CAMPING AND RV TRAVEL TRENDS[1]

Gerald L. Cole and Wilbur F. LaPage[2]

Abstract.--This paper summarizes the results from industry sources and several regional and national camping market surveys conducted between 1960 and 1979. Growth of the industry, together with pricing practices, energy impacts and occupancy data was also examined. By 1978, the number of inactive campers outnumbered active campers nationwide with persons less than 30 showing the greatest tendency to become inactive. Growth of the industry slowed in the 1970's, but franchised campgrounds provided an increased share of sites. A decline in campground occupancy was noted in 1979 and appeared to be correlated with gasoline shortages.

INTRODUCTION

The popularity of camping and RV travel continues to grow. According to a 1979 survey, camping now ranks third behind swimming and bicycling among outdoor recreation activities. The purpose of this paper is to explore numerous trends, primarily in the 1970's which have affected the camping market including number of active, inactive and potential campers. We will examine socio-economic characteristics of the general population and campers in particular. Trends in changing patterns of camper participation are discussed, including annual days of participation, adoption of new activities and new camping locations. Related to participation changes are the types of equipment used and preferences for private and public campgrounds. Perceptions and images of camping will round out the recent trends from the standpoint of the camping public.

On the supply side, recent trends in the number of campgrounds and campsites per campground in both the public and private sectors will be examined. Closely associated is the growth in franchising of campgrounds. Trends in camping fees at both private and public campgrounds will be related to facilities offered.

Energy cost and availability will be discussed with respect to camper reaction during the mid or late 1970's.

Finally, occupancy data for 1978 and 1979 will be utilized as an indication of the economic viability of the industry.

THE CAMPING MARKET

Numerous regional and national surveys have been completed since 1960. While direct comparisons are sometimes ruled out by different methodologies, a clear pattern of growth in number of campers and camping households emerges.

The earliest national survey, conducted in 1960 found 3-4 million acting camping households in the U.S. (ORRRC, 1962). The number had increased to six million by 1965. A series of three comprehensive national camping market surveys was conducted in the 1970's (LaPage 1973, Kottke and others 1975, LaPage and Cole 1979).

---

[1]Paper presented at the National Outdoor Recreation Trends Symposium, Durham, NH, April 20-23, 1980.

[2]Gerald L. Cole is a professor of resource economics at the University of Delaware, Newark, DE. Wilbur F. LaPage, principal recreation scientist with the Northeast Forest Experiment Station, Durham, NH.

The first in 1971, found 12.4 million active households; the second in 1973, 14.3 million; and the third in 1978, 17.5 million. While camping participation grew at an average annual rate of 20 percent in the 1960's, growth slowed to less than 8 percent in the early 1970's, and to less than 5 percent in the late 1970's, Table 1.

Growth in total numbers of people was at a somewhat slower rate since average household size declined from 3.33 persons in 1960 to 2.79 in 1979. Three Nielsen surveys (1979) conducted in 1973, 1976 and 1979 support this contention. The number of camping participants increased 7 percent between 1973 and 1976, but the rate declined to 4 percent between 1976 and 1979.

Table 1.—Average annual growth in the numbers of active, inactive, and potential campers, and new households in the United States, during the periods 1971-1973 and 1973-1978, in percent

Market class	Average annual growth	
	1971-1973	1973-1978
Camper:		
Active	+ 7.6	+ 4.5
Temporarily inactive	+ 42.4	+ 9.8
Permanently inactive	+ 14.7	+ 10.4
All campers	+ 14.9	+ 7.2
Noncamper:		
High and medium potential	- 10.4	- 5.2
Low and zero potential	- 2.5	0
All noncampers	- 3.9	- 1.0
New households in United States	+ 2.3	+ 2.4

Source: LaPage and Cole 1979.

The total camping market picture is not complete without looking at the number of inactive campers and potential campers. Nationally, the inactive camper market (former campers) is growing at almost twice the rate of the active segment, Table 2. Between 1971 and 1978 active campers only increased from 19 percent of all households to 23 percent.

In 1971, one-third of all households had at least one adult who had camped; by 1978 the proportion had increased to one-half. Consequently, the pool of "potential campers" - in the high and medium potential category - declined from 12 percent of all households in 1971 to 6 percent in 1978. Growth in the number of active campers is reducing the supply of high potential campers since the active market continues to increase at nearly twice the rate of new household formation in the U.S.

Table 2.--Size of the American camping market in 1971, 1973, and 1978, as a percentage of total households

Market class	1971	1973	1978
Camper:			
Active	19	21	23
Temporarily inactive	5	9	12
Permanently inactive	9	11	15
Noncamper:			
High potential	3	1	1
Medium potential	9	8	5
Low potential	4	17	18
Zero potential	51	33	26

Source: LaPage and Cole 1979.

Camping market growth is not shared among the four major regions in the U.S. in accordance with population distribution, Table 3. Over half of the nation's new campers entering the market between 1973 and 1978 live in the North Central region. Concurrently, there were almost no losses in potential campers or increases in the number of temporarily inactive campers from that region. While the Northeast gained nearly one million campers during the same period, losses to the temporarily inactive category were nearly as great. The pattern in the Western region was similar to that of the Northeast. Meanwhile, the Southern region experienced a net loss in the number of campers even though the largest supply of prospective campers resides there.

An important conclusion may be drawn from the camping market analysis. By 1978, for the first time, the total of permanent dropouts and temporarily inactive campers exceeded the number of active campers. There were two active campers for every inactive in the late 1960's and early 1970's; by 1973-74 the two groups were about equal and today former campers outnumber active campers by over 2 million households.

Characteristics of campers

Demographic characteristics of the population change rather slowly and since camping is a rather broad based participant activity, a similar pattern prevails.

Age. Historically, campers have predominately been persons less than 40 years of

Table 3.--Distribution of active, temporarily inactive, and potential camping households, by region, 1973-1978[a], in millions

Region	Total households		Camping market households: Active		Temporarily inactive[b]		Potential[c]	
	1973	1978	1973	1978	1973	1978	1973	1978
Northeast	16.4	17.3	2.3	3.3	1.0	1.8	2.1	1.1
North Central	18.4	20.1	3.2	4.9	2.1	2.2	1.2	1.1
South	21.2	24.2	4.8	4.6	2.0	3.0	2.2	1.9
West	12.3	14.4	4.0	4.7	1.2	2.1	0.6	0.4
United States[d]	68.3	76.0	14.3	17.5	6.1	9.1	6.1	4.5

a/ For an approximate estimate of total persons (campers), multiply 1973 households by 3.01 persons per household, and 1978 households by 2.81.

b/ Temporarily inactive campers have not camped for 3 years or longer. If longer, they said that they had not quit. In 1973 there were an additional 7.5 million permanently inactive households which had increased to 11.4 by 1978.

c/ This includes "high" and "moderate" potential for camping; that is, those who plan to camp or who have a distinct interest in trying it. In 1973 there were an additional 34 million households with little or no interest in camping--by 1978 this figure had not changed significantly.

d/ Northeast: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania.
North Central: Ohio, Indiana, Illinois, Michigan, Wisconsin, Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas.
South: Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, Oklahoma, Texas.
West: Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada, Washington, Oregon, California.

Source: LaPage and Cole 1979.

age reflecting in part the experiences of young campers, and camping by young families on vacation or weekend outings, Table 4. However, between 1973 and 1978, a large increase in inactivity occurred among heads of households less than 30 years of age. The inactivity may be temporarily due to formation of new households (young children, etc.), but if it becomes permanent this will lend to support the contention made earlier about the increased supply of inactive campers. Furthermore, additional survey results indicate a decline in the participation of children under 12 and teens 12-17 between 1976 and 1979, -13 percent and -11 percent, respectively (Nielsen 1979). This further adds to underrepresentation of young persons under 30 years of age in the active market and skews the age distribution in favor of those over 30.

Education, occupation and income. These three demographic characteristics are highly intercorrelated and it is difficult to separate a meaningful cause and effect relationship between one variable and camping participation. Since 1960, some trends have emerged, however. Campers have consistently tended to have higher than median educational levels. For example, A KOA survey (1976) pointed out that 88 percent of camping heads of households have at least a high school education compared to 63 percent of the U.S. public.

Higher than average educational levels among campers transcends into overrepresentation of professional and white collar occupations among active campers. Conversely, in 1978, the largest proportion of potential campers came from the blue collar or semiskilled categories.

Table 4.--Age distribution for active, temporarily inactive, and potential campers in 1973 and 1978, in percent

Head-of-household's age	United States 1973	United States 1978	Active 1973	Active 1978	Inactive 1973	Inactive 1978	Potential 1973	Potential 1978
18-29	27	30	44	41	38	55	42	39
30-39	19	19	25	28	23	15	26	22
40-49	15	14	12	14	15	14	17	20
50-59	15	14	10	9	15	8	8	14
60 or older	24	23	9	8	9	8	7	5

Source: LaPage and Cole 1979.

Finally, the educational levels and occupational groupings for active and inactive campers results in higher than average incomes. In 1976, 44 percent of camping households reported incomes in excess of $15,000, while nationally only 37 percent of households reported incomes in the same category (KOA).

Families vs. singles: Camping has primarily been a family activity and remains so; however, a new trend began to emerge between 1973 and 1978. There was a notable increase in the proportion of single campers and a decline in married campers, with even a more pronounced increase in singles in the temporarily inactive category, (LaPage and Cole 1979).

Changing patterns of participation

Another dimension on the camping market, in addition to the number of participants, is the frequency of participation. Also, a trend analysis of the frequency variable is useful in interpreting total growth of the market. One national survey reports a slight increase in average days of participation from 1973 to 1976, while the rate held steady between 1976 and 1979 (Nielsen 1979). Regionally, a gain was indicated in the North Central states between 1976 and 1979, while the Northeast registered a loss in average days of participation.

In the 1978 Forest Service Survey more active campers said they had recently increased their participation level compared to a decrease or the same level (LaPage and Cole 1979). Average days of participation were 15.98 and very similar to the 1979 Nielsen survey. The 1978 median participation rate was only two weekend trips of three days each. Thus, the heavy half phenomenon reported previously (LaPage 1969) continues to be important. In 1978, one half of the active campers accounted for 78 percent of all camping trips and 77 percent of the total camping days. The 1979 Nielsen survey reported that 32 percent of the active campers participated 20 or more days each year, accounting for 68 percent of total participation.

Travel patterns. The 1976 National Travel Survey indicated that camping trips tend to be longer, in miles, than other trips taken by Americans (U.S. Travel Data Center). In the 1977 NE-100 survey, campers said they were traveling farther from home than in previous years (Bevins and others 1979a). They were seeking new types of experiences or new campgrounds. As of 1977, energy concerns or costs apparently did not deter campers.

Equipment and facility preferences

Tents and recreational vehicles (RV's) were equally preferred in 1971, while in 1973 and 1978 surveys, RV's had gained slightly with motor homes showing the greatest percentage change, Table 5. Tents tend to be the preferred shelter for beginning campers (59 percent in the 1973 study).

RV shipments from manufacturers have been sensitive to general economic conditions and to the energy situation. For example, the gasoline shortage and the recession in early 1974, both likely contributed to a 41 percent decline in shipments compared to the previous year, Table 6. However, shipments regained momentum in late 1974 and the trend continued until 1976, followed by a decline in 1977 and 1978. Truck campers and camping trailers have exhibited a declining market share since 1970, and travel trailers a slight increase. Motor homes have captured the major increase.

Table 5.--Type of shelter used by active campers on last camping trip, 1971, 1973, and 1978, in percent

Shelter[a/]	1971	1973	1978
Tent	50	41	42
Camping trailer	13	11	11
Travel trailer	17	17	19
Truck camper	15	15	12
Motor home	3	7	9
Van or converted bus	6	10	10
Pickup cover	6	5	11
Other	-	5	4
Unknown	-	1	1

[a/] Totals exceed 100 percent because some campers use more than one type of shelter on a camping trip.

Source: LaPage and Cole 1979.

Table 6. Recreational vehicle shipments, 1970-1978

Year	Camping trailer	Truck camper	Motor home	Travel trailer	Total shipment	Change from preceding year
	- - - -	percent	- - - -		thousands	percent
1970	31	25	8	36	380	- 5.2
1971	21	24	13	42	451	+ 18.7
1972	19	18	20	43	583	+ 29.3
1973	19	17	24	40	529	- 9.3
1974	19	15	23	43	296	- 44.1
1975	14	13	29	44	340	+ 14.9
1976	12	10	35	43	441	+ 29.7
1977	13	8	39	41	414	- 6.1
1978	12	6	40	41	390	- 5.8

Source: LaPage and Cole 1979.

A KOA study (1976) indicates that RV owners camp more nights per year than do tent users. RV users averaged 16 nights per year, tent users 9 nights. Greater convenience and a greater fixed investment may encourage more use of RV equipment.

Little difference in incomes has been reported between tent and RV users; however, a Delaware study concluded that campers earning more than $10,000 per year preferred less campsite development than did those earning more than $10,000 (Brokaw and Cole 1977). The standard level of development included picnic tables, level parking, flush toilets and showers.

Although public campgrounds were used more than private campgrounds in both the 1973 and 1978 studies, the market share for private campgrounds appears to be growing. This trend is likely associated with greater use of RV's since private campgrounds offer a greater opportunity for utility hookups.

Perceptions and images of camping

Americans' perceptions of camping as an outdoor recreation activity were utilized in the 1973 and 1978 national surveys as one means of assessing the market's growth potential. A series of word pairs on a 5-point rating scale ranging from very favorable to very unfavorable were used to develop a composite image. For example, respondents could rate camping as convenient or inconvenient, safe or unsafe, etc. The general public preceived camping to be substantially more favorable than unfavorable, Table 7. Furthermore, there were very few changes in those images between 1973 and 1978.

A major concern was whether perceptions of camping might act as barriers to participation. If potential campers view camping as "difficult" or complex then they may be unlikely to try the activity. In 1973, 50 percent of all prospective campers thought camping would be easy, but by 1978 the percentage had declined to 41 (LaPage and Cole 1979). Also, "comfortable" dropped from 54 percent to 39 percent and "fun" from 57 percent to 42 percent for the same group. Perceptions of crowding increased from 35 percent to 43 percent. The same kinds of perceptual limitations will likely prevent temporarily inactive campers from returning to the active market.

Most importantly, increasingly favorable perceptions among active campers could reflect increased satisfaction and a reduced likelihood of their dropping out of the market. Of the image factors included in the surveys, eight showed higher positive images and four higher negative images in 1978, compared to 1973 (LaPage and Cole 1979). For example, active campers in 1978 felt that camping was less crowded (+10 percent), more convenient (+8 percent), interesting (+5 percent), easier (+3 percent) and more confortable (+3 percent) than in 1973. Conversely, active campers felt it was less safe (-9 percent) and less fun (-5 percent).

Camper's satisfaction with the last camping trip was quite stable between 1973 and 1978, Table 8. The data collected suggest that the accelerating dropout rate is apparently not due to a decline in the quality of the experience. One possible exception may be the availability of utility hookups which may not be keeping pace with the increased use of self-contained units. Also, a minor decline (4 percentage points) was noted among active campers in satisfaction with the level of camping fees. However, reaction to fee levels was more favorable among temporarily inactive campers in 1978, compared to 1973.

The "cost image" of camping is apparently changing for the better among all market segments except potential campers. Among temporarily inactive campers, the belief that camping is a more economical way of traveling and vacationing was much more prevalent in 1978 than in 1973, Table 9. The discrepancy between potential campers and those who have actually camped suggests that an industry sponsored cost comparison could be a source of market growth.

THE CAMPGROUND INDUSTRY - IS IT REACHING MATURITY?

Growth in the private and public sectors

The campground industry was young and exhibited rapid expansion during the 1960's. In the Northeast region, private campgrounds increased 800 percent between 1961 and 1967 and outnumbered public campgrounds by 4 to 1 (Moeller 1971).

Currently, there is no all inclusive inventory of tent and trailer campsites in the U.S. Inventories have been made periodically by the National Association of Conservation Districts - the most recent in 1974. Annually several commercial publishing firms monitor the industry for inclusion of public and private firms in their directories. However, many directories attempt to maintain certain quality standards for the benefit of their clientele. Hence, there is no intent to include all campgrounds. Also, in an industry which has been as dynamic as the campground industry, it is extremely difficult to be aware of all firms entering and exiting.

While there is no agreement on the number of campgrounds and campsites among the various potential sources of information, there is agreement that the industry growth rate has diminished in the late 1960's and during the 1970's. In the Northeast, the growth rate slowed to 12 percent per year between 1967 and 1971 (Bevins and others 1974). This was in part due to a conscious effort by public administrators to reduce the rate of campground expansion.

Two commercial sources indicate that the number of private campgrounds decreased by approximately 10 percent between 1973 and 1978 (Bevins and others 1979b). There is a discrepancy on public sector data; one source indicates a 25 percent increase, another a 27 percent decrease.

Data from Federal resource management agencies indicate a relatively stable supply

Table 7.--Percentage of camping market households with a positive image of camping, 1973-1978

Image description	Camping Market Household: All 1973	All 1978	Active 1973	Active 1978	Temporarily inactive 1973	Temporarily inactive 1978	Permanently inactive 1973	Permanently inactive 1978	High and medium potential 1973	High and medium potential 1978	Low and zero potential 1973	Low and zero potential 1978
Environment:												
Interesting	55[a/]	57	86	88	79	77	65	56	83	74	30	34
People friendly	59	59	78	79	66	75	69	59	6[illegible]	57	47	44
Refreshing	44	47	73	71	70	68	47	41	62	58	21	26
Pleasant	52	57	81	84	73	79	63	59	81	81	27	32
Composite	52	55	80	81	72	75	61	54	72	68	31	34
Conditions:												
Clean	34	34	54	52	39	36	40	30	47	49	21	21
Safe	43	42	64	62	60	53	45	44	45	49	30	27
Uncrowded	25	26	29	34	26	30	36	25	35	26	19	21
Inexpensive	37	37	50	52	44	42	41	37	40	41	28	27
Composite	35	35	49	50	42	40	40	34	42	41	24	24
Attraction:												
Easy	35	35	56	62	47	40	36	37	50	41	21	18
Fun	40	39	62	57	56	46	45	45	57	42	23	25
Convenient	27	32	47	53	40	39	31	36	35	37	15	16
Comfortable	39	39	65	67	56	49	43	43	54	39	20	20
Composite	35	36	58	60	50	44	39	40	49	40	20	20
Number of respondents	2,199	2,013	450	423	214	238	281	318	198	109	1,056	908

a/ In 1973, 55 percent of the U.S. public felt that camping was interesting; that is, they assigned a 1 or 2 on a scale of 1 to 5 (1 being the most positive, 5 being the most negative).

Source: LaPage and Cole 1979.

situation in Forest Service and Park Service campgrounds and a modest increase at Corps of Engineer operated facilities during the 1979's (Bevins and others 1979b).

Utilizing the various sources of information, it appears that in 1978 we had approximately 7,000 public campgrounds and 9,000 privately operated enterprises.

It is also important to look at the trend in numbers of campsites. One source indicates an annual 20 percent increase nationally in the number of private sites between 1967 and 1973, and a 12 percent increase in public campsites (Bevins and others 1979b). Growth slowed between 1973 and 1978 to a five percent increase in the private sector and less than one percent increase in the public sector, Figure 1.

The trend is towards larger campgrounds. Private campgrounds averaged 88 sites in 1978, compared to only 28 sites in 1967, a 214 percent increase, Figure 2. In a Northeast regional study, private campgrounds averaging fewer than 50 sites were much less likely to be financially successful than larger units (Bevins and others 1974). Public campgrounds exhibit a similar

Table 8.--Camper satisfaction or dissatisfaction with last camping trip, 1973, and 1978, in percent

Degree of satisfaction[a]	Active		Temporarily inactive		Permanently inactive	
	1973	1978	1973	1978	1973	1978
Overall trip:						
Generally satisfied	93	93	89	91	73	78
Generally dissatisfied	4	5	8	8	16	14
Does not apply to my camping style	2	1	2	1	6	4
Campsite availability:						
Generally satisfied	78	78	75	83	63	71
Generally dissatisfied	9	11	12	9	13	15
Does not apply to my camping style	12	10	11	8	18	9
Hookup availability:						
Generally satisfied	53	48	54	54	39	52
Generally dissatisfied	5	8	7	8	7	9
Does not apply to my camping style	38	43	33	33	40	36
Recreation facilities:						
Generally satisfied	73	72	71	72	55	66
Generally dissatisfied	11	11	12	14	14	15
Does not apply to my camping style	15	15	15	13	24	13
Cleanliness and condition of campground:						
Generally satisfied	78	80	76	76	65	72
Generally dissatisfied	12	9	13	13	15	13
Does not apply to my camping style	9	11	9	8	15	10
Level of camping fees;						
Generally satisfied	70	66	70	75	54	65
Generally dissatisfied	9	11	8	6	5	8
Does not apply to my camping style	17	20	16	13	25	16

a/ Totals do not equal 100 percent in most cases because of nonresponses.

Source: LaPage and Cole 1979.

Table 9.--Attitude toward the total cost[a] of camping compared with other ways of traveling and taking a vacation, 1973 and 1978, in percent[b]

Camping group	More economical		Less economical	
	1973	1978	1973	1978
U.S. public	43	46[b]	14	14[b]
Active	66	67	13	13
Temporarily inactive	51	72	18	9
Permanently inactive	45	49	18	19
High-potential households	51	40	15	5
Medium-potential households	53	47	9	13
Low-potential households	36	32	16	15
Zero-potential households	27	24	11	16

[a] Respondents were asked to visualize the total cost of camping as including taxes on equipment, campsite fees, extra tolls, insurance, and other equipment costs.

[b] Totals for each year do not equal 100 percent due to many respondents reporting "no opinion."

Source: LaPage and Cole 1979.

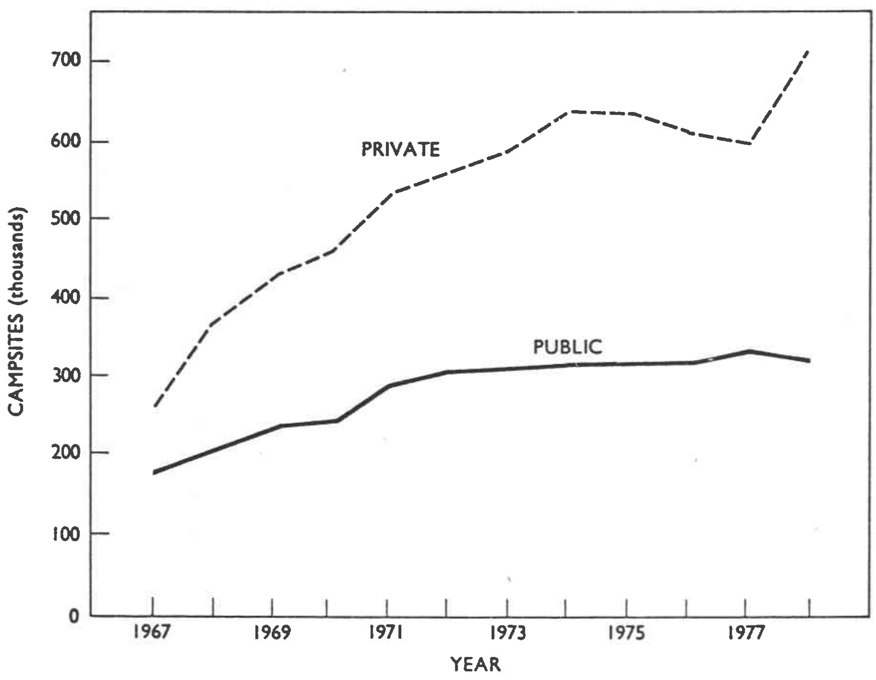

Figure 1.--Public and private developed campsites in the United States. Woodall management has indicated that 1977 private campsite numbers may be low because of changes in campground inventory procedures and not because there were fewer private campgrounds.

Source: Bevins and others 1979b.

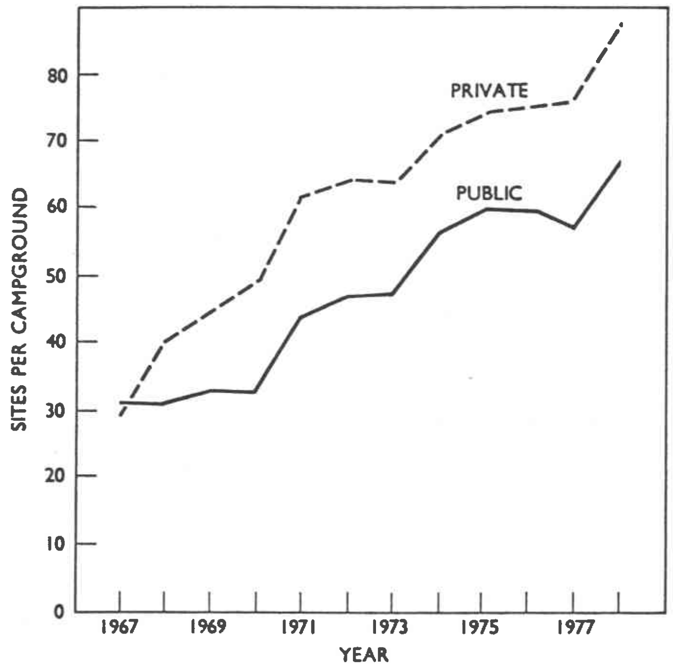

Figure 2.--Average number of campsites per campground listed by Woodall Publishing Co., 1967-1978.

Source: Bevins and others 1979b.

trend, more than doubling from 31 sites in 1967 to 67 in 1978 (Bevins and others 1979b).

Private campgrounds have grown out of economic necessity and in some areas due to zoning regulations that prevented establishment of new campgrounds but allowed existing businesses to expand. Growth has not occurred uniformly throughout the U.S. There was over twice the resident population per campsite (333) in the Northeast region compared to the Western region (154) in 1977 (Bevins and others 1979b). This ignores interregional travel among campers, but illustrates the disparity in available sites especially if energy concerns increase.

Growth in the private sector was likely stimulated by an additional trend which emerged during the 1970's - franchising. While the number of franchisers decreased from 27 in 1970 to 6 in 1977, franchised campgrounds grew to occupy an impressive market share (Oertle 1977). The 1976 Woodall's Campground Directory indicated that 12.1 percent of the private campgrounds were franchisees, providing 21 percent of the available private campsites. By comparison, this was over four times as many spaces as provided by the National Park Service and National Recreation Areas combined.

The franchisers stressed a package of services and amenities that couldn't be found in the public sector and that would appeal to the destination type camper. Included in the service package by some of the chains was a nationwide reservations service similar to that provided by motel chains.

Pricing practices

Fee structures in the private and public sectors are not always based on the same management goals. Traditionally, public agency managers have adopted the philosophy that public campgrounds should be only partially supported from rental fees.

Recent studies in Oregon, Pennsylvania and Rhode Island suggest that costs per site per night exceed fees charged by up to $12.00 (LaPage 1978). A few states, notably New Hampshire, have directed state park managers to adjust fees upward to recover full costs of development and operation. This is the exception, however. A Northeast study found that between 1960 and 1971 state park fees barely kept pace with increases in the prive level, with no allowance for increased development costs (Bond and others 1973).

Private campground owners have often criticized the public agencies as a source of unfair competition when less than full cost fees are charged. However, it appears that the private sector has attempted to carve out a segment of the market not being served by public campgrounds, and adjusted their fees accordingly. By 1977, more than three-fourths of all sites at private campgrounds had electricity and water, while only one-fourth of public sites had electricity and only one-tenth had water (Bevins and others 1979b).

An analysis of fees in the Northeastern states indicated that trailer site fees at private campgrounds were 43 percent higher than public fees for similar sites in 1977 (Bevins and others 1979b). The basic fee was $4.60 at private campgrounds, compared to $3.22 at public campgrounds. Both the private and public sectors increased fees between 1973 and 1977 with a slightly greater increase in the private sector (30 percent) compared to the public sector (27 percent). Fee increases varied considerably among states in the region. There was no increase at Connecticut's public campgrounds but a 95 percent increase occurred in New Jersey. Private fee increases ranged from 25 percent in Vermont to 40 percent in New Jersey. The variation in trends noted suggests that numerous forces were at work, including differing public policies concerning fees and variations in willingness to pay among campers. The highest fees were recorded in Delaware and New Jersey, two states near to major population centers with camping available to ocean beaches.

Willingness to pay studies have indicated that campers supported higher fees in both public and private campgrounds, although acceptable increases in private campgrounds were approximately half the level at public campgrounds (Bevins and others 1979b). This probably reflected the higher fees already being charged at private campgrounds.

Energy and economic conditions

The two Forest Service national surveys, conducted in 1973 and 1978, both attempted to learn of the impact of the gasoline situation and/or economic conditions on camping trips. Gasoline availability or cost, together with the total anticipated trip cost, were insignificant reasons given for either cancelling or shortening a planned camping trip. While shipments of recreational vehicles cited earlier appear to be sensitive to economic conditions, the above results do not suggest that camping participation has been affected.

Participation in relation to industry capacity based on occupancy data

One of the key indicators of the economic health of the hotel-motel industry is percent occupancy. Similar statistics should be beneficial to the campground industry. For the first time, in 1978, the National Campground Owners' Association coordinated a nationwide effort to monitor weekly occupancy data from a sample of campgrounds. The effort was successful and was expanded from 94 campgrounds in 1978 to include 259 in 1979. Consequently, two years of data are available for the period from Memorial Day to Labor Day.

Nationally, average daily occupancy declined from 58 percent for the 1978 season to 47 percent in 1979, representing a 19 percent loss in business (LaPage and Cormier 1979). While in prior studies campers said they had not curtailed trips because of gasoline cost or availability, it appears that they were influenced in 1979. The decline in occupancy was greatest in the Western region. Seasonal 1979 slumps appeared to coincide with the appearance of gasoline shortages in California. Likewise a decline in occupancy in other regions appeared to be correlated with gasoline availability.

Occupancy levels for both years were highest in the Northeast, followed closely by the Western regions. Levels were significantly lower in the North Central and Southern regions. Because of greater driving distances in the West, there was a smaller proportion of weekend only camping or less variation between weekday and weekend occupancy rates. In the Northeast, the smallest of the four regions, higher occupancy rates overall and weekend peaking reflect lesser distances from population centers to tourist attractions. Also, during 1979, seasonal rentals were up in all regions except the West.

While two years of data are insufficient to establish a trend, nationwide a 14 percent decline in occupancy between 1978 and 1979 was noted. Continued monitoring will be useful to evaluate the impact of energy and economic considerations.

SUMMARY AND CONCLUSIONS

Several national and regional market surveys and industry sources were utilized to establish trends in camper participation, characteristics of campers, attitudes about camping, travel patterns and equipment preferences. Growth of the industry, both in terms of campgrounds and the number of campsites, was also examined together with pricing practices, energy impacts and occupancy data.

By 1978, the number of inactive campers nationwide outnumbered active campers. Persons from 27 percent of U.S. households had tried camping and dropped it. Furthermore, there are fewer potential campers as viewed by the public's image of camping. Younger persons (less than 30) have become inactive in a greater proportion than other age groups in the population.

Camping still retains a favorable cost image as an economical means of traveling and vacationing among active and inactive campers, but to a lesser degree among potential campers. This may indicate a need for an industry sponsored cost comparison campaign to educate potentials.

Camper satisfaction with the last camping trip remained quite stable in the 1970's. A minor decline was noted in satisfaction with fee levels.

A noticeable slowdown in the rate of campground growth occurred during the 1970's. By the end of the decade, there were indications that the number of campgrounds could even be declining. However, it was apparent that the number of campsites continued to increase, reflecting expansion of existing campgrounds into more economically sized units. The number of campsites relative to population remained smallest in the Northeast region and largest in the Western region of the U.S. By 1976, franchised campgrounds provided over 20 percent of private sector sites.

Fees charged in the public sector often represented a management philosophy of recovery of less than full costs. Fee increases were greater in the private sector during the 1970's, perhaps out of economic necessity. Private campgrounds provided a greater share of utility hookups than the public sector.

Prior to 1979, there was no indication that energy availability or prices had been a deterrent to campers' planned trips. However, occupancy data for 1979 compared to 1978 clearly indicate a decline nationwide among a sample of reporting campgrounds. Declines in occupancy appear to be correlated with regional gasoline shortages. Occupancy levels were highest in the Northeast for both years and lower in the Southern and North Central regions. There was more weekend peaking in the Northeast, reflecting shorter driving distances and the least amount in the West because of greater distances. The question of energy prices and availability looms as a major challenge to the industry in the 1980's, particularly in view of a decline in the growth rate of the camping market.

LITERATURE CITED

Bevins, Malcolm I., Tommy L. Brown, Gerald L. Cole, Kenneth J. Hock and Wilbur F. LaPage. 1974. Analysis of the campground market in the Northeast. Report II. Privately owned areas. Vermont Agric. Exp. Stn. Bull. 679.

Bevins, Malcolm I., Tommy L. Brown, Gerald L. Cole, Kenneth J. Hock, Marvin W. Kottke, Wilbur F. LaPage, Richard W. Stammer and Daniel J. Stynes. 1979a. Changing patterns of outdoor recreation participation in the Northeast. Delaware Agric. Exp. Stn. Bull. 427.

Bevins, Malcolm I., Wilbur F. LaPage and Daniel P. Wilcox. 1979b. The campground industry: Recent national trends. USDA For. Serv. Gen. Tech. Rep. NE-53.

Bond, Robert S., Malcolm I. Bevins, Tommy L. Brown and Paul R. Fiske. 1973. Analysis of the campground market in the Northeast. Report 1, Public policy. Massachusetts Agric. Exp. Stn. Bull. 601.

Brokaw, Marion J and Gerald L. Cole. 1977. An economic analysis of camper equipment preferences, facilities and fees in relation to income. Delaware Agric. Exp. Stn. Bull. 422.

Kampgrounds of America. 1976. 1976 camper survey. Billings, Mont.

Kottke, Marvin W., Malcolm I. Bevins, Gerald L. Cole, Kenneth J. Hock and Wilbur F. LaPage. 1975. Analysis of the campground market in the Northeast. Report III. A perspective on the camping involvement cycle. USDA For. Ser. Res. Pap. NE-322.

LaPage, Wilbur F. 1969. Campground marketing: The heavy half strategy. USDA For. Ser. Note NE-93.

LaPage, Wilbur F. 1973. Growth potential of the family camping market. USDA For. Ser. Res. Pap. NE-252.

LaPage, Wilbur F. 1978. The camping market and the campground industry: trends and research. In Campgrounds and camping 1980 conference proceedings, Southern Illinois Univ., Carbondale.

LaPage, Wilbur F. and Gerald L. Cole, 1979. 1978 national camping market survey. USDA For. Ser. Res. Pap. NE-450.

LaPage, Wilbur F. and Paula L. Cormier. 1979. The national campground occupancy index. A report to the Board of Directors, National Campground Owners Assoc. USDA For. Ser. unnumbered report.

Moeller, George H. 1971. Growth of the camping market in the Northeast. USDA For. Ser. Res. Pap. NE-202.

Nielsen, A. C., Company. 1979. Sports participation study. Camping.

Oertle, V. Lee. 1977. The franchising phenomenon. In Woodall's trailer and RV travel. Woodall Publishing Co., Highland Park, Ill.

Outdoor Recreation Resources Review Commission. 1962. National recreation survey. Study report 19, U.S. Gov. Print. Off., Washington, D.C., p. 31.

U. S. Travel Data Center. 1977. 1976 National travel survey: full year report. Washington, D. C.