GROWTH POTENTIAL of the Family Camping Market

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ABSTRACT

A study of the camping market's short-term growth potential, based upon interviews with the heads of 2,003 representative American households. The study estimates the size of the potential camping market and divides it into three segments: those families with a high, medium and low propensity to become campers. The developed camping market is also divided into an active and an inactive segment, determined by camping participation during the 12 months preceding the survey. The total camping market is estimated to include 12.6 million active camping families, 9 million inactive, and 10 million potential camping families. Regional distributions and characteristics of each segment are described.

CONTENTS

AN OVERVIEW OF THE FAMILY CAMPING MARKET

"FAMILY CAMPING" is a convenient but somewhat inaccurate term for a collection of outdoor travel activities. The market is served by a large number of diverse industries: several thousand commercial and public campgrounds, several hundred manufacturers and distributors of recreational vehicles, scores of outdoor equipment suppliers, and dozens of outdoor recreation publishers. The market is highly diversified, exhibiting numerous variations in camping styles, camping equipment, and camping motivations which range from the need for an inexpensive form of travel to the desire for a priceless outdoor experience.

The market and its many segments have enjoyed sustained and vigorous growth over the past decade. As a result of this growth, there is an increasing concern that the market may be approaching a temporary saturation point —a stage in its growth where new additions are increasingly difficult to attract and hold. And unless the market can hold onto its new additions they may tend to suppress market growth through their sale of used camping equipment and their example of a less than fully satisfying experience with camping and recreation-vehicle travel.

In a study of trends in family camping participation from 1964 to 1968, each family that increased its volume of camping was offset by two other families who camped less each year (*LaPage and Ragain, 1971*). And an investment banker recently described the campground industry as approaching a level of development where "the period of rapid growth is over and individual companies' growth must be achieved largely through gains in market share" (*Peterson, 1971*).

A recent follow-up survey to the 1964-1968 trend study found that 20 percent of the panel were no longer active campers, another 33 percent showed a decreasing trend in annual number of days of camping participation from 1968 to 1971, and that another 20 percent whose camping participation was increasing quite frequently reported that they were camping more but enjoying it less. An impressive proportion (35 percent) of all panel members said that campground conditions were deteriorating and that a new breed of inconsiderate campers was taking over. These negative comments were in sharp contrast to comments made by the same campers at the start of the study in 1964.

The depth of our ignorance about the national camping market is best revealed by our inability to answer reliably one question: "How many campers are there in the United States?" Or, more importantly, how many families consider themselves to be in the camping market, whether they camped this year or not? Without an answer to this question, most estimates of market growth are little more than guesses.

National surveys of outdoor recreation participation in 1960 and in 1965 indicated that about 8 percent of the adult population (12 years or over), or about 13 million adults and children, were campers in 1960, and that about 10 percent of the adults, or 18 million adults and children, camped in 1965 (*Bureau of Outdoor Recreation, 1967*). An extension of this 38-percent growth rate to the second half of the decade would result in a projection of 25 million campers by 1970.

At the First Camping Congress in June, 1971, estimates of the total number of campers (adults and children) ranged from 33 million to 50 million (*Dunlap, 1971; Smith, 1971; Booth, 1971*). One estimate presented at that congress was that there were 3.5 million recreational vehicles in use and 4.5 million tent camping families, for a total of 8 million camping families. Another estimate set the figures at 7.8 million adults (3.9 million families?) who camped in recreation vehicles, and 12 million adults (6 million families?) who camped in tents (for a total of 10 million camping families?). No one knows whether the estimated 8 or 10 million families who camped in 1970 were 50 percent or 99 percent of the total camping market!

In November, 1971, through the combined efforts of government and private enterprise, an effort was made to answer some of these questions. In a nation-wide probability sample, 2,003 heads of households were interviewed to determine the existing size and short-term growth potential of the family camping market. If a household had been in the camping market and had left it, we wanted to know why. And from those still in the market we collected a number of measures of the volume and trend of camping participation. Finally, we asked the heads of non-camping households to estimate the likelihood of their entering the family camping market during the next 4 to 5 years.

The term "household" is used in the Census Bureau's definition: "all persons who occupy a 'housing unit.' " A single person living alone is a household. Heads of households were asked about their own, and their spouse's, camping experience and equipment; activities of other members of the household, in which either head did not participate, were not covered. Thus "family camping," as used in this study, would include a group of men hunting or fishing together but might not include a group of camping students living at home.

HIGHLIGHTS OF THE SURVEY

Defining the Market

Past national surveys of participation in outdoor recreation have tended to treat camping as just one of a long list of outdoor activities, rather than as the means by which many other activities are enjoyed. Participation in camping is prerequisite to part of the reported activity in boating, hiking, fishing, swimming, sightseeing, driving for pleasure, and numerous other activities that can best be enjoyed in and around campgrounds. Many past surveys have failed to differentiate clearly between such activities as wilderness camping, family camping at developed sites, recreational vehicle travel, cabin camping, youth camping, and church camping.

In order to be certain that we were measuring the size and growth potential of the family camping market as we defined it, and not some of these other types of camping, this survey used line drawings of several different types of familiar camping equipment—items such as tents, camping trailers, pick-up campers, and motor homes. Heads of households were not asked if they had ever camped, but if they had ever taken an overnight trip with their families or friends using any of the depicted items of equipment. This approach was used to minimize over-counting from cabin campers, youth campers, etc., as well as to avoid under-representing the hunters and fishermen who may use camping equipment on overnight trips but do not consider themselves campers.

The Developed Camping Market

The survey findings suggest that the camper market is substantially larger than any of the Camping Congress estimates (table 1). More than 12.6 million households (40.2 million persons) were estimated to have camped in the 12 months preceding the survey. And over 9 million more households (29.1 million persons) had camped at some time in the past, but not during the past 12 months. For the households that had camped during the past year, the median level of participation was seven nights away from home on two separate camping trips.

The survey disclosed a relatively high level of equipment renting and borrowing. For their most recent trip, 11 percent of all campers (active or inactive in 1971) had rented their equipment, and 35 percent had borrowed it. This multiple use of equipment may explain why this survey's estimate of market size is higher than many past estimates based on production and sales figures of recreational vehicles and camping equipment.

The Potential Camping Market

A larger developed camper market might logically suggest a smaller potential camper market to draw upon. There has been almost no research on the size of the potential camping market. However, a 1960 nationwide survey of outdoor recreation interests provides a partial comparison of public interest in camping over the past decade (table 2).

Table 1.—Highlights of the 1971 camper market survey of 2,003 heads of households

Head of household	Survey	Estimated households[a]	Estimated persons[b]
	Percent	*Millions*	*Millions*
1. Has camped with family or friends:			
a. During the past 12 months	19.4	12.6	40.2
b. At some time in the past, but not in the past 12 months	14.0	9.1	29.1
2. Has never camped with family or friends but family:			
a. Plans to in 1972	2.7	1.8	5.5
b. Hopes to try it, 2-5 years	8.6	5.6	17.9
c. May try it in 2-5 years	4.0	2.6	8.3
3. Is not likely to go camping	51.3	33.3	106.3
Total	100.0	65.0	207.3

[a]Based on an estimated 65 million households in 1971, projected from 1964-1969 data. Statistical Abstract of the U.S., 1970.

[b]Based on an estimated 3.19 persons per household (1969 data). Statistical Abstract of the U.S., 1970.

Table 2.—A comparison of camping interests in two national surveys

Item	1960[a]	1971
	Percent	*Percent*
Has camped in the past year	15	19
Has camped, but not in past year	(not asked)	14
Has never camped, or has not camped in past year, but would like to do so in the future	9	—
Never camped, but may try it in future	—	15
Never camped and not interested, no answer	76	51[b]
Basis: sample size	2,759	2,003

[a]From ORRRC 1962. Participation in Outdoor Recreation: Factors Affecting Demand among American Adults, Study Report 20, Outdoor Recreation Resources Review Commission.

[b]For an estimate of the proportion of the population with no potential for entering the camping market, those households that have camped in the past but have permanently given up camping should be added to this figure. If we assume that campers who have not camped for 3 years or more are permanently out of the market, then two-thirds of the inactive campers should be added, and the nonmarket group would increase from 51 to 61 percent.

A casual inspection of table 2 might suggest that the potential camping market grew from 9 percent of the population in 1960 to 15 percent of the population in 1970. A closer look at both studies will reveal a slightly different picture. Actually, as is shown in table 1, less than 3 percent of those interviewed in 1971 expressed a strong interest in taking up camping as a leisure activity. Another 8-1/2 percent said that they hoped to try it in the future. Since not all of these expectations will produce campers, something less than 11-1/2 percent of the 1971 sample represent potential market additions. Furthermore the 1960 O.R.R.R.C. survey failed to distinguish between those who had never camped and those who had not camped in the past year. Consequently the 9 percent in 1960, who had camping aspirations includes some who were already in the camping market. However, the O.R.R.R.C. report indicates that the 9 percent is mostly made up of people who have not yet had their first camping experience (*O.R.R.R.C., 1962*, pages 7 and 62).

Obviously, by 1971 many more people had been exposed to camping equipment, camping advertising, camping neighbors and friends, and popular literature depicting camping as a pleasurable and low cost leisure activity. This increased exposure has undoubtedly had an impact on the size of both the potential and the active camper market segments.

Recent Camping Trends

The distribution of years of camping experience, for all campers, reveals the "newness" of the camping market and indicates that camping has continued to attract sizable numbers of new campers in recent years:

Year began camping	*Percent*
Don't recall	11
Before 1949	10
1950-1959	16
1960-1965	21
1966-1969	25
1970	9
1971	8
	100

Although the market appears to be expanding rapidly by adding new campers, the average number of days that each camper camps is either decreasing or remaining relatively constant. Campers who had been in the market for at least two years were asked if their camping participation had been increasing or decreasing during the past few years. Only 16 percent reported an increase, as opposed to 37 percent who reported decreasing participation and 25 percent whose participation was either constant or highly variable. The proportion of approximately 1 increasing to 2 decreasing campers coincides with the trends found in a long-term panel study of camping participation (*LaPage and Ragain, 1971*).

Campers with at least 2 years of camping experience were also asked whether they had noticed any major changes in the condition of campgrounds, in the costs of camping, or in the types of people who go camping. The most commonly mentioned changes, and the frequency with which they were reported, are:

	Percent
Improved facilities, services	32
Increased costs	24
More campers, over-crowding	22
Less desirable campers	12
No changes	12
Don't use campgrounds, haven't been lately	9
More campgrounds available	6
Dirty campgrounds	5
More expensive equipment	4
Campers more congenial	4

For their most recent camping trip, about half the campers used tents and half used some type of camping vehicle (table 3). Asked about their next purchase, 5 percent of active and inactive campers said they planned to buy a tent and 16 percent said they intended to purchase a camping vehicle (camping trailer, 2 percent; travel trailer, 4 percent; truck camper, 5 percent; pickup cover, 1 percent; motor home, 3 percent; and van conversion, 1 percent).

Table 3.—Type of equipment used on last camping trip by all households[a] that have camped, and how acquired for that trip[b]

Equipment	Used on last camping trip and:			
	Rented	Borrowed	Purchased	Already Owned
	Percent	*Percent*	*Percent*	*Percent*
Tent	4	18	6	22
Camping Trailer	3	4	2	4
Travel Trailer	3	4	1	9
Truck Camper	1	5	(*)	9
Pick-up Cover	(*)	1	(*)	5
Motor Home	(*)	1	0	2
Van Conversion	0	2	1	3

[a]Includes active and inactive campers in the 1971 survey.
[b]Totals do not add to 100 percent because some campers use more than one type of equipment on a single trip.
*Less than half of 1 percent.

THE FINDINGS IN DETAIL

The Existing Camper Market

The camping market is usually defined arbitrarily as those persons who have camped during the past year. To estimate sales potential, it might be more realistic to consider a somewhat larger market, including those people who intend to start camping in the next year as well as those who may have only temporarily dropped out of the market. About 6-1/2 percent of the campers in a recently reported panel study failed to camp in any one year over a 5 year period (*LaPage and Ragain, 1971*). Although the 1971 survey cannot readily identify the point at which temporary market losses become permanent losses, about one-third of the inactive campers, that is households that have not camped in the past year, have failed to camp in the past 2 years:

Years since last camped	*Percent of all camping households*	*Percent of inactive camping households*
0	58	—
1	4	10
2	10	24
3	7	17
4-5	8	19
6-9	4	9
10+	8	18
Don't know	1	3
	100	100

The probability of returning to the market undoubtedly diminishes with each additional year away from camping; the bulge in the distribution at 2 years might indicate that 2 years is the break point—including some temporary and some permanent market losses. That is, a 1 or 2-year gap is probably a temporary drop in activity for most people, but those who have been out of the market for 3 or more years may tend to become permanent losses. If we assume from table 1 that one-third of the inactive campers (9.7 million) are only temporarily inactive, and that all non-campers who are planning to camp next year (5.5 million) do as planned, there would be an estimated 55.4 million persons in the camping market.

Although the camping market is undoubtedly larger than its currently active segment, only that segment was analyzed in the survey for the obvious reason that it alone can provide current participation data.

Of all camping heads of households surveyed, 13 percent reported that they do not participate in family camping. (The comparable figure for the active market segment is 8 percent.) That is, they have no families, or camp with friends, or use their camping equipment for hunting and fishing trips exclusively. This is probably a larger portion of the active camping market now than it was in 1960, and it may become increasingly important in campground planning and management.

Reported campground patronage during the 12 months preceding the survey indicates a slight disadvantage to commercial campgrounds (table 4). Forty percent of active campers had not visited a commercial campground, but only 24 percent had failed to visit a public campground. And 27 percent of active campers had visited at least two public campgrounds, while only 16 percent had visited two or more commercial developments. The "advantage" to public campgrounds may be somewhat exaggerated by these figures because the average visit is longer at commercial campgrounds (most public campgrounds have a limit). Also, most wilderness and back-country camping is done on public lands and might be reported in these figures as having been done on public "campgrounds".

Although there are many campers in the active market, the median level of participation

Table 4.—Visits to commercial and public campgrounds by active camping households in 1971

No. of campgrounds visited in 1971	Type of campground visited	
	Commercial	State or Federal
	Percent	*Percent*
1	22	28
2-5	16	27
6 or more	9	9
None	40	24
Don't recall	13	12
Total	100	100

is low, both in terms of trips and in terms of days camped. More than half of 1971's active campers made only one or two trips and camped less than 8 days:

Trips	*Percent of campers*	*Days*	*Percent of campers*
1	38	1-2	20
2	17	3-5	21
3	12	6-7	11
4-5	12	8-30	35
6-9	7	31+	10
10+	14	Don't know	3

Applying these participation rates to the estimated 12.6 million camping households (table 1) produces an estimated 53.5 million trips and 519 million camper-days in 1971. The weighted average participation rate was four camping trips and 13 days of camping per household.

The number of households in the active camper market, and in the inactive market, increases from East to West; 54.3 percent of households in the Western States have camped at some time in the past versus 21.5 percent in the Northeast (table 5). Similarly, households with higher incomes are more likely to be campers; 44.1 percent of the households with a gross 1970 family income in excess of $15,000 have camped at some time in the past, versus 23.2 percent of those households with less than $5,000 gross income (table 6).

Table 5.—Households in the active and inactive camper markets, by region

[Percentage of all households]

Region[a]	Inactive	Active
Northeast	8.8	12.7
North Central	14.0	21.1
South	13.8	15.7
West	21.7	32.6
U.S.	14.0[b]	19.4[b]

[a]U.S. Census Bureau regions, containing the following approximate number of households: Northeast, 15.6 million; North Central, 17.5; South, 19.5; and West, 12.4. Regions include:

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.

[b]From table 1.

Table 6.—Households in the active and inactive camping markets, by income classes

[Percentage of all households]

1970 Income[a]	Inactive	Active
Under $5,000	12.3	10.9
$5,000 to $6,999	8.8	19.7
$7,000 to $9,999	15.6	20.7
$10,000 to $14,999	16.3	23.5
$15,000 or more	16.3	27.8
U.S.	14.0	19.4

[a]Total family income in 1970 before taxes.

Ten percent of the active camper market rented camping equipment at least once during 1971. Equipment renting was most common among heads of households in the 30-39 year age group, people with professional and managerial occupations, those with some college background, and those with incomes of $15,000 or more.

Twenty percent of the active market made purchases of $100 or less for camping equipment in 1971; 9 percent spent over $100. Also, 2 percent of the inactive campers spent up to $100 on camping equipment even though they did not use it in 1971.

Total expenditures while on 1971 camping trips, for items such as camping fees, tolls, gasoline, meals, and groceries, ranged from $0 reported by 5 percent to over $250 for 17 percent of the active camping households in the sample:

1971 trip expenditures	*Percent of active Camping households*
Nothing	5
$50 or less	25
$51 to $100	16
$101 to $250	18
$251 or more	17
Don't know	19

In most respects, the active camper market is not representative of a cross section of American households. On the average, heads of households in the active camping market tend to be younger, better educated, and have higher incomes than the public at large (see Appendix). There are fewer non-whites in the camping market than in the population, and fewer residents of metropolitan areas with one million or more inhabitants.

Among currently active camping households who have camped for at least the past two years, 26 percent reported that their camping participation had been increasing, and 21 percent that it had been decreasing; 43 percent expected to camp more often during the next 2 to 3 years, while 12 percent predicted a decrease. Of the inactive campers, 60 percent had been camping less and predicted a continued decrease in their camping participation. Nineteen percent of the inactive campers expressed a desire to camp more often in the future.

Both increases and decreases in camping participation were frequently explained by changes in the family's life cycle. For example, 5 percent of the active households, and 11 percent of the inactive group, explained decreases in camping on grounds of "having babies or children who are too young to camp", "family grown now", or "getting too old". And 15 percent of active households and 9 percent of inactive households explained increases by such reasons as "our children are older" and "we have more time now."

The Potential Camping Market

The potential camping market could be treated as a single group of households comprising about 15 percent of the population (table 1). In fact, however, this group can be readily divided into three sub-groups: 1.8 million households with a *high potential* for entering the market because they have already considered it and planned to try camping "next year"; 5.6 million households with *moderate potential,* because they have considered camping in the past and expect to try it in the future; and a *low potential* group of 2.6 million households in which, although the idea of camping has not been seriously considered in the past, the head of the household indicated that camping was a possibility during the next 5 years.

To promote market expansion, the most important households to concentrate on are the 7.3 million with high and moderate market potential. These people have considered camping in the past and see themselves as campers at some time in the future. However, a closer look at all three segments of the potential camping market is necessary for an understanding of total market potential.

The geographic distribution of the potential camping market's 10 million households is in sharp contrast to the distribution of the existing market; the bulk of potential market growth appears in the Northeast and North Central regions (table 7). Not only is the percentage of people who expressed a desire to try camping much higher in these two regions, but their population bases are, at present, much higher than that of the western region. In the West, 63.4 percent of the households (7.9 million) are either ex-campers, currently active campers, or potential campers. The North Central region has a lower proportion (53.9 percent) but a larger number (9.4 million) of its households in these same three categories.

The largest potential for camping market expansion, in all regions, exists in households earning $7,000 to $10,000 annually. However, a large number of families above and below

Table 7.—Households in the potential camping market, by region

[Percentage of all households]

Region[a]	High[b] camping potential	Moderate[c] camping potential	Low[d] camping potential	Total
Northeast	3.1	11.0	3.9	18.0
North Central	2.6	12.3	3.9	18.8
Southern	3.5	4.9	5.6	14.0
Western	2.3	5.9	.9	9.1
U.S.[e]	2.7	8.6	4.0	15.3

[a]See table 5 for definitions.
[b]Planning to go camping in 1972.
[c]Would like to try camping in 1 to 5 years.
[d]May become campers in 1 to 5 years.
[e]From table 1.

Table 8.—Households in the potential camping market, by income classes

[Percentage of all households]

Gross 1970 income	High camping potential	Moderate camping potential	Low camping potential	Total
Under $5,000	2.3	3.8	3.1	9.2
$5,000 to $6,999	2.1	9.3	4.3	15.7
$7,000 to $9,999	5.7	11.4	4.4	21.5
$10,000 to $14,999	2.4	10.8	2.4	15.4
$15,000 or more	2.8	11.7	5.0	19.5
All income classes	2.7	8.6	4.0	15.3

this income level are already campers, and many more would like to become campers (table 8).

Because most of the households with low potential for entering the market had not seriously considered camping before they were interviewed, the following descriptions and comparisons refer only to households with high or moderate potential for entering the market during the next 5 years. Those having low camping potential (4% of the households) have been combined with the 51 percent (from table 1) who were either unlikely to try camping or definitely not interested in it.

Among the non-camping households who expressed a desire to start camping (the high and moderate potential group), 25 percent indicated a preference for tents, and 63 percent expect to use some type of camping vehicle (camping trailer, 12%; travel trailer, 16%; truck camper, 18%; pick-up cover, 5%; motor home, 8%; and van conversion, 4%). Thirty-one percent expect to rent the equipment for their first trip, 18 percent will borrow, 28 percent will probably purchase, and 5 percent already own it.

These households, as a group, exhibit a number of characteristics that distinguish them from the larger non-market group. In many cases, these characteristics validate our measures of market potential by revealing different interests in outdoor activities. Other characteristics point to the group's ability to move from potential participation to actual involvement. And still other differences identify some of the ways in which it may be possible to reach the potential camping market through focused advertising and promotion.

Potential campers tend to share more family leisure activities than either the total U.S. public or that segment of the public which is less interested in camping (table 9). And those shared activities are much more likely to be oriented toward the out-of-doors. Fishing, for example, was reported to be a family activity by 16 percent of the total sample, by 11 percent of those not interested in camping, and by 27 percent of the potential campers. Water sports (boating and water skiing) follow the same pattern. Picnics and cook-outs were reported to be a family activity by 10 percent of the sample, by 7 percent of those less interested in camping, and by 18 percent of the potential camping market.

Although the percentages change, a similar pattern governs other activities such as vacation travel, hunting, hiking, winter sports, and recent purchases of outdoor sports equipment. Television viewing, on the other hand, was reported as a shared leisure activity by 17 percent of those who are less interested in camping, but by only 4 percent of the potential campers. This may not mean that they watch television less, but that they are less likely to consider it as a family activity.

Attendance at a camping show, boat show, or similar exhibition of outdoor equipment during the past 2 years was twice as common among potential campers as among those who have little interest in camping. Nearly the same pattern emerges for visits to city, county, state and national parks (table 9).

Potential camping households are much more likely to have a vehicle available to facilitate their camping interest, but they are also more likely to be tied to a second, or vacation, home. However, a comparable proportion of active campers also own second homes.

Compared with the households who are less interested in camping, potential campers receive more magazines in the home. And, those magazines clearly reflect the diversity of their interests (table 9). The common characteristic of potential camping households seems to be a high level of interest in a variety of family-oriented leisure activities.

Table 9.—A comparison of leisure interests and activities among the general public, potential campers, and households with little or no potential for camping (in percent)

Item	Total U.S. Public	Potential additions to camping market	Little or no interest in camping
Shared leisure activities:[a]			
Fishing	16	27	11
Water sports	16	27	11
Winter sports	4	8	1
Hunting	4	6	2
Picnics-cookouts	10	18	7
Travel-vacation	14	23	13
Walking-hiking	4	7	3
Television viewing	13	4	17
Movies-theatre	10	15	8
None shared	19	9	24
Recent visits to:			
Camping-boat show	22	34	10
City-county park	59	74	47
State park	46	53	31
National park	33	35	21
National monument	22	25	15
National seashore	38	30	22
National forest	23	21	12
None of these	25	9	37
Recent recreation equipment purchases:			
Fishing	10	13	6
Hunting	4	7	2
Winter sports	3	6	2
Lawn and court games	12	21	12
Boats	3	5	1
None purchased	47	34	62
Magazines regularly received:			
News	33	38	29
Sports	10	11	6
Home-garden	17	23	14
Hobbies-crafts	3	5	1
Women's	24	29	20
Clubs-associations	3	4	2
None at all	28	20	36
Owns, or has the use of:			
2 or more autos	44	55	31
No car or truck	16	7	23
Vacation home	10	16	6

[a]The incidences of many of these activities among the total U.S. public, as reported in our survey, differ noticeably from those given in the 1962 report of the Outdoor Recreation Resources Review Commission, the 1967 *Trends in Outdoor Recreation*, by the Bureau of Outdoor Recreation, and the most recent B.O.R. survey as reported in *U.S. News and World Report*, April 17, 1972. The differences are probably due to survey methodology. Each of these other surveys presented a list of activities to a sample of adults, whereas this study asked for *shared* family activities, and did not use a prepared list of possibilities. The 1971 B.O.R. survey found 22 percent of the population, 9 years or older, to be campers—compared with 19 percent of the households in the 1971 Forest Service study who were active campers.

OUTLOOK

Implications of the 1971 Camper Market Survey

The sustained growth of the camping market during the past decade implies expansion of the inactive, and shrinkage of the potential, segments of that market. The documentation that an inactive segment exists and is nearly equal in size to the active segment of the market is a major finding of this study. The effect of the inactive segment on future market growth can only be guessed at. Questions of when inactivity is temporary and when it is permanent, its causes, and the interrelationships among those causes, cannot be adequately answered by this study. The question of how much market "drop-out" is due to normal attrition and how much is due to unsatisfactory conditions should be of major concern to the industry.

The growth of the inactive segment from an apparently insignificant number in 1960 (*O.R.R.R.C., 1962*), to 9 million households in 1971 raises another important question that affects the viability of the potential market. If a large number of these campers are market losses due to accelerated attrition resulting from a frivolous response to advertising, then perhaps a comparable portion of our measured potential is equally frivolous.

The procedures used for identifying potential market additions seem to be validated by the consistently higher frequencies of family-oriented and outdoor-oriented leisure activities found in the potential camper segment. However, this same hyperactive segment of the population may constitute the bulk of the potential growth in many markets other than camping—some of which might be competitive with camping. Further, their involvement in a wide array of interests probably also means that this group might be looking for high quality camping experiences and will be difficult to hold in the market if camping fails to measure up to its advertised image.

The concentration of potential campers in the Northeastern and North Central regions should be encouraging to the commercial campground industries of those states, but may be a cause for alarm to managers of some already heavily-used public sector campgrounds.

At least 51 percent of the households sampled apparently have little or no interest in camping. This figure may be as high as 61 percent if the permanently inactive former camping households are included. Whether any of this segment of the population can eventually provide added market growth is probably a direct function of the camping industry's ability to diversify. Obviously these people have been exposed to many of the promotional and social stimuli that have caused others to become interested in camping and have not responded. Consequently, a new image of camping, or perhaps a new approach to selling an older style of camping (emphasizing simplicity and minimizing expensive gadgets), may be the best way to add a major new growth surge from this huge reservoir of households that have apparently "tuned out" present camping styles.

A major implication of a large and expanding inactive segment of the camper market is its resultant creation of a subsidiary market for second-hand camping equipment. Careful monitoring, in the years ahead, of production and sales statistics for new camping vehicles should reveal whether the inactive segment of the market is stabilizing, declining, or growing in proportion to total market growth.

Recommendations for Market Expansion

Any improvement in understanding individual market segments logically leads to questions of how these segments can best be reached and served. Broad-spectrum, industry-wide advertising for camping (for example: "Go camping—for the fun of it!") can certainly be improved upon with a little knowledge about market segments. We know, for example, that households with high and moderate potential for becoming campers (by definition) have been thinking about going camping, but have been putting it off. A highly relevant promotional message could encourage them to go ahead and try it with rented equipment, or at a campground "open house".

A major industry-wide effort, carefully focused on specific market segments, might have such objectives as encouraging active campers to camp more, inactive campers to give it another try, potential campers to stop delaying, and low-potential noncampers to take a look and see what camping is really all about. If such an effort were mounted, it would be highly desirable to follow it with an evaluation similar to the 1971 survey to determine its effectiveness.

If market saturation appears to be approaching after such an intensive promotional effort, that would probably be an appropriate time to re-evaluate the roles of public agencies in the camping market.

Although it is seldom recognized, public agencies have clearly served as an industry-wide loss leader. That is, low-cost public camping provides the stimulus for many campers to buy equipment and enter the market. Then, as their interests shift to more sophisticated camping, their patronage of public developments declines and they seek the greater convenience and variety of commercial campgrounds. This role could probably be strengthened and expanded to the benefit of the total market. One obvious way of expanding it is for public campground managing agencies to make a major commitment to provide outdoor opportunities for economically disadvantaged groups. And as the spending power of these groups increases, many may move into the market for more expensive forms of camping. As this survey has shown, there is a definite camping potential among families at lower income levels.

For the majority of public campgrounds, which are too remote from population centers to serve as camping "training grounds," a number of other role definitions are possible. The generally stated policy of providing minimal services at public campgrounds is not, in many instances, accurately reflected in the cost of developing those campgrounds. At costs per site of up to $3,000, more than minimal services are being offered. At those locations where an established clientele exists, public-private cooperation through lease arrangements is an obvious opportunity. At other locations, a role reversal, with the public campground serving as an overflow for nearby commercial campgrounds, may be a logical development in keeping with the broader social goals of stimulating rural economies and expanding the range of services available on public recreational lands.

The finding that 13 percent of all camping heads of households do not camp with their families invites speculation about a possibly emerging non-family camping market, and about what the industry's appropriate response might be. Solitary campers, unrelated groups, and hunters and fishermen probably make up the bulk of this segment. And, while they may provide only a minor economic contribution to the total market, many persons introduced to camping in other than a family situation may eventually join and contribute to the mainstream of the camping market. A related finding is that 13 percent of the potential camping market, and 22 percent of the active market, are single heads of households; some of these people may be looking for something other than the conventional family camping experience.

In view of the fact that many campers explained recent trends in their participation (either up or down) by various changes in their life situations, the opportunity to promote camping as one of the lifetime "sports" seems excellent. The great adaptability of camping to diverse interests, age groups, and family cycle stages, should be a relatively easy concept to promote.

Probably the single most difficult and most important problem facing the camping industry today is camping's slipping image. Comments such as "too many people," "inconsiderate campers," "overcrowding at campgrounds," and "dirty campgrounds," are too frequent and too serious to ignore.

This is an industry-wide problem. But at its present stage of development, the industry is probably not equipped to deal effectively with it, although a number of organizations are attempting to attack the problem. The several programs of the North American Family Camper's Association are probably the most outstanding effort in this field. These programs involve regional leadership conferences for campers, occasional extension-type beginners' courses in equipment usage and how to camp, and an extensive literature program on good camping manners. Much of this material could easily be expanded and made available to a wider audience through television and through adult education courses co-sponsored by public agencies, camper organizations, and equipment manufacturers. Another approach would be a vigorous federal program of technical and financial assistance to commercial campgrounds to improve the quality of camping experiences.

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APPENDIX

DEMOGRAPHICS OF THE CAMPING MARKET

Characteristics	U.S. public[a]	Camping households: Active	Camping households: Inactive	Camping households: Potential[b]
Head of household:	*Percent*	*Percent*	*Percent*	*Percent*
18-29 years of age	26	43	30	40
30-39	17	21	15	28
40-49	18	17	21	17
50-59	15	13	14	8
60 years or over	23	5	20	7
Less than high school complete	41	25	30	30
High school complete	36	41	41	42
Some college	23	34	28	27
Professional	12	18	14	15
Managerial	10	12	10	10
Clerical, sales	12	14	17	12
Craftsman, foreman	17	25	19	19
Other manual, service	23	18	16	32
Farmer, farm laborer	3	2	3	4
Household:				
Non-Metro - rural	11	13	8	9
urban	21	26	26	21
Metro - 50,000-999,999	27	27	28	25
1,000,000 or over	41	34	37	45
Northeast	25	16	16	30
North Central	28	31	28	36
South	30	24	29	22
West	17	29	27	12
Under $5,000 income	29	16	25	13
$5,000 - $6,999	12	12	7	12
$7,000 - $9,999	18	19	20	20
$10,000 - $14,999	22	26	25	25
$15,000 or over	17	24	20	21
White	88	95	96	87
Nonwhite	12	3	4	12
No children in household	49	37	49	24
With children under 18	50	63	49	76
Own home	65	65	66	67
Rent home	35	34	33	33
Percent of sample (2,003 households)	100	19	14	11

[a]Based on a sample of 2,003 households surveyed in December, 1971.
[b]Does not include low potential group; another 4% of the population.

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 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 were conducted with all persons in the universe represented by the sample.

Size of sample on which survey result is based	*Approximate sampling tolerances applicable to percentages at or near these levels*		
	10% or 90%	*30% or 70%*	*50%*
2,000 interviews	2%	3%	3%
1,000 interviews	2%	4%	4%
500 interviews	3%	5%	5%
250 interviews	5%	7%	8%
100 interviews	7%	11%	12%

Sampling Tolerances When Comparing Two Samples

Tolerances are also involved in the comparison of results from different parts of any one sample. 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.

Sizes of samples being compared	*Differences required for significance[a] at or near these percentage levels:*		
	10% or 90%	*30 or 70%*	*50%*
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%

[a]At the 95% probability level.

SECTION C

The next group of questions concerns your leisure interests and your possible interest in vacation travel and family camping.

SHOW EXHIBIT C-1

C1. 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 took with scouting groups, or while you were in the military service.

1 YES → SKIP TO Q. C5
2 NO
3 DON'T KNOW

(IF "NO" ON Q. C1, ASK):

C2. Have you, or has your spouse, ever considered going on such a trip?

1 YES
2 NO → SKIP TO Q. C4
3 DON'T KNOW

(IF "YES" ON Q. C2, ASK):

SHOW EXHIBIT C-3

C3. Which one of the statements on this card best describes your family's present attitude toward camping? Just read me the number, please.

1 2 → SKIP TO Q. C21

3 4 5 DON'T KNOW → SKIP TO Q. C24

(IF "NO" ON Q. C2, ASK):

C4. Would you say that it is likely or not likely that you might go camping with your family some time in the next 4 - 5 years?

1 LIKELY
2 NOT LIKELY
3 DON'T KNOW

NOW SKIP TO Q. C24

SHOW EXHIBIT C-1 AGAIN

C5. These are silhouettes of several kinds of camping equipment. Which of these is most like the equipment you used for your last such trip? Just read me the letter, please.

A. TENT →

C6a. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

B. CAMPING TRAILER →
(Folding)

C6b. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

C. TRAVEL TRAILER →
(Any kind, any size)

C6c. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

D. TRUCK CAMPER →

C6d. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

E. PICK-UP COVER →

C6e. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

F. MOTOR HOME →

C6f. For this trip did you
1. Rent
2. Borrow
3. Purchase
4. Or already own this equipment?
5. DON'T KNOW

G. VAN CONVERSION →

C6g. 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):

____

C6x. 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

C7. During the past 12 months, how many camping trips did you go on?

_______ # OF TRIPS

X NONE
Y DON'T KNOW

(IF "NONE" ON Q. C7, ASK):

C8. About how many years ago did you take your last camping trip?

_______ YEARS AGO

X DON'T KNOW

NOW SKIP TO Q. C12

C9. In total, how many nights were spent away from home on these _____ trips?

_______ # OF NIGHTS

X NONE
Y DON'T KNOW

C10. In total, how many different privately owned and how many federal or state government owned campgrounds did you stay at while on the _____ trips?

_______ PRIVATELY OWNED

X NONE
Y DON'T KNOW

_______ GOVERNMENT OWNED

X NONE
Y DON'T KNOW

C11. Approximately how many of these _____ trips were predominantly family camping or vacation travel trips, how many were for hunting and fishing, and how many were business trips at least in part?

_______ # FAMILY CAMPING AND VACATION TRAVEL

_______ # HUNTING AND FISHING

_______ # BUSINESS TRIPS

X DON'T KNOW

C12. In what year did you begin camping as a family?
(INTERVIEWER: IF "NEVER", CIRCLE "Y" AND ASK: "When did you, yourself, begin camping?")

_______ YEAR

X DON'T REMEMBER
Y NEVER CAMPS WITH FAMILY

INTERVIEWER: IF "1970" OR EARLIER, ASK Q. C13 – C17. IF "1971", SKIP TO Q. C18.

(IF "1970" OR EARLIER ON Q. C12, ASK):

C13. Do you camp about the same number of nights each year, or has your participation in camping been increasing or decreasing during the past few years?

1 SAME
2 INCREASING
3 DECREASING
4 VARIES
5 DON'T KNOW

C14. Do you expect to do more, or less, camping in the next 2-3 years?

1 MORE
2 LESS
3 ABOUT THE SAME
4 DON'T KNOW

(IF "MORE" OR "LESS" ON Q. C14, ASK):

C15. Why do you say that?

C16. In the past, what has kept you from camping more frequently than you have camped?

C17. During the past few years, have you noticed any major changes in the condition of campgrounds, in the costs of camping, or in the types of people who go camping? If so, what have you noticed?

C18. Approximately how much money did you spend during the past 12 months for the rental and how much for the purchases of camping equipment of all types? That is, big items like tents and trailers plus small items like sleeping bags and lanterns—but not food. First, rentals; then, purchases.

$ ________ RENTALS $ ________ PURCHASES

X NOTHING
Y DON'T KNOW

C19. Approximately how much money did you spend during the past 12 months while on camping trips in total for items like gasoline, tolls, camping fees, meals, and groceries?

$ ________

X NOTHING
Y DON'T KNOW

SHOW EXHIBIT C-1

C20. Which of these types of camping equipment have you used in the past? Please list them in the order you used them; that is, which is most like the equipment you used on your first trip, and list all others right up to that used on your last trip.

TRIP # 1.	A	B	C	D	E	F	G
TRIP # 2.	A	B	C	D	E	F	G
TRIP # 3.	A	B	C	D	E	F	G
TRIP # 4.	A	B	C	D	E	F	G
TRIP # 5.	A	B	C	D	E	F	G
TRIP # 6.	A	B	C	D	E	F	G
TRIP # 6.	A	B	C	D	E	F	G
TRIP # 7.	A	B	C	D	E	F	G

INTERVIEWER: CHECK BACK TO Q. C3. IF #1 or #2 CIRCLED, ASK Q. C21 & C22; OTHERWISE, SKIP TO Q. C23.

SHOW EXHIBIT C-1

C21. Which of these types of camping equipment will you most likely use when you start camping—for your first trip?

A B C D E F G
X DON'T KNOW

C22. Will your equipment for your first trip most likely be . . .

1 Rented
2 Borrowed
3 Purchased
4 Or do you already own it?
5 DON'T KNOW

NOW SKIP TO Q. C24

C23. Which of these will you probably purchase next?

____

X NONE OF THESE
Y DON'T KNOW

Here are some questions about your leisure time —

C24. What kinds of leisure activities (other than camping) do you participate in with members of your immediate family?

C25. What kinds of leisure activities do you and your spouse participate in, but do not share? First, your activities; then your spouse's.

Respondent's:

1. ________________________
2. ________________________
3. ________________________

X NONE
Y DON'T KNOW

Spouse's:

1. ________________________
2. ________________________
3. ________________________

X NONE
Y DON'T KNOW
Sp NO SPOUSE

C26. Approximately how many hours in an average week do you and your spouse spend in meetings and in voluntary work with clubs, civic associations, service organizations, and church activities? First, your activities, then your spouse's.

Respondents:

________# OF HOURS

X NONE
Y DON'T KNOW

Spouse:

________# OF HOURS

X NONE
Y DON'T KNOW
Sp NO SPOUSE

C27. What magazines are regularly received in your household?

X NONE

Y DON'T KNOW

C28. Do you belong to an automobile club?

1 YES
2 NO
3 DON'T KNOW

(IF "YES" ON Q. C28, ASK):

C29. What is the name of the automobile club(s) you belong to?

C30. At the present time, how many automobiles, vans, panel and pick-up trucks, in running condition, do you have the use of?

________# of autos

X NONE
Y DON'T KNOW

________# of trucks

X NONE
Y DON'T KNOW

SHOW EXHIBIT C-31

C31. During the past two years, have you visited any of the following places listed on this card? Just read me the numbers, please.

1 2 3 4 5 6

7 NONE OF THESE
8 DON'T KNOW

C32. Have you, or has anyone in your immediate family, attended a camping show, boat show, or similar exhibition of outdoor recreation equipment during the past two years?

1 YES
2 NO
3 DON'T KNOW

C33. Do you happen to recall your last 2 to 3 purchases of outdoor recreation equipment for family use, and in what year did you purchase them?

ITEM	YEAR PURCHASED
1. ______	______
2. ______	______
3. ______	______
4. ______	______
5. ______	______

X NONE PURCHASED
Y CAN'T REMEMBER

C34. Do you own, or have the use of a vacation home? (INTERVIEWER: INCLUDE TRAILER ONLY IF IT IS STATIONARY.)

1 YES
2 NO
3 DON'T KNOW

(IF "YES" ON Q. C34, ASK):

C35. How many miles from your home is it to your vacation home?

______# of miles

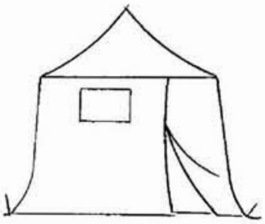
X DON'T KNOW

C36. On the average, how many days per year do you use your vacation home?

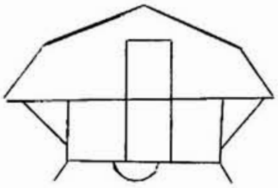
______# of days per year

X DON'T KNOW

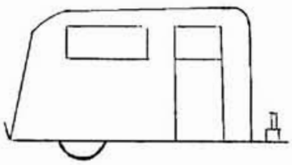
EXHIBIT C-1



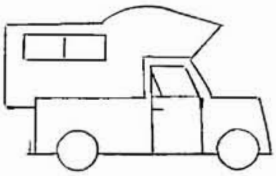
A. TENT (Any kind, any size)



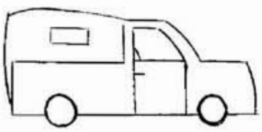
B. CAMPING TRAILER (Folding)



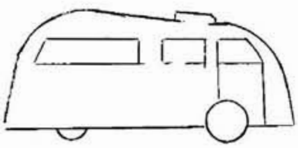
C. TRAVEL TRAILER (Any kind, any size)



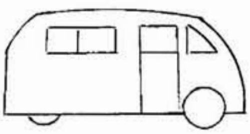
D. TRUCK CAMPER



E. PICK-UP COVER



F. MOTOR HOME



G. VAN CONVERSION

EXHIBIT C-3

1 We are planning to try it next year.

2 We hope to try camping sometime in the future, but probably not next year.

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

4 We are definitely not interested in camping.

EXHIBIT C-31

1 A city park or county park

2 A state park

3 A national park or recreation area

4 A national monument

5 A national forest

6 A national seashore

SAMPLING PROCEDURES

This report presents the findings of a personal interview research survey conducted among 2,003 men and women 18 years of age or over living in private households in the continental United States.

The most advanced probability sampling techniques were used in the design and execution of the sample plan and the results, therefore, may be projected to the total U.S. population of men and women 18 years of age or over.

The Opinion Research Corporation master sample consists of 360 communities, which are arranged in six blocks. The 60 communities within each block are further distributed into six national probability samples of 10 communities each. Each block is an independent probability sample and can be used alone or in combination with other blocks.

To construct the sample, all 3070 U.S. counties were grouped into areas designated by the U.S. Office of Business Economics. Within each area, counties were arranged by descending population size. These 171 area groupings were then arranged in geographical order from north and east to south and west. Sixty counties were then chosen at random by systematic sampling (with probability proportional to size of population) to form a block. The process was repeated with different starting points to obtain a total of six blocks.

Within each county thus selected, all Minor Civil Divisions (MCD), with the estimates of their current populations, were listed. The next step was to select at random (with probability proportional to its population) a single MCD from each county.

A primary sampling unit (PSU) is a device for initiating and localizing the choice of a starting point within each county. In the Opinion Research Corporation sample, the PSU is a community, which is defined by the area covered by the largest telephone book containing the selected MCD. Sample sizes can be adjusted by varying the number of starting points within each PSU.

The sampling elements, the individuals to be interviewed, are selected as follows:

1. The required number of starting points are chosen for the PSU (telephone book), using randomizing techniques, from the households listed in each such phone book.
2. Each starting point is then used to determine a "cluster" of households (both with and without listed telephones) in which interviews will be conducted. The first interviewing point is the household immediately to the left of the starting point. Each starting point effectively determines a *neighborhood* in which interviewing will be conducted. The procedures outlined above give to every neighborhood of any given size in a stratum equal probability of being chosen for interviewing.
3. The interviewers select individuals to be interviewed from each household of the cluster by a prescribed rule. Only one interview was taken per household, regardless of the number of people 18 years of age or over in the household. Weights were introduced into the tabulations to ensure proper representation in the sample.
4. Interviewing for this Caravan survey, was completed during the period November 15 through December 6, 1971, by members of the Opinion Research Corporation national interviewing staff. All interviews were conducted in the homes of respondents.

THE FOREST SERVICE of the U. S. Department of Agriculture is dedicated to the principle of multiple use management of the Nation's forest resources for sustained yields of wood, water, forage, wildlife, and recreation. Through forestry research, cooperation with the States and private forest owners, and management of the National Forests and National Grasslands, it strives — as directed by Congress — to provide increasingly greater service to a growing Nation.