

2015 American Camper Report

PRESENTED BY THE COLEMAN COMPANY, INC.
AND THE OUTDOOR FOUNDATION





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Introduction

Camping is one of the most popular outdoor activities in America, attracting 40.5 million participants in 2014. And, camping is almost as diverse as Americans themselves, adapting to various ages, ability levels and interests. Campers can carry gear on their backs, unload it from a car or stay in the vehicle itself. From cozy cabins to utilitarian bivies, campers can enjoy fully loaded campsites or head into the wilderness to disconnect completely. But regardless of how Americans camp, at its core, camping continues a great American tradition of setting off to reconnect with the natural world.

A Look Back at 2014: Overall Trends

The 2015 *American Camper Report* shows that 40.5 million Americans, or 14 percent of the population over age six, camped at least once in 2014. While the participation rate remained steady since 2013, the number of participants increased by 400,000 people. In total, participants camped 572.4 million days, or an average of 14.1 days per camper.

The majority of camping participants are Caucasian, and they skew slightly male. The average age is 34. On average, these camping participants embark on 4.1 camping trips per year that each last 2.7 nights. State park campgrounds are the most popular venue. Campers typically drive 155.8 miles from home to their destinations and set up camp within one-fourth of a mile from their cars.

While camping, the younger generations like to hike, while the older generation prefers outdoor cooking. Campers of all ages are nearly unanimous in their love for nightly campfires.

The Year Ahead: Future Opportunities

As seen in past years, research confirms that reaching Americans at an early age is critical to instilling a love of the outdoors and encouraging an active, healthy lifestyle. Fifty-six percent of current campers participated in outdoor recreation during childhood, compared to only 24 percent of non-participants. Participation during adolescence produced nearly the same effect.

The outlook for camping appears bright. Ninety-two percent of campers say it is “very likely” or “likely” that they will continue camping next year. Indeed, these campers plan to set off on almost four trips.

To help stakeholders reach campers and non-campers alike, the 2015 *American Camper Report* details camping participation and provides data and analysis on camping trends throughout the United States. The report also takes a look at first-time camping participants to understand what motivates non-campers to take their first outing and how to retain them as camping enthusiasts. The research in this report will help the camping industry — and the entire outdoor industry — be better equipped to engage campers and initiate an increase in camping participation.

Key Findings

Overview of Camping Participation

- In 2014, 40.5 million Americans went camping at least once.
- Camping gained about 400 thousand participants from 2013 to 2014. Due to population growth, the participation rate remained steady at 14 percent.
- Participants camped a collective 572.4 million days, or an average of 14.1 days per camper.
- Tents are the most popular type of shelter.
- The Mountain Region has the highest camping participation rate at 19 percent.
- Thirty-four is the average age of camping participants in the US.
- Eighty-six percent of campers participate in multiple outdoor activities.

Profile of a Camping Trip

- The average camper goes on 4.1 camping trips, down from 5.4 the year before.
- More than half of participants choose state park campgrounds as their camping venues.
- Camping trips last an average of 2.7 nights.
- Participants travel an average of 155.8 miles to their campsites.
- Thirty-four percent of campers plan their trips at least one month in advance, but 30 percent do not make campsite reservations in advance.
- Almost three-quarters of campers drive to their camping destinations and park within one-fourth of a mile of their campsites.
- Of those that have access to an electrical hook-up, 80 percent use it.

- More than 70 percent of participants camp with friends as their companions.
- Many campers say that they make the decision to go camping and arrange the logistics.

Buying Behavior

- Most campers are employed or students, while only four percent are temporarily unemployed.
- Sixty-eight percent of camping purchases replace lost or broken items.
- A majority of participants decide to purchase their camping items at home, prior to their outings.

First-Time Campers

- Eleven percent of campers were new to the activity in 2014.
- Participants spend an average of approximately \$200 in preparation for their first trips.
- Friends or relatives take half of new participants on their first camping trips.

Future of Camping

- Eighty-three percent of campers take their first trip between birth and age 15.
- Three-quarters of campers, ages 13 and over, participated in physical education as children.
- Lack of time due to work or school is the most cited reason for not camping next year.
- Campers plan to go on an average of 3.7 trips next year, a decrease from 4.9 trips in 2013.

CAMPING PARTICIPATION

In 2014, 40.5 million Americans went camping at least once. Camping gained about 400 thousand participants, but due to population growth, the participation rate remained steady at 14 percent.

Participants camped for a collective 572.4 days, which equates to an average of 14.1 days per camper. This is a slight decrease from 597.7 total days and 14.9 average days per camper the previous year.

A majority of camping participants, 78 percent, are Caucasian. Among genders, participants are more balanced, with 55 percent male and 45 percent female 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.

40.5 Million

40.5 million Americans, or 14 percent of the population, went camping in 2014.

Tents

Sixty-five percent of participants primarily camp in tents.

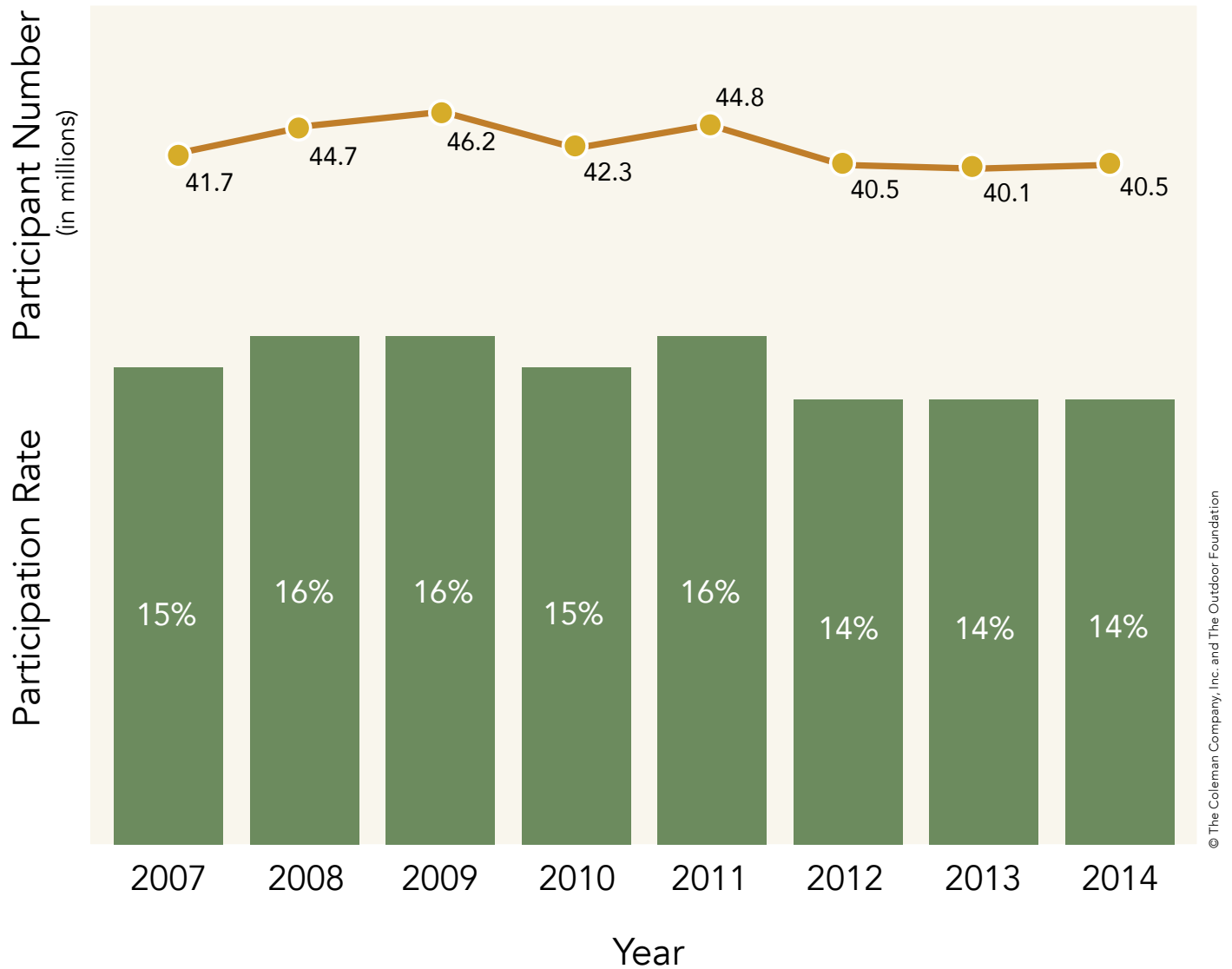
572.4 Million

Americans went camping a total of 572.4 million days in 2014.

Camping Participation Over Time

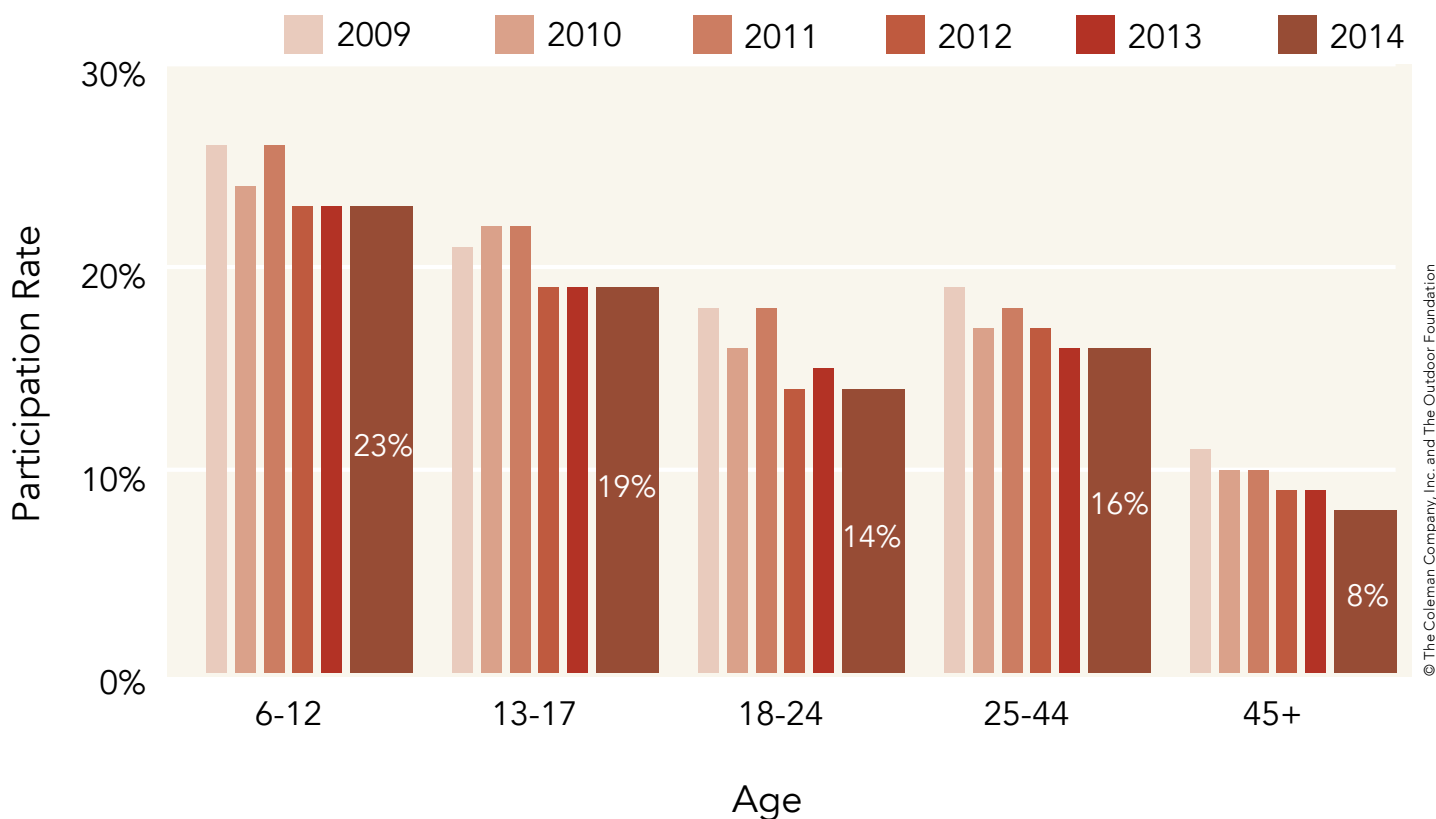
All Americans, Ages 6+

In 2014, 40.5 million Americans camped at least once for a participation rate of 14 percent. The number of camping participants climbed by 400 thousand since the previous year, when the number of camping participants was at a seven-year low. Despite the growth in participants, the participation rate remained steady at 14 percent due to population growth.



Camping Participation by Age

All Americans, Ages 6+



Camping Participation by Type of Camping

All Americans, Ages 6+

Camping Type	Participants (in millions)	Participation Rate	Total Days (in millions)	Average Days per Participant
Drive-up	28,660	10%	270,342	9.4
RV	14,633	5%	178,421	12.2
Backpacking	10,101	4%	123,650	12.2
All	40,500	18%	572,413	14.1

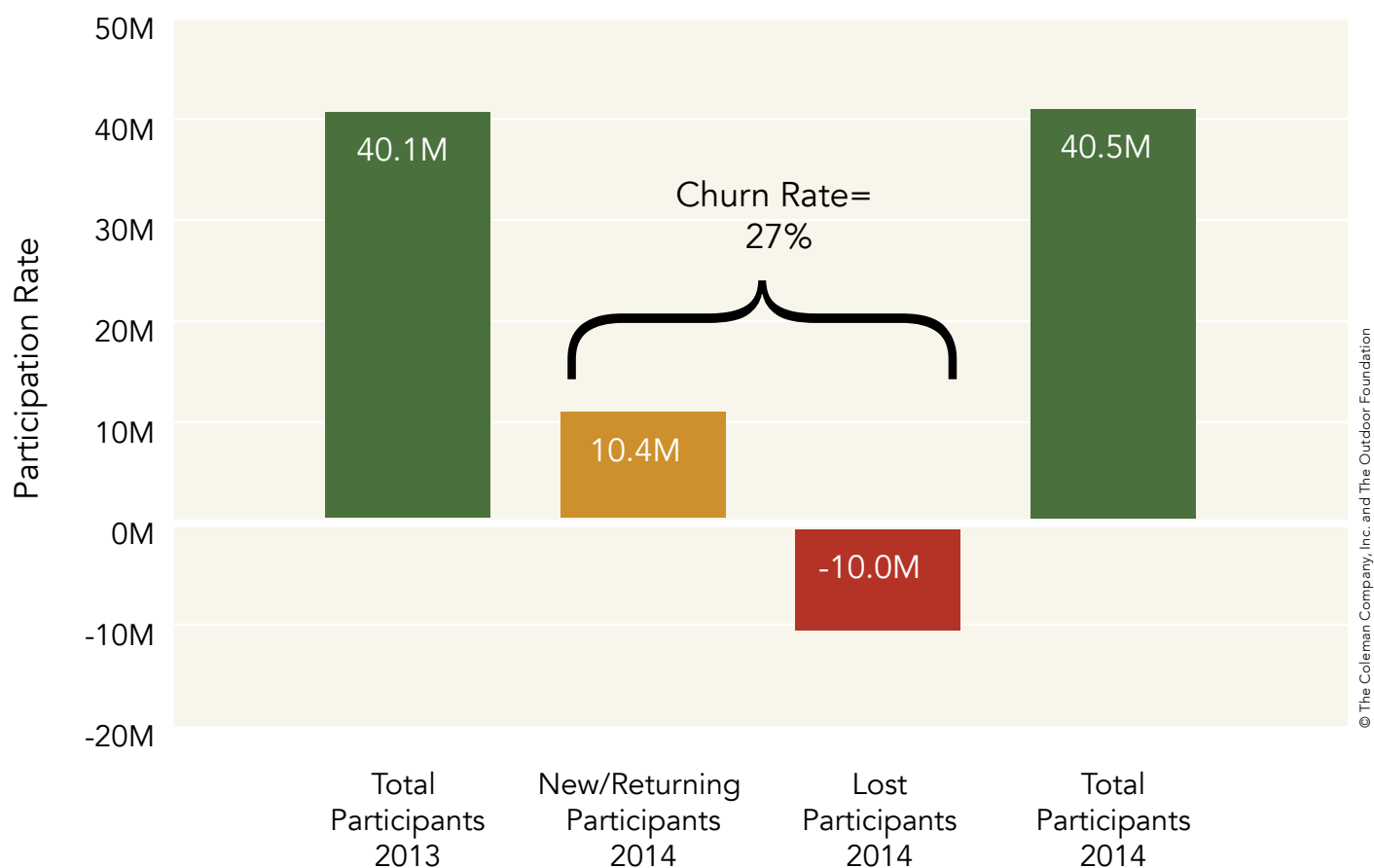
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Note: Some campers participated in several types of camping.

The Leaky Bucket

Campers, Ages 6+

The Leaky Bucket analysis shows where camping gained participants from 2013 to 2014. The activity attracted 10.4 million new or returning participants in 2014, while losing 10 million campers. This resulted in a net gain of 400 thousand camping participants and a churn rate (those leaving and joining the activity) of 27 percent.



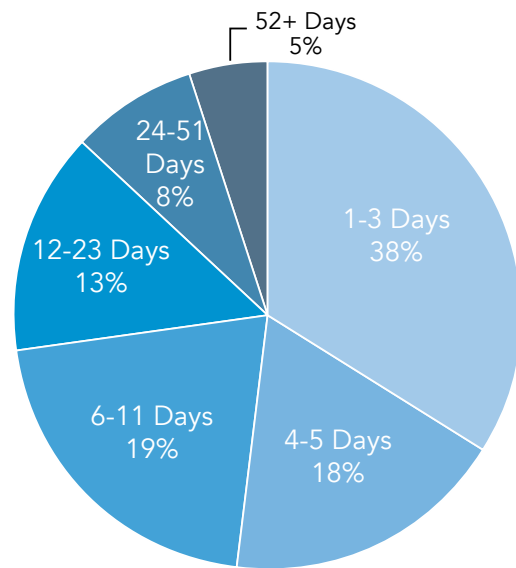
DEMOGRAPHICS OF CAMPING PARTICIPANTS

Annual Camping Days

In 2014, participants camped for a total of 572.4 million days.

14.1 days

The average participant camped for 14.1 days in 2014.

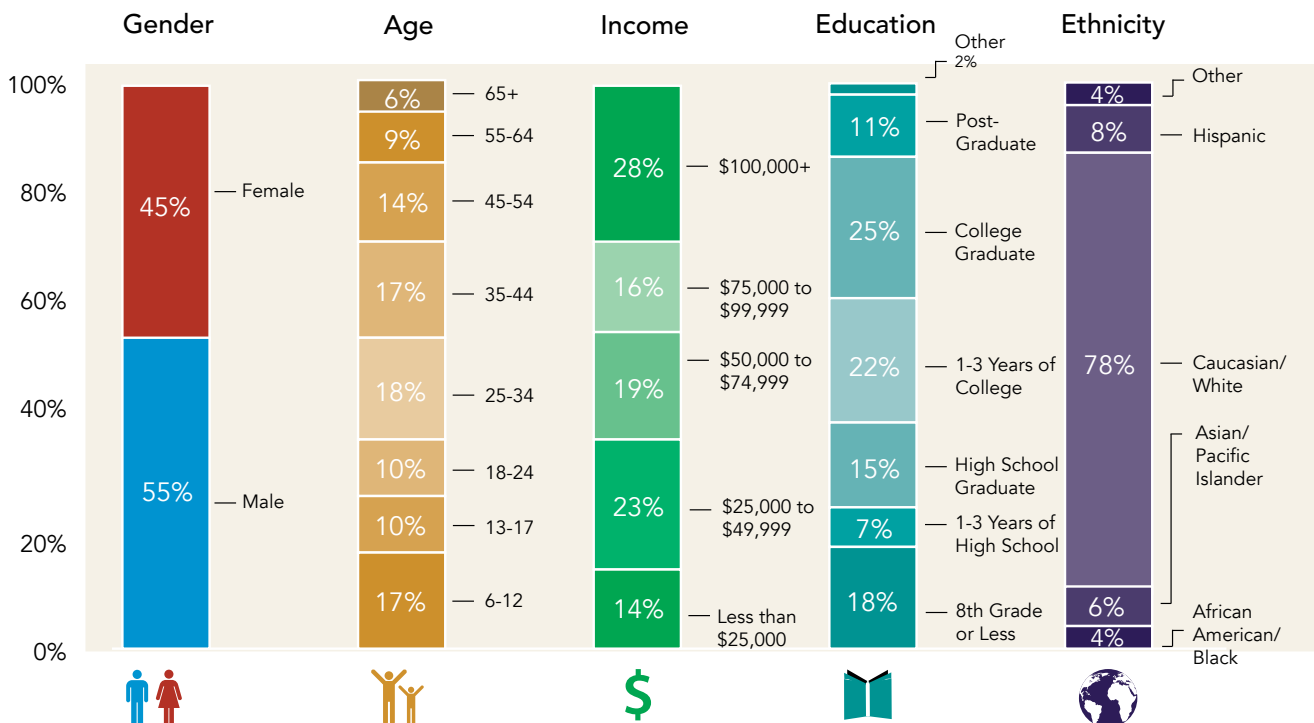


Campers, Ages 6+

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Demographics

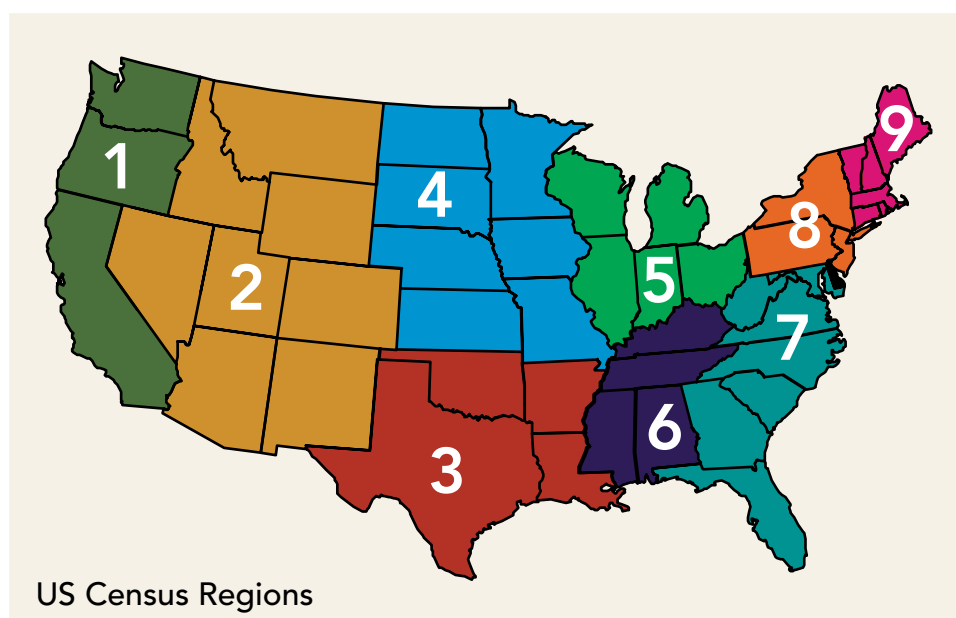
Campers, Ages 6+



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Geography of Camping Participants

Camper, Ages 6+



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Participation Rate by Region looks at camping participation within a geographic area. It shows the percentage of camping participants in each region of the US.

Percent of US Participants compares each region's participation to one another. It illustrates which regions have the highest participation rates within the US.

1. Pacific

Participation Rate by Region: 17%
Percent of US Participants: 20%

2. Mountain

Participation Rate by Region: 19%
Percent of US Participants: 10%

3. West South Central

Participation Rate by Region: 12%
Percent of US Participants: 10%

4. West North Central

Participation Rate by Region: 16%
Percent of US Participants: 8%

5. East North Central

Participation Rate by Region: 14%
Percent of US Participants: 16%

6. East South Central

Participation Rate by Region: 11%
Percent of US Participants: 5%

7. South Atlantic

Participation Rate by Region: 10%
Percent of US Participants: 15%

8. Middle Atlantic

Participation Rate by Region: 11%
Percent of US Participants: 11%

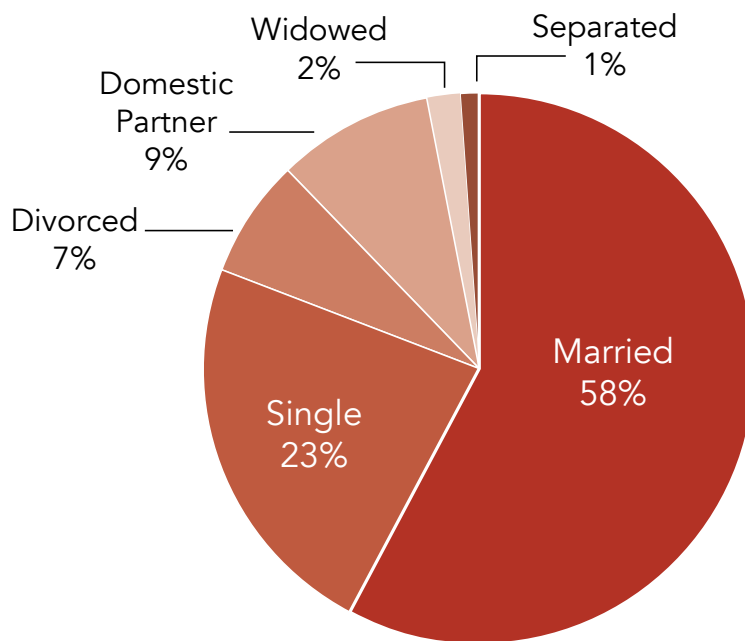
9. New England

Participation Rate by Region: 11%
Percent of US Participants: 4%



Participation in Camping by Marital Status

Sixty-seven percent of adult camping participants are married or living with a domestic partner, which suggests that camping is a family-friendly activity.

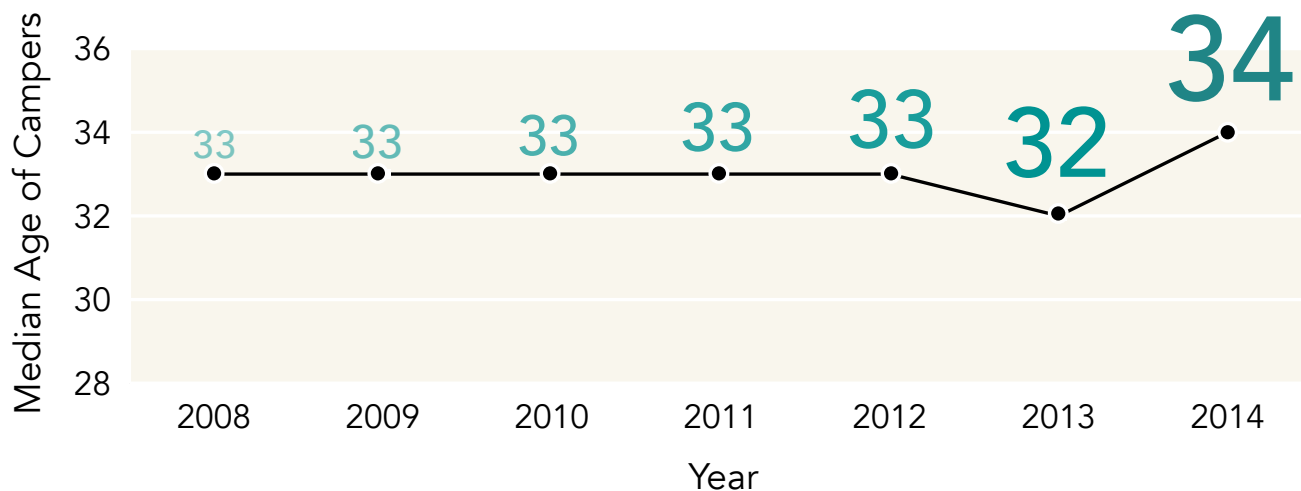


Campers, Ages 18+

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Median Age of Campers

Campers, Ages 6+

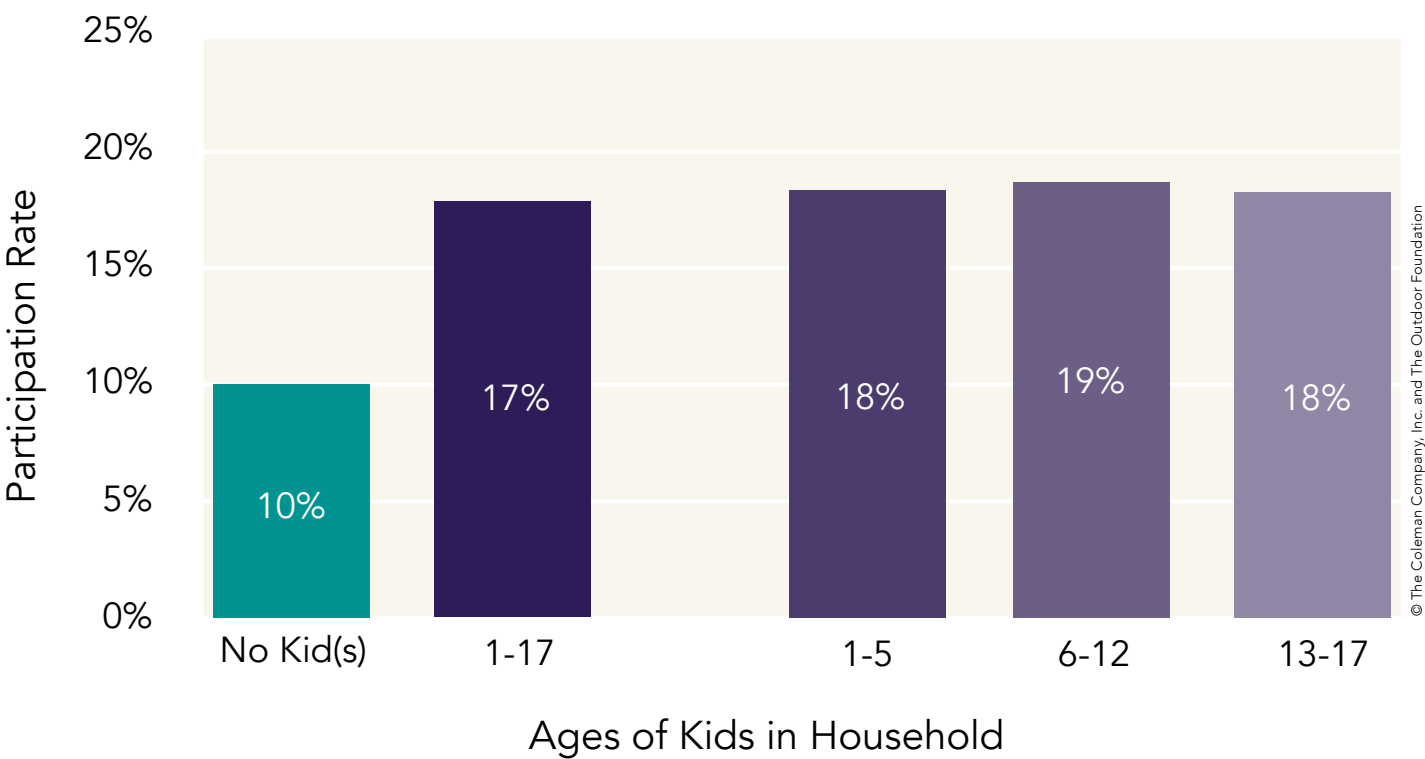


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Participation in Camping Among Adults with Youth in Their Households

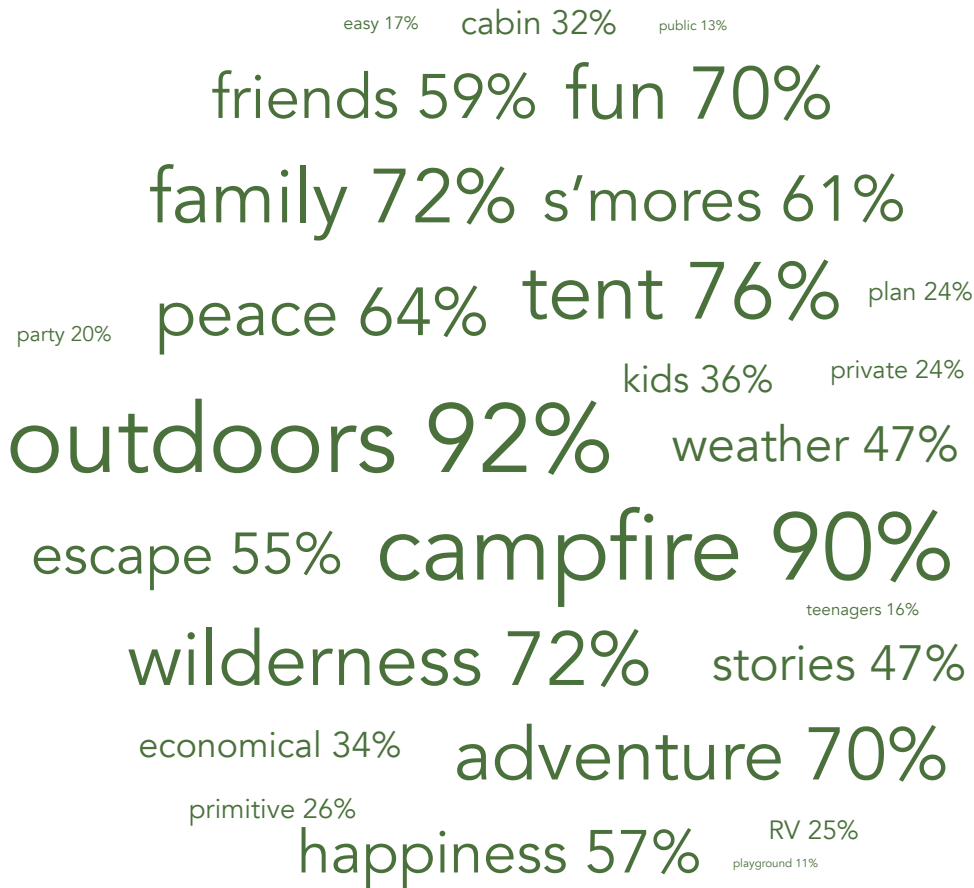
Campers, Ages 18+

Adults with children in their households participate in camping at a rate seven percentage points higher than their peers without children. Those with children ages six to 12 participate at a slightly higher rate than those with young children or teenagers.



Words Associated with Camping

Campers, Ages 18+



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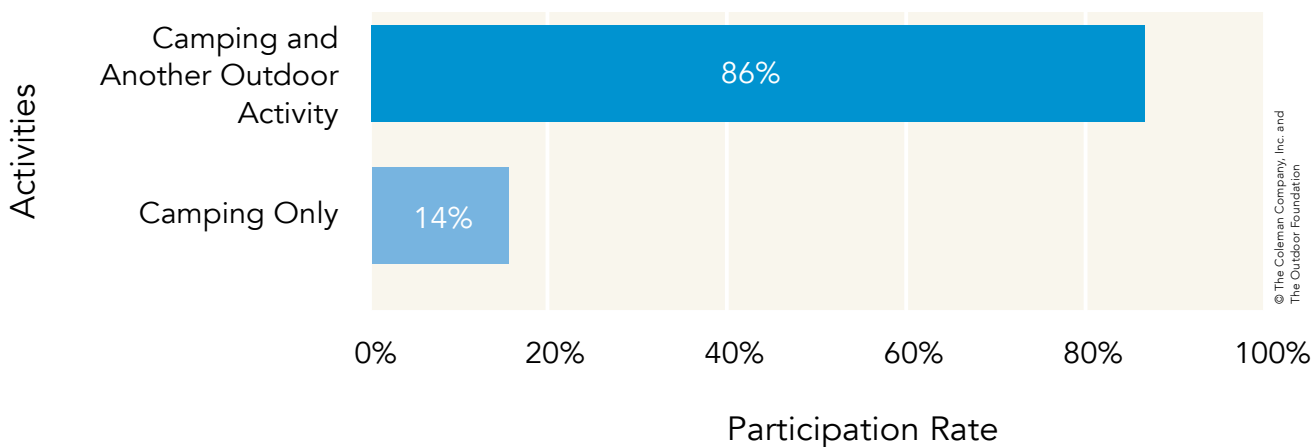
Words Least Associated

-
- Swimming pool 9%
 - Intense 8%
 - Discomfort 7%
 - Electricity 7%
 - Close to home 5%
 - Expensive 5%
 - Difficult 4%
 - WiFi 3%

A Gateway to the Outdoors

Campers, Ages 6+

Camping, like other gateway activities, introduces its participants to other outdoor pursuits. Eighty-six percent of participants enjoy multiple outdoor activities and only 14 percent participate in camping alone.

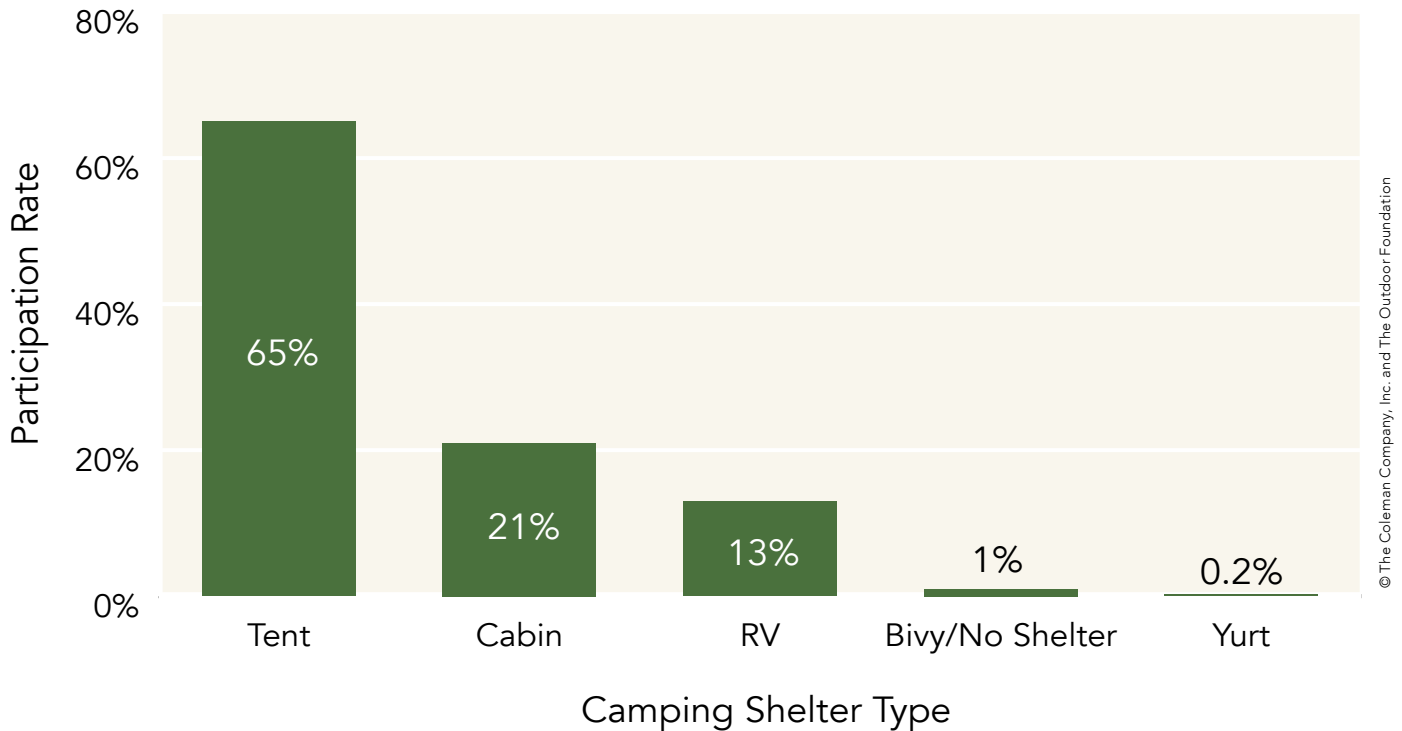


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Primary Type of Camping Shelter

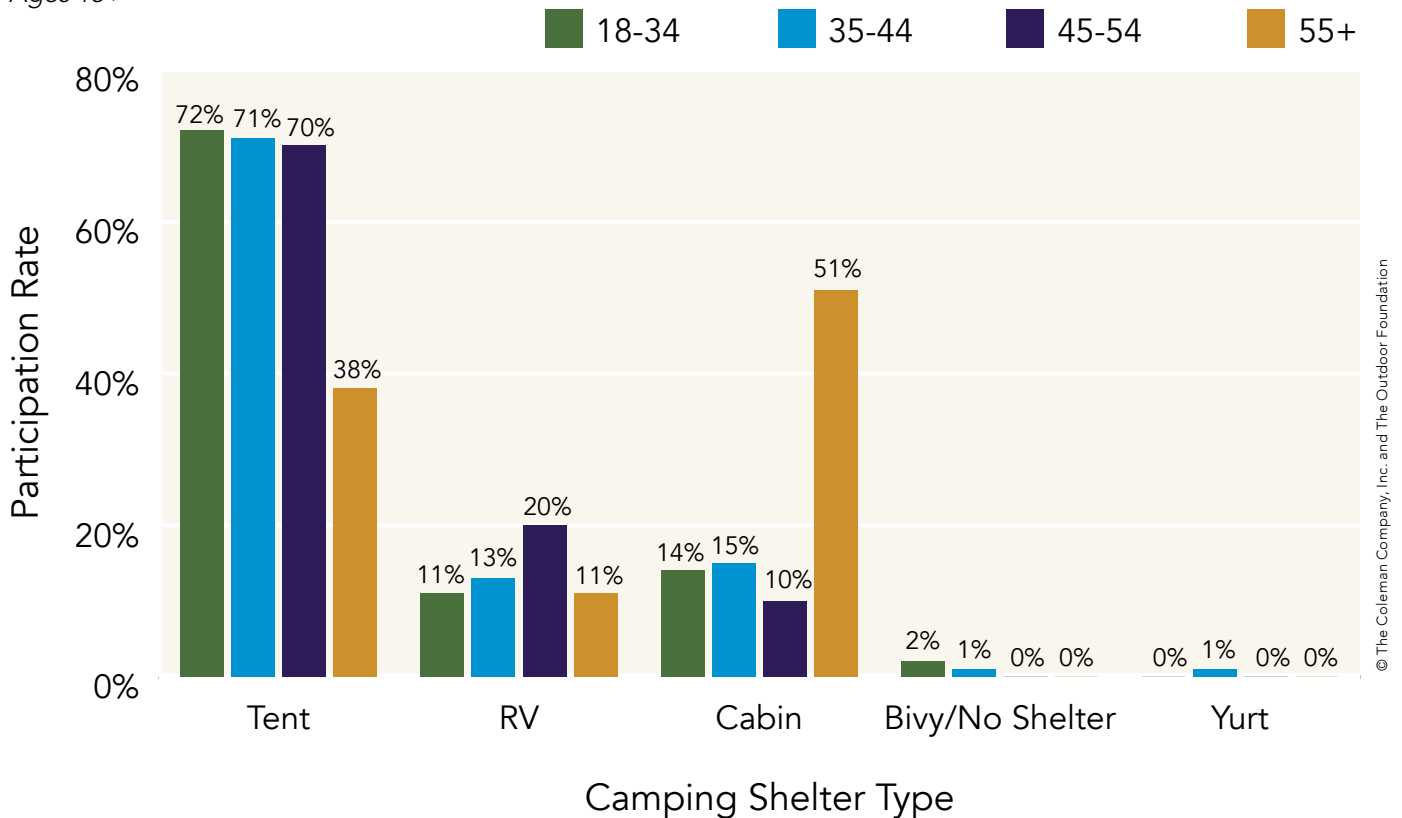
All Campers

Ages 18+



Campers by Age

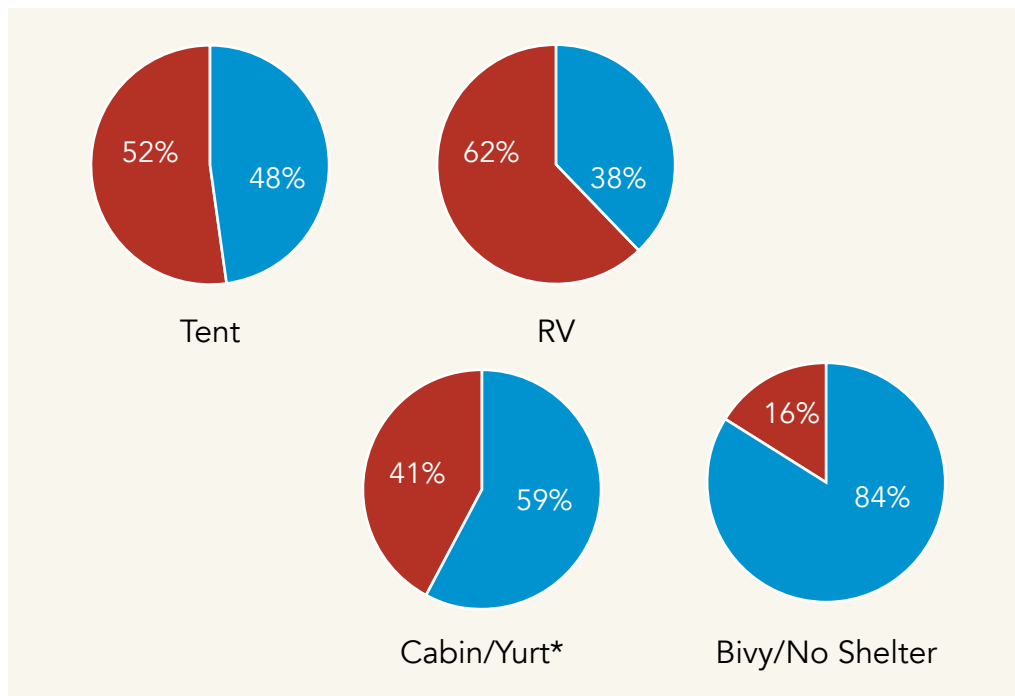
Ages 18+



Campers by Gender

Ages 18+

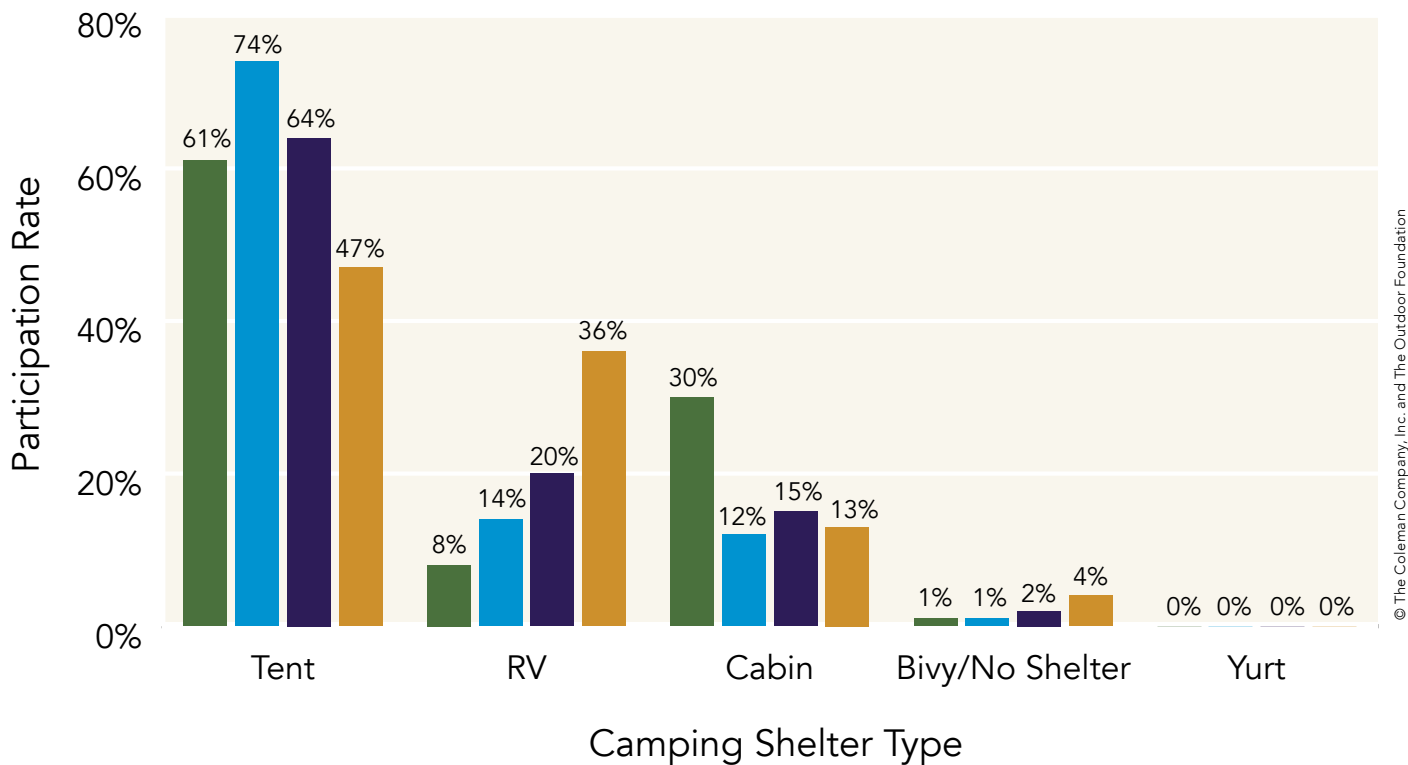
Female Male



Campers by Frequency

Ages 18+

1-2 Outings 3-5 Outings 6-10 Outings 11+ Outings

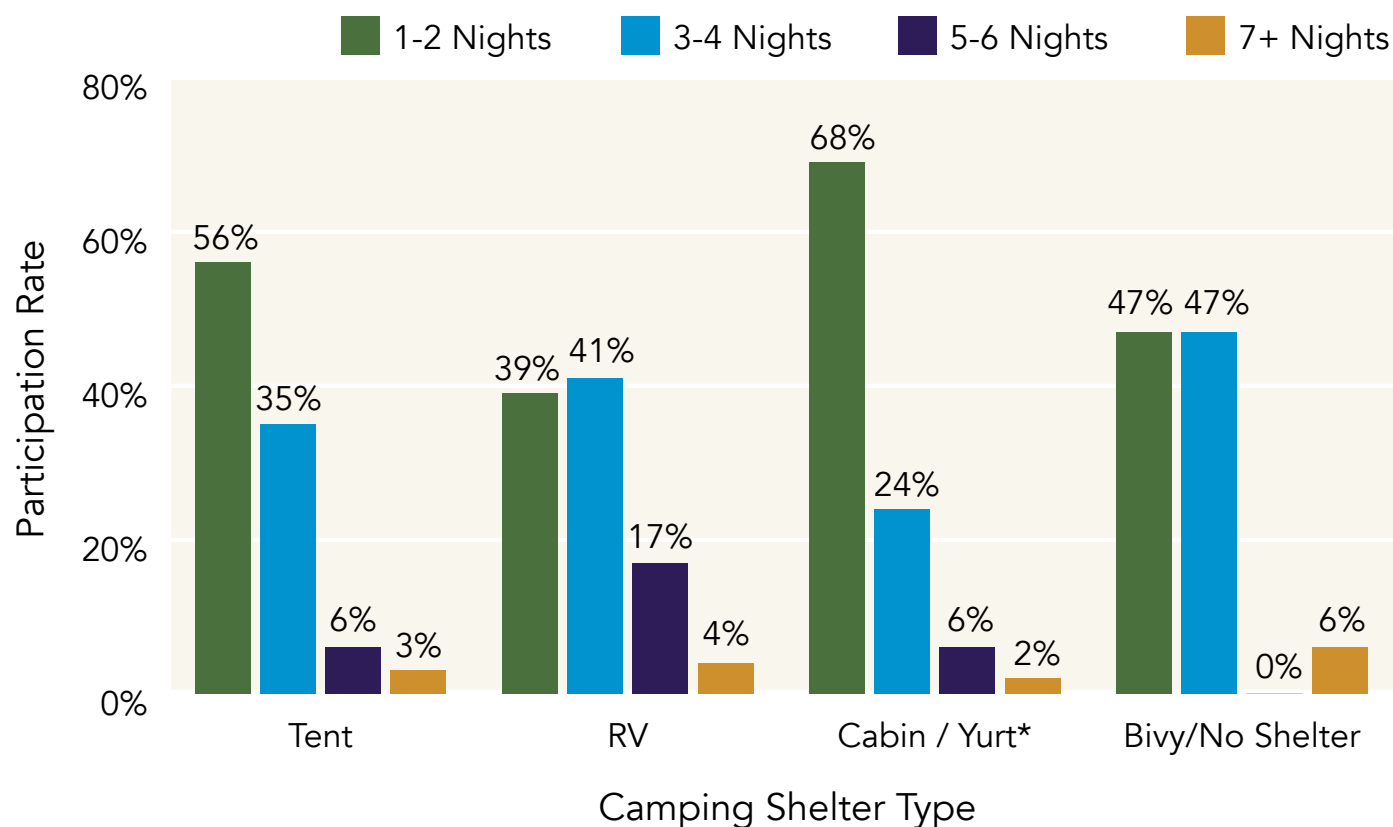


Most recent camping trip...

Length of Trip by Type of Camping Shelter

Camper, Ages 18+

The average camping trip lasts 2.7 nights. Participants who opt to stay in RVs tend to camp for the longest amount of time — 3.3 nights. Cabin campers are slightly below the average, with their trips typically lasting 2.3 nights.



**Yurt and cabin camping participants have been combined to determine length of stay due to the small number of these types of campers.*



PROFILE OF A CAMPING TRIP

Americans average 4.1 camping trips per year. These outings typically last one or two nights, with the most trips taken during the summer months. As seen in previous years, state park campgrounds are the camping destinations of choice. A majority of campers drive about 156 miles and park within one-fourth of a mile from their chosen campsites.

Campers prepare their outings in advance, with 34 percent deciding to go camping more than one month ahead of time. Interestingly, campsites are not usually reserved in advance. Thirty percent of reservations are made the day of the camp.

While camping, 60 percent of participants use their Smartphones. Still, campers enjoy disconnecting by hiking during the day and hanging out by a campfire at night.

The following section takes a comprehensive look at what happens before and during camping trips in the United States.

Phones

Sixty percent of all campers use Smartphones during camping trips.

Drive-up

Almost three-quarters of participants park within one-fourth of a mile of campsites.

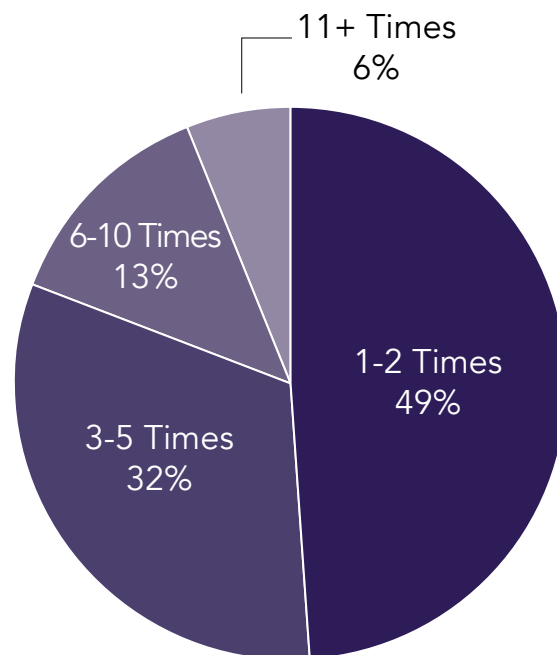
155.8 Miles

Campers travel an average distance of 155.8 miles for camping trips.

Camping in the last 12 months...

Number of Camping Trips per Year

Adult campers make an annual average of 4.1 camping trips per year. Almost half camp one or two times, while a dedicated six percent go camping eleven or more times per year.



Campers, Ages 18+

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Camping Venue

Campers, Ages 18+

"In which venue did you camp in the last 12 months?"

State park campground	51%
Local park campground	16%
National park campground	15%
Event (e.g. festivals or public events)	8%
Backyard	3%

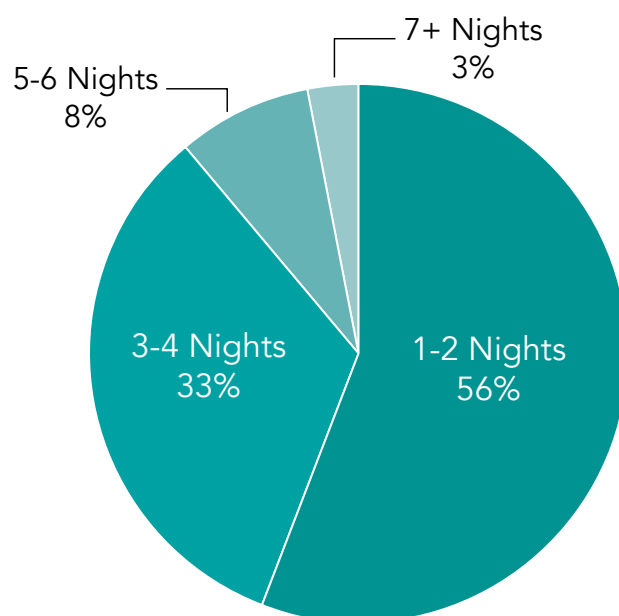
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More than half of adult participants camped at state park campgrounds, making them the most popular venue.

Most recent camping trip...

Length of Trip

Camping trips last an average of 2.7 nights. A majority of trips, 89 percent, last between one and four nights. Only 11 percent extend five nights or more.



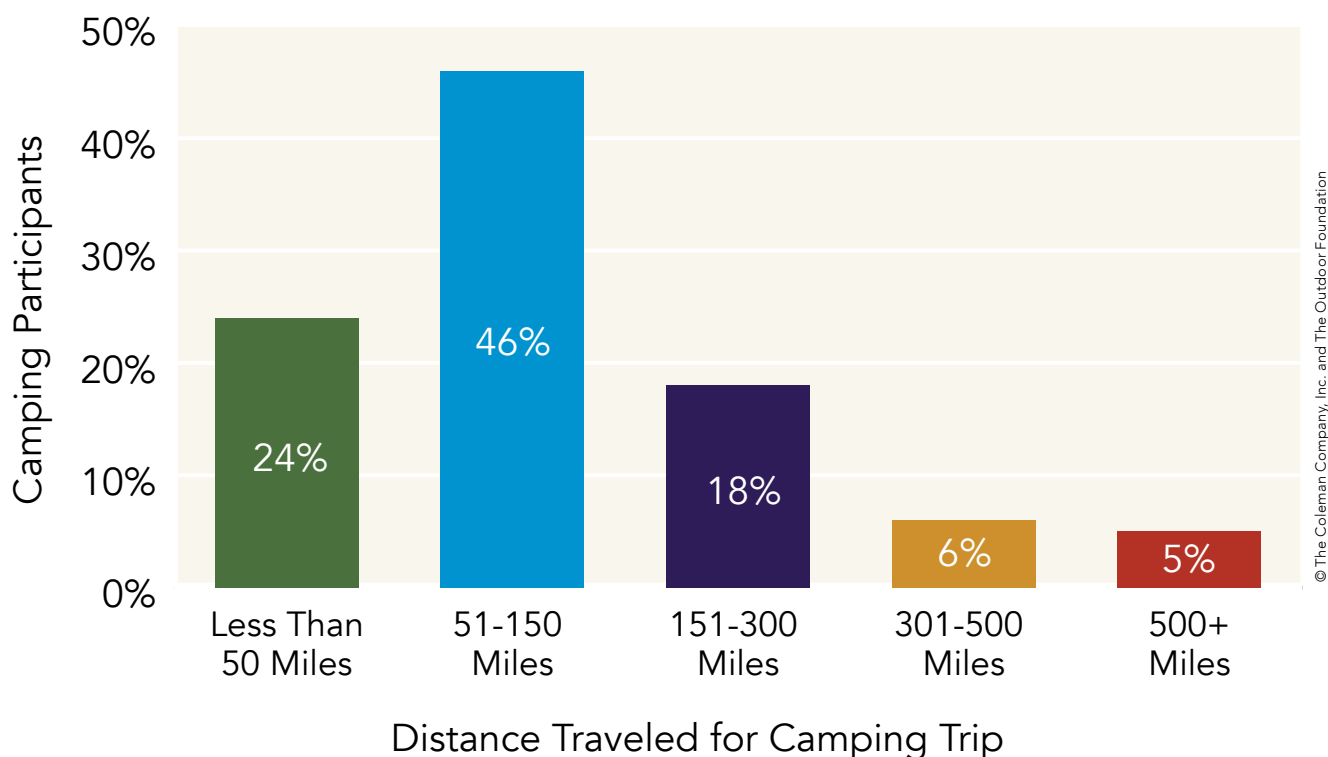
Campers, Ages 18+

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Distance from Home

Campers, Ages 18+

Participants travel an average of 155.8 miles from home to reach their camping destinations. This is down slightly from 186.7 miles travelled the year before.



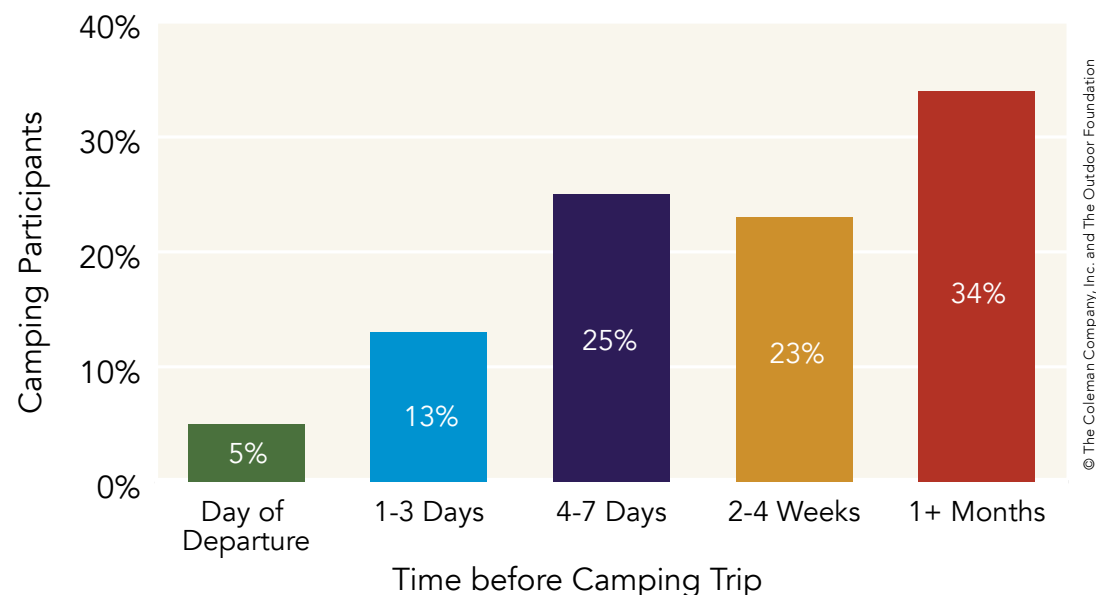
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Most recent camping trip...

Trip Planning and Preparation

Campers, Ages 18+

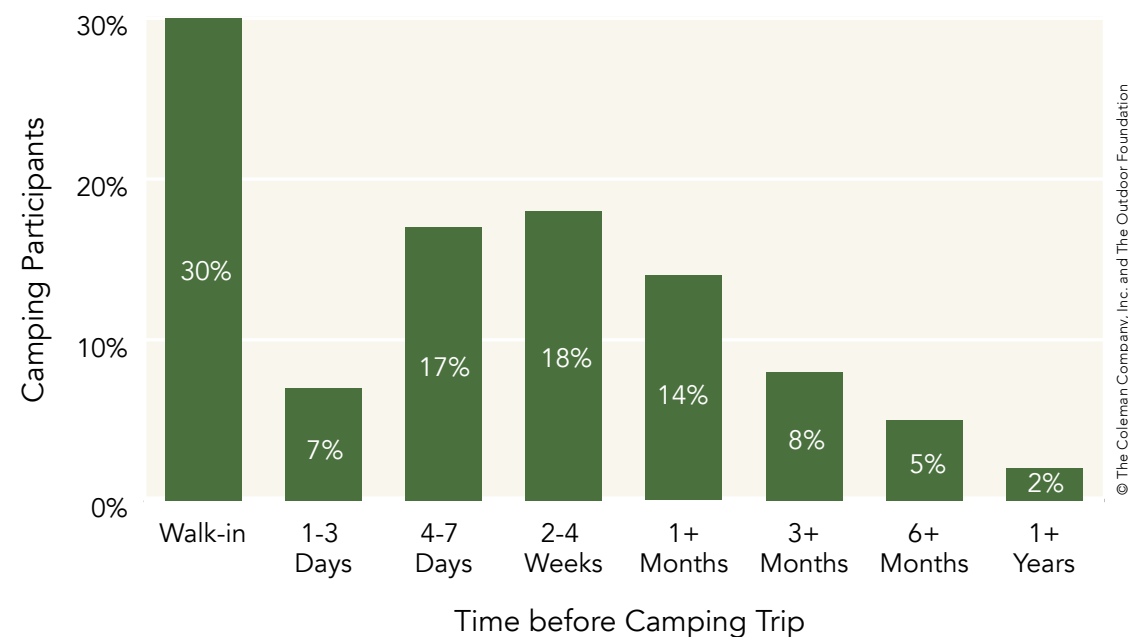
Camping trips are planned almost a month in advance — an average of 26.9 days.



Campsite Reservations

Campers, Ages 18+

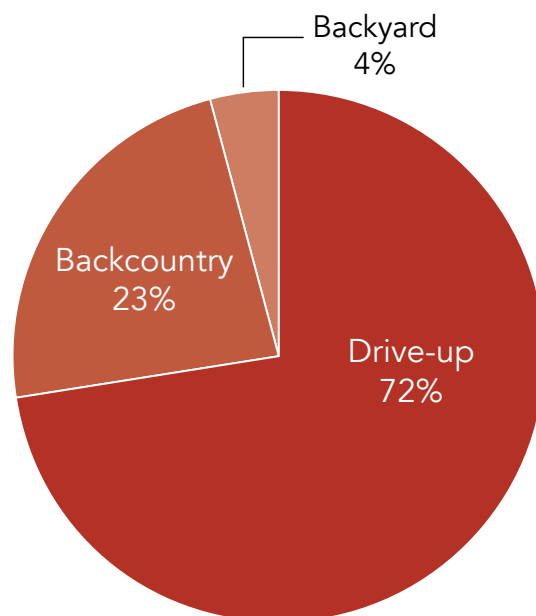
Of campers who stay at campsites, 30 percent do not make reservations ahead of time.



Most recent camping trip...

Type of Trip

Almost three-quarters of adult campers drive to their camping destination and park within one-fourth of a mile of their campsite. Twenty-three percent hike into the backcountry to camp, while only four percent camp in their backyards.



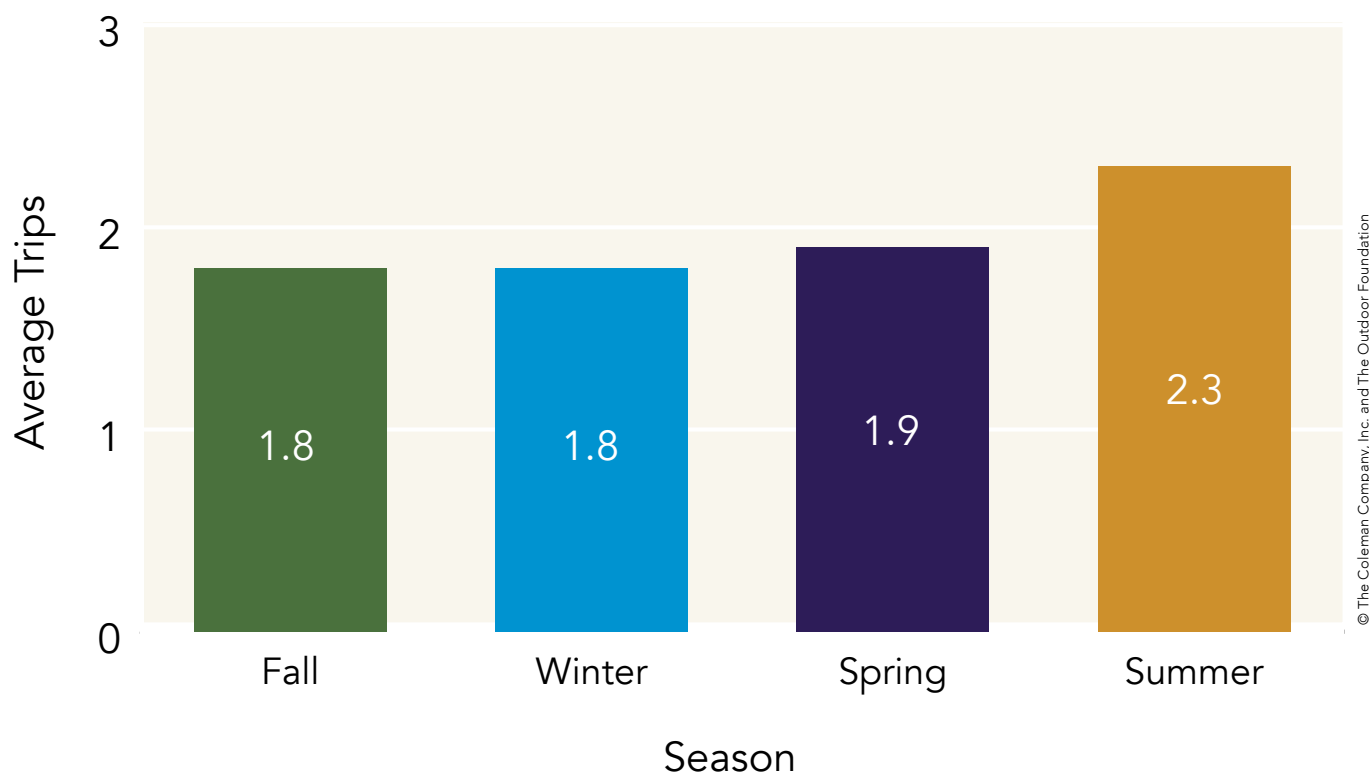
Campers, Ages 18+

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Number of Camping Trips by Season

Campers, Ages 18+

Americans camp the most during the summer months, averaging 2.3 trips. They take an average of 1.9 trips in the spring and 1.8 in the fall and winter.

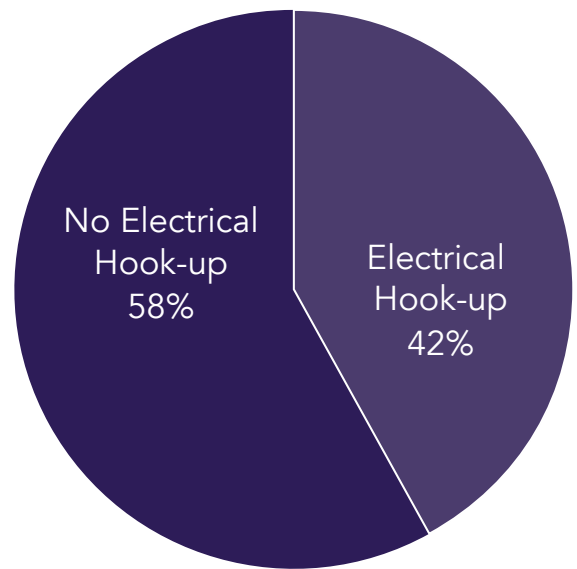


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Most recent camping trip...

Electrical Hook-up Availability

While most campers do not have access to electrical hook-ups at their campsites, 42 percent do.

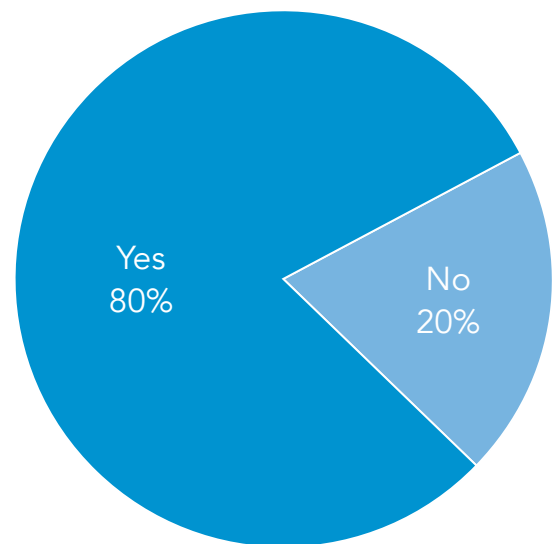


Campers, Ages 18+

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Use of Electrical Hook-up

Of those campers who have access to electrical hook-ups, most of them — 80 percent — take advantage of it.



Campers, Ages 18+

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Camping in the last 12 months...

Camping Companions

Campers by Age

"With whom have you camped?"	Ages 18-35	Ages 35-44	Ages 45-54	Ages 55+	All Ages
Friend(s)	80%	63%	59%	81%	72%
Immediate family	54%	50%	53%	36%	49%
Spouse or significant other	52%	60%	60%	24%	50%
Pets	29%	28%	28%	17%	26%
Extended family	21%	24%	20%	11%	20%
Kids or grandkids, ages 2-8	21%	34%	21%	19%	24%
Kids or grandkids, ages 9-14	13%	32%	20%	17%	19%
Kids or grandkids, ages 0-2	12%	14%	4%	9%	11%
Kids or grandkids, ages 15-17	7%	18%	20%	8%	12%
Scouts or guides	1%	3%	0%	0%	1%
Church	1%	1%	1%	2%	1%
Alone	0%	1%	1%	2%	1%
Other groups	1%	1%	2%	0%	1%

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Friends are the most popular camping companions for almost every age group. They are especially popular among younger adults, ages 18 to 35, and older adults, ages 55 and over. Among those ages 45 to 54, it is slightly more common to camp with spouses or significant others than friends.

Decision Making

Campers by Age

"Who brings up the idea to go camping?"	Ages 18-34	Ages 35-44	Ages 45-54	Ages 55+	All Ages
Me	39%	42%	48%	34%	40%
Friends	23%	14%	14%	44%	23%
Male spouse/significant other	16%	21%	19%	8%	16%
Parents	11%	2%	3%	0%	5%
Female spouse/significant other	5%	4%	5%	2%	4%
Children	4%	14%	8%	13%	9%

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Many campers say that they tend to make the decision to go camping themselves. Older campers, ages 55 and older, say that their friends have a bigger influence on the decision.

Camping Arrangements

Campers by Age

"Who makes arrangements to camp?"	Ages 18-34	Ages 35-44	Ages 45-54	Ages 55+	All Ages
Me	55%	61%	66%	47%	57%
Friends	17%	11%	9%	46%	19%
Parents	12%	3%	3%	0%	6%
Male Spouse/ Significant Other	9%	15%	14%	2%	10%
Female Spouse/ Significant Other	4%	5%	4%	2%	4%
Children	1%	1%	1%	4%	2%
Other Family Member	1%	2%	0%	0%	1%

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Like making the decision to go camping, most adult participants say they also made the camping arrangements. Friends are much more likely to make the arrangements for older campers than for campers in any other age group.

Motivation for Camping

Campers by Age

"What is your main motivation for camping?"	Ages 18-34	Ages 35-44	Ages 45-54	Ages 55+	All Ages
Camping itself	42%	31%	37%	23%	35%
Spending time with family and friends	28%	34%	26%	53%	34%
Escaping the grind	16%	14%	15%	9%	14%
Teaching kids or next generation about outdoors	4%	6%	8%	4%	5%
Equal mix camping and sports activities	5%	8%	4%	2%	5%
Staying close to an event without paying for hotel	3%	4%	2%	4%	3%
Save money compared to other vacation options	1%	2%	3%	4%	2%
Participation in other sports or active pursuits	2%	1%	4%	2%	2%

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Camping in itself is the main motivation for campers ages 18 to 34 and 45 to 54. However, participants ages 35 to 44 and 55 and over are motivated to camp because it's a way to spend quality time with friends and family.

Favorite Activities while Camping

Campers by Age

In general, campers like to hike during their camping trips. Among older campers ages 55 and over, outdoor cooking is slightly more popular than hiking.

Sports and Leisure Activities	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Hiking	51%	48%	51%	61%	52%
Fishing	36%	38%	34%	17%	32%
Outdoor cooking	30%	37%	35%	64%	39%
Card or board games (e.g. Uno, Pitch, Life)	25%	25%	20%	13%	22%
Photography	20%	21%	12%	55%	26%
Traditional yard games (e.g. badminton, croquet, horseshoes)	17%	18%	15%	9%	15%
Kayaking	17%	13%	11%	2%	12%
Canoeing	15%	16%	14%	8%	14%
Boating	13%	13%	15%	4%	12%
Climbing	10%	4%	4%	4%	6%
Rafting	6%	5%	5%	2%	5%
Hunting	6%	4%	7%	4%	5%
Road bicycling	6%	5%	5%	6%	5%
Mountain bicycling	5%	3%	3%	6%	4%
Trail running	4%	3%	3%	6%	4%
Running or jogging	4%	2%	1%	6%	3%
Snorkeling	3%	1%	2%	2%	2%
Scuba diving	2%	1%	3%	4%	2%
Stand-up paddling	2%	3%	1%	2%	2%
Wakeboarding	2%	1%	2%	0%	1%
Alpine skiing	1%	0%	0%	0%	1%
Surfing	1%	0%	3%	4%	2%
Sailing	1%	2%	0%	0%	1%
Snowboarding	1%	0%	1%	0%	1%
Other	10%	12%	20%	9%	12%
None	1%	3%	2%	0%	1%

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General Sports and Leisure Participation

Campers by Age

Even when participants are not camping, many still enjoy hiking. Older campers, however, hike more during camping trips. While 61 percent hike while camping, only 26 percent hike in general.

Sports and Leisure Activities	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Hiking	54%	47%	47%	26%	46%
Card or board games (e.g. Uno, Pitch, Life)	50%	46%	43%	19%	42%
Fishing	43%	41%	40%	26%	39%
Outdoor cooking	41%	41%	38%	30%	38%
Photography	40%	32%	31%	70%	42%
Traditional yard games (e.g. badminton, croquet)	38%	37%	24%	15%	31%
Running or jogging	36%	29%	20%	9%	26%
Boating	30%	26%	23%	11%	24%
Road bicycling	28%	23%	27%	59%	33%
Kayaking	27%	18%	12%	8%	18%
Canoeing	20%	18%	10%	6%	15%
Climbing	18%	9%	6%	11%	12%
Trail running	17%	13%	7%	8%	12%
Hunting	12%	11%	11%	4%	10%
Mountain bicycling	11%	9%	12%	2%	9%
Rafting	11%	6%	6%	6%	8%
Stand-up paddling	9%	6%	8%	8%	8%
Snowboarding	8%	1%	1%	0%	3%
Snorkeling	7%	4%	7%	2%	6%
Alpine skiing	7%	6%	10%	6%	7%
Surfing	6%	2%	3%	4%	4%
Scuba diving	6%	2%	5%	2%	4%
Wakeboarding	5%	2%	1%	0%	3%
Sailing	5%	3%	3%	2%	3%
Snowshoeing	3%	3%	5%	2%	3%
Cross-Country skiing	2%	1%	2%	2%	2%
Triathlon	2%	1%	1%	0%	1%
Other	8%	11%	14%	15%	11%
None of the above	2%	6%	3%	0%	2.8%

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Favorite Nighttime Activities while Camping

Campers by Age

Campfires are the quintessential nighttime activity for a majority of campers in all age groups.

Sports and Leisure Activities	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Hanging out by the campfire	82%	85%	83%	87%	84%
Looking at the stars	68%	65%	58%	41%	60%
Cooking	45%	36%	42%	74%	48%
Cards or board games	45%	45%	40%	19%	39%
Reading	25%	23%	29%	19%	24%
Playing guitar or other instruments	23%	13%	15%	9%	16%
Swimming	19%	12%	11%	9%	14%
Fishing	16%	13%	13%	11%	14%
Hiking	12%	10%	7%	44%	17%
Scavenger hunt	11%	6%	5%	0%	7%
Boating	7%	4%	6%	4%	6%
Hunting	6%	1%	2%	2%	3%
Spotlighting	6%	3%	7%	0%	4%
Other	5%	7%	5%	8%	6%

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Technology Use while Camping

Campers by Age

Sixty percent of all campers use Smartphones while camping. Only about one-quarter of participants do not use technology while camping.

Sports and Leisure Activities	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Smartphone	66%	72%	57%	38%	60%
iPod/music player	31%	17%	29%	17%	25%
Handheld GPS	13%	11%	14%	2%	10%
Tablet	12%	14%	20%	17%	15%
Fitness monitor	9%	11%	14%	6%	10%
Laptop computer	7%	8%	9%	9%	8%
Watch-based GPS	5%	3%	2%	0%	3%
Other	2%	1%	1%	4%	2%
None	19%	15%	25%	59%	27%

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BUYING BEHAVIOR

Most camping participants are either employed or are still students, while only four percent are temporarily unemployed.

For many camping participants, tents are the most essential piece of camping gear. Wireless internet and GPS capability are considered the biggest luxury items.

Most camping-related purchases are practical and predetermined. Sixty-eight percent of purchases replace lost or broken equipment. And, a majority of purchasing decisions are made at home, prior to the camping trip.

This section explores the buying behaviors of the nation's camping participants. The research gives the camping industry insights into the consumers of camping goods.

Replacement

Nearly 70 percent of camping purchases are replacement items.

Home

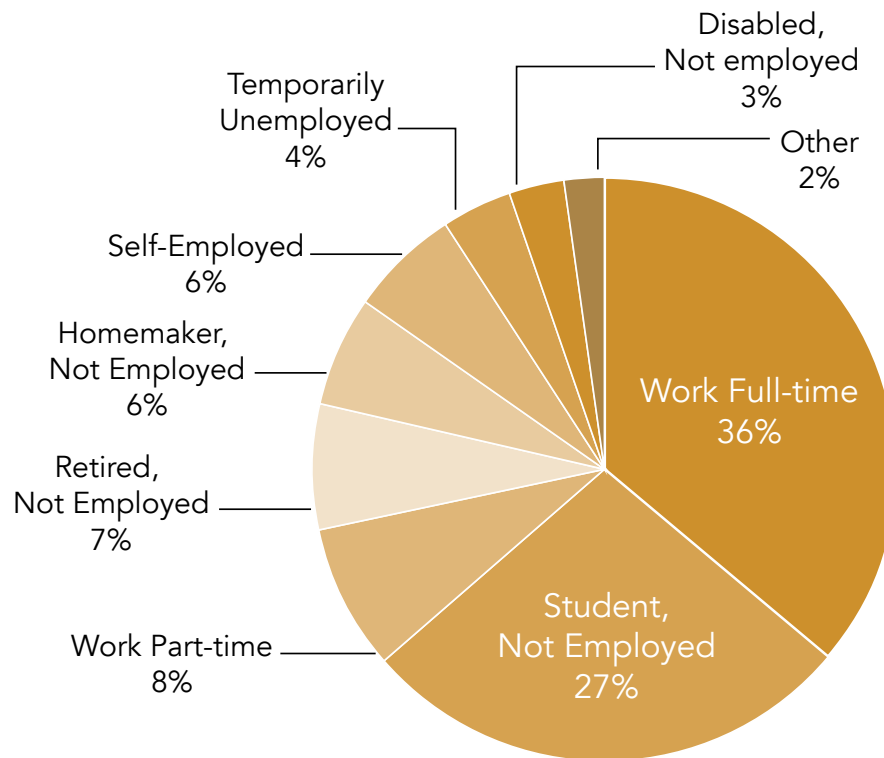
Seventy percent of campers make camping purchase decisions at home before their trips.

WiFi

Wireless internet and GPS capability are the most popular luxury camping items.

Camping Participants by Employment Status

Most camping participants are either employed or are students who are not yet employed. Only four percent of campers are temporarily unemployed.



Campers, Ages 6+

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Most Essential Camping Items

Campers by Age

Tents are generally considered the most essential camping item. Older campers, ages 55 and over, consider sleeping bags and then toilet facilities most essential. While sleeping bags are considered the second most essential item for the other age groups, toilet facilities do not rank nearly as high.

Camping Item	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Tent	64%	64%	63%	30%	57%
Sleeping bag	42%	38%	44%	70%	47%
Fire, wood, fire starters	36%	34%	24%	2%	26%
Bug spray	21%	25%	19%	15%	21%
Flashlights or lanterns	18%	19%	14%	9%	16%
Clothes	17%	12%	6%	47%	20%
Toilet facilities	16%	24%	26%	55%	27%
Shoes	14%	9%	5%	6%	9%
Cooler or fridge	11%	16%	13%	4%	11%
Airbed or mattress	10%	15%	20%	11%	13%
Backpack	10%	6%	5%	4%	7%
Tools	7%	6%	2%	6%	6%
Stove	7%	7%	14%	9%	9%
Camper or RV	6%	8%	14%	13%	10%
Shelter or tarpaulin	5%	5%	5%	0%	4%
Chairs	5%	5%	3%	6%	5%

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Most Luxury Camping Items

Campers by Age

Wireless internet and GPS are usually deemed the most luxury camping items. But, although 57 percent of campers ages 45 to 54 use technology on camping trips, a higher percentage of them prefer air conditioning or heating over connectivity.

Camping Item	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
WiFi/GPS	40%	39%	29%	57%	41%
Electricity	33%	28%	32%	55%	36%
Air conditioning or heating	33%	37%	39%	11%	31%
TV and electronics	29%	31%	22%	47%	32%
Shower	25%	25%	26%	19%	24%
Camper or RV	21%	20%	29%	15%	21%
Toilet facilities	20%	18%	16%	13%	17%
Airbed or mattress	18%	22%	20%	11%	18%
Cooler or fridge	12%	13%	15%	9%	12%
Cooking utensils	10%	7%	3%	8%	7%
Stove	9%	7%	5%	2%	6%
Coffee	6%	11%	7%	6%	7%
Tent	6%	7%	10%	6%	7%
Flashlights or lanterns	5%	6%	3%	6%	5%
Pillow	5%	3%	4%	2%	4%
Sleeping bag	5%	6%	4%	4%	5%
Clothes	4%	2%	3%	2%	3%
Chairs	3%	2%	2%	4%	3%

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Most recent purchase...

Camping Item Purchased

Camper by Age

Sixty-three percent of adult campers say that a tent is the most essential piece of camping equipment to take on an outing, and sleeping bags are second at 54 percent.

Camping Item	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Airbed	16%	18%	20%	8%	16%
Backpack	15%	12%	9%	6%	11%
Tent	14%	12%	9%	6%	11%
Cooler	12%	11%	9%	49%	20%
Sleeping bag	9%	9%	6%	8%	8%
Propane or liquid fuel lighting	8%	9%	10%	2%	7%
Portable grill	7%	9%	8%	6%	7%
Battery lighting	7%	5%	9%	4%	6%
Camp stove	3%	4%	3%	0%	3%
Bicycle to take camping	3%	2%	4%	0%	2%
Camp furniture	3%	6%	10%	6%	6%
Sleeping equipment	1%	0%	1%	0%	1%
Recreational vehicle (RV)	1%	1%	3%	2%	2%
RV equipment	0%	0%	0%	2%	1%

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Preparation and Purchase

Camper by Age

Most adult participants purchase their camping gear in a store without researching the item online in advance.

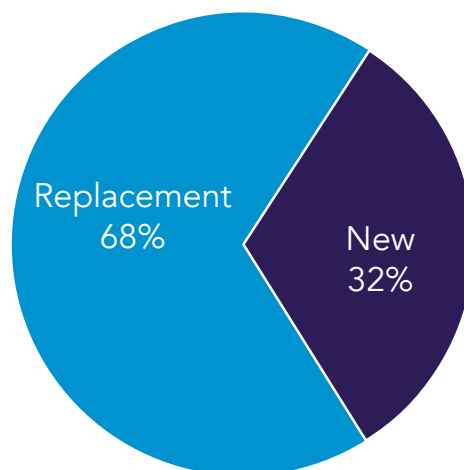
"Which best describes how you made your purchase?"	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Purchased in store without doing online research	34%	36%	34%	63%	41%
Researched online, went to store to see item and made purchase in store	31%	32%	33%	16%	28%
Saw item in store but made purchase online	17%	16%	17%	16%	16%
Made purchase online without seeing it at store	17%	14%	15%	4%	13%

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Most recent purchase...

Kind of Purchase

The majority of adult campers buy replacement camping equipment for lost or broken goods instead of buying equipment that is new to them.



Camper, Ages 18+

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Purchasing Decision

Camper by Age

Seventy percent of all adult campers plan purchases before their camping trips. A small percentage makes spontaneous buying decisions.

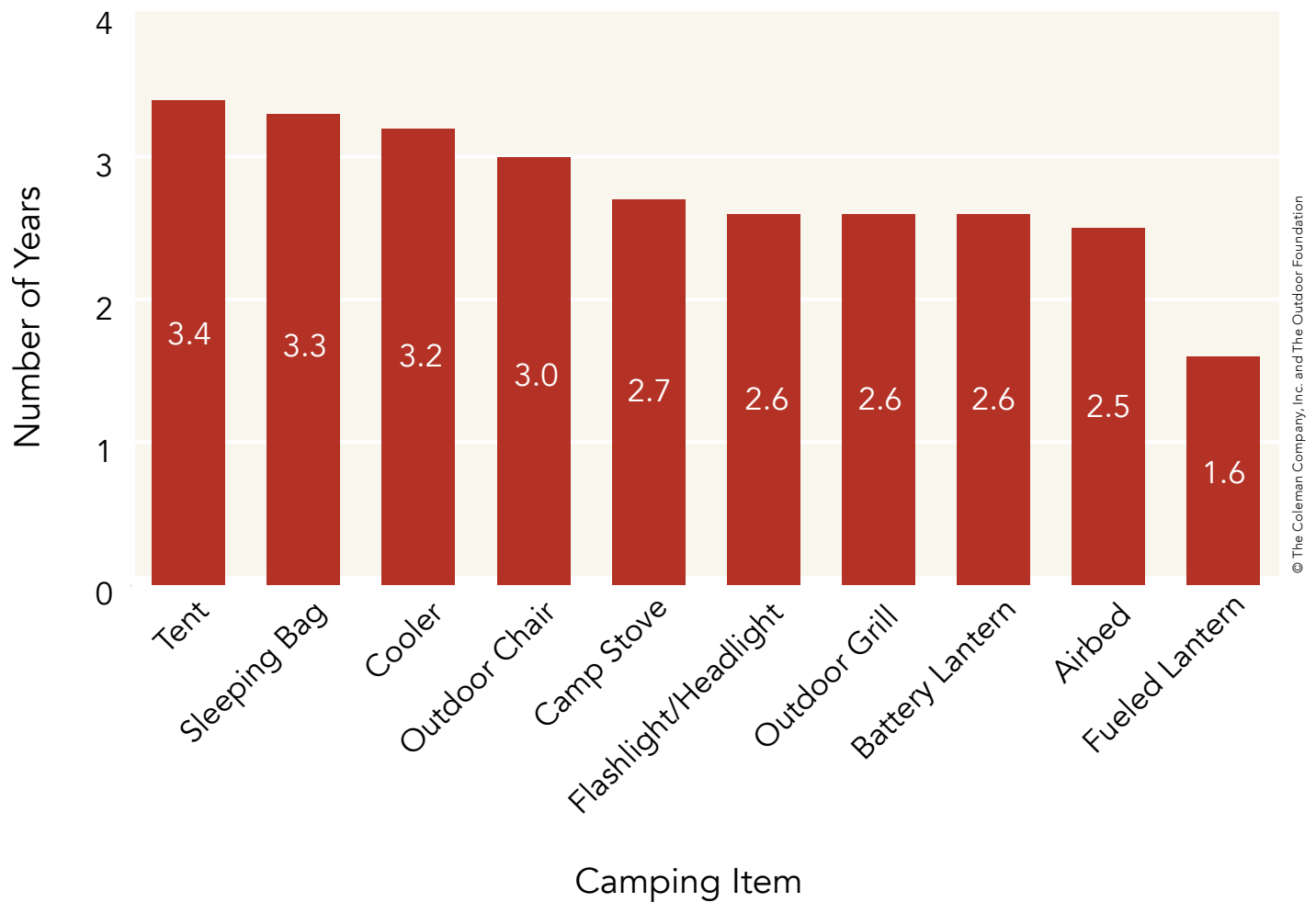
"When was the purchase decision made?"	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
At home, prior to the camping trip	64%	68%	66%	84%	70%
While in a camping equipment store	13%	9%	10%	8%	10%
While camping	9%	13%	9%	2%	8%
Reviewing camping equipment online	7%	7%	10%	2%	6%
Looking through a printed catalog	4%	2%	3%	0%	3%
At store or when seen	2%	1%	3%	4%	2%

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Frequency of Purchasing Items

Campers, Ages 18+

Adult campers generally replace camping items between every one and three years. Tents seem to last the longest and are replaced an average of every 3.4 years. Fueled lanterns are purchased the most often, at an average of every 1.6 years.



Spending Less on Sports and Recreation

Campers, Ages 6+

	Campers	Non-Campers
Winter sports	23%	17%
Team sports outside school	17%	14%
Gym memberships	17%	16%
Outdoor recreation activities	16%	18%
Travel to take part in sports and recreation	15%	16%
Golf memberships or fees	14%	18%
Lessons, instructions or sports camps	14%	17%
Sports or recreation clothing	14%	20%
Sports or recreation equipment	14%	19%
Sports or recreation footwear	13%	16%
Tennis memberships or fees	13%	11%
Individual sporting events	13%	18%
Team sports at school	12%	16%

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Almost one-quarter of camping participants are cutting spending on winter sports. Non-campers are more likely to spend less on sports and recreation clothing, followed by sports equipment, sporting events and outdoor activities.

Spending More on Sports and Recreation

Campers, Ages 6+

	Campers	Non-Campers
Team sports outside school	20%	9%
Lessons, instructions or sports camps	19%	12%
Team sports at school	19%	13%
Gym memberships	18%	13%
Tennis memberships or fees	17%	10%
Sports or recreation clothing	17%	11%
Individual sporting events	17%	11%
Sports or recreation footwear	16%	11%
Travel to take part in sports or recreation	16%	14%
Sports or recreation equipment	15%	11%
Golf memberships or fees	15%	12%
Outdoor recreation activities	12%	8%
Winter sports	11%	7%

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Again highlighting that campers tend to be family-oriented, many activities campers are spending more on involve kids. Twenty percent are increasing spending on team sports outside of school, followed by sports camps and team sports at school. Non-campers, on the other hand, spend more on travel for sports.

FIRST-TIME CAMPERs

Seven percent of campers were new to the activity in 2014. Almost 30 percent of these participants were children between the ages of six and 12.

Friends are the preferred camping companions for first-time campers. Along with relatives, friends are responsible for motivating half of all first camping trips.

In preparation for a first camp, participants spend more than \$200 on gear. Half of first-timers buy a tent for the excursion.

With “fun” used 52 percent of the time to describe the first trip, it can be assumed that most first trips are a success.

This section examines participants who camped for the first time in 2014 to better understand what motivates them to take a first outing and how to retain them as lifelong camping participants.

Friends

Half of first-time campers are motivated to camp by friends or relatives.

\$203

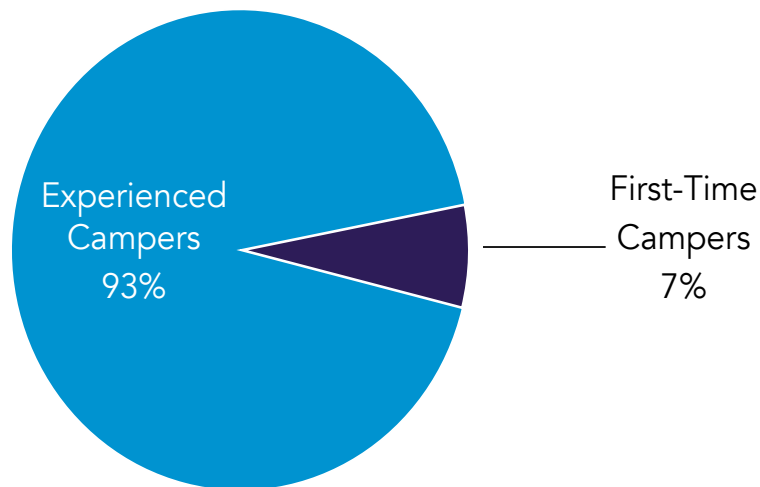
Campers spend an average of \$203.65 on their first camping trip.

Fun

More than half of first-time campers associate their first trip with the word “fun.”

First-Time Campers

In 2014, seven percent of all campers were new to the activity. The majority of participants, 93 percent, had been camping in previous years.



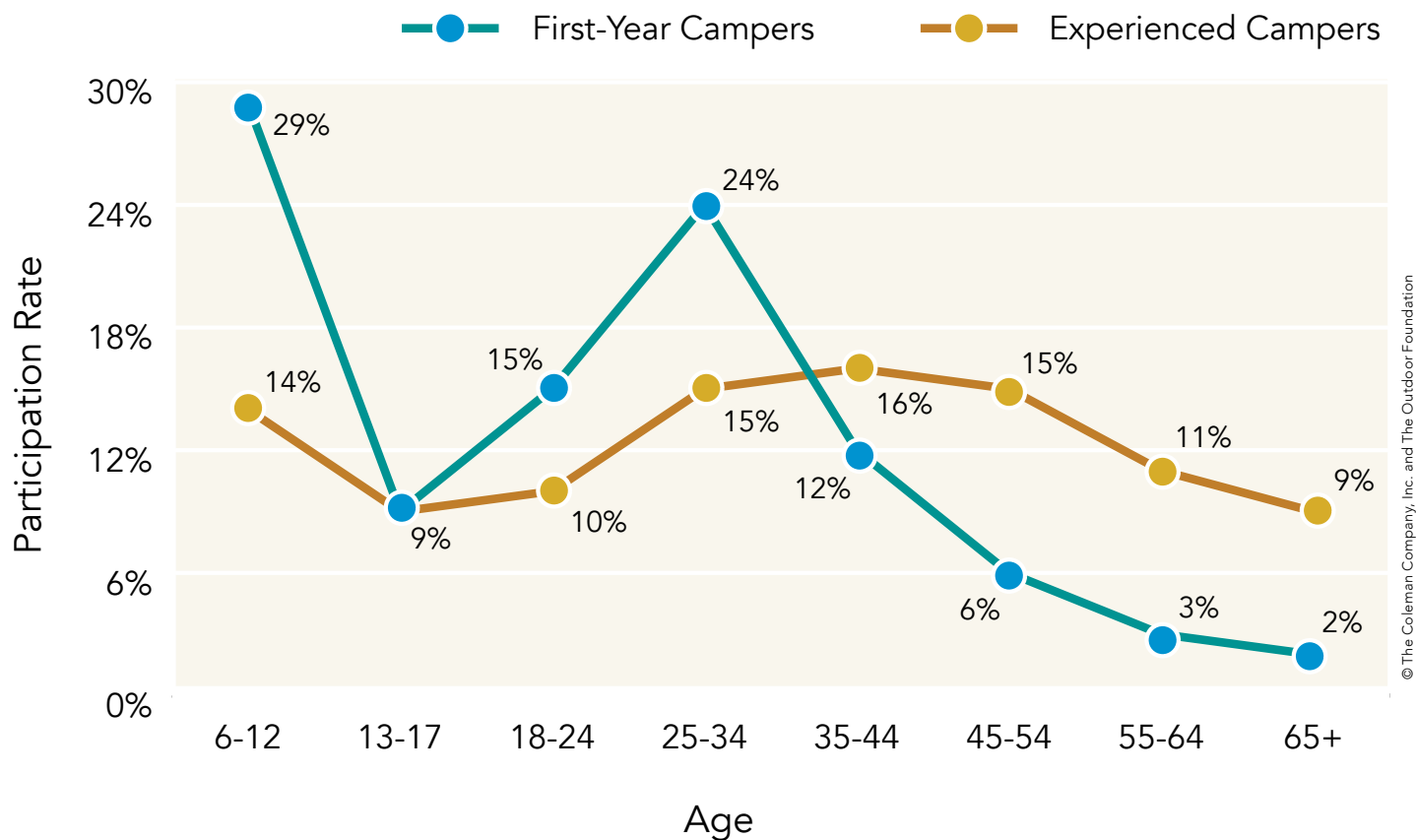
Campers, Ages 18+

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Age of First-Time vs Experienced Campers

Campers, Ages 6+

First-time campers tend to be younger than campers who have participated in the activity in previous years. The highest percentage of first-time campers are seen among those ages six to 12.



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First-Time Camping Companions

First-Time Campers, Ages 18+

"With whom did you camp with on your first camping trip?"

Friends	44%
Spouse or significant other	22%
Immediate family	19%
Kid or grandkids, ages 9-14	8%
Pets	3%
Extended family	2%
Kids or grandkids, ages 2-8	2%
Cub Scouts	1%
Kids or grandkids, ages 0-2	1%

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Like most adult campers, first-time participants camp with friends during their first trip.

Motivation for First Camping Trip

First-Time Campers, Ages 18+

"Which was an influence in you taking your first camping trip?"

A friend or relative took me	50%
Spending time with family and/or friends	38%
I wanted to try a new experience/adventure outdoors	27%
I love being outdoors	20%
Escaping the grind	17%
I wanted to give my family a new outdoor experience	16%
I thought it would be fun	16%
I've always wanted to go camping	15%
It was an affordable getaway	15%
Camping enabled participation or competition in other sports or active pursuits	13%
My children asked me to take them camping	11%

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For half of all first-time campers, a friend or relative is the impetus for the introductory trip.

Equipment Bought for First Camping Trip

First-Time Campers, Ages 18+

"What equipment did you purchase in preparation for your first camping trip?"

Tent	50%
Airbed	44%
Cooler	39%
Battery lighting	38%
Sleeping bag	38%
Camp stove	34%
Backpack	33%
Portable grill	33%
Propane or liquid fuel lighting	26%
Camp furniture	18%
Bicycle to take camping	13%
RV	10%
None	2%

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To prepare for a first camping trip, half of first-time camping participants buy a tent.

Equipment Rented or Borrowed for First Camping Trip

First-Time Campers, Ages 18+

"Did you rent or borrow any equipment in preparation for your first camping trip?"

Bicycle	28%
Battery lighting	27%
Cooler	25%
Tent	24%
Portable grill	23%
Camp furniture	19%
Backpack	17%
Airbed	16%
Camp stove	15%
Sleeping bag	14%
Propane or liquid fuel lighting	12%
Recreational vehicle (RV)	10%
None	5%

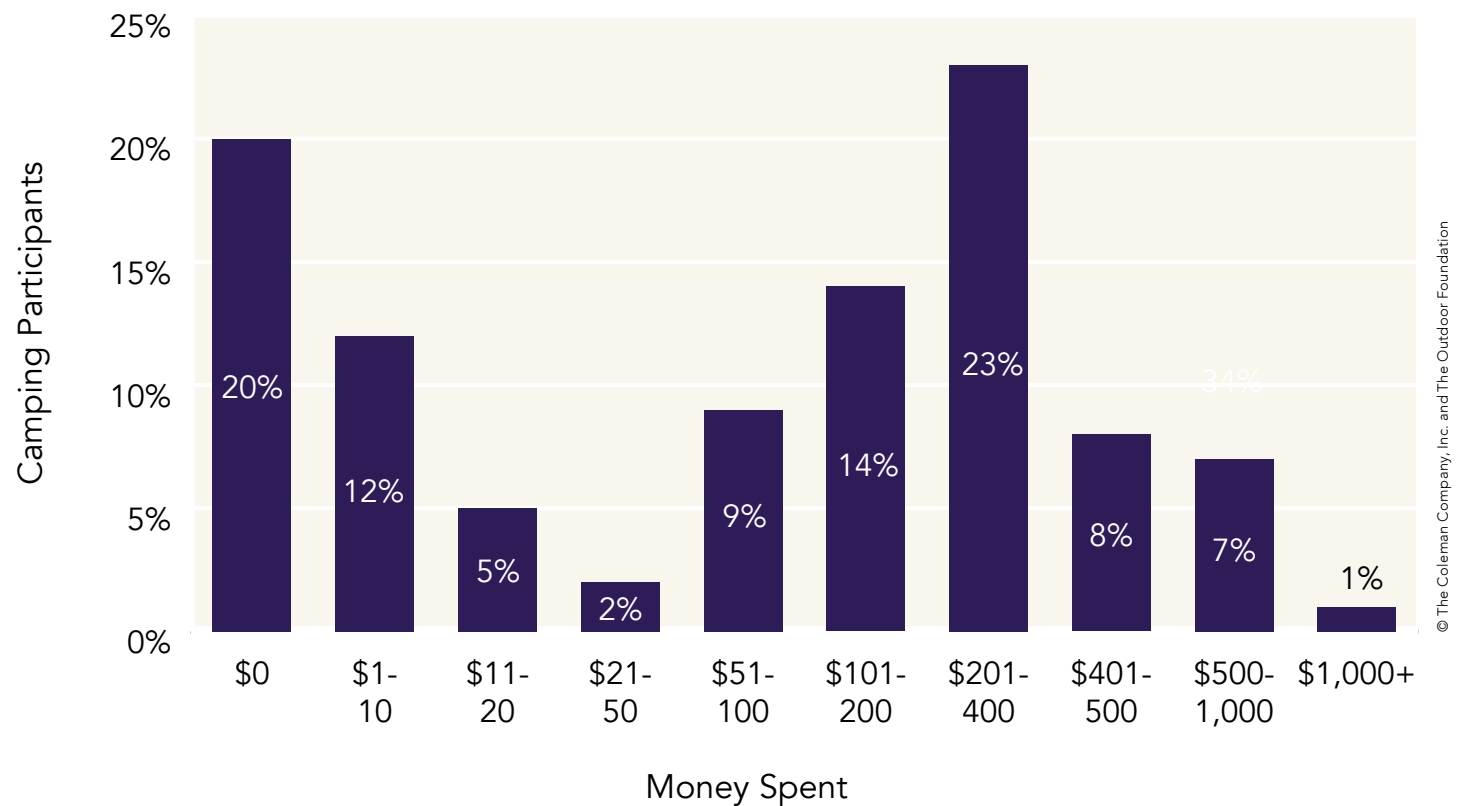
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First-time campers rent or borrow an assortment of equipment for their first outing. Items ranking highest are bicycles, battery lighting, coolers and tents.

Spending on Equipment for First Camping Trip

First-Time Campers, Ages 18+

Campers spend an average of \$203.65 on their first trip.



Helpful Equipment Not Taken on First Trip

First-Time Campers, Ages 18+

"Was there gear you wished you had brought?"

Bicycle	7%
Blankets	4%
Flash light/lantern	4%
Bug spray	3%
Air mattress	3%
Mosquito net	3%
Clean water	3%
Portable grill/stove	2%
Lighter	2%
Tent	2%
Dining fly	2%
Camp chair	2%
None	63%

Sixty-three percent of first-time campers were satisfied with the equipment they brought on their trips. Of those that wished they had brought certain equipment, seven percent said they wanted a bicycle.

Words Associated with First Camping Trip

First-Time Campers, Ages 18+



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THE FUTURE OF CAMPING

More than 80 percent of campers are introduced to camping between infancy and age 15. After age 15, the chances of being introduced to camping drop and continue to decline as the population ages.

The importance of introducing youth to the outdoors is also underscored by the percentage of current adult campers who participated in recreational activities at a young age. More than 60 percent participated in outdoor activities between the ages of 13 and 17, compared to just 27 percent of non-campers. Outdoor recreation during childhood had almost the same impact on future lifestyle choices.

Ninety-two percent of campers said it is “likely” or “very likely” that they will participate in camping next year. Indeed, participants plan to set off on an average of 3.7 trips next year.

Age 15

Eighty-three percent of campers took their first trips between age 0 and 15.

3.7 Trips

Participants plan to take an average of 3.7 camping trips next year.

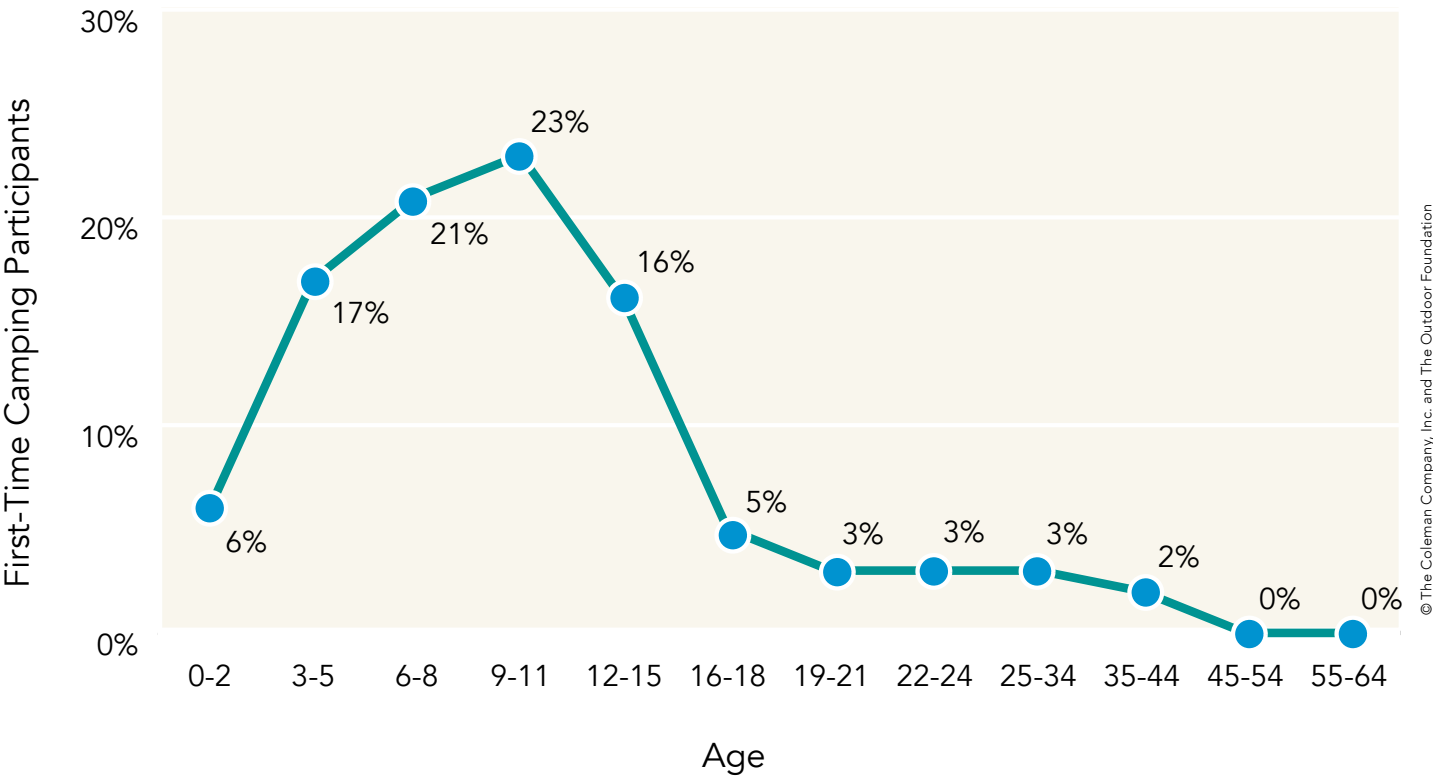
Outdoors

Sixty-three percent of campers were exposed to outdoor activities as adolescents.

Introducing Camping for the First Time

Campers, Ages 18+

Among current adult campers, 83 percent took their first camping trip between infancy and age 15. The percentage of people being introduced to camping after age 15 plummets, and the likelihood of setting off on a first camping trip continues to decrease as the person ages.



Youth Participation in Sports and Recreation Among Current Adult Campers

Americans, Ages 6+

Among adult campers, 63 percent participated in outdoor activities between the ages of 13 and 17, compared to 27 percent of non-campers. Outdoor recreation during childhood had a similar affect.

"Which activities did you regularly participate in?"	Campers Ages 6-12	Non-Campers Ages 6-12	Campers Ages 13-17	Non-Campers Ages 13-17
Physical education at school	75%	64%	72%	63%
Outdoor activities	56%	24%	63%	27%
Team sports	41%	28%	47%	32%
Cycling	38%	27%	40%	25%
Running or jogging	25%	16%	39%	24%
Swimming for fitness	25%	15%	28%	16%
Water sports	22%	11%	25%	13%
Winter sports	17%	8%	21%	11%
Racquet sports	8%	5%	15%	10%
Golf	7%	3%	12%	7%
Fitness or health club-based activities	7%	3%	13%	7%
None of the above	10%	24%	9%	23%

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Number of Trips Taken

Campers by Age

More than one-quarter of camping participants have not changed the amount or length of their camping trips over the last three years.

"In the last three years, how would you characterize your camping activity?"	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
No significant change	27%	33%	31%	17%	27%
Fewer trips now, and they are shorter	17%	18%	20%	15%	18%
More trips now, and they are longer	17%	16%	10%	6%	13%
More trips now, but they are shorter	16%	9%	14%	11%	13%
Fewer trips now, but they are longer	10%	9%	7%	6%	8%
About the same number of trips, but they are shorter	9%	12%	9%	46%	17%
About the same number of trips, but they are longer	4%	4%	9%	0%	4%

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Reasons for Taking Fewer Trips

Campers by Age

Those taking fewer camping trips cite lack of time due to work or school commitments as the reason. Campers, ages 45 to 54, also blame lack of vacation time and family commitments.

"What keeps you from participating in camping more often?"	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Lack of time due to work or school	73%	46%	37%	46%	55%
Not enough vacation time	44%	30%	37%	0%	32%
Lack of time due to family commitments	29%	36%	37%	36%	34%
Too expensive	16%	16%	0%	27%	14%
Poor weather	12%	14%	15%	0%	11%
No-one to go with	12%	9%	7%	9%	10%
Need better or different equipment	11%	13%	4%	0%	8%
Fuel prices	6%	7%	11%	0%	6%
Couldn't get reservation	4%	7%	15%	0%	6%
Prefer comfort of hotel or lodge	3%	4%	4%	9%	4%
Have baby or dependent children	3%	4%	0%	0%	2%
Children grown up	1%	0%	4%	0%	1%
Allergies	0%	0%	0%	9%	1%
Illness	0%	2%	0%	0%	0%

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Most Time-Consuming Aspect of Camping

Campers by Age

For all age groups, except campers ages 55 and over, finding the time to get away is the most time-consuming part of camping.

"What is the most time-consuming aspect that you lack the time to complete?"	Age 18-34	Age 35-44	Age 45-54	Age 55+	All Ages
Finding time to get away	52%	49%	47%	32%	46%
Planning (e.g. making reservations, shopping, meals etc)	17%	15%	11%	9%	14%
Packing and unpacking	12%	14%	18%	4%	12%
Clean-up/maintenance of gear upon return	10%	15%	18%	6%	12%
Traveling	8%	7%	6%	9%	8%
None	1%	0%	0%	40%	8%

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Motivation for Camping in the Future

Campers, Ages 18+

"What would encourage you to continue camping in the future?"

More free time or vacation time	56%
My friends encouraged me to go again	52%
Good weather	48%
My family encouraged me to go again	44%
My spouse/significant other encouraged me to go	40%
Better equipment	28%
Campgrounds that offer a few "luxuries" (e.g. WiFi, showers, bathrooms, general store)	24%
A campground that offers activities or support for people camping with children	20%
More resources to help me figure out what to bring or to be better prepared	13%
An online resource to help me meet up with other people like me to camp with	6%

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Fifty-six percent of adult campers say more free time would allow them to camp in the future. Another 52 percent say that they would go if friends encouraged them to come along.

Reason for Not Camping Next Year

Campers, Ages 18+

"Why are you unlikely or undecided in your decision to continue camping next year?"

Lack of time due to work or school	44%
Prefer comfort of a hotel or lodge	28%
Lack of time due to family commitments	28%
Not enough vacation time	20%
No one to go camping with	10%
Didn't like being "disconnected" from technology (e.g. electronics, social media)	10%
Too expensive	9%
Need better or different equipment	7%
Didn't really enjoy my first experience	5%
Getting too old	4%
Depends if run an ultra marathon	4%
Hate spiders and bugs	1%

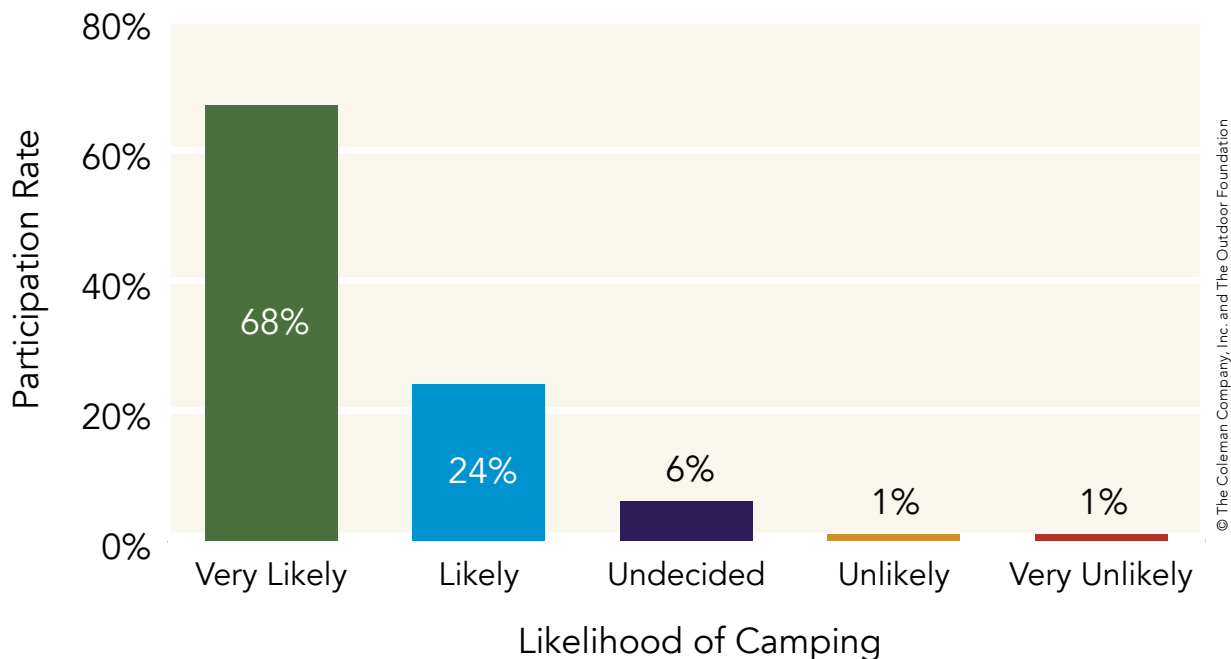
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Of adult campers unlikely to or undecided about camping next year, 44 percent say they the lack time to camp due to work or school.

Camping in the next 12 months...

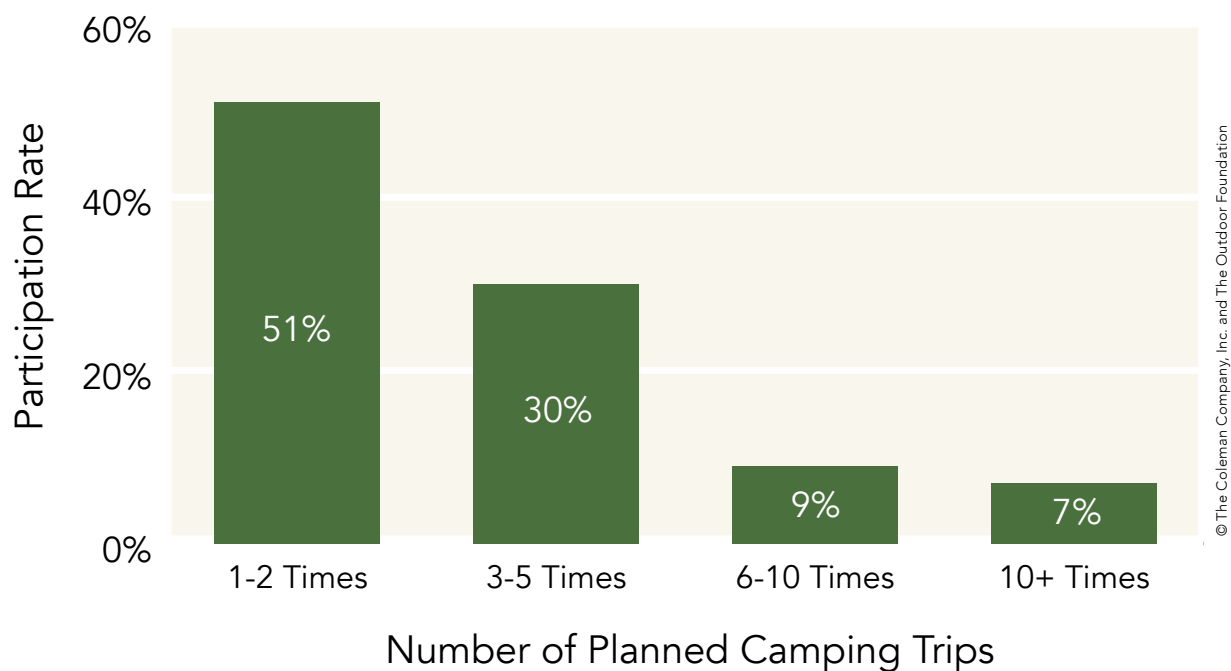
Likelihood of Camping Next Year

Campers, Ages 18+



Number of Trips Planned

Campers, Ages 18+



CROSSOVER PARTICIPATION

The following section shows which sport and recreational activities campers enjoy outside of camping. The table reports on the number of participants, participation rate and index.

Camping Crossover Participation

Campers, Ages 6+

Activity	Participants (in millions)	Participation Rate	Index
Ab Machine/Device	4,602	11.4%	174
Adventure Racing	1,467	3.6%	447
Aerobics (High Impact/Intensity/Training)	5,006	12.4%	183
Aquatic Exercise	2,967	7.3%	235
Archery	4,169	10.3%	356
Backpacking Overnight	10,236	25.3%	731
Badminton	3,509	8.7%	353
Barre	1,436	3.5%	324
Baseball	5,170	12.8%	283
Basketball	6,818	16.8%	213
Bicycling (BMX)	1,508	3.7%	463
Bicycling (Mountain/Non-Paved Surface)	3,902	9.6%	350
Bicycling (Road/Paved Surface)	12,825	31.7%	233
Birdwatching	5,311	13.1%	291
Boardsailing/Windsurfing	1,180	2.9%	545
Boot Camp-Style Cross-Training	1,899	4.7%	202
Bowling	13,847	34.2%	214
Boxing for Competition	1,075	2.7%	607
Boxing for Fitness	2,196	5.4%	310
Calisthenics/Bodyweight Exercise and Body-Weight Accessory-Assisted Training	6,968	17.2%	224
Camping	27,984	69.1%	704
Camping (RV)	14,670	36.2%	723
Canoeing	6,262	15.5%	450
Cardio Cross Trainer	2,695	6.7%	260
Cardio Kickboxing	2,520	6.2%	269
Cardio Tennis	845	2.1%	377
Cheerleading	1,677	4.1%	350
Climbing (Sport/Indoor/Boulder)	2,966	7.3%	472
Climbing (Traditional/Ice/Mountain)	2,122	5.2%	623
Cross-Training-Style Workouts	4,280	10.6%	274
Dance/Step/Choreographed Exercise to Music	5,897	14.6%	198
Elliptical Motion Trainer	5,917	14.6%	152
Field Hockey	1,022	2.5%	473

Activity	Participants (in millions)	Participation Rate	Index
Fishing (Fly)	3,139	7.8%	387
Fishing (Freshwater/Other)	15,167	37.4%	289
Fishing (Saltwater)	4,446	11.0%	271
Football (Flag)	2,648	6.5%	347
Football (Tackle)	2,334	5.8%	282
Football (Touch)	2,668	6.6%	292
Free Weights (Barbells)	6,736	16.6%	190
Free Weights (Dumbbells) Over 15 lbs	8,304	20.5%	195
Free Weights (Hand Weights) Under 15 lbs	9,142	22.6%	158
Golf (on a Golf Course)	6,556	16.2%	194
Gymnastics	1,570	3.9%	245
Hiking (Day)	16,237	40.1%	323
Hunting (Bow)	2,693	6.6%	440
Hunting (Handgun)	1,602	4.0%	374
Hunting (Rifle)	5,253	13.0%	376
Hunting (Shotgun)	4,301	10.6%	377
Ice Hockey	1,257	3.1%	374
Ice Skating	4,220	10.4%	286
Jet Skiing	2,683	6.6%	304
Kayaking (Recreational)	4,477	11.1%	365
Kayaking (Sea/Touring)	1,826	4.5%	452
Kayaking (White Water)	1,645	4.1%	505
Kettlebells	3,790	9.4%	267
Lacrosse	953	2.4%	342
Martial Arts	2,306	5.7%	310
Mixed Martial Arts for Competition	691	1.7%	403
Mixed Martial Arts for Fitness	1,119	2.8%	329
Paintball	1,860	4.6%	390
Pickleball	1,494	3.7%	437
Pilates Training	2,351	5.8%	199
Racquetball	1,674	4.1%	336
Rafting	2,484	6.1%	474
Roller Hockey	1,393	3.4%	579
Roller Skating (2x2 Wheels)	2,984	7.4%	311
Roller Skating (Inline Wheel)	2,844	7.0%	338
Rowing Machine	2,875	7.1%	211
Rugby	722	1.8%	408

Activity	Participants (in millions)	Participation Rate	Index
Running/Jogging	12,942	32.0%	183
Sailing	1,881	4.6%	346
Scuba Diving	1,617	4.0%	371
Shooting (Sport Clays)	2,877	7.1%	447
Shooting (Trap/Skeet)	2,553	6.3%	480
Skateboarding	2,823	7.0%	309
Skiing (Alpine/Downhill)	3,927	9.7%	327
Skiing (Cross-Country)	2,863	7.1%	540
Skiing (Freeski/Freestyle)	2,389	5.9%	377
Snorkeling	3,158	7.8%	260
Snowboarding	3,559	8.8%	378
Snowmobiling	2,446	6.0%	478
Snowshoeing	1,984	4.9%	409
Soccer (Indoor)	1,779	4.4%	283
Soccer (Outdoor)	4,267	10.5%	244
Softball (Fast-Pitch)	1,146	2.8%	341
Softball (Slow-Pitch)	2,852	7.0%	291
Squash	919	2.3%	415
Stair-Climbing Machine	3,755	9.3%	205
Stand-Up Paddling	1,369	3.4%	359
Stationary Cycling (Group)	2,752	6.8%	235
Stationary Cycling (Upright or Recumbent)	6,547	16.2%	132
Stretching	8,284	20.5%	168
Surfing	1,438	3.6%	381
Swimming for Fitness	7,993	19.7%	228
Swimming on a Team	1,354	3.3%	360
Table Tennis	5,597	13.8%	246
Tai Chi	1,216	3.0%	255
Target Shooting (Handgun)	5,314	13.1%	266
Target Shooting (Rifle)	6,025	14.9%	333
Telemarking (Downhill)	1,384	3.4%	456
Tennis	5,472	13.5%	220
Track and Field	1,917	4.7%	337
Trail Running	4,221	10.4%	404
Treadmill	10,015	24.7%	144
Triathlon (Non-Traditional/Off Road)	981	2.4%	501
Triathlon (Traditional/Road)	1,333	3.3%	436

Activity	Participants (in millions)	Participation Rate	Index
Ultimate Frisbee	2,065	5.1%	329
Volleyball (Court)	2,197	5.4%	251
Volleyball (Grass)	2,060	5.1%	380
Volleyball (Sand/Beach)	2,382	5.9%	369
Wakeboarding	1,698	4.2%	392
Walking for Fitness	19,520	48.2%	125
Water Skiing	1,921	4.7%	346
Weight/Resistance Machines	7,318	18.1%	147
Wildlife Viewing	8,698	21.5%	297
Wrestling	1,070	2.6%	408
Yoga	5,973	14.7%	170

Method

During January and February of 2014 a total of 10,778 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over one million people operated by Synovate/IPSOS. A total of 5,067 individual and 5,711 household surveys were completed. The total panel is maintained to be representative of the US population for people ages six and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2015 participation survey sample size of 10,778 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 US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level.

A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, household size, region, population density and panel join date. The total population figure used was 292,064,000 people ages six and older.

In many charts, sums less than two percent have been omitted.

Supplemental Survey

Profile and projection data representing ages six and over are from the national represented survey. An additional survey was completed recontacting 1,092 respondents, ages 18 and over, who camped in 2014 to collect data on more specific camping experiences. The collection method in both surveys was the same.

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.

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