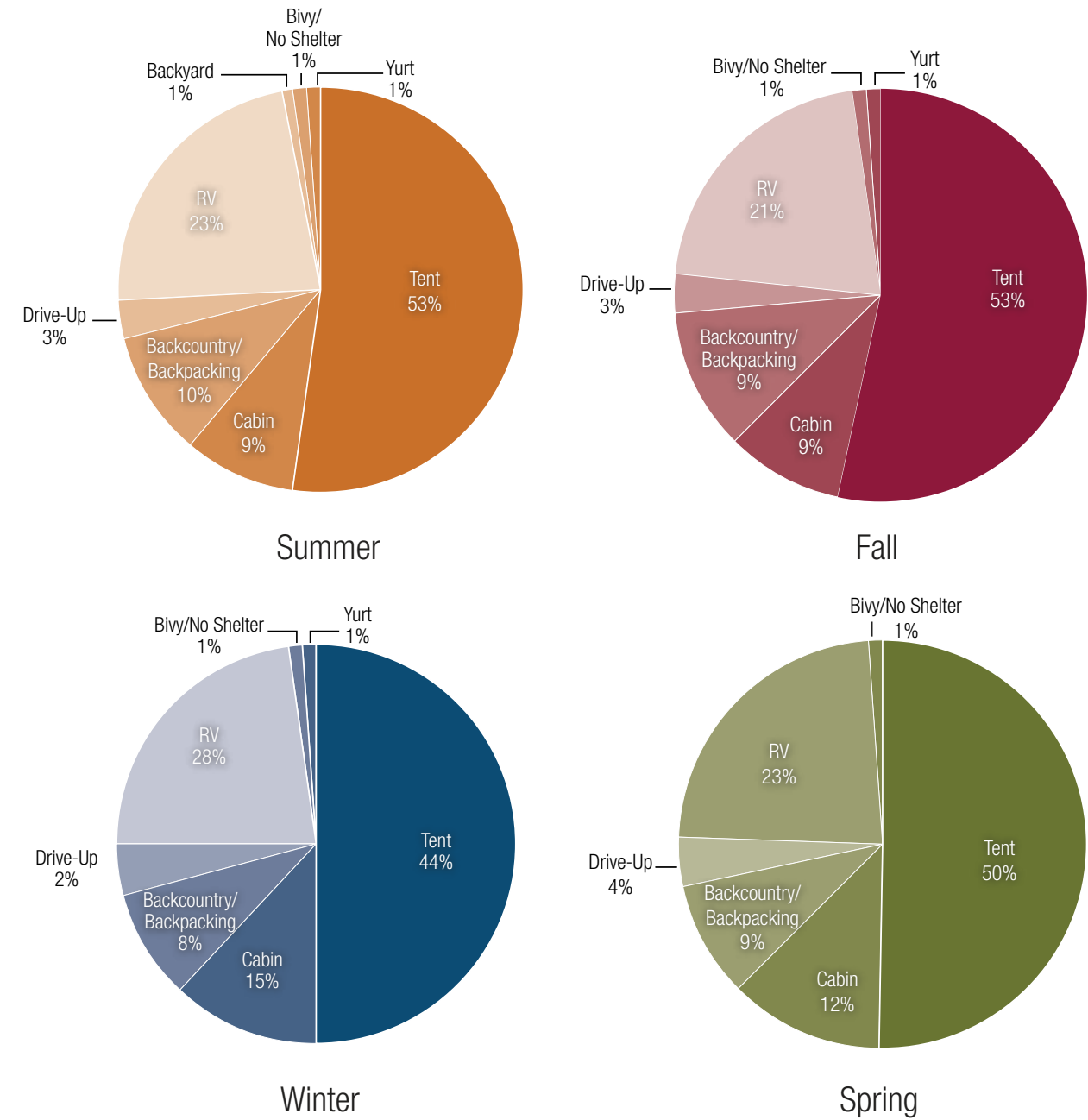
“Which best describes the place or venue where you camped most in the last 12 months?”

	Winter	Spring	Summer	Fall
Public Campground (Local, State or National Park)	70%	72%	68%	70%
Private Campground (KOA, Jellystone Park or Boy/Girl Scout Campground)	12%	10%	11%	11%
Event (Private, Public or Temporary Campground for a Concert, Festival or Other Public Event)	3%	4%	4%	4%
Backyard	1%	2%	2%	1%
Other	14%	12%	14%	14%

Camping in the last 12 months...

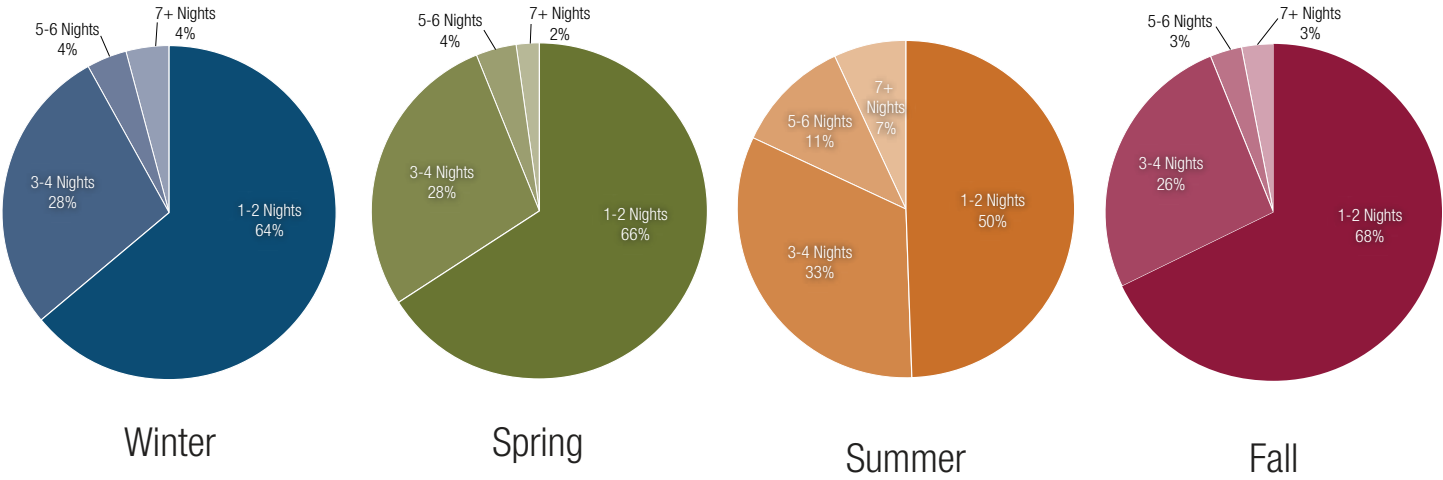
Type of Camping Trip by Season

By Number of Camping Nights



Length of Trip by Season

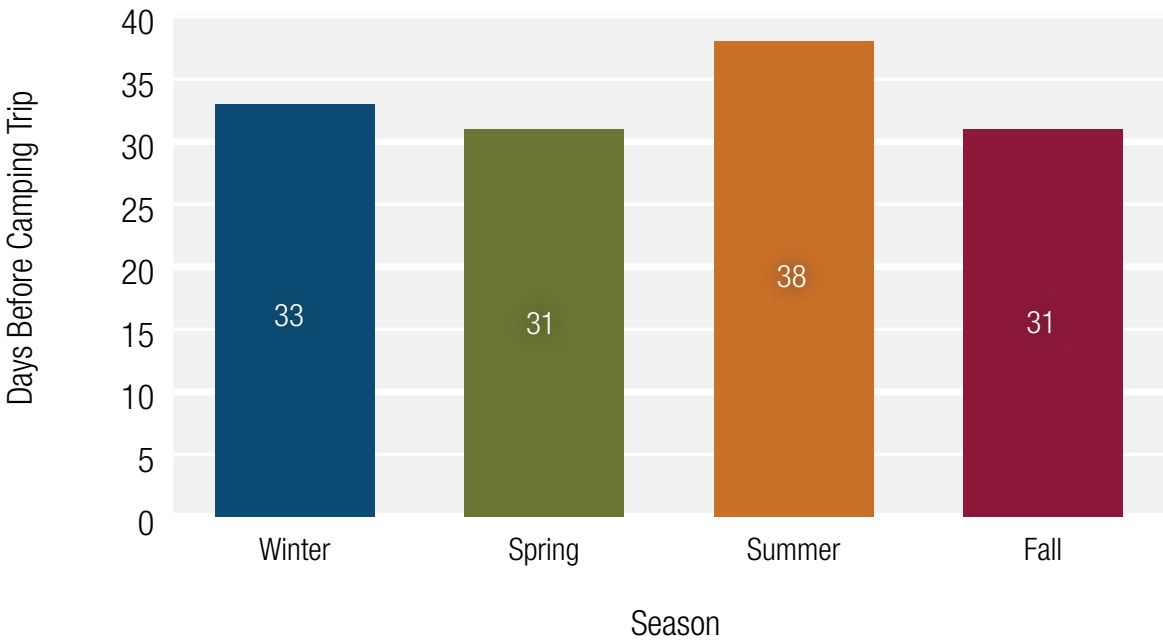
Campers Ages 18+



Days Decision is Made to Go Camping Before Trip

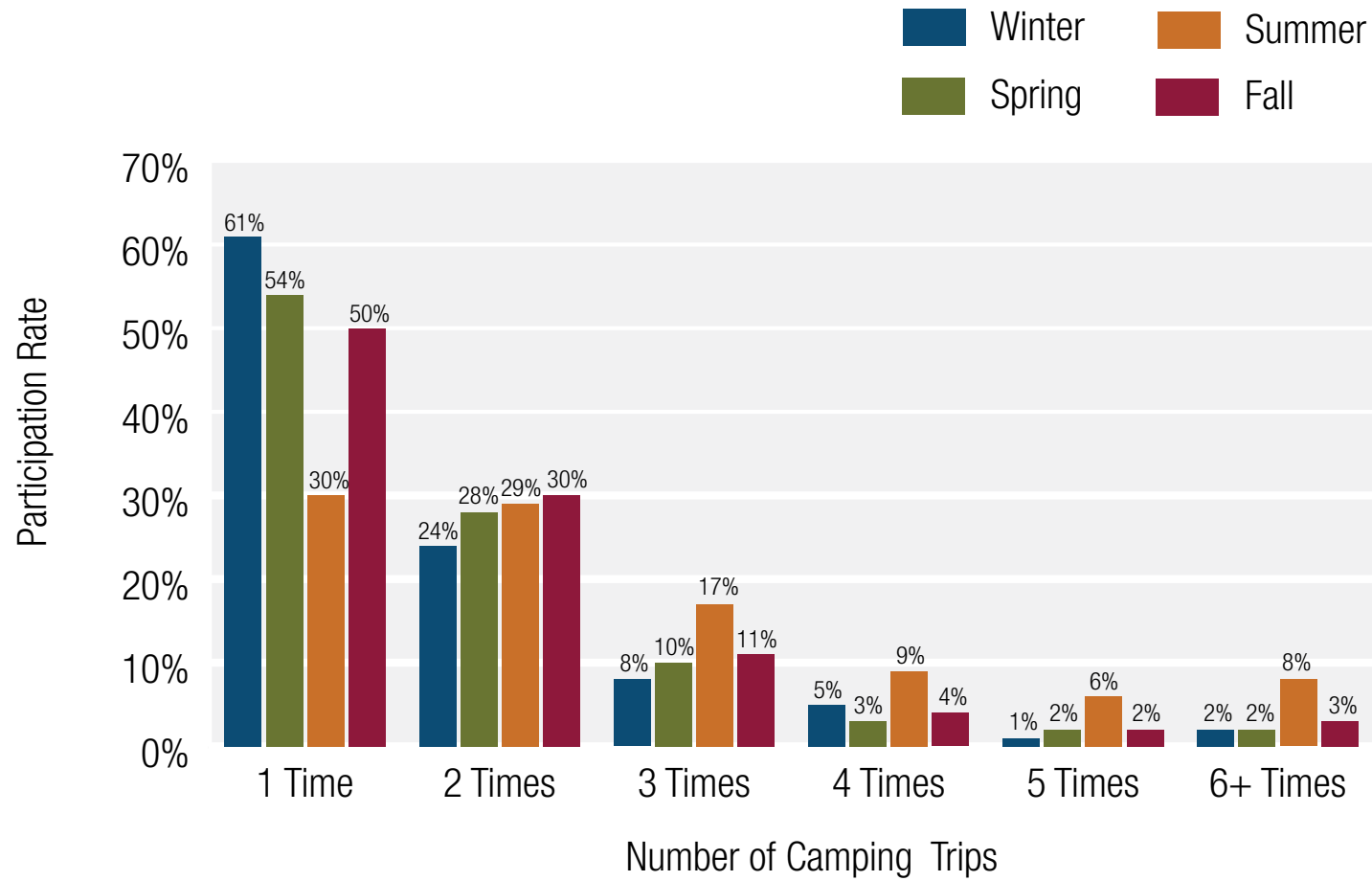
Campers by Season

On average, summer camping trips have the longest planning horizons. On average, summer trips are planned 38 days in advance. Camping trips during the spring and fall tend to be more spontaneous.



Frequency of Camping Trips

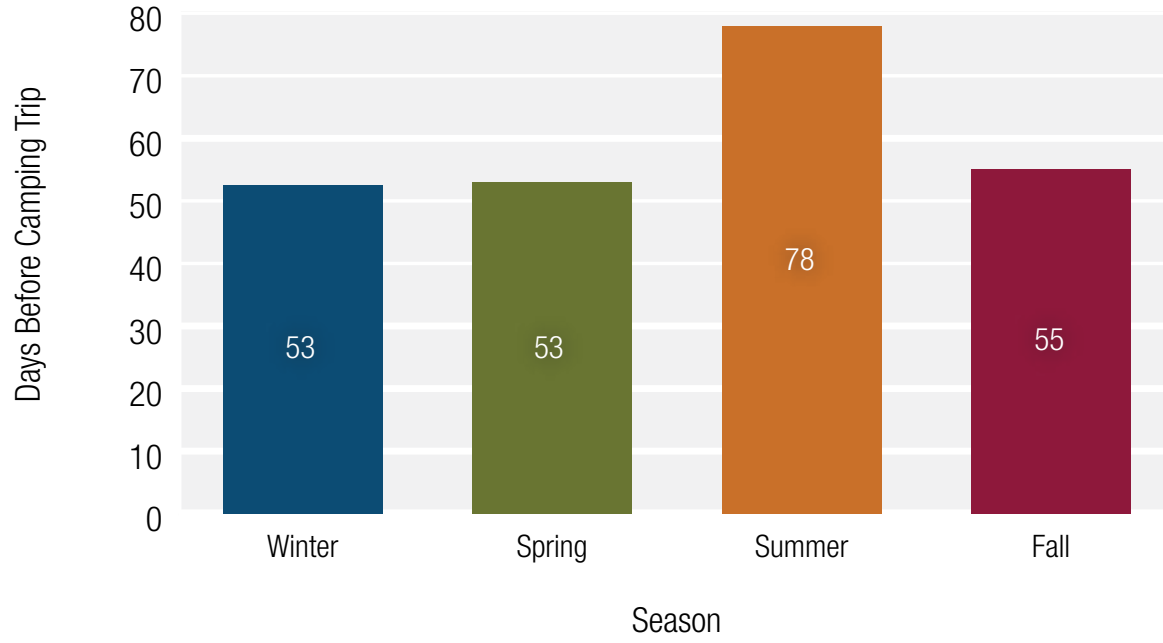
Campers by Season



Days Campsites are Reserved Before Trip

Campers by Season

Of those who choose to make a reservation at a campsite, summer campers make their reservations the furthest in advance. On average, summer reservations are made 78 days before the camping trip.



PROFILE OF A CAMPER

Camping means different things to different campers. For some, camping means spending family time outdoors; for others, it means hanging out with friends and having fun. Some campers enjoy the luxuries of electricity and Internet while camping, and others enjoy the adventure of a rugged outdoor experience.

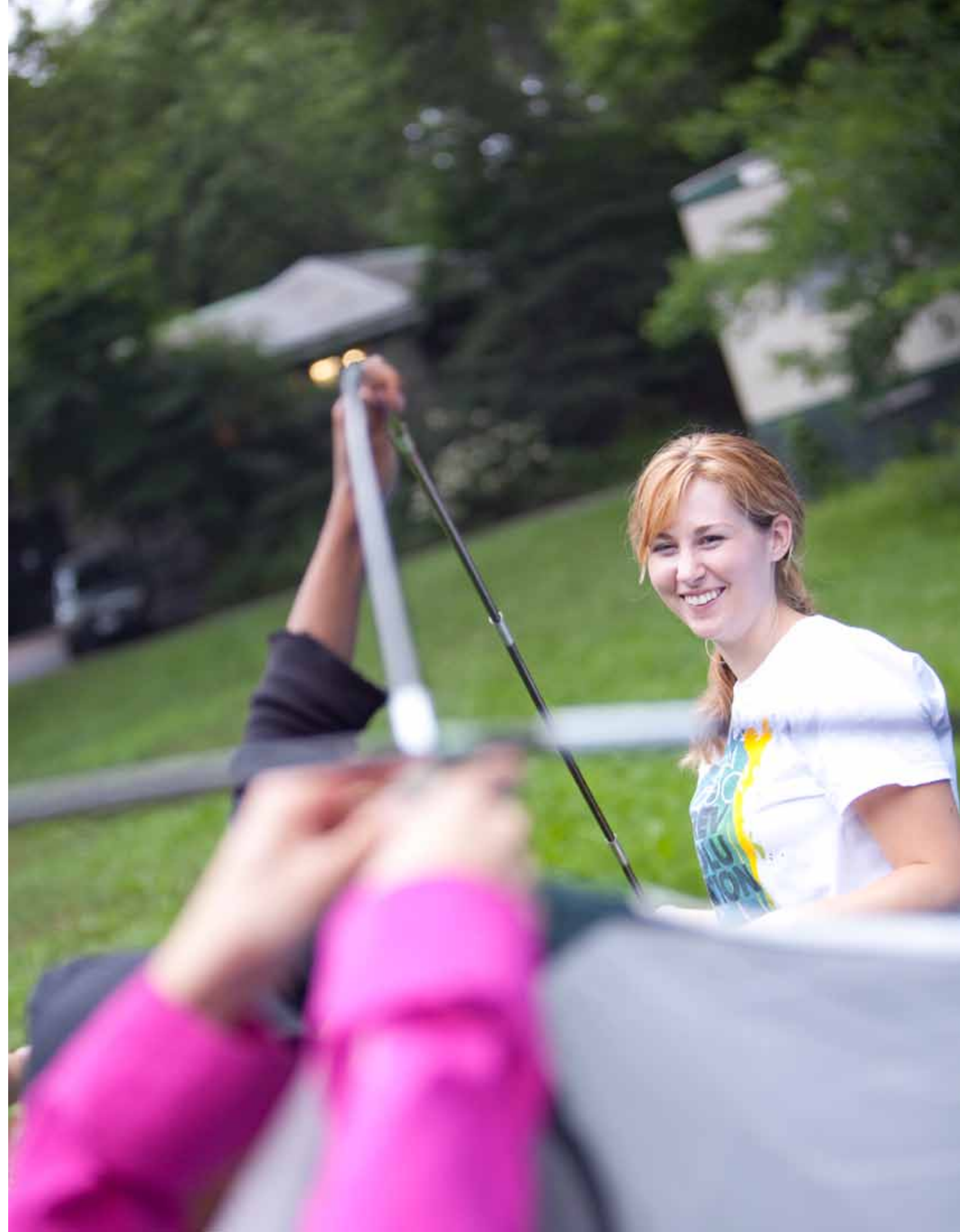
For the first time in the history of this report, camping participants have been segmented by attitudes toward camping and divided into four groups—Parent, Partier, Soft Rugged and Extreme. Segmenting campers by psychographics provides insights into their unique behaviors, perceptions and preferences.

47%

Forty-seven percent of campers in the Parent Group cite family commitments as the number one reason for taking fewer camping trips.

6.26 trips

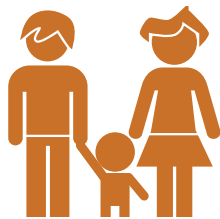
The Extreme Group went on an average of 6.26 camping trips in 2010, compared to the typical camper's 5.52 trips.



MEET OUR CAMPERS

Camping participants have been segmented by their attitudes toward camping. The following is select demographic information about each of these groups.

Information about the “average camper” has been included to provide a point of comparison.



HELLO
my name is

Parent

About Me:

- Thoughts on camping: kids, family, s’mores and playgrounds.
- Wealthy: The wealthiest group with an average household income of \$94,000 per year and 70% earning more than \$70,000 per year.



HELLO
my name is

Partier

About Me:

- Thoughts on camping: party, fun, and friends.
- Western U.S.: The most likely group to come from the West at 45%.
- Age: The youngest group.



HELLO
my name is

Soft Rugged

About Me:

- Thoughts on camping: economical, easy, cabin, RV, electricity, and wireless Internet.
- Female: Made up of 55% females, more than any other group.
- Age: The oldest group.

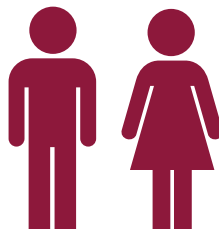


HELLO
my name is

Extreme

About Me:

- Thoughts on camping: wilderness, primitive, intense and difficult.
- Male: Made up of 59% males, more than any other group.
- Educated: The most educated group with 81% having a college degree or higher.



HELLO
my name is

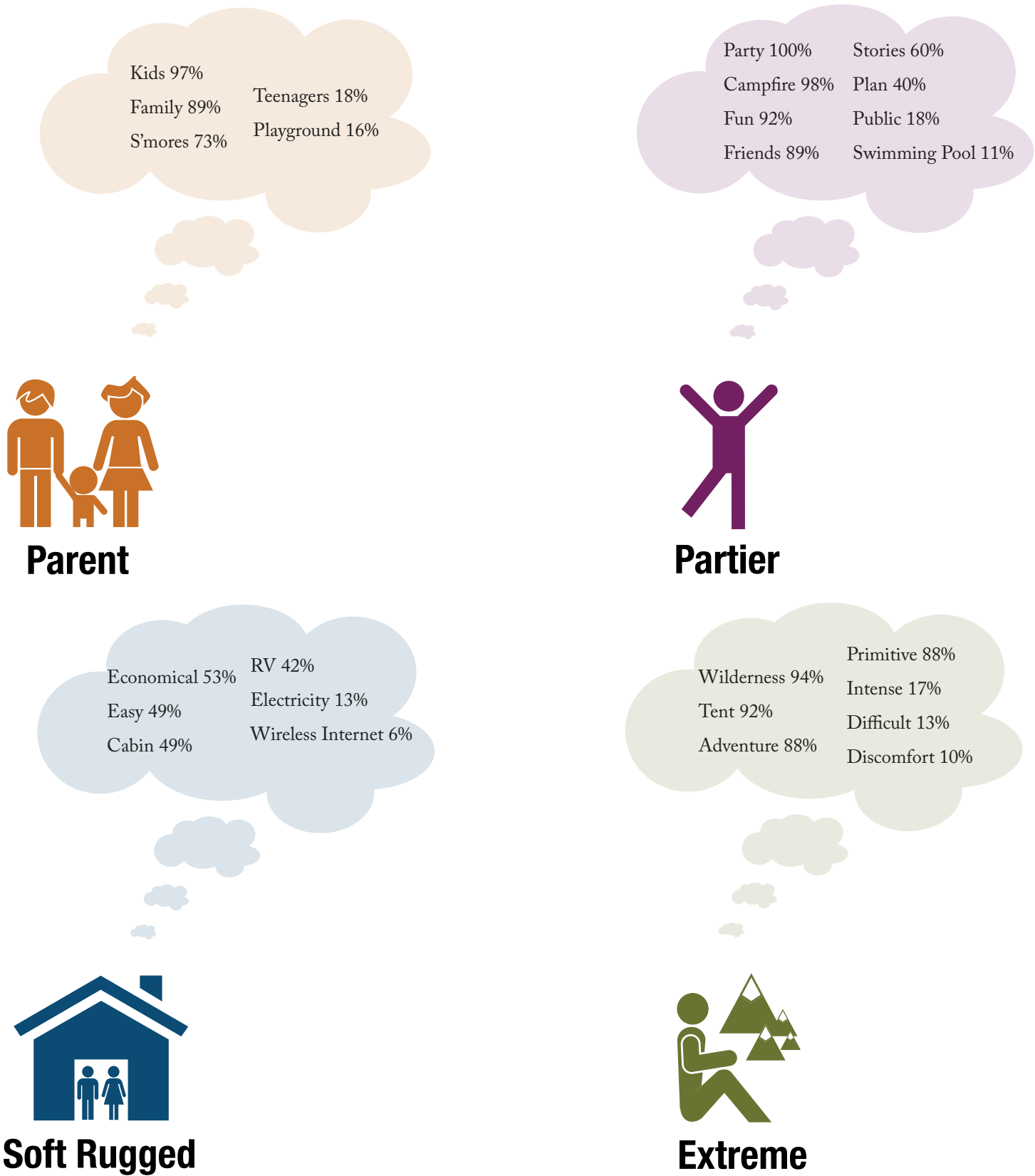
Average
Camper

About Me:

- Thoughts on camping: outdoors, campfire, tent and adventure.
- Gender: Split evenly.
- Age: 42 years old.
- Household income: \$88,000 per year.
- Region: Most live in the West at 37% and fewest live in the Northeast at 19%.

Words Associated with Camping






Words that Index Higher than Average by Profile Group



Camping in the last 12 months...






Type of Camping Trip

Campers by Profile Group

					
"In which of the following ways have you camped in the last 12 months?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
Tent	84%	84%	75%	94%	86%
Cabin	36%	31%	46%	31%	33%
RV	30%	25%	39%	16%	24%
Drive Up	26%	27%	24%	28%	26%
Backcountry/Backpacking	22%	24%	22%	46%	30%
Backyard	19%	14%	14%	11%	11%






Frequency of Camping Trips

Campers by Profile Group

					
"How many camping trips have you been on in the last 12 months?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
1-2 Times	29%	25%	24%	27%	30%
3-5 Times	41%	45%	41%	39%	39%
6-11 Times	23%	22%	23%	24%	22%
12+ Times	7%	8%	11%	11%	9%

Season of Camping Trip






Campers by Profile Group

					
"In which seasons have you made camping trips in the last 12 months?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
Summer	88%	91%	87%	85%	86%
Spring	69%	70%	74%	68%	67%
Fall	62%	60%	68%	65%	63%
Winter	26%	25%	35%	37%	31%

Camping in the last 12 months...






Venue of Camping Trip

Campers by Profile Group

					
“Which best describes the place or venue where you camped most in the last 12 months?”	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
Public Campground (Local, State or National Park)	70%	62%	67%	67%	69%
Private Campground (KOA, Jellystone Park or Boy/Girl Scout Campground)	12%	12%	14%	7%	11%
Backyard	4%	3%	2%	2%	3%
Event (Private, Public or Temporary Campground for a Concert, Festival or Other Public Event)	4%	9%	5%	4%	5%
Other	9%	13%	11%	19%	13%

Camping Companions

Campers by Profile Group

					
“With whom have you camped in the last 12 months?”	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
Immediate Family	71%	52%	56%	41%	48%
Friend(s)	66%	88%	71%	74%	70%
Spouse/Significant Other Only	50%	60%	62%	60%	59%
Kids Aged 2-8	50%	22%	30%	21%	25%
Kids Aged 9-14	49%	29%	29%	23%	25%
Extended Family	27%	21%	27%	18%	21%
Kids Aged 15-17	24%	20%	16%	16%	14%
Kids Under 2 Years Old	11%	9%	8%	7%	7%
Scouts	4%	0%	2%	3%	2%
Other Groups	1%	1%	1%	2%	1%
Other Individual/Group	1%	2%	2%	2%	2%
Alone	1%	1%	1%	1%	1%
Bicycle Group	0%	0%	0%	1%	0%
Church Group	0%	0%	1%	1%	0%
Co-Workers	0%	0%	0%	1%	0%
Team	0%	0%	0%	1%	0%
Dog	0%	0%	1%	1%	1%








Camping in the last 12 months...

Participation in Other Activities While Camping

Campers by Profile Group






Hiking is the most popular activity among all groups. Fishing, however, is enjoyed by parents more than any other group. Fifty-six percent of those in the Parent Group fish while camping, compared to 45 percent of the Partier Group, 47 percent of Soft Rugged Group, 41 percent of the Extreme Group and 43 percent of Average Campers.

					
"In the last 12 months, what other sports and leisure activities have you taken part in while on camping trips?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
Hiking	91%	87%	91%	93%	92%
Fishing	56%	45%	47%	41%	43%
Running/Jogging	53%	58%	57%	52%	55%
Trail Running	42%	42%	42%	48%	45%
Canoeing	40%	27%	32%	38%	34%
Bicycling (Road)	34%	33%	37%	34%	35%
Bicycling (Mountain)	32%	35%	33%	32%	32%
Kayaking	28%	33%	32%	28%	32%
Boating	28%	35%	27%	21%	23%
Climbing	26%	23%	27%	33%	26%
Rafting	12%	15%	14%	14%	14%
Triathlon	12%	15%	14%	14%	12%
Hunting	9%	9%	9%	10%	8%
Snorkeling	8%	5%	9%	8%	7%
Skiing (Alpine)	8%	9%	8%	6%	7%
Other	8%	11%	10%	10%	9%
Wakeboarding	6%	5%	5%	4%	4%
Snowshoeing	6%	7%	8%	11%	9%
Stand-Up Paddling	4%	5%	5%	4%	4%
Surfing	4%	6%	5%	3%	3%
Skiing (Cross-Country)	4%	5%	5%	8%	5%
Snowboarding	2%	5%	5%	5%	4%
Sailing	1%	0%	2%	2%	2%
Scuba Diving	1%	4%	3%	3%	3%
Boardsailing/Windsurfing	0%	0%	0%	0%	0%
None of the Above	1%	0%	1%	1%	1%

Camping in the last 3 years...

Number of Trips Taken






Campers by Profile Group

					
"In the last three years (including this year, 2011), how would you characterize your camping activity?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
There really hasn't been any significant change in our activity.	33%	36%	30%	34%	32%
We take fewer trips now than in the past, and they are shorter in duration.	26%	28%	27%	25%	27%
We take more trips now than in the past, but they are shorter in duration.	13%	14%	15%	12%	12%
We take more trips now than in the past, and they are longer than before.	12%	6%	11%	15%	13%
We take fewer trips now than in the past, but they are longer than before.	7%	8%	7%	7%	7%
We take about the same number of trips, but they are shorter in duration.	6%	7%	6%	6%	6%
We take about the same number of trips, but they are longer than before.	4%	2%	4%	2%	3%

Camping in the next 12 months...

Number of Trips Planned






Campers by Profile Group

					
"How many times do you plan to camp in the next 12 months?"	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
1-2 Times	19%	20%	17%	18%	22%
3-5 Times	53%	51%	47%	47%	48%
6-10 Times	16%	18%	21%	18%	19%
11+ Times	11%	11%	15%	17%	12%

Reasons for Taking Fewer Trips

Campers by Profile Group






The Parent Group cites lack of time due to family commitments as the number one reason for taking fewer camping trips. All other groups say that they have too little time due to work or school commitments.

					
	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
“If taking fewer trips, what are the main reasons?”					
Lack of time due to family commitments.	47%	28%	29%	28%	33%
Lack of time due to work/school commitments.	33%	40%	43%	43%	42%
Young children limit where can go.	8%	0%	3%	1%	3%
It's too expensive.	5%	9%	7%	7%	5%
No one to go with.	3%	9%	5%	5%	5%
Not enough vacation time.	1%	4%	4%	5%	6%
The weather has been poor.	1%	2%	2%	1%	1%
Prefer other activities.	1%	4%	2%	2%	2%
Prefer staying in hotel.	1%	2%	1%	1%	1%
I need better or different equipment.	0%	0%	3%	3%	2%
Sites too crowded.	0%	2%	2%	2%	1%
Health.	0%	0%	0%	1%	0%

Decision Making

Campers by Profile Group






Among all groups, the majority of respondents said that they made the decision to go camping. The second most popular response was that of a spouse or significant other. Differences are seen in the third most influential decision-maker: friends. More participants in the Partier Group are dependent on a friend’s decision than any other group.

					
	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
“In general, who decides to go camping most often?”					
Me	69%	60%	67%	68%	65%
Spouse/Significant Other	20%	21%	20%	19%	19%
Friends	5%	16%	8%	9%	10%
Children	3%	2%	2%	1%	2%
Joint Decision (Self + Spouse)	1%	1%	1%	2%	1%
Family Decision	1%	1%	0%	1%	1%
Group Decision	1%	1%	1%	0%	1%
Parents	0%	0%	1%	0%	0%
Scouts	0%	0%	0%	1%	0%
Other	0%	0%	0%	0%	0%

Motivation for Camping

Campers by Profile Group

Across all groups, camping participants are motivated to go camping because they like camping. The Partier Group is also slightly more motivated to go camping because of other sports or active pursuits connected to the camping trip and to camp near an event than any other group.

					
	Parent Group	Partier Group	Soft Rugged Group	Extreme Group	Average Camper
“What is the main motivation for camping?”					
Camping Itself	57%	48%	54%	50%	54%
Equal Mix of Camping and Sports Activities	36%	34%	34%	36%	34%
Other Sports or “Active” Pursuits	6%	12%	8%	10%	9%
To Stay Close to an Event (Music Performance, Festival, Family Event) Without a Hotel	2%	6%	4%	3%	3%
Other	0%	0%	0%	1%	0%



BUYING BEHAVIOR

The state of the economy affects whether Americans participate in camping. Forty-five percent of campers say that the economy impacts how often they participate in outdoor activities. In addition, more than half of camping participants are employed.

Despite America’s still uncertain economy, 61 percent of camping participants say they spent the same amount on sports and recreation as they did the previous year. Thirty-four percent say they spent considerably less or put off some spending.

In general, camping participants spend slightly more on sports and recreation than non-participants. Most of these purchases—both new and replacements—are planned at home before taking a camping trip.

Backpacks

Backpacks are the most often purchased camping gear among campers age 18 to 34.

51%

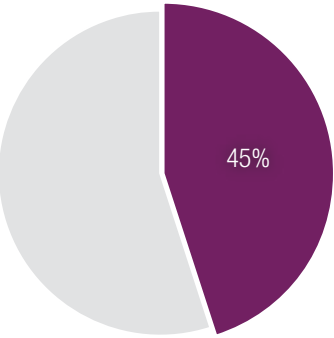
More than half, 51 percent, of campers are employed.

Frequent Campers

Frequent campers, those camping more than 12 times per year, are more likely to buy more camping equipment.

Camping Participants and the Economy

The overall state of the economy has a significant impact on how often campers participate in outdoor activities.



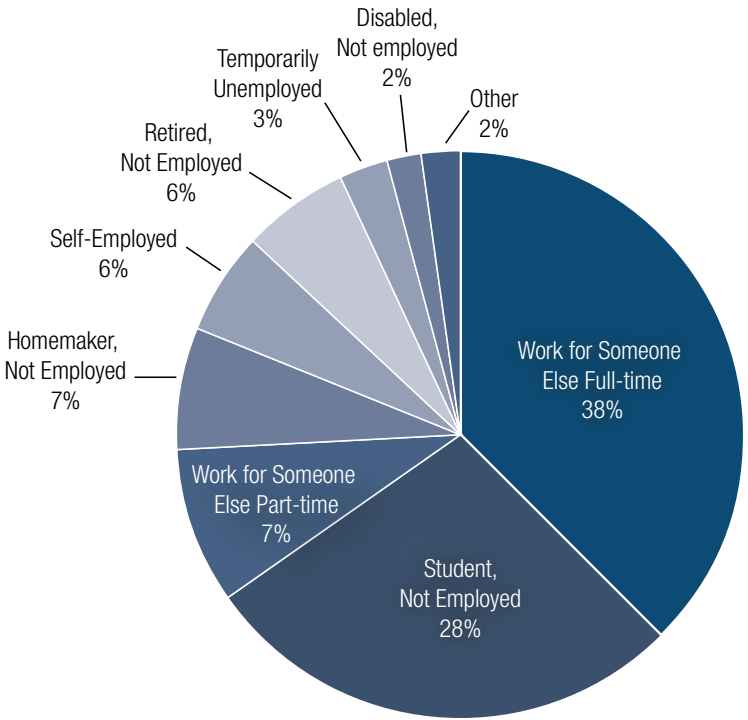
45% of campers said the economy affects their outdoor participation.

Campers Ages 6+
Based on 2009 data

Camping Participation by Employment Status

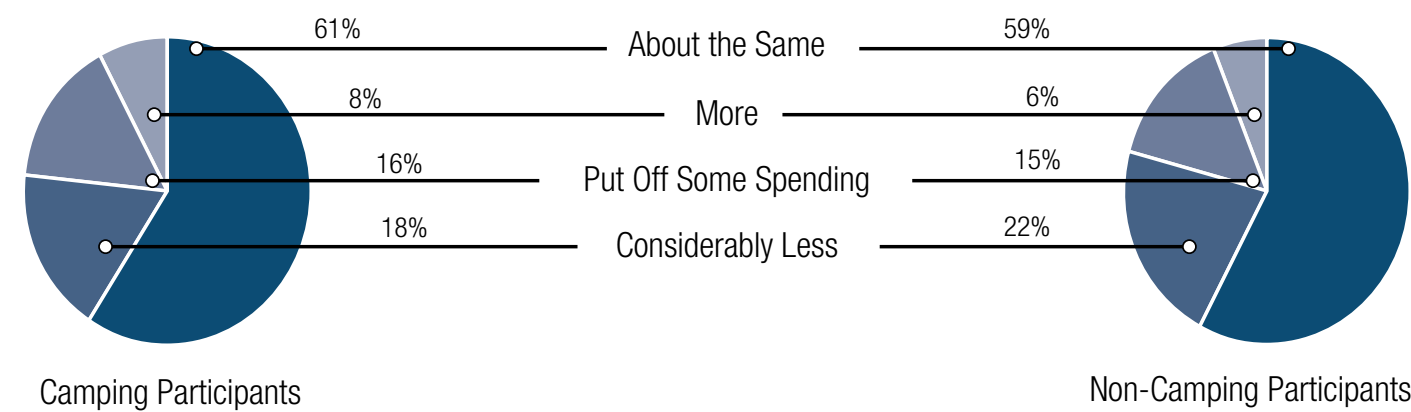
Campers Ages 6+

The economy affects whether Americans participate in outdoor recreation. More than half of outdoor participants are employed, and only three percent are temporarily unemployed.



Campers Ages 6+

Money Spent on Sports and Recreation in 2010, Compared to Money Spent in 2009



	If you spent less on indoor and outdoor goods and services, what areas did you spend less on?		If you put off purchases, what areas of spending have you put off?	
	Camping Participants	Non-Camping Participants	Camping Participants	Non-Camping Participants
Equipment Purchase	49%	48%	51%	50%
Travel to Take Part in Sports/ Recreation	47%	42%	46%	39%
“Pay to Play” Fees	27%	29%	33%	30%
Membership Dues for a Health Club	25%	25%	24%	27%
Lessons/Instruction	19%	21%	17%	21%
Membership Dues for a Country Club	10%	11%	16%	13%
Other activities	7%	11%	5%	7%

	What will you spend more on in 2011?	
	Camping Participants	Non-Camping Participants
Travel to Take Part in Sports/ Recreation	44%	32%
Equipment Purchase	36%	36%
Membership Dues for a Health Club	23%	26%
Lessons/Instruction	21%	21%
“Pay to Play” Fees	18%	19%
Membership Dues for a Country Club	4%	4%
Other Activities	4%	4%

Most Recent Camping Purchase

Campers by Age

During campers’ most recent camping equipment purchase, most bought airbeds, battery lighting, propane or liquid fuel lighting, backpacks, sleeping bags and tents. Campers under age 35 were relatively more likely to buy backpacks, while those over age 45 were more likely to buy propane lighting.

“What did you purchase in the last 12 months?”	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Campers
Backpack	16%	12%	9%	4%	11%
Airbed	13%	10%	16%	14%	13%
Battery Lighting	12%	13%	10%	16%	12%
Sleeping Bag	12%	12%	9%	11%	11%
Tent	12%	11%	14%	7%	11%
Propane or Liquid Fuel Lighting	11%	13%	14%	13%	12%
Cooler	7%	8%	8%	7%	8%
Camp Stove	6%	4%	4%	7%	5%
Camp Furniture	6%	7%	7%	6%	6%
Portable Grill	2%	6%	4%	6%	4%
Beds/Bedding/Hammocks/Cots	1%	1%	1%	3%	1%

Campers by Frequency

Frequent campers were more likely to buy more products in general than less frequent campers but especially camp furniture, stoves, coolers and lighting.

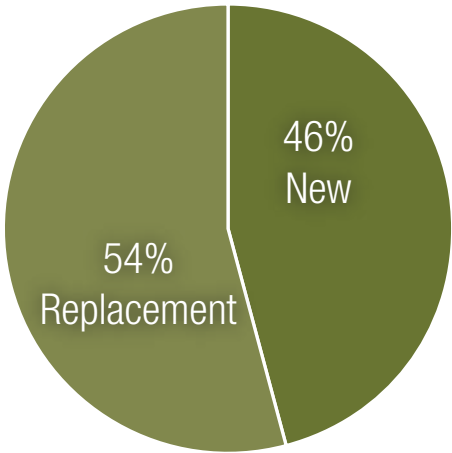
“What did you purchase in the last 12 months?”	1-2 Camps	3-5 Camps	6-11 Camps	12+ Camps	All Campers
Airbed	16%	11%	11%	14%	13%
Backpack	14%	12%	11%	6%	11%
Battery Lighting	13%	12%	12%	9%	12%
Sleeping Bag	11%	12%	11%	6%	11%
Tent	11%	9%	16%	7%	11%
Propane or Liquid Fuel Lighting	10%	13%	11%	19%	12%
Cooler	9%	9%	5%	4%	8%
Portable Grill	6%	4%	2%	10%	4%
Camp Stove	4%	6%	4%	7%	5%
Camp Furniture	3%	7%	8%	10%	6%
Beds/Bedding/Hammocks/Cots	0%	0%	2%	3%	1%

Most recent purchase...

Kind of Purchase

Surveying the kind of item camping participants bought during their last camping equipment purchase reveals what kind of purchases they usually make.

In 2010, there were slightly more replacement items (54 percent) purchased than new items (46 percent).



Campers Ages 6+

Purchasing Decision

Campers, Ages 18+

There is little impulse buying when it comes to making camping equipment purchases. Both new and replacement purchases are planned at home, prior to taking the camping trip.

“When was your most recent purchasing decision made?”	New Purchases	Replacement Purchases
At Home, Prior to the Camping Trip	59%	68%
While Camping	15%	19%
Reviewing Camping Equipment Online	11%	4%
While in a Camping Equipment Store	9%	5%
Looking Through a Printed Catalog	3%	0%
In Shop/Impulse	1%	1%
Gift	1%	N/A
After Previous Trip	1%	0%
On Way to Camp/Travelling	0%	1%
Auction/Advertisement	0%	0%
Other	1%	1%



THE FUTURE OF CAMPING

Introducing children to camping at a young age is vital to their enjoyment of the activity throughout life. In fact, half of all current campers experience their first camping trip before they are just seven years old. Conversely, it is difficult to encourage older people to try camping if they have not experienced it as a child. Only nine percent of camping participants try camping for the first time after the age of 19.

A majority of youth and adolescent campers are motivated to get outside because they think outdoor activities are cool. While young adults also think outdoor activities are cool, they cite exercise as their top motivator. Young adults also see outdoor activities as a way of managing stress, while youth and adolescents go outside because their relatives do.

Fathers have a significant influence over camping participation. Almost half of all campers say their fathers took them camping for the first time. Boy Scouts or Girl Scouts came in a distant second at 17 percent.

In the next year, campers are planning an average of 5.07 camping trips, down slightly from 5.52 camping trips made during the previous year. Most camping participants (32 percent) say they have not changed their camping activity in the last three years, and nearly a quarter of frequent camping participants are taking more trips that are also longer.

Exercise

Sixty-three percent of campers ages 18 to 24 participate in outdoor activities for exercise.

Cool!

Most youth campers participate in outdoor activities because they think the outdoors is cool.

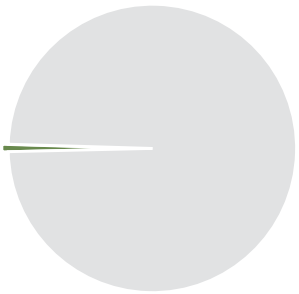
Fathers

Fathers were cited by 46 percent of campers as the person or group that introduced them to camping.

First Time Camping Participants

All Americans, Ages 18+

1% of campers ages 18 and over tried camping for the first time in 2010.



Age 7

Fifty percent of all campers took their first camping trip before age seven.

9%

Only nine percent of camping participants camped for the first time when they were age 19 or older.

Who Introduces People to Camping

All Americans, Ages 18+

“Who/what group took you camping for the first time?”	Ages 18-34	Ages 35-44	Ages 45-54	Ages 55+	All Ages
Father	47%	50%	43%	35%	46%
Scouts (Girl or Boy)	16%	14%	19%	30%	17%
Friend	12%	14%	14%	11%	13%
Mother	7%	9%	6%	5%	7%
Church	4%	3%	3%	5%	3%
Community Center/Youth Program (not YMCA/YWCA)	2%	1%	2%	0%	2%
Both Parents	2%	3%	0%	0%	2%
Spouse	2%	1%	5%	4%	3%
Others	2%	1%	2%	5%	2%
YMCA/YWCA	1%	2%	0%	3%	2%
Grandparents	1%	0%	2%	0%	1%
Aunt/Uncle	1%	1%	0%	1%	1%
Joint Family	1%	1%	0%	0%	1%
Other Family Member	1%	0%	1%	1%	1%
School	1%	0%	0%	0%	0%
Brother	0%	1%	0%	0%	0%
Sister	0%	0%	0%	0%	0%
Self	0%	0%	1%	0%	0%

Forty-six percent of campers say their fathers introduced them to camping. Boy Scouts or Girl Scouts come in second at 17 percent.

Youth Participation in Outdoor Activities Among Adult Camping Participants

All Americans by Age

Physical education (PE) is important to growing the number of camping enthusiasts. Among adults who are current camping participants, 83 percent say they had PE in school between the ages of 6 and 12. That compares with just 72 percent of non-camping participants. Similarly, 81 percent of participants say they had PE in school from 13 to 17 years of age, while only 71 percent of non-participants recall PE in school during the same period of time.

Early exposure to outdoor activities also has a large impact on current campers. Fifty-seven percent of camping enthusiasts participated in outdoor activities from ages 6 to 12 and 63 percent between ages 13 and 17. That compares to just 30 percent and 34 percent of the respective age groups for non-campers.

“I regularly participated in...”	Ages 6-12		Ages 13-17	
	Campers	Non-Campers	Campers	Non-Campers
PE at School	83%	72%	81%	71%
Outdoor Activities	57%	30%	63%	34%
Team Sports	45%	33%	51%	39%
Cycling	44%	33%	45%	32%
Water Sports	25%	16%	29%	19%
Running/Jogging	23%	19%	40%	28%
Swimming for Fitness	22%	16%	24%	18%
Winter Sports	21%	13%	26%	16%
Racquet Sports	8%	6%	17%	12%
Fitness/Health Club-Based Activities	6%	4%	13%	9%
Golf	6%	4%	13%	8%
None of the Above	7%	17%	6%	17%

Reasons Youth Participate in Outdoor Activities

All Americans by Age

Youth and adolescent camping participants are motivated to get outside simply because they think outdoor activities are cool. Although the cool factor is present in young adults too, exercise is the number one motivator for this older demographic. Young adult campers also see outdoor activities as a way of managing stress, while the younger demographic goes outside because their relatives do.

“What motivates you to participate in outdoor activities?”	Ages 6-12	Ages 13-17	Ages 18-24
Outdoor activities are cool.	59%	51%	51%
My parents/brothers/sisters/other relatives participate.	51%	52%	31%
I can do outdoor activities near my home.	42%	36%	52%
Outdoor activities are a good way to get exercise/stay fit.	42%	46%	63%
My friends participate.	33%	44%	41%
I want to try something new.	32%	31%	46%
Outdoor activities are affordable.	23%	34%	44%
A school/community/other organized program introduced me.	22%	20%	7%
Outdoor activities look fun in magazines/books/websites/TV/movies.	22%	16%	17%
I like challenges.	22%	31%	48%
My kids are the right age now.	11%	3%	6%
I want to relax/manage stress.	10%	18%	55%
I want a change from my usual routine.	10%	19%	38%
Some other reason not listed above.	3%	1%	1%



Camping in the last 3 years...

Number of Trips Taken

Campers by Age

“In the last three years (including this year), how would you characterize your camping activity?”	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
We take fewer trips now than in the past, and they are shorter in duration.	30%	23%	29%	25%	27%
There really hasn't been any significant change in our activity.	30%	38%	30%	25%	32%
We take more trips now than in the past, but they are shorter in duration.	14%	13%	10%	10%	12%
We take more trips now than in the past, and they are longer than before.	14%	10%	13%	19%	13%
We take fewer trips now than in the past, but they are longer than before.	5%	9%	7%	6%	7%
We take about the same number of trips, but they are shorter in duration.	5%	5%	5%	12%	6%
We take about the same number of trips, but they are longer than before.	3%	2%	5%	4%	3%

Thirty-two percent of camping participants say they have not changed their camping habits in the last three years—indicating the enduring value of camping.

Campers by Frequency

“In the last three years (including this year), how would you characterize your camping activity?”	1-2 Outings	3-5 Outings	6-11 Outings	12+ Outings	All Campers
We take fewer trips now than in the past, and they are shorter in duration.	42%	28%	10%	11%	27%
There really hasn't been any significant change in our activity.	29%	33%	38%	28%	32%
We take more trips now than in the past, but they are shorter in duration.	6%	11%	19%	20%	12%
We take more trips now than in the past, and they are longer than before.	5%	10%	24%	24%	13%
We take fewer trips now than in the past, but they are longer than before.	11%	7%	3%	3%	7%
We take about the same number of trips, but they are shorter in duration.	5%	8%	5%	3%	6%
We take about the same number of trips, but they are longer than before.	3%	3%	2%	12%	3%

The number of camping excursions participants take each year affects their camping habits and hints at their commitment to camping.

Nearly a quarter of frequent campers say they are taking more trips and staying longer.

Camping in the last 3 years...

Reasons for Taking Fewer Trips

Campers by Age

“What keeps you from participating in outdoor activities more often?”	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Lack of time due to work/school commitments.	50%	41%	44%	28%	43%
Lack of time due to family commitments.	26%	37%	37%	24%	33%
Not enough vacation time.	7%	6%	3%	12%	6%
No one to go with.	4%	1%	6%	16%	5%
It's too expensive.	4%	2%	5%	12%	4%
Young children limit where I can go.	2%	6%	0%	0%	3%
I need better or different equipment.	4%	2%	1%	0%	2%
The weather has been poor.	1%	1%	1%	0%	1%
Prefer other activities.	1%	1%	3%	0%	1%
Prefer staying in hotel.	0%	1%	0%	4%	1%
Sites too crowded.	1%	2%	0%	4%	1%

Camping participants are taking fewer camping trips because of work commitments (43 percent) and family commitments (33 percent).

Additionally, campers over age 55 find camping too expensive (12 percent compared to 4 percent of all respondents).

Campers by Frequency

“What keeps you from participating in outdoor activities more often?”	1-2 Outings	3-5 Outings	6-11 Outings	12+ Outings	All Campers
Lack of time due to work/school commitments.	38%	45%	48%	28%	43%
Lack of time due to family commitments.	37%	33%	20%	24%	33%
Not enough vacation time.	9%	3%	4%	12%	6%
No one to go with.	5%	3%	4%	16%	5%
It's too expensive.	2%	6%	8%	12%	4%
Young children limit where I can go.	2%	3%	8%	0%	3%
I need better or different equipment.	3%	2%	0%	0%	2%
The weather has been poor.	2%	0%	0%	0%	1%
Prefer other activities.	1%	3%	0%	0%	1%
Prefer staying in hotel.	1%	1%	0%	4%	1%
Sites too crowded.	1%	1%	8%	4%	1%

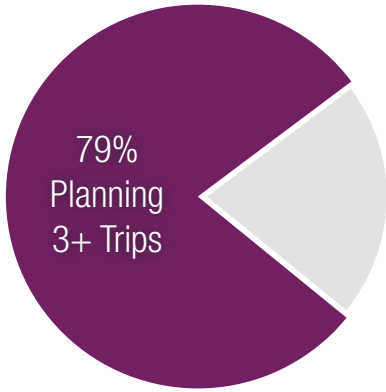
As with all camping participants, frequent campers place work and family commitments as the top reasons why they do not camp more often.

More so than less frequent campers, however, frequent campers cite lack of camping companions and vacation time, as well as expense as reasons for not camping more than they do.

Camping in the next 12 months...

Camping Plans

More than three-quarters of current camping participants plan to go on three or more camping trips in the next year.



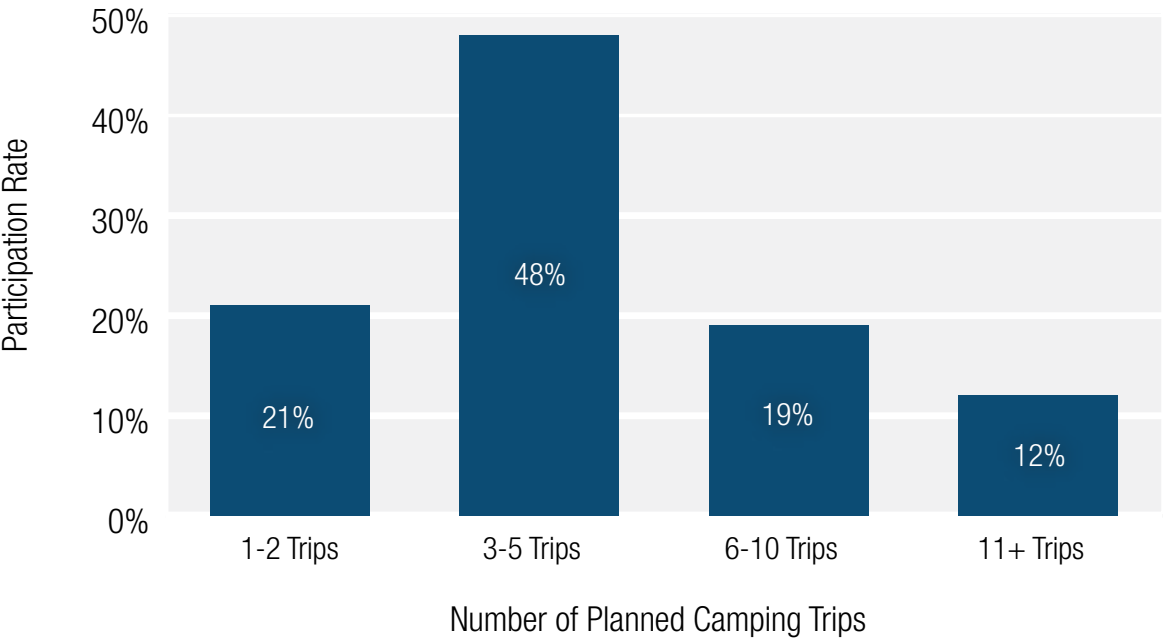
Campers Ages 18+

5.07 trips

Camping participants are planning on taking an average of 5.07 camping trips next year.

Number of Trips Planned

Campers, Ages 18+



Method

During January and February 2011, a total of 38,742 online interviews were carried out with a nationwide sample of individuals and households from the U.S. Online Panel operated by Synovate. A total of 15,086 individual and 23,656 household surveys were completed. The total panel has more than one million members and is maintained to be representative of the U.S. population. Oversampling of ethnic groups took place to boost response from typically underresponding groups.

A weighting technique was used to balance the data to reflect the total U.S. population aged six and above. The following variables were used: gender, age, income, household size, region and population density. The total population figure used was 283,743,000 people aged six and above. The report details participation among all Americans: youth, young adults and adults.

The 2010 participation survey sample size of 38,742 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error—that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. A sport with a participation rate of five percent of the total population has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants. Small groups’ participation, especially those with less than one million participants, can be expected to fluctuate from year to year.

The survey methodology changed slightly in 2007 to include household interviews in addition to individual interviews. The two methodologies are comparable, and all results are indicative of the state of sports and

leisure participation. Caution is recommended, however, in placing undo emphasis on trends extending back to 2006.

In October 2011, an additional 887 adult campers (age 18+) were recruited to complete a more in-depth interview about camping habits. This survey was also used to create the segmentation in the report (parent group, partier etc). The segmentation was based on the response to the “image” of camping question.

The main survey (38,742 respondents) is used for all of the profiling and projection to national participation numbers. The “add-on survey (887 campers) was used for analysis of camping habits and attitudinal data

Youth Interviews

All interviews of children under 13 were carried out following the guidelines set out in the Children’s Online Privacy Protection Act of 1998 (COPPA). No children were contacted directly. The panel is a balanced sample of households with children in each age group, but contact is always made through designated adult panelists. The adult panelist receives the survey invitation on behalf of a specified child, age 6 to 12, and they are asked to complete the survey together. Respondents ages 13 to 17 are contacted in a manner similar to respondents ages 6 to 12, but they are asked to complete the survey themselves.

Notes

Unless otherwise noted, the data in this report was collected during the latest 2011 participation survey, which focused on American participation in the 2010 calendar year. 2006, 2007, 2008 and 2009 data noted in the report was collected in previous surveys.

<p>The Coleman Company 3600 North Hydraulic Wichita, KS 67219 www.coleman.com</p> <p>® The Coleman Company and The Coleman Company logo are registered trademarks of The Coleman Company.</p>	<p>Kampgrounds of America, Inc. PO Box 30558 Billings, MT 59114 www.koa.com</p> <p>® Kampgrounds of America, Inc. and the Kampgrounds of America, Inc. logo are registered trademarks of Kampgrounds of America, Inc..</p>
<p>The Outdoor Foundation 4909 Pearl East Circle, Suite 200 Boulder, CO 80301 303.444.3353 www.outdoorfoundation.org</p> <p>® The Outdoor Foundation and The Outdoor Foundation logo are registered trademarks of The Outdoor Foundation.</p>	<p>© 2011, All Rights Reserved</p>

A Partnership Project of:

