

A second look at
the **HEAVY HALF**
of the Camping Market

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A 1968 survey of campers revealed that one-half of the campers did more than three-fourths of all the reported camping. Campers in this heavy half of the camping market were found to differ significantly from light-half campers in their camping motivations, past experience, and investments in camping equipment (*LaPage 1969*).

However, the 1968 survey identified heavy-half campers on the basis of a single year's (1967) participation and did not determine whether heavy-half campers consistently camped more than the average year after year. To better understand the heavy half of the camping market, we have examined the camping participation patterns of 565 campers for a period of 4 years.

In 1964 the Northeastern Forest Experiment Station began a long-term panel study of camper behavior (*LaPage and Ragain 1970*). Panel members were selected randomly at four public

Table 1.—*Camping participation reported by the camper panel*

Year	Median camping days	Reported camping days	Percent of total by heavy half
	<i>Days</i>	<i>Days</i>	<i>Pct.</i>
1964	20	12,425	73
1965	18	11,866	80
1966	16	11,311	83
1967	15	11,144	85

campgrounds and four private campgrounds in New England. From 1965 to 1969 each panel member provided an annual record of his camping and other leisure-time activities and expenditures.

By annually splitting the sample of 565 campers at the median number of days camped, we determined that, in the first year, the heavy half accounted for 73 percent of the total reported camping days, and in the second, third, and fourth years the heavy half did more than 80 percent of all reported camping (table 1).

CAMPING VOLUME AND TREND

In the 1968 survey, the campers were asked to recall their volume of camping for each year since 1964. It was noted that heavy-half campers tended to increase their camping from 1964 to 1967, while light campers showed a slight decrease on the average. Our panel data reinforce both of these trend findings and show a much sharper decline for the light-half campers (table 2).

The wide differences in average participation for light-half campers are probably due to major differences in the design of the two studies. Not all panel members were active campers at the conclusion of the trend study, whereas all respondents in the 1968 survey were currently active in the camping market. Recall bias in the earlier study may be significant, as many campers probably tend to round off their figures to 7, 14, or 21 days when thinking about participation 2 or 3 years in the past.

Table 2.—Trends in mean camping frequencies of heavy and light campers, from two independent surveys

Year	Average days camped			
	Light half		Heavy half	
	1968 study	Panel survey	1968 study	Panel survey
1964	13	12	26	33
1965	14	8	28	34
1966	12	7	30	34
1967	12	6	34	35

Because the heavy-half of the camping market promises to be an important focus for informational and promotional campaigns by campground managers, we wanted to know how consistent a heavy-half camper is. That is, how many campers were never in the heavy half? And how many were in the heavy half for 1, 2, 3, or all 4 years of the panel study?

Of the 565-member panel, 151 were never in the heavy half, and these campers accounted for only 9 percent of the total

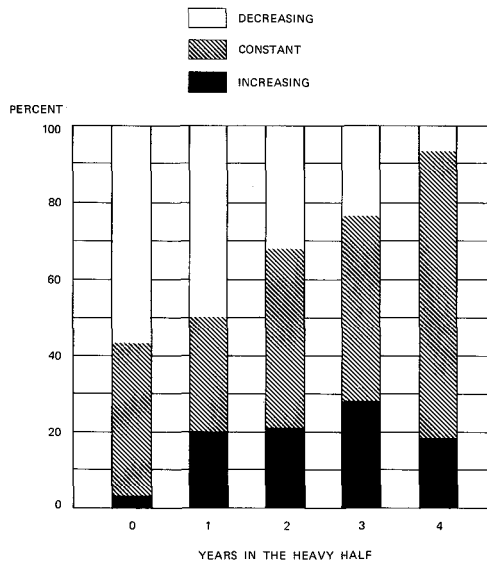


Figure 1.—The trend of camping activity according to number of years in the heavy half of the camping market.

Table 3.—Consistency of camper representation in the heavy half.

Number of years in the heavy-half	Study years	No. campers	Percent of 4-year reported camping
0	Total	151.....	9
1	1	36	
	2	23	
	3	23	
	4	21	
	Total	103.....	11
2	1 + 2	18	
	1 + 3	10	
	1 + 4	12	
	2 + 3	8	
	2 + 4	15	
	3 + 4	18	
	Total	81.....	12
3	1 + 2 + 3	23	
	1 + 2 + 4	11	
	1 + 3 + 4	15	
	2 + 3 + 4	27	
	Total	76.....	16
4	1 + 2 + 3 + 4	154.....	52
		565.....	100

camping; while 154 were in the heavy half all 4 years, and they accounted for 52 percent of the total camping (table 3).

After the campers had submitted questionnaires for 4 consecutive years, each camper's annual participation data were analyzed to determine whether his average camping revealed an increasing or decreasing trend. The proportion of campers who showed a decreasing trend was strongly and inversely related to the number of years in the heavy half (fig. 1). Among consistently light campers, 57 percent had decreasing trends in camping participation, as opposed to only 6 percent of those campers who were consistently in the heavy half (*LaPage and Ragain 1970*).

CHARACTERISTICS OF HEAVY-HALF CAMPERS

Our panel findings support the conclusions of earlier research that the heavy camper tends to have a larger investment in camping equipment and is therefore a potentially more mobile camper. Purchases of camping equipment over the 4-year period increased the investment gap between heavy and light campers both in total number of items acquired and in the number of expensive items purchased (table 4).

Because heavy campers had more expensive camping equipment initially, and subsequently purchased more mobile camping equipment, the heavy half had a substantially larger investment in camping equipment. The 1968 survey revealed that 68 percent of the heavy half had more than \$500 invested in camping equipment as opposed to 26-percent of the light half. Our camper panel revealed a direct relationship between years in the heavy half and initial equipment investments of more than \$500:

<i>Years in the heavy half since 1964:</i>	<i>Percent having more than \$500 in camping equipment in 1964:</i>
0	11
1	30
2	36
3	50
4	59

Heavy campers may also be more socially involved in their camping. The incidence of membership in camping clubs, an apparent preference for private campgrounds, and a social attitude toward camping all increased with the number of years campers were in the heavy half (table 5).

Numerous recent studies and much popular literature point to the fact that camping can be predominantly a social experience for many people. In fact, panel members who tended to see camping in the more classical role of a physical "return to nature" were less likely to be consistent members of the heavy half, and were more likely to decrease their camping participation. However, those who perceived camping to be many things, both social and physical, were more likely to have been in the heavy half for at least one of the 4 years.

Table 4.—Initial equipment and subsequent purchases of camping equipment by panel members, according to years in the heavy half

Item	Years in the heavy half				
	0	1	2	3	4
Tents:					
Initial equipment (percent)	73	55	63	46	32
Purchases (number)	48	31	17	6	27
Recreation vehicles:					
Initial equipment (percent)	22	39	36	50	60
Purchases (number)	15	30	29	35	53
Tents and vehicles:					
Purchases (number)	—	—	8	11	21

Table 5.—Some indicators of a social orientation to camping, by years in the heavy half

Years in heavy half	Initially members of camping clubs	Express agreement with social definition of camping	Have an apparent preference for private campgrounds
	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
0	7	30	39
1	18	41	48
2	24	43	51
3	29	42	61
4	38	56	58

Along with a high level of involvement in camping, heavy-half campers were also more active in other forms of outdoor recreation participation (table 6). Consistently light campers averaged an additional 36 outdoor recreational events per year, while the consistently heavy camper averaged 52 events over and above his camping. Correlations between the annual volume of camping and annual participation in other forms of outdoor recreation, for 565 campers, produced coefficients that were all positive, ranging from 0.130 (camping in 1964 versus other outdoor activities in 1967) to 0.318 (camping in 1968 versus other outdoor

activities in 1968). This suggests that campers do not commonly substitute participation in camping for participation in other outdoor activities (*LaPage and Ragain 1970*).

The uniformity of average annual participation in outdoor recreation, by each of the 5 camping market segments shown in table 6, fails to reflect the widespread belief that per-capita participation is increasing.

Differences in camping style are also apparent between heavy and light campers. Based on response to the question: "Do you usually do your camping at 2 or 3 carefully selected campgrounds, or do you usually try to go to a different campground on each trip?", campers were classified as having either a repetitive or an

Table 6.—The average number of non-camping outdoor recreational events *(and their standard deviations) each year by campers in four heavy-half categories

Years in the heavy-half	Mean events per year $\pm$ s.d.			
	1964	1965	1966	1967
0	36 $\pm$ 27	36 $\pm$ 33	37 $\pm$ 37	34 $\pm$ 31
1	38 $\pm$ 27	37 $\pm$ 27	39 $\pm$ 30	39 $\pm$ 38
2	45 $\pm$ 52	49 $\pm$ 55	42 $\pm$ 56	37 $\pm$ 44
3	45 $\pm$ 40	43 $\pm$ 33	47 $\pm$ 45	39 $\pm$ 30
4	52 $\pm$ 39	53 $\pm$ 41	52 $\pm$ 41	53 $\pm$ 36

*Non-camping outdoor recreational events were predominantly swimming, hiking, fishing, boating, hunting, and skiing.

exploratory camping style. The two styles of camping were almost evenly represented among panel members who were recruited at the four public campgrounds, but nearly three out of four campers from the private campgrounds reported a repetitive style. Consistently heavy campers were twice as likely to have a repetitive style rather than an exploratory style of camping. The consistently light campers who had an exploratory style of camping were more than four times as likely to have been recruited at a public campground.

SIGNIFICANCE OF THE HEAVY-HALF CAMPER

If the heavy half of the camping market is to be a useful concept for campground management and promotion, two questions must be answered:

- Is membership in the heavy half simply a reflection of some other more useful concept such as a life-cycle effect, which controls entry into and exit from the heavy half?
- Who are the heavy-half campers, what do we know about them, and how can they be effectively reached?

Several findings of our camper panel research suggest that different stages of a camping life-cycle have little effect on camping volume. For example, the reduction in average annual camping by light campers, accompanied by an increase on the part of heavy campers, is at odds with the life-cycle idea of a light-camping stage developing into heavier stages. Trends in annual camping show only a weak relationship with life-cycle expressed as camper age:

Years in heavy half:	0	1	2	3	4
Percent over 45 years old:	27	27	20	29	40

Also, the distribution of past years of camping experience for each heavy-half category (table 7) reveals no direct relationship between years in the heavy half and years of camping. Many new

Table 7.—The percentage of campers in each of three past experience categories, by number of years in the heavy half

Years in the heavy half	Years of camping experience		
	5 or less	6 to 8	9 or more
	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
0	20	30	50
1	16	32	52
2	10	34	56
3	16	37	47
4	5	33	62

campers move into the heavy half during their first 5 years of camping, while many long-time campers have never been in the heavy half.

The identity of heavy-half campers, in useful marketing terms, continues to be elusive. However, the findings from this panel study suggest an important inconsistency about the heavy half: their frequent combination of expensive camping equipment having a high potential for mobility, combined with a social orientation to camping and a repetitive style of camping that results in little actual mobility. Both a repetitive style of camping and heavy camping were much more common among panel members recruited at private campgrounds. Sixty-five percent of these campers had a repetitive style, and 32 percent were consistently in the heavy half, as opposed to 45 percent and 25 percent respectively of the campers recruited at public campgrounds. These differences in camping style and frequency are reflected in the trend toward season-long campsite rentals at a great many private campgrounds. (Visits of more than 2 weeks in length are not allowed at most campgrounds managed by public agencies.) For many heavy campers, the attraction of recreational vehicles may be less in their mobility than in their comfort and convenience in a semipermanent location.

The reasons why some campers camp much more than others do are probably as many and as varied as the reasons for camping itself. Clearly no one simple explanation will account for all the individual reasons. However, our increasing knowledge of heavy-half campers emphasizes their potential importance to campground marketing.

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