Analysis of the Campground Market in the Northeast
Report III

A PERSPECTIVE ON THE CAMPING-INVOLVEMENT CYCLE

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FOREWORD

THE NORTHEASTERN Regional Research Project NEM-42 was organized to conduct an economic analysis of the campground market in the Northeast. One of its four major objectives was:

> *To determine the motivations, goals, and characteristics of the camping public as a guide to development of a rational pricing system of public and private camping resource mix.*

This report presents the results of a nationwide household survey that was designed to meet this objective. The geographical scope of the survey was extended beyond the 12 Northeastern States to develop a comprehensive view of the camping market on a nationwide basis. This survey was designed by the NEM-42 Committee to learn more about the camping involvement cycle – from potential, to active, to inactive camping status – and to describe the images of camping at each stage of that cycle.

This is the third report prepared by the committee. Report I, *Analysis of the Campground Market in the Northeast: Public Policy (Bond et al. 1973)* deals with the legal authority and policies underlying management of public campgrounds. *Analysis of the Campground Market in the Northeast: Report II: Privately Owned Areas (Bevins et al. 1974),* presents the results of a survey of commercial camping operations.

This research was funded by the agricultural experiment stations at state universities of the 12 Northeastern States, and by the Family Camping Federation of America, the Chrysler Corporation, Kampgrounds of America, the Woodall Publishing Company, the National Sporting Goods Association, and the U.S. Forest Service.

The household interviews for this survey were conducted by the Opinion Research Corporation of Princeton, New Jersey, during November and December 1973.

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A PERSPECTIVE ON THE CAMPING-INVOLVEMENT CYCLE

Results of a 1973 Nationwide Household Survey

A report by the Technical Committee of
Northeastern Regional Research Project NEM-42

"Economic Analysis of the Campground Market
in the Northeast"

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ABSTRACT

This is a report on a survey of 2,213 households and their potential for entering the camping market in 1973. One out of every two households was found to be in one of three stages of the camping-involvement cycle. Active campers included 21 percent of the sample, up by 2 percent since 1971; inactive campers, 20 percent, up by 6 percent; and potential campers, 9 percent, down by 2 percent. Reasons for the increased numbers of inactive campers, and possible barriers between potential and active participation, are examined in detail. Twelve separate components of the popular image of camping — environments, conditions, and attractions — are examined for each stage of the camping-involvement cycle.

INTRODUCTION AND PROCEDURE

The Problem

During the past 10 years, dozens of surveys of visitors to the Nation's 8,700 commercial camping parks and 6,500 public campgrounds have produced volumes of descriptive data about campers, their equipment, their likes and dislikes, their participation patterns, their travel habits, and their socioeconomic characteristics. A recent bibliography of camping-market research identifies more than 200 surveys and observational studies of campers *(LaPage and Haaland 1974)*. Because of their focus on known campers (usually at the campground), the majority of these surveys have had limited usefulness for:

1. Improving our understanding of camping market growth.
2. Designing marketing strategies that will effectively eliminate possible barriers to participation among potential campers.
3. Identifying the causes of a lack of camping by former campers.

Even a highly refined descriptive profile of active campers is not likely to provide reliable marketing clues for reaching the potential camper who needs specific information more than he needs a convincing appeal to try camping. And though surveys of active campers may include some who have temporarily stopped camping in the past, they have rarely attempted to examine the causes and control of camping market drop-out.

An earlier phase of this NEM-42 Project demonstrated that a relationship between marketing effort and commercial campground success exists and indicated a generalized need for an increased volume of business at most commercial campgrounds *(Bevins et al. 1974)*. Given effective market ing tools, it should be possible to attract new campers and influence the return-visitation patterns of ex-campers. The purpose of this research is to provide information that will lead to more effective marketing and improve camper satisfaction. The approach used in this study incorporates three major innovations in descriptive camper-survey research:

1. A comparison of the *images of camping* held by potential campers, active and inactive campers, and persons having little or no interest in camping.
2. An examination of those householders who were *almost a camper* at some time in the past, their consideration given to camping, and their reasons for not camping.
3. An evaluation of *the last camping trip,* its satisfactions and its disappointments for currently active campers, and for those who have given up camping temporarily or permanently.

Sample Selection

A representative national sample of 2,213 heads of households, interviewed by Opinion Research Corporation as a part of their December 1973 Caravan survey, provided the data for this study. To facilitate measurement of trends in growth of the camping market, the survey procedures were made comparable to those of an earlier study of the National Camping Market *(LaPage 1973)*. In the following analyses, segments of the sample have been weighted to accurately reflect current population statistics (table 1).

Table 1.—Demographic description of the national sample of households

Description	Percent of sample households	
	Before weighting	After weighting[1]
Men	49	49
Women	51	51
18–29 years of age	27	27
30–39	19	17
40–49	15	19
50–59	15	17
60 years or over	15	20
Less than high school	34	41
High school	34	37
Some college	31	22
Professional occupation	13	11
Managerial	12	11
Clerical, sales	10	11
Craftsman, foreman	19	21
Other manual, service	21	24
Farmer, farm laborer	3	3
Non-metro — rural	14	14
— urban	14	14
Metro — 50 M to 1 Million	29	27
— over 1 million	43	45
Northeastern U.S.	23	24
North Central	28	29
South	33	32
West	16	16
White	90	87
Non-white	8	11
Under $5,000 family income	17	22
$5,000 to $6,999	12	13
$7,000 to $9,999	19	20
$10,000 to $14,999	25	25
$15,000 or over	25	19
No children in household	50	50
Children under 18	50	50
Teenagers, 12–17	23	27
Home owners	69	65
Home renters	30	34

[1] Weighting was performed to reflect current population statistics.

On the basis of response to a pictorial question asking, "Have you ever gone on an overnight trip using any of these types of equipment?", households were classified as being either *campers* or *non-campers*. Campers were further classified as *active, temporarily inactive,* or *permanently inactive*. Active campers, those who went camping in 1973, included 21 percent of the weighted sample (table 2). Campers who had not been camping since 1970 or earlier, and who reported no intention of returning to an active camping status, made up 11 percent of the sample. Another 9 percent was classified as temporarily inactive, and was made up of campers who had not camped in 1973; however, most of them had camped in 1971 or 1972. One out of every two persons ever having camped was an inactive camper in 1973.

Table 2.—Extent of camping involvement by sample respondents, 1973

Camping-involvement group[1]	Percent of sample households	
	Before weighting	After weighting[2]
Campers:	43	41
Active	20	21
Temporarily inactive	10	9
Permanently inactive	13	11
Non-campers:	57	59
High potential	1	1
Medium potential	9	8
Low potential	16	17
Zero potential	32	33

[1] Definitions:

Active. Participated in camping in 1973.

Temporarily inactive. Had camped before, but not in 1973 and, if had not camped since 1970, specifically stated, "have not stopped camping."

Permanently inactive. Has camped, but not since 1970 and did not specifically state "have not stopped."

High potential. Never camped, but expected to camp in 1974.

Medium potential. Never camped, but expected to camp in future but probably not in 1974.

Low potential. Never camped and felt it would be unlikely in the foreseeable future, or didn't know.

Zero potential. Never camped and was definitely not interested.

[2] Weighting was performed to reflect current population statistics.

Non-campers, or nearly 60 percent of the sample, were further classified according to their potential for becoming campers in the near future. One percent of the total sample had made plans to try camping for the first time in 1974; these households were classified as having a *high potential* for entering the camping market. Another 8 percent of the total expressed a desire to try camping, but had not planned to do so in 1974, and were considered to have *medium potential*. Seventeen percent of the sample, the *low potential* group, stated that they were unlikely to try camping in the foreseeable future. And a *zero potential* classification was applied to the remaining one-third of the sample who were definitely not interested in camping.

The Camping-Involvement Cycle

A comparison of the results of this and the 1971 survey (table 3) reinforces the need, by all segments of the camping industry, for a better understanding of the three stages of the camping involvement cycle—from being a potential camper (high or medium potential), an active camper, or an inactive member of the camping market. [Inactive campers do continue to buy camping equipment *(LaPage and Ragain 1974)*]. According to our 1974 survey results, 9 percent of American households were potential campers, 21 percent active, and 20 percent inactive. The other 50 percent had little or no interest in camping.

The significant increase since 1971 in the size of the inactive segment of the market, combined with a shrinking reservoir of potential campers, indicates the emerging need for a totally new approach to the marketing of camping. The bulk of future market growth cannot continue to come from induction of initiates. Future growth will depend increasingly on higher levels of active participation and renewed interest by camping market drop-outs.

The increase in the ratio of inactive campers to active campers, from 3:4 in 1971 to 1:1 in 1973, suggests that current marketing practices may be highly successful in attracting new campers, but apparently are insufficient to hold them in the market or to reactivate former campers. The proportion of campers with at least 2 years of experience, who reported that their annual participation has been declining, was 50 percent in 1973; up from 37 percent in 1971.

The degree of difficulty of the marketing function increases as the size of the potential camping market decreases. In the early days of camping market expansion, family camping was an easy concept to sell. Willing buyers made the marketing job almost unnecessary. But, as thousands of eager potential campers swelled the demand, there occurred simultaneous increases in: (1) *consumer confusion* between hundreds of brand names and thousands of potential places to go camping; (2) *campground crowding*, waiting lines, and deterioration of facilities, resulting in a slipping image through camping's most effective advertising medium: word-of-mouth recommendations; (3) *rising costs* of camping and camping equipment, and direct comparisons with alternative forms of vacation travel,

Table 3.—A comparison of camping-involvement trends from 1971 to 1973

Involvement in camping	Number of households[1] 1971	1973	Change
	Thousands	Thousands	Percent
Active	12,600	14,300	+13
Inactive	9,100	13,600	+49
Potential[2]	7,400	6,100	−18
Little or no interest[3]	35,900	34,000	− 5
Total	65,000	68,000	+ 4
	Number of households		
Basis: (sample size)[4]	2,003	2,213	—

[1] Source of total households for the years 1971 and 1973: U.S. Census Bureau 1962. For converting households to persons, multiply by 3.11 for 1971 and by 3.01 for 1973.

[2] Includes high- and medium-potential groups.

[3] Includes low- and zero-potential groups, which are considered as not being in the camping-involvement cycle.

[4] Sampling errors for surveys in this size range are approximately 2 percent, or roughly 1.3 million households, at the 95 percent probability level. This means that only the inactive camper segment shows a difference between these two surveys, which could not be explained on the basis of sampling error alone.

forcing camping to lose its once highly competitive edge; and (4) *diversity in camping motivations,* with resultant decreases in camping satisfactions and in camping's status appeal.

Today's marketing job is to overcome the liabilities developed as a result of earlier rapid expansion in the market. Three critical points of attack are developed in the following sections of this report: (1) the images of camping; (2) the transition from potential to active camper; and (3) recollections of the last camping trip. In each section, comparisons are made between the involvement categories as defined in table 2. Such comparisons have only tentative transient validity as people pass from one stage of the involvement cycle to another. Nevertheless, expressions by the respondents on their intentions for the future and their evaluations of past experiences are indicative of general market conditions.

THE IMAGES OF CAMPING

The rapid growth of the campground industry brought with it consumer confusion, crowding, rising costs, and diversity of motivations. Consequently, negative images of camping may be developing. Perhaps such negative images are contributing to a slowing-down of the camping growth rate. The first objective for this study was:

> *To compare the images of camping held by potential, active, and inactive campers with those held by non-campers and to evaluate the probable impact of the comparative images of camping growth rates.*

The following statement was used by the interviewers to aid respondents in providing a description of their camping images:

> "This exhibit contains descriptive words which can be used to describe camping. As I read the letter before the descriptive word, please choose a point on the scale which is closest to what would describe your impression of camping."

Respondents were told to choose a point on a scale ranging from 1 to 5 (1 = interesting to 5 = boring). The descriptive terms were randomly assigned so that the most positive term was not always listed first. For analysis purposes, rankings of both "3" and "no response" were considered to be the same reaction, since both responses indicate indifference.

Three components of the public's image of camping are recognized: camping environment, camping conditions, and camping attractions. The first component, *camping environment,* included the following four descriptive extremes: camping is interesting or boring; refreshing or tiring; pleasant or unpleasant; and campers are friendly or unfriendly. Each of these attitudes reflect a respondent's impressions of the physical and social environment of camping.

The second component, *camping conditions,* included the following four descriptive extremes: the campground is clean or dirty; safe or dangerous; uncrowded or crowded; and inexpensive or expensive. These attitudes are also logically grouped together because each is a direct function of campground management.

The third component, *the attraction of camping,* included the following four descriptive extremes: camping is easy or difficult; fun or work; convenient or inconvenient; and comfortable or uncomfortable. These terms reflect the camping activity itself, independent of physical and managerial considerations.

The Positive Camping Image

Considering the three components, or clusters of attitudes, we found that the most positive response from all groups related to *the camping environment* (table 4). More than half of all households (U.S. public) held positive attitudes about the camping environment. For the most part, they pictured a campground as interesting, the people friendly, and the experience as refreshing and pleasant. Such an image was most pronounced for active campers (80 percent), followed by the temporarily inactive (72 percent) and the permanently inactive (61 percent). The environmental images of the

Table 4.—Households holding a positive camping image classified by degree of camping involvement

Image description	Camping-involvement group					
	All	Active	Temporarily inactive	Permanently inactive	High and medium potential	Low and zero potential
	Percent of respondents					
Camping Environment:						
Interesting	55*	86	79	65	83	30
People friendly	59	78	66	69	64	47
Refreshing	44	73	70	47	62	21
Pleasant	52	81	73	63	81	27
Composite	52	80	72	61	72	31
Camping Conditions:						
Clean	34	54	39	40	47	21
Safe	43	64	60	45	45	30
Uncrowded	25	29	26	36	35	19
Inexpensive	37	50	44	41	40	28
Composite	35	49	42	40	42	24
Attraction of Camping:						
Easy	35	56	47	36	50	21
Fun	40	62	56	45	57	23
Convenient	27	47	40	31	35	15
Comfortable	39	65	56	43	54	20
Composite	35	58	50	39	49	20
Basis: number of respondents	2,199	450	214	281	198	1,056

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

high- and medium-potential campers closely resembled those of the temporarily inactive. Less than 1/3 of the low- and zero-potential group had a positive image of the camping environment.

Thirty-five percent of all households held a favorable image of *camping conditions,* by perceiving campgrounds as clean, safe, uncrowded, and not expensive. Active campers had the highest positive image (49 percent) of campground conditions. The temporarily inactive and permanently inactive campers had similar impressions of camping conditions: about 40 percent favorable. And about 40 percent of the high and medium potential campers had a good impression of camping conditions. Less than a quarter of those with low or zero potential had a positive image of camping conditions.

Like the image of camping conditions, 35 percent of the public had a positive image of *the attraction of camping* (easy, fun, convenient, and comfortable). Fifty-eight percent of the active campers, 50 percent of the temporarily inactive campers, and 39 percent of the permanently inactive campers had positive images of camping's attraction. The attraction for potential campers was as favorable as that of the temporarily inactive group, while the low- and zero-potential group were far below all others, only one out of five finding anything attractive about camping.

The Negative Camping Image

Camping's potential for expansion is also related to negative aspects of its image. A reversal of the positive image would be expected except that many people are indifferent and hold neither positive nor negative views. A stronger similarity was noted between permanently inactive campers and households with a little or no potential for camping (table 5). This similarity was not quite as evident when only the positive camping image was analyzed.

Of the three major components, the attrac-

Table 5.—Households holding a negative camping image classified by degree of camping involvement

Image description	Camping-involvement group: All	Active	Temporarily inactive	Permanently inactive	High and medium potential	Low and zero potential
	Percent of respondents					
Camping Environment:						
Boring	19*	6	10	15	3	30
People unfriendly	11	11	16	10	17	3
Tiring	25	10	18	28	15	35
Unpleasant	18	8	13	15	7	26
Composite	18	9	14	17	10	24
Camping Conditions:						
Dirty	22	15	17	23	15	26
Dangerous	15	9	10	17	21	16
Crowded	32	32	35	38	35	29
Expensive	18	15	17	19	21	18
Composite	22	18	20	24	23	22
Attraction of Camping:						
Difficult	25	13	24	30	22	29
Work	26	18	21	26	18	32
Inconvenient	33	19	24	36	26	40
Uncomfortable	26	11	18	28	12	35
Composite	28	15	22	30	20	34
Basis: number of respondents	2,199	450	214	281	198	1,056

* 19 percent of the U.S. public felt that camping was boring, that is, they assigned a 4 or 5 rank on a 1 to 5 scale (1 being the most positive, 5 being the most negative).

tion of camping was most likely to be negative (camping is difficult, work, not convenient, and uncomfortable) for all except active and potential campers. This suggests a major barrier to market expansion because attraction should be stronger in order to overcome the correctable negative images of environment and camping conditions.

Looking at specific elements of the negative image, we found that about 1 out of 10 active and temporarily inactive campers see camping as being dangerous. However, 25 percent of the high-potential group and 20 percent of the medium-potential group include an element of danger in their image of camping. The most common image of camping conditions, held by 1 out of 3 campers and noncampers alike, is crowding. This seems to provide the most obvious focus for attempts to improve the public image of camping conditions.

The Indifferent or Moderate Image

While it is important to analyze both positive and negative images, the indifferent or undeveloped opinion about camping may also suggest marketing opportunities. Nonresponse to image elements was minimal in all groups except for those with low or zero potential, where the nonresponse was nearly as great as the indifferent response.

The frequency of indifferent images ranged from 29 percent for the camping environment to 44 percent for camping conditions, and the percentages were surprisingly similar for active, temporarily inactive, and potential campers. These relatively high frequencies may indicate a reluctance to generalize about situations that can be both favorable and unfavorable (table 6). However, when the indifferent image is combined with the negative image for factors such as crowding, convenience, and cleanliness, it becomes apparent that the industry faces a major challenge to produce a more desirable image and thereby expand the potential for market growth.

An Image Index Related to Demographic and Camping-Involvement Groups

To evaluate either the positive or negative camping image alone could lead to distorted impressions. A composite image index was devised by dividing the percentage of households holding a positive image by those holding a negative image. (The indifferent or moderate image is excluded from this image index.) A single index number is derived for each group of households (active campers, Westerners, home-owners, etc.) by averaging the 12 image factors.

Image indices ranged from slightly below 1.0 to slightly above 4.0; that is, for each person having a negative impression of camping, there were between 1 and 4 persons having a favorable impression. The only group having an image-index of less than 1.0 was that of households having little or no potential to enter the camping market. The image-index for the general public is 1.7, while that for active campers is 4.3 (that is 4.3 favorable for each unfavorable).

The image index provides a tool for studying the camping potential of various demographic groups. Potential campers have an index of 2.6. Others approaching this level are heads of households who are 18 to 29 years old (2.6), home renters (2.1), and Westerners (2.2). At the other extreme, the lowest image-indices are found among: farmers

Table 6.—Households holding an indifferent or moderate camping image, classified by degree of camping involvement

Image description	Camping-involvement group					
	All	Active	Temporarily inactive	Permanently inactive	High and medium potential	Low and zero potential
	Percent of respondents					
Camping Environment:						
Interesting-boring	26*	8	11	20	14	40
People friendly-unfriendly	30	11	18	21	19	45
Refreshing-tiring	31	17	12	25	23	44
Pleasant-unpleasant	30	11	14	22	12	46
Composite	29	12	14	22	17	44
Camping Conditions:						
Clean-dirty	44	31	44	37	38	53
Safe-dangerous	42	27	30	38	34	54
Uncrowded-crowded	43	39	39	26	30	52
Inexpensive-expensive	45	35	39	40	38	54
Composite	44	33	38	35	35	53
Attraction of Camping:						
Easy-difficult	40	31	29	34	28	50
Fun-work	34	20	23	29	25	45
Convenient-inconvenient	40	34	36	33	39	45
Comfortable-uncomfortable	35	24	26	29	34	44
Composite	37	27	28	31	32	46
Basis: number of respondents	2,199	450	214	281	198	1,056

*26 percent of the U.S. public were indifferent or had a moderate view on whether camping was boring or interesting, that is, they assigned a 3 rank or failed to respond to the question.

(1.2), persons over 60 years old (1.3), Northeasterners (1.3), and women (1.4) (appendix VI).

In terms of education there was relatively little difference between groups. The image index of farmers, clerical, and sales workers was considerably lower than that of craftsmen and foremen. Those with an annual income less than $7,000 had a higher image index than families in higher income groups, especially those whose incomes exceeded $15,000.

To validate the image index, a similar analysis was made of responses to the following open-ended question:

> "As briefly as possible, tell me what thoughts come to mind as you think about living at a campground for a few days."

Disregarding the nonresponse and the irrelevant answers, all responses containing a positive statement were divided by all within that group making a negative statement, to create a second image index. For the most part, the same general relationships between population groups were found. However, the spread between income groups was less, and the relative positions of certain income groups changed from the preceding analysis. Also, the spread between home-renters and homeowners was reduced. A slightly larger spread between the residents of large metropolitan areas and smaller urban area was noted. However, all factors considered, the validity of the image index is substantiated.

Attitude Toward Cost of Camping

One element of the camping image—"camping is expensive or not expensive"—was assumed to be a major potential barrier to market growth. Respondents were asked to consider the total cost of camping, including taxes on equipment, campsite fees, extra tolls, insurance, and equipment costs, and decide whether camping is more economical than other ways of traveling and taking a vacation (table 7).

Two-thirds of all active campers felt that camping was more economical than alternative ways of vacationing. This attitude was far more prevalent among active campers than among any other group, including those households with a high potential to try camping. One-third of the high-potential respondents felt that the cost of camping was about the same as other ways of traveling and taking a vacation. The cost-image of camping, among potential campers, is clearly not one of "bargain basement travel." And the apparent advantage seen by active campers may be as much a justification of their equipment investment as it is a reflection of their superior knowledge of the market.

Table 7.—Attitudes toward the total cost of camping as compared with other ways of traveling and taking a vacation, in percent[1]

Camping-involvement group	More economical	Less economical	About same	Don't know
U.S. public	43	14	19	24
Active campers	66	13	17	4
Temporarily inactive	51	18	27	4
Permanently inactive	45	18	24	13
High-potential households	51	15	34	0
Medium-potential households	53	9	24	14
Low-potential households	36	16	18	30
Zero-potential households	27	11	17	47

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

ALMOST A CAMPER

With 10 percent of the population as potential campers, those households that are almost in the camping market become an important focus for research. What has kept them from taking that first camping trip? What types of equipment are they likely to use if they decide to try camping? What other kinds of recreational activities are they interested in?

The second objective of this study—*to determine the processes by which people move from the reservoir of potential campers to become active members of the camping market*—is approached through a comparison of campers, potential campers, and persons with little or no interest in camping.

Characteristics of Potential and Nonmarket Households

Potential includes both high- and medium-potential groups. The *Nonmarket* includes those households that are considered to have low or zero potential for entering the camping market.

We hypothesized that many potential entrants would be young families with children and that their interest is prompted primarily by a search for low-cost recreation.

In comparing the socioeconomic characteristics of potential campers with the characteristics of the nonmarket households, we saw several patterns emerge (table 8). Potential campers are more numerous in the 30 to 49-year age bracket than are active campers. Nearly half of the active camper group are under 30. Persons 50 and over are not as likely to be interested in camping as those in younger age groups. And potential campers are much more likely to have children in the household than are the nonmarket households and the active campers (table 9).

Nearly one-half of the potential campers reported 1973 incomes of $10,000 or more (table 10). The largest income category among nonmarket households was less than $5,000.

More than 19 percent of the potential campers were nonwhites, compared to 3 percent of all the active campers and 11 percent of all households (table 11).

Region of residence seems to influence the market for potential campers. The Northeast has the greatest proportion of potential campers and the smallest proportion of active campers (table 12). This may be due in part to the historical development of fewer public campsites per capita in these regions than in the North Central or Western regions *(ORRRC 1962)*. As a result of having more camping opportunity, a larger proportion of

Table 8.—Age category distributions for all households and selected camping market segments (1973), in percent

Age category (years)	All households	Active campers	Potential campers	Nonmarket households
18–29	27	46	36	16
30–39	17	21	27	14
40–49	19	14	24	20
50–59	17	12	9	19
60 and over	20	7	4	31
Total	100	100	100	100

Table 9.—Presence of children for all households and selected camping market segments, 1973, in percent

Children in household	All households	Active campers	Potential campers	Nonmarket households
Yes, under 18 years of age	50	58	78	42
None	50	42	22	58
Total	100	100	100	100

Table 10.—Income classes for all households and selected camping market segments, 1973, in percent

Income level (dollars)	All households	Active campers	Potential campers	Nonmarket households
Under 5,000	22	15	18	27
5,000–6,999	13	11	16	14
7,000–9,999	20	20	19	20
10,000–14,999	25	28	28	22
15,000 and over	19	26	19	16
Total	99	100	100	99

Table 11.—Race breakdown of all households and selected camping market segments, 1973, in percent

Race	All households	Active campers	Potential campers	Nonmarket households
White	87	97	78	82
Nonwhite	11	3	19	17
Total	98	100	97	99

Table 12.—Region of residence for all households and selected camping market segments, 1973, in percent

Region of residence	All households	Active campers	Potential campers	Nonmarket households
Northeast	24	14	34	29
North Central	28	23	18	32
South	32	31	36	31
West	16	32	12	8
Total	100	100	100	100

Table 13.—Friends owning camping equipment, by camping-involvement group, in percent

Camping-involvement group	Friends owning equipment		
	Yes	No	Don't know
Campers:			
Active	94	6	0
Temporarily inactive	90	10	0
Permanently inactive	77	21	2
Potential campers:			
High potential	76	24	0
Medium potential	67	32	1
Nonmarket households:			
Low potential	46	51	3
Zero potential	31	61	8
All groups	60	36	4

Table 14.—Respondents having visited a camping or recreational-vehicle show within past two years, 1973

Camping-involvement group	Visited camping show
	Percent
Campers:	
Active	51
Temporarily inactive	34
Permanently inactive	22
Potential campers:	
High potential	25
Medium potential	26
Nonmarket households:	
Low potential	14
Zero potential	6
Total	23

the North Central or Western population has already tried camping.

Association with Camping Friends

More than two-thirds of the potential campers have friends who own camping equipment, while less than one-half of the nonmarket households report associating with persons who are active or inactive campers (table 13).

The industry might, for example, examine marketing techniques that enhance the likelihood that campers will introduce noncampers to camping. For example, commercial campgrounds might sponsor occasional open houses or a free camping weekend for regular customers who bring along potential campers to inspect the campground and meet other campers. Or campgrounds having sites with equipment rentals might offer a discount rate in a rental unit during slack periods in the season for people who have never camped before.

Visits to Camping Shows

Visits to camping or recreational-vehicle shows are a partial indicator of potential camping interest. But only one out of four potential campers reported having visited a camping or recreational vehicle show during the previous 2 years (table 14). The strongest appeal of camping shows seems to be for the active and temporarily inactive campers.

Considering a Camping Trip

Three-fourths of the high-potential group and more than one-half (54 percent) of the medium-potential campers had considered going camping during the past 1 to 3 years (table 15). Of those having considered camping, one out of two had selected a region to visit, and one out of three had looked into the possibilities of buying, renting, or borrowing camping equipment for the trip.

Those who had considered camping were asked why they did not take the trip they had contemplated. The most frequent reason given by the high-potential group was the lack of sufficient time, followed by a lack of information about camping equipment. Other less

Table 15.—Noncamper households who have considered a camping trip, their extent of planning, and their reasons for not camping, in percent

Item	Camping-potential group				
	High	Medium	Low	Zero	Total
Non-camper households considering camping	75	54	13	2	14
EXTENT OF PLANNING TO CAMP[1]					
Selected a region to visit	77	48	54	50	50
a. Wrote for camping information[2]	23	15	8	0	14
b. Attempted to make reservations[2]	1	2	0	0	4
Checked into cost of camping equipment	51	37	31	0	36
Checked into cost of renting equipment	11	22	23	0	21
Checked into borrowing equipment	45	33	15	0	29
REASONS FOR NOT HAVING STARTED CAMPING[1]					
Cost of camping	6	19	19	33	21
Other priorities for time	33	14	19	0	14
Lack of equipment information	18	11	6	33	14
Lack of campground information	1	10	12	0	7
Uncertain of social enjoyment	6	3	6	0	7
Lack of equipment	6	6	*	0	7
Mixed preferences within family	0	2	6	0	*
Gas shortage	0	3	*	0	*
Other	30	32	32	34	30
Estimated number of households in each potential group (millions):	0.8	5.3	11.2	22.5	39.8

[1] Asked only of those who considered camping in the past 1 to 3 years.
[2] Asked only of those who had selected a region to visit.
* Signifies any value less than 0.5 percent.

frequent reasons included concern about the cost of camping, uncertainty about the experience of associating with other campers, and the lack of equipment. Among the medium-potential group, concern about the cost of camping was cited most often, followed by lack of time. Other reasons included lack of information about equipment and available campgrounds as well as the lack of equipment.

This reinforces our finding that the image of camping is complex. It shows a need for the industry to communicate with potential campers and satisfy their needs for information. Relevant information for prospective campers might include a cost-comparison of various types of equipment (for example, tents and associated equipment compared with self-contained trailer, truck, or motor home units) for different camping objectives, and expected frequencies of camping trips. Attempts at providing relevant information should have the objective of reducing the complexity that potential campers see in becoming involved with camping equipment and choosing among campground locations and facilities.

Of those who had previously considered a camping trip, about one-half of the high-potential group and one-third of the medium-potential group had investigated the cost of purchasing camping equipment. Almost the same respective proportions of the two groups had considered borrowing equipment for their first trip. Equipment rental was explored to a lesser extent by potential campers. Again, this suggests an opportunity for the campground industry to provide information about the alternative costs of equipment purchase versus rental.

Camping Shelter Likely to be Used

Tents are most likely to be chosen for the first camping trip by both the high- and medium-potential campers (table 16). In a distant second place, and at the opposite end of the cost spectrum, is the motor home.

Of the potential tent campers, 40 percent expect to purchase a tent for their first trip, while one out of three intends to borrow a tent, and 11 percent hope to rent a tent. Purchasing intentions among high-potential campers were more than three times that of the medium-potential group.

Nearly three-fourths of all potential campers who indicated camper trailers or travel trailers as their first choice are most likely to rent units for their first trip. Among potential campers who are likely to choose a motor home, 60 percent of those with high potential would prefer to purchase, and one out of two with medium potential expect to purchase.

Participation in Outdoor Recreation Activities

Potential campers are frequent participants in other outdoor recreation activities. An index of participation for 10 outdoor recreation activities shows that participation in activities other than camping increases as potential campers become active campers and diminishes as their camping declines (table 17). Those classified as disinterested (low and zero camping potential) participated least in other outdoor recreational activities. Thus camping activity may be a useful indicator of total outdoor recreational involvement by households.

Equipment Purchases

Another question asked was, "During the next year, which of the following types of equipment do you expect to purchase?" An index for 15 different kinds of outdoor-recreation equipment indicated that the interest in purchasing increases from medium- to high-potential camping groups. Expectations of buying equipment remain high among active campers, but decline slightly among temporarily inactive campers (table 18). The dis-

Table 16.—Type of shelter potential campers expect to use on first trip, in percent

Type of shelter	Camping-potential group	
	High	Medium
Tent	59	37
Motor home	10	17
Folding trailer	10	12
Truck camper	10	12
Travel trailer	3	12
Van or bus conversion	6	5
Pickup cover	2	2

Table 17.—Index of participation in ten outdoor recreation activities, by camping-involvement group, 1973

Camping-involvement stage and group	Index of participation in 10 recreation activities[1]
Medium potential	243
High potential	317
Active	385
Temporarily inactive	312
Permanently inactive	215
Low potential	145
Zero potential	89

[1] Obtained by adding the percentage of participation in each activity for the following 10 activities: picnicking, swimming, fishing, boating, hunting, hiking, trail-bike/snowmobiling, back-packing, canoeing, and snow skiing. See table 19 for participation rates by individual activities.

Table 18.—Index of expected outdoor-recreation equipment purchases, by camping-involvement group, 1973

Camping involvement	Index of expected equipment purchases[1]
Medium potential	99
High potential	246
Active	152
Temporarily inactive	125
Permanently inactive	60
Low potential	40
Zero potential	15

[1] Constructed by summing percentages for each sample group. See table 20 for listing of types of equipment.

interested group has a very low expectation of purchasing outdoor recreation equipment.

Obviously, interest in outdoor-recreation equipment is closely related to interest in camping. Marketing efforts for outdoor-recreation equipment aimed at persons with the characteristics of the active or high-potential campers would probably be most productive.

The importance of campers in the total demand for many types of outdoor-recreation facilities and equipment is clearly evident (appendix I and II). The three categories of campers made up 41 percent of the total survey sample and accounted for 52 to 55 percent of the picnicking and swimming, 62 to 69 percent of the motorboating, and 70 to 95 percent of the participation in the other activities listed. Campers may be expected to purchase 60 to 69 percent of the fishing and hunting equipment, snowmobiles, trail bikes, motor boats, and refrigerators or coolers; 70 to 79 percent of the hiking and skiing equipment, sleeping bags, camp stoves, and lanterns; and more than 80 percent of the planned lightweight tents, back-packs, and canoes.

THE LAST CAMPING TRIP

Does the high rate of camper drop-out represent normal attrition? Do people become involved over a period of years and then gradually quit camping? Is there a relationship between the camping-involvement cycle and the family life cycle? Is the accelerating rate of camping market drop-out since 1971 due, in part, to dissatisfaction with camping experiences? We hypothesized that impulsive entry into the market may have led to short-lived camping involvement for some who found that camping and campers were different from their expectations.

Our purpose in focusing on the last camping trip was to evaluate the satisfactions and disappointments of campers as they approach the inactive stages of the involvement cycle. Specifically, the objective for this part of the study was:

> *To evaluate the processes by which campers leave the camping market and to determine the extent and source of camper dissatisfactions.*

Campers are Different

To get an indication of how campers might differ from noncampers, respondents were asked about their participation in selected outdoor-recreation activities that may complement the camping activity. Campers are action-oriented people who commonly participate in many types of outdoor-recreation activities. Active and temporarily inactive campers are much more likely to be participants in outdoor activities other than camping (table 19). Active campers represent only 21 percent of the sample, but they account for more than half of the reported participation in backpacking, hiking, skiing, and trail-bike and snowmobile use (appendix I).

The idea that campers are a more active group of people is further supported by an examination of plans to purchase outdoor-recreation equipment (table 20). The percentage of active and temporarily inactive campers with plans to purchase various types of outdoor-recreation equipment in 1974 accounted for more than 50 percent of all expected purchases (appendix II). Purchase intentions were, expectedly, highest among the small group having high camping potential; and the similarity in purchasing plans be between active and temporarily inactive campers suggest that the temporary classification is a reasonably accurate one. The high proportion of temporarily inactive campers planning to purchase lightweight tents suggests that camping market dropout may be preceded by a search for alternative camping styles (table 20).

The reasons given by inactive campers for not having camped recently are predominantly personal constraints rather than a reaction to changes in the camping environment (table 21). The lack of equipment, affecting 1 out of every 10 inactive campers, seems to be the only limitation that the industry might be able to correct.

In response to the question about disposal of equipment by inactive campers, 40 percent of the temporarily inactive campers and 53 percent of the permanently inactive campers

Table 19.—Percentage of camping-market groups participating in selected recreation activities, by 1973

Recreation activity	Camper-involvement group					
	Little or no potential	Medium potential	High potential	Active	Temporarily inactive	Permanently inactive
Picnicking away from home	34	71	76	70	62	46
Swimming away from home	31	62	63	63	60	47
Fishing	21	39	53	65	55	39
Motorboating	11	25	32	49	37	32
Hiking	4	20	18	45	30	18
Hunting	6	10	41	34	31	12
Trail-bike/snowmobiling	2	7	13	22	14	10
Canoeing	2	5	14	12	13	10
Snow skiing	1	4	5	11	7	5
Back-packing	(*)	2	3	14	8	1
None of the above	37	9	8	3	8	18

* Less than 0.5 percent.

Table 20.—Percentage of camping-market groups expecting to purchase recreation equipment in 1974

Type of equipment	Little or no potential	Medium potential	High potential	Active	Temporarily inactive	Permanently inactive
Sleeping bags	2	15	46	23	18	8
Fishing	8	23	40	28	29	14
Hunting	3	11	27	14	16	7
Cooler/Refrigerator	3	10	23	15	12	6
Lantern	1	7	21	13	9	3
Camp stove	1	6	14	7	7	2
Lightweight tent	0	1	14	4	8	2
Hiking	(*)	3	11	6	2	2
Back-pack	1	2	11	8	5	2
Heater	1	5	10	5	2	2
Skiing (snow)	1	3	7	9	3	2
Motorboat	2	5	4	6	3	3
Trail-bike	2	5	2	7	4	4
Snowmobile	1	0	2	2	2	1
Canoe	1	0	0	3	1	(*)
Other	1	0	0	2	4	2
None of these	85	51	23	38	45	70

* Less than 0.5 percent.

Table 21.—Frequency with which inactive campers reported selective reasons for not having camped since their last trip, in percent

Reason	Temporarily inactive	Permanently inactive
Lack of time	31	24
Lack of money	13	8
Lack of equipment	12	9
Lack of interest	10	19
Family conflicts	9	10
Crowded and dirty campgrounds	—	4

reported that they never owned camping equipment. And 9 percent and 24 percent, respectively, have disposed of their equipment. On the basis of current equipment ownership, alone, only about 25 percent of all inactive campers might be encouraged to try camping again.

Campers' Satisfaction With Their Last Trip

One important measure of industry performance is customer satisfaction. The majority of campers in all camper groups expressed general satisfaction with the overall experience on their last camping trip (table 22). Only 7 percent of the active campers were generally dissatisfied with their last trip, as were 11 percent of the temporarily inactive campers. However, dissatisfaction with the last camping trip was reported by 27 percent of the permanently inactive campers.

Though a high proportion of campers were generally satisfied with their last trip, substantially fewer were pleased with the availability and quality of specific accommodations at the campgrounds they visited on that trip. In contrast to the 93 percent of the active campers who were satisfied with their overall trip, 73 to 78 percent were satisfied with the availability of campsites, recreation facilities, and the cleanliness or condition of the campgrounds visited. Dissatisfaction was most common for both active and inactive campers on: campground cleanliness (13 percent), recreation facilities (11 percent), and availability of campsites (11 percent).

Not all camping trips are carefully planned in advance. Thirty-nine percent of all active and inactive campers indicated that their last

Table 22.—Camper satisfaction with the last camping trip, in percent

Item and satisfaction	Active	Temporarily inactive	Permanently inactive	All campers
Overall trip:				
Generally satisfied	93	89	73	86
Generally dissatisfied	4	8	16	8
Does not apply to camping style	2	2	6	3
Campsite availability:				
Generally satisfied	78	75	63	72
Generally dissatisfied	9	12	13	11
Does not apply to camping style	12	11	18	14
Hookup availability:				
Generally satisfied	53	54	39	49
Generally dissatisfied	5	7	7	6
Does not apply to camping style	38	33	40	37
Recreation facilities				
Generally satisfied	73	71	55	67
Generally dissatisfied	11	12	14	11
Does not apply to camping style	15	15	24	18
Cleanliness and condition of campground:				
Generally satisfied	78	76	65	74
Generally dissatisfied	12	13	15	13
Does not apply to camping style	9	9	15	10

camping trip was taken with relatively little planning. However, the difference in percentages of active and inactive campers who camped on impulse is not great enough to indicate that unplanned trips were a cause of dissatisfaction leading to camping inactivity.

Use of a tent on the last trip was most common among all classes of campers, and was highest for the permanently inactive group. Nearly two-thirds of the inactive campers used tents or tent-trailers, while fewer than one out of five used motor homes, truck campers, or converted vans. Because the temporarily inactive camper represents a transition stage of involvement, a few of those currently using tents and tent-trailers may be in the market for unitized camping rigs (motor homes, trucks, and vans) (table 23).

Classification of campgrounds by type of ownership showed relatively little difference in utilization by each of the camper groups on their last camping trip. Approximately half of all active and inactive campers patronized publicly owned and operated campgrounds, one-fourth to one-third chose privately operated campgrounds, and 15 percent visited both types on their last trip.

Table 23.—Type of shelter used on the last camping trip, in percent[1]

Shelter	Camper group		
	Active	Temporarily inactive	Permanently inactive
Tent	41	46	49
Folding trailer	11	15	8
Travel trailer	17	18	20
Truck camper	15	9	6
Motor home	7	5	3
Van or converted bus	10	5	4
Pickup cover	5	5	3
Other	5	3	6
Unknown	1	2	3

[1] Percentages by camper group add to more than 100 percent because some respondents used more than one type of shelter.

Camping Fees

In addition to evaluating campground facilities, campers were asked about their satisfaction with the costs of camping encountered on their last trip. Seventy percent of the active and temporarily inactive campers expressed general satisfaction with fees paid for facilities on their last camping trip compared to 54 percent of the permanently inactive campers (table 24). But less than 10 percent of all campers were dissatisfied with the fees.

All campers and noncampers were asked whether fees charged at publicly operated campgrounds should be set high enough to cover all costs of developing and operating the facility or whether fees should be kept low by covering most of the costs with tax monies. A majority of active campers felt that fees should be kept low. However, the largest proportion of inactive and potential campers who expressed a definite opinion felt that camping fees should cover all costs of operating public campgrounds. Inactive campers felt most strongly that fees should cover costs—a further indication that cost was probably not a cause of inactivity. The lack of any opinion by large segments of the public having little or no potential for becoming campers tends to distort the true level of relevant public opinion that fees should cover all costs of operating public campgrounds (table 25).

Table 24.—Level of satisfaction with camping fees, in percent

Level of satisfaction	Camper group		
	Active	Temporarily inactive	Permanently inactive
Generally satisfied	70	70	54
Generally dissatisfied	9	8	5
Does not apply to camping style	17	16	25
Don't know	4	6	16

Table 25.—Opinion of respondents concerning public campground fees, in percent

Sample group	Fees cover all costs	Fees kept low	No opinion
Active campers	43	51	6
Temporary inactive campers	56	37	7
Permanent inactive campers	49	34	17
High-potential campers	52	42	6
Medium-potential campers	48	45	7
Low-potential campers	36	30	34
Zero-potential campers	31	20	49
Total sample	40	34	26

Table 26.—Primary purpose for camping for active and inactive campers, in percent

Purpose	All campers	Active	Temporarily inactive	Permanently inactive
Vacation inexpensively	16	13	19	21
Enjoy out-of-doors	53	54	52	52
Both of above	25	32	23	18
No opinion	5	1	6	9
Total	100	100	100	100

Table 27.—Recent trends in camping participation for all campers having begun camping prior to 1973, in percent

Camper group	Trend		
	About the same each year	Increased lately	Decreased lately
All campers	20	16	50
Campers without children	20	13	51
Campers with children	20	18	48
Currently active campers	31	28	26
Head-of-household under 30	19	16	45
Head-of-household 30–39	21	22	45
Head-of-household 40–49	22	13	53
Head-of-household 50–59	20	13	56
Head-of-household 60 or older	13	12	60

Reasons for Camping

More than half of the respondents who had camped indicated that their primary purpose in camping was to enjoy the out-of-doors or outdoor activities. Only 16 percent went primarily as a means of vacationing inexpensively, and 26 percent said both reasons were important (table 26). However, a significantly (0.05 level) higher proportion of inactive campers went camping primarily as a means of vacationing inexpensively than did active campers. Hence, while economy in vacation expenditures was not the primary reason for camping among the majority of respondents, it does appear to have been relatively more important among those who are currently inactive.

The observation that camping seems to be related to life-cycle stages is reinforced by the stronger positive image of camping held by people having children in the household and by their higher incidence of having camped (44 vs. 38 percent) or having considered camping (21 vs. 7 percent). Apparently the presence of children in the household increases the likelihood of camping involvement. But once a household is in the camping market, life-cycle changes have no consistent effect on length of frequency of participation *(LaPage and Ragain 1974)*. Recent camping patterns among all campers indicate little or no relationship to the presence of children in the household (table 27).

SUMMARY AND CONCLUSIONS

As eager campers swelled demand during the 1960s, builders of campgrounds and suppliers of camping equipment responded by investing heavily in the industry. Recent declines in the growth rate of equipment sales and new campground developments, along with a sharp increase in numbers of inactive campers, seem to herald an era of new marketing challenges for the industry.

The purpose of this study was to investigate the reasons for the apparent decline in several of the camping industry's growth indicators. The approach used was to apply the concept of a camping-involvement cycle, with emphasis on explaining the processes of entry and exit of campers into and out of the cycle. A basic hypothesis of the study was that the popular image of camping had deteriorated for many campers and that disappointing camping experiences markedly increased exit rates.

The concept of a camping-involvement cycle assumes that there are stages through which people move as they become involved in and then eventually leave camping. Persons or households become potential campers, then active campers, and finally become ex-campers or camping market drop-outs.

According to our 1973 survey results, 9 percent of all U.S. households were in the potential stage, 21 percent were in the active stage, and 20 percent were either temporarily or permanently out of the market. The remaining 50 percent were not involved in any stage of the cycle. Not only is the reservoir of potential campers relatively small, it has decreased from 7.4 to 6.1 million households between 1971 and 1973. This change, plus the increase in drop-outs, emphasizes the need for an understanding of peoples' expectations, experiences, and images of camping.

Potential campers were classified as having *medium* or *high potential* based on their explicit plans to start camping. Inactive campers were classed as *temporarily inactive* or *permanently inactive,* depending upon their length of inactivity and their intentions of returning to an active status. These four groups, plus the active campers, account for one-half of all households. The other half was divided into households with *low* and *zero potential* for camping.

The first objective of this study was to compare the *images of camping* among the several camping-involvement groups. Respondents' images of camping were analyzed with reference to three components: the camping environment, the camping attraction, and camping conditions.

A high proportion (52 percent) of all respondents had a favorable impression of *the* camping environment. That is, most people viewed camping as friendly, pleasant, interesting, and refreshing. Only 18 percent had a negative image, and 29 percent had no specific impression of the camping environment.

Only 35 percent of all respondents held a positive image of camping conditions (clean, safe, uncrowded, inexpensive), while 44 percent had neither a favorable or unfavorable view of camping conditions. Among the negative impressions, crowding was viewed similarly at all stages of the camping-involvement cycle: one out of three respondents saw campgrounds as being crowded places.

The attractions of camping (ease, enjoyment, convenience, comfort), were recognized by 35 percent of all respondents. Of the three components of the camping image, attraction was most frequently seen to be negative (28 percent) by all respondents. Negative images of camping were based largely on the impression that camping is not convenient, is too much work, and is not very comfortable. This common view suggests that a trade-off between low-cost accomodations and inconvenience is not a consideration for many people who might otherwise be potential campers. Again, however, many respondents (37 percent) were indifferent or had an undeveloped image of the attractions of camping.

Active campers and high-potential campers had a much higher image of camping than did any other group. Next highest were the temporarily inactive and medium-potential campers, followed by the permanently inactive campers. The poorest images were held by the low- and zero-potential groups. Differences in the images of camping between the potential and inactive campers suggest that expectations of a rewarding camping experience were probably higher than the rewards actually experienced by those who later became inactive. In short, camping images tend to follow, and to reinforce, our description of the camping-involvement cycle.

The second objective of this study was to determine the processes by which people move from being *almost a camper* to becoming an active camper. The survey indicates that potential campers are mainly young families with children who are active in outdoor-recreation activities. More than 19 percent of the potential campers, compared to 11 percent of the total sample, were nonwhites. More than two-thirds of the potential campers had friends who own camping equipment.

Considerable geographic variation exists between regions of the country in numbers of potential campers. The Northeast and South have the highest proportions of potential additions to the market (34 and 37 percent, respectively, of all households). This corresponds only partially with camping images by regions. Southerners had a correspondingly high image, but the Northeastern respondents did not. Apparently factors other than image influence camping potential.

More than half of the potential campers had considered taking a camping trip in the past 1 to 3 years. However, very few had sought information about the availability of campgrounds and practically none had tried making reservations at a campground. Other priorities for time, followed by a lack of information about camping equipment, were reasons frequently given for not having started camping by those who had considered it. Fewer than one out of five people considering a camping trip had investigated the cost of camping equipment; and most potential campers excepted to purchase a tent for their first trip.

Intentions of purchasing a variety of outdoor-recreation equipment coincided with camping-market involvement stages. Similar findings from a study of actual purchasing patterns are reported by LaPage and Ragain *(1974)*. Clearly, plans to purchase camping-related equipment rise and fall with the camping-involvement cycle. It is not obvious, though, why purchasing intentions of other types of outdoor-recreation equipment should rise and fall along with camping involvement, unless the potential to become a camper coincides with the potential to enter other leisure-activity markets.

The third and final objective of this study was to evaluate the process by which campers exit from the camping market and to assess the importance of camper dissatisfaction with camping. A high rate of camper drop-out may represent normal attrition or may be due to growing dissatisfaction with camping experiences.

Eighty-six percent of all campers and 93 percent of the active campers expressed overall satisfaction with their last camping trips. Fewer of the inactive campers, especially the permanently inactive campers, were generally satisfied. The major sources of dissatisfaction were concerns over availability of campsites, campground cleanliness, and recreational opportunities. Less than 10 percent of any camping-involvement group expressed dissatisfaction with the size of fees, indicating that fees were not a major factor in campers' decisions to drop out of the camping market.

Campers in the permanently inactive group were older, on the average, (44 years), which suggests that some of the dropping-out may be associated with stages of the family life cycle (family-rearing period, etc.). However, a comparison of the average ages of respondents in other stages of camping involvement suggests that much of the dropping-out must be due to other reasons.

Participation in all outdoor-recreation activities generally increased from potential to active and then decreased among inactive campers. The decline was most noticeable in the permanently inactive group. Yet, more than half of the campers indicated that their primary purpose in camping was to enjoy the out-of-doors, while 16 percent said their purpose was to vacation inexpensively, and 26 percent said both. Certainly camping, if not several of its related outdoor-recreation activities, should have a life-time appeal for people with a predisposition to enjoy the out-of-doors.

In conclusion, it appears that camping images do reflect the three stages of the camping-involvement cycle. But the relationships between images and specific causes of camping inactivity such as dissatisfaction, cost, and family life-cycle, are not clearly evident. Inactivity is due to a number of causes, but perhaps most important is a lack of interest or long-term commitment. Special kinds of facilities could be designed to recapture this large and growing group; however, it seems clear that for many of them camping was simply a low-cost opportunity to try something new.

More specialized campgrounds catering to different groups, or more multiple-purpose campgrounds designed with separate sections catering to different groups, may have promise for the campground industry in the future. And information should be directed to potential campers so they may become knowledgeable about what the campground industry has to offer. Potential campers may then approach the market with more realistic expectations and aspirations, have more enjoyable camping experiences, and thereby lengthen the active stage of their camping-involvement cycle.

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APPENDIX I

Table 28.—Percentage of total participation in selected outdoor recreation activities by camping-involvement-cycle groups, 1973

Recreation activity	Campers: Active	Campers: Temporarily inactive	Campers: Permanently inactive	Potential campers: High	Potential campers: Medium	Potential campers: Low	Potential campers: Zero	Total
Picnicking	30	11	11	2	12	15	19	100
Swimming	31	13	12	2	11	14	17	100
Fishing	37	13	12	2	8	12	16	100
Motor-boating	41	13	14	2	8	10	12	100
Hunting	46	18	9	3	5	8	11	100
Hiking	52	15	11	1	9	7	5	100
Trail-bike/snowmobiling	53	14	13	2	6	4	8	100
Back-packing	74	18	3	1	4	0	(*)	100
Canoeing	42	19	10	3	7	8	11	100
Snow skiing	51	14	12	1	7	8	7	100
No participation	3	3	9	*	3	19	63	100
Per cent of total sample:	21	9	11	1	8	17	33	100

* Less than 1 per cent.

APPENDIX II

Table 29.—Percentage of expected purchases of outdoor-recreation equipment, by sample respondent groups, 1973

Expected equipment purchase	Campers: Active	Campers: Temporarily inactive	Campers: Permanently inactive	Potential campers: High	Potential campers: Medium	Potential campers: Low	Potential campers: Zero	Total
Sleeping bags	49	16	9	6	12	5	3	100
Cooler/refrigerator	41	14	9	4	10	18	4	100
Camp stove	47	20	7	5	15	5	1	100
Lantern	51	15	6	5	10	6	7	100
Shelter heater	53	9	11	6	20	(*)	(*)	99
Lightweight tent	42	35	11	8	4	—	—	100
Fishing equipment	36	16	9	3	11	13	12	100
Hunting equipment	38	18	10	4	11	11	8	100
Hiking equipment	58	8	10	6	11	7	—	100
Back-pack	64	17	8	5	6	(*)	(*)	100
Motor-boat	47	10	13	2	15	13	(*)	100
Canoe	88	12	(*)	—	—	(*)	(*)	100
Skiing equipment	59	8	7	3	7	5	11	100
Snowmobile	40	16	10	2	—	(*)	31	99
Trail bike	41	10	13	1	11	14	10	100
No purchase anticipated	12	6	12	0	6	19	45	100
Per cent of total sample	21	9	11	1	8	17	33	100

* Less than 1 per cent.

APPENDIX III

SAMPLING PROCEDURES

Sampling, interviewing, data-coding, and machine analysis for this survey were performed by the Opinion Research Corporation of Princeton, N.J., under contract with the Northeastern Forest Experiment Station, Forest Service, USDA.

The ORC master sample consists of 360 counties in the contiguous United States. This master sample of 360 counties comprises, in fact, six subsamples of 60 counties each.

To construct the sample, the counties within each state were arranged in order of descending population size; and all the states were grouped in geographical order from Maine to California. Sixty counties were then chosen by statistical procedures that insure representative geographical distribution. This process was repeated to obtain the six subsamples that make up the master sample of 360 counties.

The next step in the sampling design was to select an area from each of the 360 counties in the master sample. Again, a probability sampling method was used to select, within each county, a minor civil division (MCD) as defined by the Bureau of the Census. A minor civil division may be a town, township, city, or part of a city. The probability that any particular minor civil division was selected in a county was proportional to the population of that minor civil division. Thus the larger a minor civil division, the greater the likelihood that it be selected. The minor civil division, then, is the primary sampling unit.

Once the MCD has been selected, the next step is to determine those households where interviewing is to take place. Under the ORC National Probability Sample procedure, any current listing of household locations, even if incomplete, constitutes the first stage of the sampling plan. From this list of households, one or more addresses are chosen at random. Each of these addresses defines the place that the interviewer begins following the interviewing site-selection process. The interviews in a cluster or neighborhood do not begin at the household selected from the list, but at the adjacent household, which may or may not be on the original list. Thus the list does not define the universe of households in an MCD, but rather the list of households adjacent to possible starting points. Depending on the number of households contacted from each starting point, the number of starting points chosen, and the criteria for being included on the original list, every household in the MCD has a known, or knowable, probability of being included in the ORC sample.

The specific persons to be interviewed are selected as follows:

1. A certain number of starting points are selected from the telephone books covering the minor civil divisions or communities selected. The starting points are chosen in a manner that, within the minor civil division, each household listed in the phone book has an equal chance of being selected.
2. Each starting point selected determines a group of households, called a cluster, in which interviews are conducted. This cluster of households includes households both with and without listed telephones. The first household in which an interview is conducted is the household immediately to the left of the household selected from the telephone book as the starting point. Thus, the first household can be one either with or without a telephone.
3. The interviewer conducts an interview in the first household and then works through the group of households following a prescribed rule. The interviewer continues working through the cluster until interviews have been completed in a preassigned number of households.
4. A respondent-selection procedure determines for the interviewer which person to interview in any given household. Every eligible respondent in the household has the same chance to be interviewed as any other eligible respondent. The interviewer is not allowed to make any substitutions.

Once all interviews have been completed, weighting procedures are employed to ensure that the sample properly represents the population from which it was drawn.

This sampling procedure is rigorous in concept and practice and allows for the exact determination of the statistical precision of any finding.

APPENDIX IV

STATISTICAL INTERPRETATION

Reliability of Survey Percentages

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

The table below shows the possible sample variation that applies to percentage results reported from the Opinion Research Corporation sample. The chances are 95 in 100 that a Caravan survey result does not vary, plus or minus, by more than the indicated number of percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

Size of sample on which caravan survey result is based (No. of interviews)	*Approximate sampling tolerances applicable to percentages at or near these levels*		
	10% or 90%	*30% or 70%*	*50%*
2,000	2%	3%	3%
1,000	2%	4%	4%
500	3%	5%	5%
250	5%	7%	8%
100	7%	11%	12%

Sampling Tolerances When Comparing Two Samples

Tolerances are also involved in the comparison of results from different parts of any one Opinion Research Corporation sample and in the comparison of results between two different ORC samples. A difference, in other words, must be of at least a certain size to be considered statistically significant. The table below is a guide to the sampling tolerances applicable to such comparisons.

Size of samples compared	*Differences required for significance at or near these percentage levels**		
	10% or 90%	*30% or 70%*	*50%*
2,000 and 2,000	2%	4%	4%
2,000 and 1,000	3%	4%	5%
1,000 and 1,000	3%	5%	6%
1,000 and 500	4%	6%	7%
500 and 500	5%	7%	8%
500 and 200	6%	9%	10%
200 and 200	7%	11%	12%
200 and 100	9%	14%	15%
100 and 100	10%	16%	17%

* Based on 95 chances in 100.

APPENDIX V

INTERVIEWING MATERIALS

SECTION C

The following set of questions concerns your interest in family camping and your experiences with any of the types of equipment shown on this card --

SHOW EXHIBIT C-1

C1.	Within the past two years, have you visited a camping show or recreational vehicle show where any of these types of equipment were displayed?	1 YES 2 NO 3 DON'T KNOW
C2.	Do any of your friends own or use any of the types on this card?	1 YES 2 NO 3 DON'T KNOW
C3.	Considering the total cost of camping, including taxes on equipment, campsite fees, extra tolls and insurance, and equipment costs, do you feel that camping is more economical or less economical or about the same as other ways of traveling and taking a vacation?	1 MORE ECONOMICAL 2 LESS ECONOMICAL 3 ABOUT THE SAME 4 DON'T KNOW

C4. As briefly as possible, could you tell me what thoughts come to mind as you think about living at a campground for a few days in any of these types of equipment.

SHOW EXHIBIT C-5

C5. This exhibit contains descriptive words that can be used to describe camping. As I read the letter before the descriptive word, please choose a point on the scale which is closest to how it would describe your impression of camping.

For instance, if you will look above the list of words, there is an example. If you were describing the weather and you felt it was "a cold day," you would place it on the scale toward #5.

The colder it was, the closer to #5 you would place it. On the other hand, if you felt it was a hot day, you would place it on the scale toward #1. The hotter you thought it was, the closer you would place it to #1. If you felt it was neither very cold nor very hot, you would place it toward the middle of the line.

First, let's start with Description A. What point on the scale is closest to how Description A best describes camping to you. (INTERVIEWER: CIRCLE # FOR DESCRIPTION A AND REPEAT FOR EACH DESCRIPTION.)

						No Answer
A	1	2	3	4	5	0
B	1	2	3	4	5	0
C	1	2	3	4	5	0
D	1	2	3	4	5	0
E	1	2	3	4	5	0
F	1	2	3	4	5	0
G	1	2	3	4	5	0
H	1	2	3	4	5	0
I	1	2	3	4	5	0
J	1	2	3	4	5	0
K	1	2	3	4	5	0
L	1	2	3	4	5	0
M	1	2	3	4	5	0

TURN BACK TO EXHIBIT C-1

C6. Have you ever gone on an overnight trip with your family, or with friends, and used any of the types of equipment shown on this card? Do not include any camping trips you may have taken with scouting groups or military experience.

1 YES → SKIP TO Q. C17
2 NO
3 DON'T KNOW

(IF "NO" OR "DON'T KNOW" ON Q. C6, ASK):

C7. Have you, as a household, considered such a camping trip in the past 1-3 years?

1 YES
2 NO → SKIP TO Q. C14
3 DON'T KNOW → SKIP TO Q. C14

(IF "YES" ON Q. C7, SHOW EXHIBIT C-8, AND ASK):

C8. Did you decide not to camp at that time for any of these reasons? Just read me the numbers that apply please. (Check as many as apply.)

1 2 3 4 5 6 OTHER (Specify)__________
7 NONE OF THESE
8 NO OPINION

C9. When you last considered going on a camping trip, had you selected a region or part of the country you wanted to visit?

1 YES
2 NO
3 DON'T KNOW

(IF "YES" ON Q. C9, ASK):

C10a. Did you write for information or try in other ways to determine the availability of campgrounds?

1 YES
2 NO
3 DON'T KNOW

C10b. Did you attempt to reserve a campsite in advance?

1 YES
2 NO
3 DON'T KNOW

C11. Did you check into the cost of buying camping equipment?

1 YES
2 NO
3 DON'T KNOW

C12. Did you look into the cost of renting your equipment?

1 YES
2 NO
3 DON'T KNOW

C13. Did you look into the possibilities of borrowing the equipment?

1 YES
2 NO
3 DON'T KNOW

SHOW EXHIBIT C-14

C14. Which of the statements on this card best describes your household's present attitude toward camping. Just read me the number, please.

1 NEXT YEAR
2 HOPE TO GO IN FUTURE
3 UNLIKELY TO GO → SKIP TO Q. C29
4 NOT INTERESTED → SKIP TO Q. C29
5 DON'T KNOW → SKIP TO Q. C29

SHOW EXHIBIT C-1 AGAIN

C15. Which of these types of equipment will you probably use on your first trip? Just read me the number please. (INTERVIEWER: CIRCLE APPROPRIATE LETTERS BELOW AND ASK Q. C16 FOR EACH TYPE USED IN Q. C15.)

1. TENT	C16a. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
2. CAMPING TRAILER (Folding)	C16b. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
3. TRAVEL TRAILER (any kind, any size)	C16c. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
4. TRUCK CAMPER	C16d. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
5. PICK-UP COVER	C16e. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
6. MOTOR HOME	C16f. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
7. VAN OR BUS CONVERSION	C16g. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
X. OTHER (Please specify): ______________	C16h. For this trip will you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
Y. DON'T KNOW	

(INTERVIEWER: CHECK BACK TO Q. C6, IF "YES" ON Q. C6, ASK Q. C17; OTHERWISE, SKIP TO Q. C29.)

C17. In what year did you last go camping? (Check one)

1 1973 → SKIP TO Q. C20
2 1972
3 1971
4 1970, OR EARLIER

(IF "1972 OR EARLIER" ON Q. C17, ASK):

C18. Can you recall why you stopped camping? (PROBE: What specifically has kept you from going camping again since that last trip?)

X HAVE NOT STOPPED -- SKIP TO Q. C20

C19. Have you sold your tent, trailer or other camping shelter, have you given it away, or do you still have it?

1 SOLD IT (or is selling it)
2 GIVEN AWAY
3 STILL HAVE IT
4 DID NOT OWN (rented or borrowed)
5 DON'T KNOW

C20. In what year did you first go camping as an adult?

1 1973 → SKIP TO Q. C22
2 1972
3 1971
4 1970
5 BEFORE 1970
6 DON'T RECALL

(IF "1972 OR EARLIER" ON Q. C20, ASK):

C21. Do you camp about the same number of nights each year, or has your participation in camping been increasing or decreasing in the past few years? (Check one)

1 ABOUT THE SAME EACH YEAR
2 INCREASED LATELY
3 DECREASED LATELY
4 DON'T KNOW

C22. During the past year, did the gasoline shortage -- or the threat of a gas shortage -- cause you to cancel any of your camping trips, to cut them shorter than you planned, or to postpone the purchase of a major item of camping equipment? (Check as many as apply)

1 TRIP CANCELLATIONS
2 SHORTENED TRIPS
3 POSTPONE PURCHASES
4 NONE OF THE ABOVE

TURN BACK TO EXHIBIT C-1

C23. On your last camping trip, which of these types of camping equipment did you use. Just read me the letter please.

1. TENT	C24a. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
2. CAMPING TRAILER (Folding)	C24b. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
3. TRAVEL TRAILER (Any kind, any size)	C24c. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
4. TRUCK CAMPER	C24d. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
5. PICK-UP COVER	C24e. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
6. MOTOR HOME	C24f. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
7. VAN OR BUS CONVERSION	C24g. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
X. OTHER (Please specify): ______________________	C24h. For this trip did you 1. Rent 2. Borrow 3. Purchase 4. Or already own this equipment? 5. DON'T KNOW
Y. DON'T KNOW	

C25. On your last camping trip were you generally satisfied or generally dissatisfied with: (INTERVIEWER: READ EACH STATEMENT BELOW AND CIRCLE RESPONDENT'S ANSWER.)

	GENERALLY SATISFIED	GENERALLY DISSATISFIED	DON'T KNOW	DOES NOT APPLY TO MY STYLE OF CAMPING
A. The availability of tentsites and trailersites	1	2	3	4
B. The availability of recreational facilities at the campground	1	2	3	4
C. The cleanliness and condition of campgrounds	1	2	3	4
D. The availability of hook-ups	1	2	3	4
E. The level of camping fees	1	2	3	4
F. The trip as a whole	1	2	3	4

C26. On that trip did you camp at private campgrounds, public campgrounds such as state parks, or both public and private?

1 PRIVATE
2 PUBLIC
3 BOTH
4 DON'T KNOW

C27. Thinking back to the time of your last camping trip, can you recall whether that trip was the result of long planning over a period of several days or weeks, or was it more like a "spur of the moment" idea with <u>less than</u> 2 days of planning?

1 CAREFUL PLANNING
2 IMPULSE
3 DON'T KNOW

C28. Would you describe your camping as primarily a way of vacationing inexpensively, or as basically your way of enjoying the out-of-doors, hiking, swimming, fishing, and other physical activities?

1 WAY OF VACATIONING INEXPENSIVELY
2 A WAY OF ENJOYING OUT-OF-DOORS
3 BOTH
4 NO OPINION

INTERVIEWER: ALL RESPONDENTS ARE ASKED THE FOLLOWING:

SHOW EXHIBIT C-29

C29. During the next year, which of the following types of equipment do you expect to purchase? (Just read me the numbers, please.) (Circle each item answered.)

1 2 3 4 5 6 7 8 9 10

11 12 13 14 15 16 OTHER (Please specify):______________

17 NONE OF THESE

SHOW EXHIBIT C-30

C30. Many campgrounds are provided on public lands such as State and National Parks. Here are two opposite ideas about fees for camping at these public parks. Which of these statements do you most agree with?

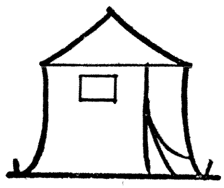
1 FEES COVER ALL COSTS
2 FEES KEPT LOW
3 NO OPINION

SHOW EXHIBIT C-31

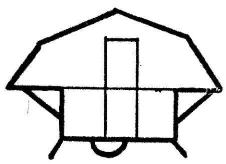
C31. During the past 12 months have you, personally, participated in any of the following types of leisure time activties? (Just read me the numbers, please.)

1 BOATING (motor boats)
2 CANOEING
3 FISHING
4 HIKING
5 SKIING (on snow)
6 PICNICKING (away from home)
7 SWIMMING (away from home)
8 TRAIL BIKE RIDING OR SNOWMOBILING
9 HUNTING (any type, any place)
10 BACK PACKING

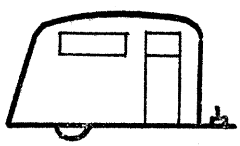
EXHIBIT C-1



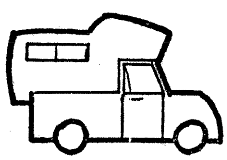
1 TENT (Any kind, any size)



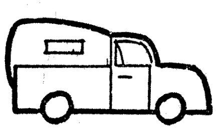
2 CAMPING TRAILER (Folding)



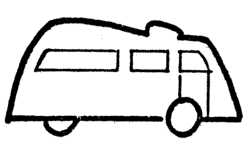
3 TRAVEL TRAILER (Any kind, any size)



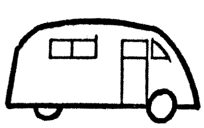
4 TRUCK CAMPER



5 PICK-UP COVER



6 MOTOR HOME



7 VAN OR BUS CONVERSION

Example:

A warm day	1	2	3	4	5	A cold day

EXHIBIT C-5

I think camping would be:

A....... Interesting	1	2	3	4	5	Boring
B..Unfriendly people	1	2	3	4	5	Friendly people
C............. Clean	1	2	3	4	5	Dirty
D......... Dangerous	1	2	3	4	5	Safe
E........ Refreshing	1	2	3	4	5	Tiring
F........... Crowded	1	2	3	4	5	Uncrowded
G......... Expensive	1	2	3	4	5	Not expensive
H......... Difficult	1	2	3	4	5	Easy
I.......... Pleasant	1	2	3	4	5	Unpleasant
J.............. Work	1	2	3	4	5	Fun
K.........Convenient	1	2	3	4	5	Not convenient
L........Complicated	1	2	3	4	5	Easy
M..... Uncomfortable	1	2	3	4	5	Comfortable

EXHIBIT C-8

Reasons for deciding not to camp

1 The expected costs of camping.

2 We lacked information about camping equipment.

3 We lacked information about places to camp.

4 We were uncertain about whether we would enjoy associating with campers.

5 The "gas shortage."

6 Other reasons (Please specify)

EXHIBIT C-14

1. We expect to go camping next year.

2. We hope to go camping at some time in the future, but probably not next year.

3. We are unlikely to go camping in the foreseeable future.

4. We are definitely not interested in camping.

EXHIBIT C-29

Next year I expect to buy:

1. FISHING EQUIPMENT
2. SNOWMOBILE
3. CANOE
4. SKIING EQUIPMENT
5. MOTOR BOAT
6. HUNTING EQUIPMENT
7. TRAIL BIKE - OR OFF-ROAD RECREATIONAL VEHICLE
8. HIKING EQUIPMENT
9. BACK PACK
10 SLEEPING BAGS
11. CAMP STOVE
12. TRAILER OR TENT HEATER
13. LIGHT WEIGHT, MOUNTAINEERING TENT
14. COOLER CHEST, OR REFRIGERATOR
15. GAS OR PROPANE LANTERN
16. OTHER (Please specify)

EXHIBIT C-30

1 Camping fees should be set high enough to cover all - or most - of the costs of operating a public campground.

2 Camping fees on public lands should be kept low and most of the costs of operating campgrounds should be paid out of our taxes.

EXHIBIT C-31

1 Boating (motor boats)

2 Canoeing

3 Fishing

4 Hiking

5 Skiing (on snow)

6 Picnicking (away from home)

7 Swimming (away from home and outdoors)

8 Trail Bike Riding or Snowmobiling

9 Hunting (any type, any place)

10 Back Packing

APPENDIX VI

Table 30.—Image indexes for selected demographic and camping market groups

Item	n	image-index	Item	n	image-index
TOTAL U.S. PUBLIC	2207	1.689	Region:		
Sex:			Northeast	516	1.346
Men	1067	1.991	North Central	620	1.623
Women	1116	1.443	South	724	1.801
Age (years):			West	347	2.230
18–29	590	2.560	Income:		
30–39	418	1.609	Under $5,000	383	2.033
40–49	327	1.517	$5,000–$6,999	273	1.885
50–59	331	1.462	$7,000–$9,999	413	1.868
60+	529	1.252	$10,000–$14,999	560	1.631
Education:			$15,000 or more	548	1.406
Less than high school	758	1.733	Race:		
High school	757	1.772	White	1979	1.673
Some college	676	1.573	Nonwhite	188	1.970
Occupation:			Family size:		
Professional	283	1.890	No children	1102	1.608
Managerial	295	1.455	Children under 18	1105	1.766
Clerical, sales	212	1.522	Home ownership:		
Craftsman, foreman	462	1.818	Own home	1514	1.531
Other manual, service	410	2.018	Rent home	664	2.130
Farmer, farm laborer	66	1.179	Market class:		
Place of residence:			Active campers	450	4.274
Rural	310	1.676	Temporarily inactive	213	2.937
Urban (non-metro)	307	1.977	Permanently inactive	295	1.847
50,000–999,999	651	1.766	High and medium potential	181	2.616
1,000,000 or more	939	1.567	Low and zero potential	1053	0.842

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