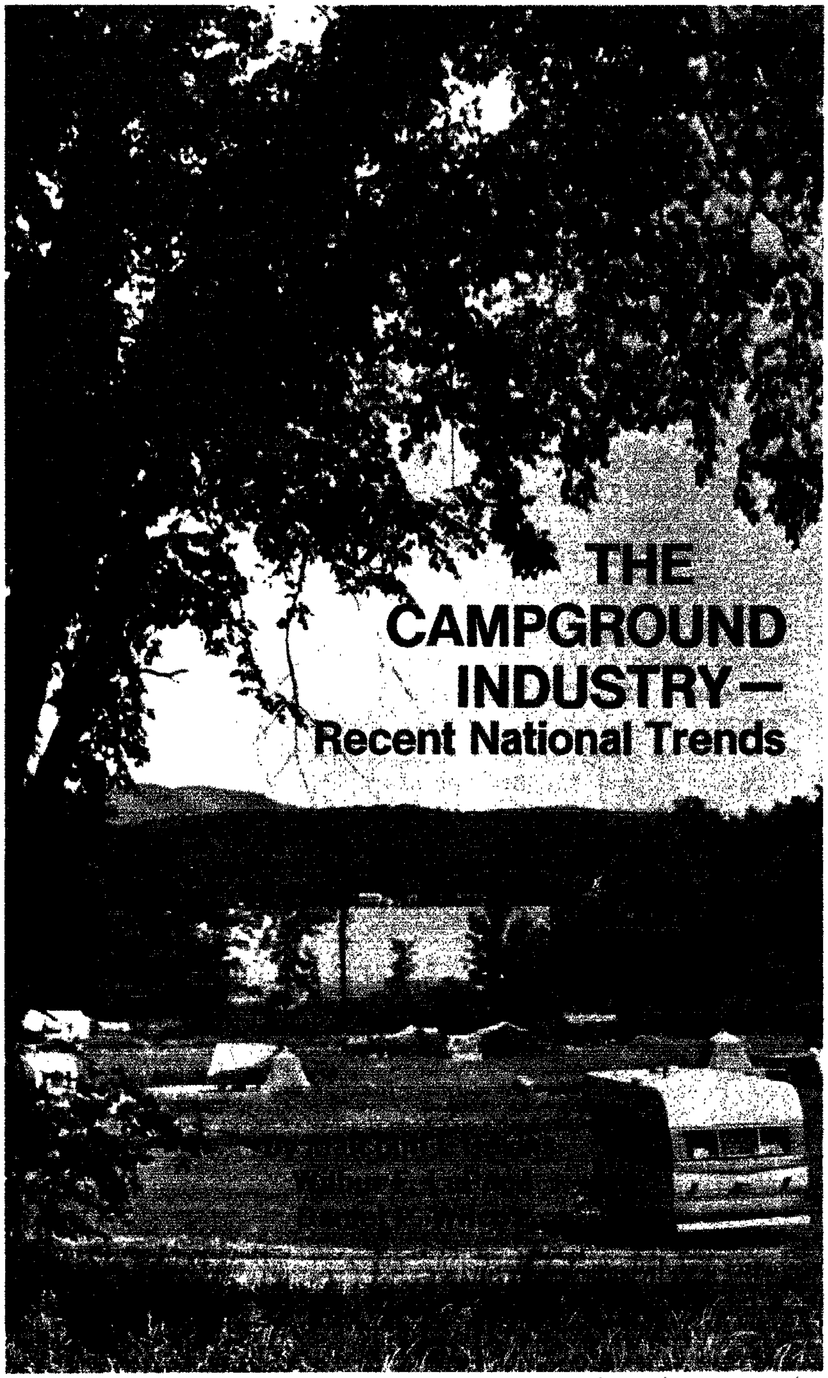

FOREST SERVICE GENERAL TECHNICAL REPORT NE-53
1979

FOREST SERVICE, U.S. DEPARTMENT OF AGRICULTURE
NORTHEASTERN FOREST EXPERIMENT STATION
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THE CAMPGROUND INDUSTRY—
Recent National Trends

Abstract

The number of United States campers appears to be increasing by 1 to 2 percent per year—a rate of growth slightly higher than that of the general population. Recreation vehicles (RV's) continue to be the most popular type of camping shelter used at developed campgrounds. Also, RV campers tend to camp more frequently than tent campers. Generally, campers have not reduced their camping-related travel in the last few years despite fuel price increases. Campers appear willing to pay higher fees at both public and private camping areas. The national supply of public and private campsites has stabilized; however, small, minimal facility private campgrounds are being replaced by larger, convenience-oriented areas. Private campground operators see the low fees and development of convenience facilities at public campgrounds as unfair competition for private campgrounds.

Looking toward 1985, camping industry leaders foresee greater participation by retirees, and more demand for conveniences and recreation activities at campgrounds. Surveyed industry leaders expect public campground policies in 1985 to include (1) slower rate of new campground development; (2) construction of campgrounds closer to population centers; and (3) separation of RV sites from tent sites within the same campground. Future private campground policies foreseen by industry leaders include (1) slower rate of new campground development; (2) more full-season campsite rentals and (3) more onsite RV rentals.

TABLE OF CONTENTS

INTRODUCTION

THIS REPORT evaluates the national supply and demand situation for the campground industry. A basic assessment was made in 1975 by the U.S. Forest Service (1976) to fulfill the requirements of the Forest and Rangeland Renewable Resources Planning Act of 1974 (RPA).

To update the information reported in the "Developed camping and related activities" section of the first RPA assessment, a search was undertaken for the most current data. Published and unpublished materials were obtained from public agencies, private industry, and universities. Public agencies contributing recreation resource statistics to this report include the U.S. Forest Service, the U.S. National Park Service, and the U.S. Army Corps of Engineers. A substantial portion of the supply situation analysis for developed camping is based on data compiled by two major campground directory publishers (Rand McNally and Woodall).

Several recent university- and government-sponsored research studies are cited. These include the study financed by the Heritage Conservation and Recreation Service (formerly U.S. Bureau of Outdoor Recreation [BOR]), entitled "Public willingness to pay for camping and picnicking," and the NE-100 Regional Research Project, which analyzes emerging trends in recreation. Included also is a specially conducted opinion survey of 12 hand-picked public and private camping industry leaders, in which each was asked to predict what camping may be like in 1985.

DEMAND SITUATION FOR DEVELOPED CAMPING

The camping public

Camping market surveys. Statistics from a series of national surveys indicate trends in camping market growth since 1960 (Table 1). Although variations in survey methodologies do not permit exact comparisons among all survey findings, the historical data presented in Table 1 suggest that the number of campers

Table 1.—Number of campers in the U.S., 1960–1977

Date of survey	Persons: Number (millions)	Persons: Percent of population	Households: Number (millions)	Households: Percent of population	Source
1960	10	8	—	—	Ferris et al. 1962
1960	—	—	4	8	U.S. Forest Service 1976:65
1965	—	—	6	10	U.S. Forest Service 1976:65
1965	18	10	—	—	LaPage 1973:1
1971	39	19	13	19	LaPage 1973:3
1972	23	11	—	—	U.S. Bureau of Outdoor Recreation 1973:23
1973	43	20	14	21	Kottke et al. 1975:3
1973	54	26	20	30	A. C. Nielson Co. 1976
1976	—	—	23	32	Kampgrounds of America 1976
1976	58	27	22	30	A. C. Nielson Co. 1976
1976-77	52	30	—	—	[a]

[a]Heritage Conservation and Recreation Service, U.S. Dep. Inter. 1978. Preliminary unpublished findings of the 1977 Outdoor Recreation Survey. Table 16.

and camping households has at least tripled since 1960.

Comparative findings from two national camping surveys (LaPage 1971, Kottke et al. 1973) indicate that the number of camping households increased from 12.6 million in 1971 to 14.3 million in 1973, an increment of 13 percent. Statistics from a 1976 A. C. Nielsen survey reveal that nationally there were 21.8 million camping households in 1976, an 8 percent increase over the number estimated by Nielsen in a similar survey conducted in 1973. For the 1976 survey, sports participation survey data were collected through telephone interviews with a random sample of U.S. households. Responses were obtained from 3,000 households. The results of studies done by LaPage (1971), Kottke et al. (1973), and Nielsen (1973, 1976) indicate that while the number of campers is increasing, the *rate of growth* in the United States camping market may be declining. If true, this evidence of slower market growth corroborates the conclusion of the initial RPA report that "demand for camping might be approaching a temporary saturation point" (U.S. Forest Service 1976:67).

A study conducted for the NE-100 Technical Research Committee in October 1977 examined patterns of participation by age group in many different activities in the Northeastern States (Table 2). Camping was dis-

Table 2.—Percentage of adult population, by age group and total, that participates in outdoor activities. Northeastern states, 1977

Activity	Age group				All ages[a]
	18-34	35-49	50-64	65+	
Bicycling	64.9	46.0	24.8	7.4	41.7
Boating					
Sail	17.4	11.6	6.5	2.7	11.0
Motor	30.0	21.5	15.2	5.4	20.5
Camping					
Backpack	17.6	5.2	3.0	0.9	8.3
Tent	29.5	14.5	6.5	2.2	15.9
Recreation vehicle	14.5	13.0	8.7	2.7	10.9
Canoeing	21.0	11.7	5.8	1.1	11.9
Fishing					
Freshwater	32.9	24.5	18.7	9.4	23.7
Saltwater	24.0	21.8	16.7	6.1	19.0
Golfing	18.7	17.8	13.7	8.3	15.7
Hiking	36.2	27.0	18.3	9.4	25.4
Hunting	15.1	11.6	8.3	4.7	11.0
Ice skating	36.7	24.3	10.7	1.6	21.8
Jogging	47.4	26.3	12.2	3.6	26.8
Motorcycling	23.3	8.7	1.8	0.4	10.9
Picnicking	70.6	68.9	55.5	29.8	60.3
Skiing					
Downhill	20.2	9.5	4.1	0.2	10.5
Cross-country	5.6	5.0	2.8	0.2	4.0
Water	18.9	8.7	3.5	0.7	9.8
Snowmobiling	13.6	9.0	3.9	0.9	8.2
Swimming	80.4	68.7	44.8	15.2	58.9
Tennis	53.6	31.6	12.6	2.0	30.2
Other	8.4	5.5	2.2	0.9	5.0
(Percent in adult population)	(34.6)	(26.7)	(23.3)	(15.4)	(100.0)

[a]Weighted by percent of Northeast population in each age group, according to 1970 Census of Population.

Source: NE-100 Technical Research Committee, Northeastern States Agricultural and Forestry Experiment Stations. Unpublished data, December, 1977.

aggregated into backpacking, tent camping, and recreational vehicle (RV) camping. The weighted participation rates for each group were approximately 8 percent, 16 percent, and 11 percent, respectively. Compared with other outdoor recreation, camping stands out as an important activity.

Visits to National Parks and Forests. Federal camping area use statistics also are useful indicators of camping activity. The U.S. Forest Service estimates that visitor days of camping totaled approximately 37.5 million during 1977 at developed Forest Service campgrounds (Table 3). Except for the 5.7 percent increase in visitor days recorded between 1974 and 1975, camping at developed Forest Service campgrounds appears to be relatively stable or declining slightly.

The National Park Service (NPS) is another source of Federal campground activity level data. Over the 6-year period 1972–1977, overnight stays at NPS campgrounds increased in each year except 1974 (Table 4). Recent monthly NPS statistics indicate that the number of persons camping in National Parks decreased during Summer 1978 and increased during Fall 1978 (Table 5). Total National Park visits increased in all but two months from January through October 1978.

The following statement, which appeared in the 1975 annual public use report of the U.S. National Park Service (1976), suggests that NPS campgrounds may be inadequate to meet an increasing camping demand:

> Capacity constraints and possible further reductions in the number of sites significantly affect the capability of NPS operated campgrounds to fulfill total demand for camping by park visitors.

NPS officials hope that implementation of a campsite reservation system for heavily used parks and increased reliance on private campgrounds (including those operated by concessionaires) will help satisfy a growing demand for NPS camping.

Camper characteristics. Annual household incomes of campers are higher than the nationwide average, according to a 1976 Kampgrounds of America (KOA) camping survey (Table 6). KOA mailed 5,000 questionnaires to a sample of U.S. families. Eighty percent of the questionnaires were returned. Of the camping households surveyed, 44 percent reported

Table 3.—Recreation use of U.S. Forest Service developed campgrounds, 1972–1977

Year	Visitor days (thousands)	Percent annual change
1972	36,080	
1973	35,965	−0.3
1974	35,678	−0.8
1975	37,721	+5.7
1976	37,135	−1.6
1977	37,554	+1.1

Source: U.S. Forest Service, 1972-1977.

Table 4.—Trend in use of campgrounds operated by the National Park Service, 1967–1977[a]

Year	Number of areas reporting	Overnight stays	Percent change
1967	90	9,309,700	+ 3.4
1968	88	9,411,100	+ 1.1
1969	85	9,049,200	− 3.8
1970	87	9,023,800	− 0.3
1971	86	7,934,300	−12.1
1972	88	8,383,000	+ 5.7
1973	90	8,685,100	+ 3.6
1974	89	8,411,800	− 3.1
1975	89	8,817,000	+ 4.8
1976	92	9,267,300	+ 5.1
1977	93	9,318,600	+ 0.6

[a]Total of overnight stays reported does not include campers staying at concessionaire campgrounds located in National Park Service areas. In 1976 a total of 817,638 overnight stays was recorded at concessionaire-operated trailer villages and campgrounds. An additional 3,108,690 overnight stays were tallied at rooms and cabins operated by concessionaries in National Park Service areas.

Source: National Park Service, 1978.

incomes in excess of $15,000 annually, as compared with the U.S. average of 37 percent.

Additional data from the KOA survey indicate that camping households tend to be larger than average in size. Sixty-four percent of camping households were found by KOA to contain three or more persons, as compared with the national average of 50 percent. This partially supports the contention that camping is an important family activity.

Table 5.—Monthly totals of overnight stays and visits at National Park Service areas, January–October 1978

Month	Overnight stays		Total visits	
	Number	Percent change from previous year	Number	Percent change from previous year
January	358,800	+ 4.2	9,414,000	+ 5.0
February	427,100	− 9.0	9,467,500	−13.4
March	745,400	+21.3	15,844,900	+ 6.6
April	874,900	−19.5	21,681,600	+ 2.3
May	1,413,400	− 0.9	25,439,900	+ 0.2
June	2,728,200	− 1.5	33,195,900	+ 7.3
July	3,555,900	− 4.0	44,456,100	+ 3.2
August	3,459,300	+ 0.3	37,974,800	− 0.3
September	2,000,000	+10.8	26,278,600	+ 6.6
October	1,090,400	+10.4	22,948,700	+12.4

Source: U.S. Travel Data Center, 1979.

Table 6.—Percentage of campers with selected characteristics, compared to percentages of the general public

Characteristic	Percentage of U.S. public, 1975[a]	Percentage of U.S. campers, 1976[b]
Household income		
$ 0–$ 9,999	42	29
10,000– 14,999	21	28
15,000 and over	37	44
Education (head of household)		
Non high school graduate	38	12
High school graduate	47	70
College graduate	16	18
Age (head of household)		
Under 25 years	8	13
25–54 years	56	68
55 years and older	36	20
Household size		
1–2 persons	50	36
3–4 persons	33	42
5 or more persons	17	22

[a]U.S. Bureau of the Census 1976.
[b]Kampgrounds of America, 1976. In 1976 KOA mailed 5,000 questionnaires to a sample of U.S. families. Eighty percent of the questionnaires were returned.

According to KOA survey statistics, 88 percent of all camping household heads have been graduated from high school at least. This compares with 63 percent for the total U.S. public. Survey findings also indicate that heads of camping households are younger than noncampers. Whereas 36 percent of all U.S. heads of household are 55 years or older, only 20 percent of camping heads of households have reached the age of 55 years.

Geographic distribution of campers. Findings from the NEM-42 (Bond et al. 1973, Kottke et al. 1977) and the 1977 American Forest Institute Recreation Survey show an increase between 1973 and 1977 in the percentage of campers coming from the Northeast and North Central states (Table 7). In contrast, the number of U.S. campers coming from the South and West appears to have decreased as a percentage of the total in the same years.

When 1975 total population levels are compared with 1977 Woodall campsite supply data, the Northeast has a higher number of residents per campsite (333 persons per campsite) than any other region and significantly more than the national average (228) (Table 7). The reverse is seen in the West, where a resident population of 154 persons exists for every campsite listed in the Woodall directory.

Although these statistics indicate that disparities may exist between regions in the number of developed campsites available to the resident population of that region, the substantial amount of travel traditionally undertaken by campers makes any determination of appropriate regional campsite supply levels unrealistic.

Data from the 1976 National Travel Survey (U.S. Travel Data Center 1977) indicate that camping was involved to some degree in 64 million person-trips taken by U.S. travelers in 1976. The most popular camping destination regions were the Far West and Hawaii and the South; the fewest camping trips were taken in the New England and Eastern Gate-

Table 7.—Residence of U.S. campers by census region, 1973 and 1977

Census region	Active campers			Regional population per site available[d]
	1975 U.S. population[a]	1973 NEM-42[b]	1977 AFI[c]	
		Percent		
Northeast	23	14	17	333
North Central	27	23	33	206
South	32	31	21	263
West	18	32	28	154
U.S. total	100	100	99	228

[a]Based on 1975 U.S. Bureau of the Census population statistics.
[b]Kottke et al. 1975:10.
[c]American Forest Institute 1977:12.
[d]Based on 1975 Bureau of the Census population data and 1977 Woodall's Campground Directory statistics.

Table 8.—Origin and destination of camping trips by travel region, 1976

Travel region[a]	Number of camping trips		Difference
	Origin	Destination	
New England	2,478	2,492	+ 14
Eastern Gateway	6,007	3,600	−2,407
G. Washington Country	6,767	6,041	− 726
South	9,209	12,825	+3,616
Great Lakes Country	12,804	9,012	−3,792
Mountain West	4,072	4,480	+ 408
Frontier West	7,799	7,492	− 307
Far West and Hawaii	15,047	15,141	+ 94
Outside U.S.	—	3,099	—
Total	64,183	64,182	—

[a]For a disaggregation of travel regions, see Appendix, p. 35.
Source: U.S. Travel Data Center 1977.

way travel regions (Table 8). The "import-export" balance of campers was most disproportionate in the Great Lakes Country and Eastern Gateway (greater export) and the South (greater import).

Equipment and facility use and preference

Preferred type of camping shelter. Comparative findings from three camping surveys conducted between 1971 and 1976 indicate that tents and recreational vehicles (RV's) were equally popular in 1971. However, in 1973 and 1976, RV's were more popular than tents (Table 9).

There is, however, some indication that tents may be regaining some of their former popularity. Findings from the 1973 survey show that 41 percent of active campers used tents, and statistics from the 1976 survey place the percentage of active tent campers at 43 percent. This slight but potentially significant increase in tent use is partially supported by the 1973 survey finding that a majority (59 percent) of noncampers who planned to camp for the first time in 1974 indicated that they would use tents.

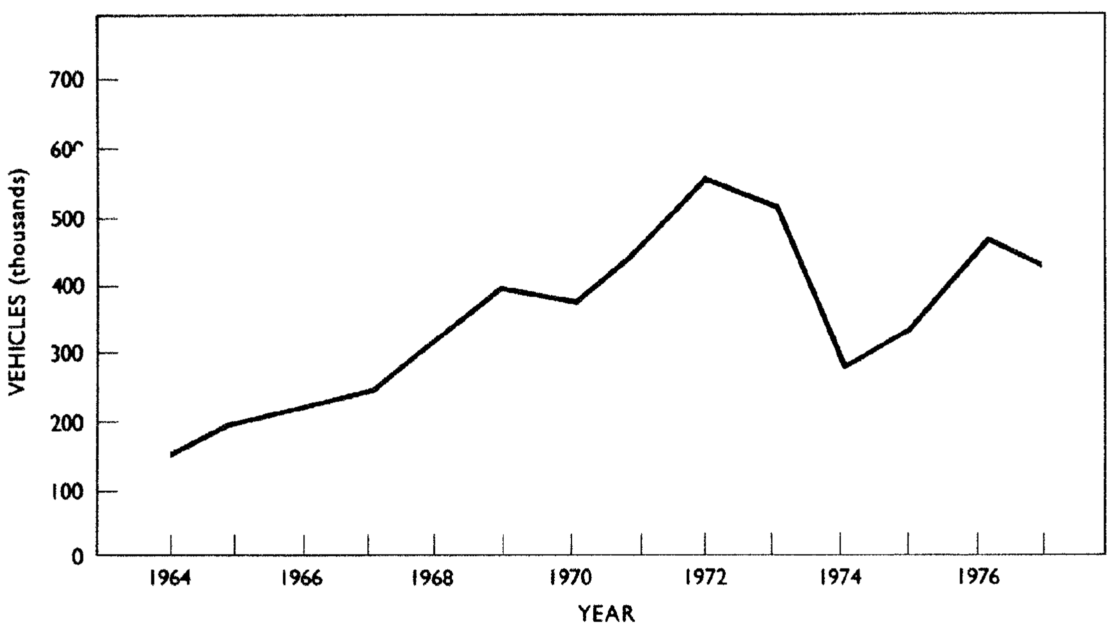
Recreation vehicle shipments. While survey findings suggest some increase in the use of tents, recent RV shipments from manu-

Table 9.—Preferred type of camping shelter, 1971, 1973, and 1976

Shelter type	Percent of all campers		
	1971[a]	1973[b]	1976[c]
Tent	50	41	43
Tent trailer	13	11	13
Travel trailer	17	17	17
Truck camper	15	15	15
Motor home	3	7	7
Van or converted bus	6	10	6
Pick-up cover	6	5	—
Other	—	5	6
Unknown	—	1	1

[a]LaPage 1973:4.
[b]Kottke et al. 1975:16.
[c]Kampgrounds of America 1976:1.

Figure 1.—Recreational vehicle shipments, 1964–1977. Shipments do not include pick-up covers and type B2 motor homes ("surfer vans"). Source: Recreation Vehicle Industry Association, 1976–1978.



facturers to dealers have declined. During 1977, 414 thousand new RV's were shipped to U.S. dealers—a decrease of 6 percent from 1976 shipments (Figure 1, Table 10). RV shipments do not include pickup covers and type B2 motor homes ("surfer vans"—minimum life support).

Although the gasoline shortage early in the year undoubtedly contributed to a 30 percent decrease in total RV shipments in 1974, deliveries began to increase in late 1974—a trend that ended in 1976. Between 1976 and 1977, shipments of truck campers decreased by 24 percent and shipments of travel trailers by 12 percent. Only slight increases occurred in motor home (+3 percent) and camping trailer (+2 percent) shipments. David Forward, President of the Recreation Vehicle Industry Association (RVIA), attributed the slump in 1977 RV sales to the effects of President Carter's energy message in April 1977. However, according to Forward, RV sales began a comeback; by the end of 1977, sales figures were higher than for the same period in 1976 (Los Angeles Times 1977).

The National Park Service (NPS) has compared RV and tent use in the period from 1965 to 1976 (Figure 2). Since 1971 RV's have been more common than tents at NPS-operated campgrounds. In 1977 approximately 57 percent of NPS campers used RV's, and 43 percent used tents. Between 1976 and 1977 the number of RV campers staying at NPS campgrounds declined slightly, whereas the number of NPS tent campers increased slightly. Also, during the 1974 energy crisis the number of NPS tent campers decreased less than NPS recreational vehicle campers. This may indicate that during periods of unusually high gas prices or gas shortages, tent camping becomes more popular.

Relationship between nights camped and equipment used. RV's not only appear to be more popular than tents but are also used more (Figure 3). Tent campers averaged 9 nights for the season, while motor home users averaged 23. As a group, RV campers averaged 16 nights of camping per year. Quite possibly, a greater fixed investment in equipment is associated with a desire to utilize such equipment more fully.

Income of campers. A KOA analysis of in-

Table 10.—Recreational vehicle shipments, 1961–1977 (thousands)[a]

Year	Camping trailers	Truck campers	Motor homes	Travel trailers	Total shipments	Percent change from preceding year
1961	18	16	—	29	63	—
1962	23	17	—	41	80	+27.0
1963	40	27	—	52	119	+48.8
1964	52	35	—	64	151	+26.9
1965	67	44	5	77	193	+24.5[b]
1966	72	55	6	87	220	+14.0
1967	79	62	9	95	244	+10.9
1968	125	80	13	115	333	+36.5
1969	141	93	23	144	401	+20.4
1970	116	96	30	138	380	− 5.2
1971	96	107	57	191	451	+18.7
1972	110	105	117	251	583	+29.3
1973	98	90	129	212	529	− 9.3
1974	55	45	69	126	296	−44.1
1975	48	44	97	151	340	+14.9
1976	53	42	156	190	441	+29.7
1977	54	32	160	168	414	− 6.1

[a]Shipments do not include pick-up covers and type B2 motor homes ("surfer vans").
[b]Motor homes are not included in this calculation
Source: Recreation Vehicle Industry Association 1977, 1978.

Figure 2.—Tent and recreational vehicle used in campgrounds operated by the National Park Service, 1965–1977.
Source: U.S. National Park Service, 1978.

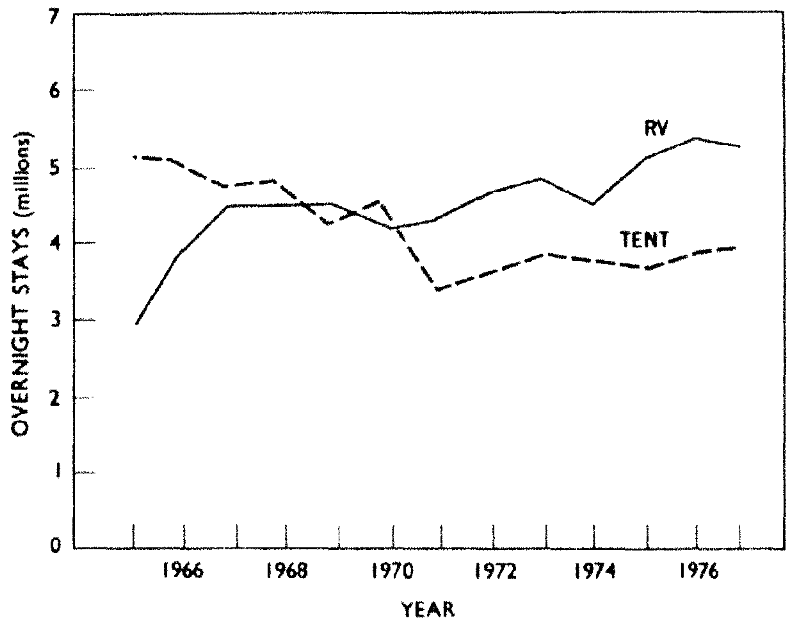
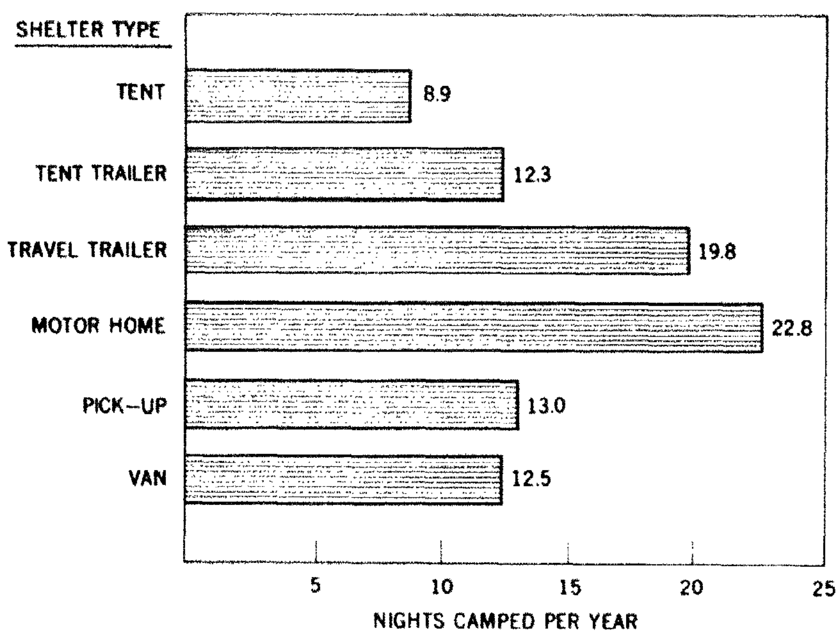


Figure 3.—Average number of nights camped by campers using various types of shelter, 1976.
Source: Kampgrounds of America, 1976.



come earned by RV owners and tenters shows little difference between the two groups (Figure 4). Of campers responding to the KOA survey, 42 percent of tent campers and 44 percent of RV campers reported household incomes in excess of $15,000. Brokaw and Cole (1977) analyzed the relationship between income and desired level of campground development (Table 11). They found that Delaware state park campers as a group preferred a combination of picnic tables, firewood, level parking, water, flush toilets, showers, and minimal activity development. Campers earning more than $10,000 a year preferred a lesser degree of development than those whose income was under $10,000.

Figure 4.—Household income of RV and tent campers, 1976.
Source: Kampgrounds of America, 1976.

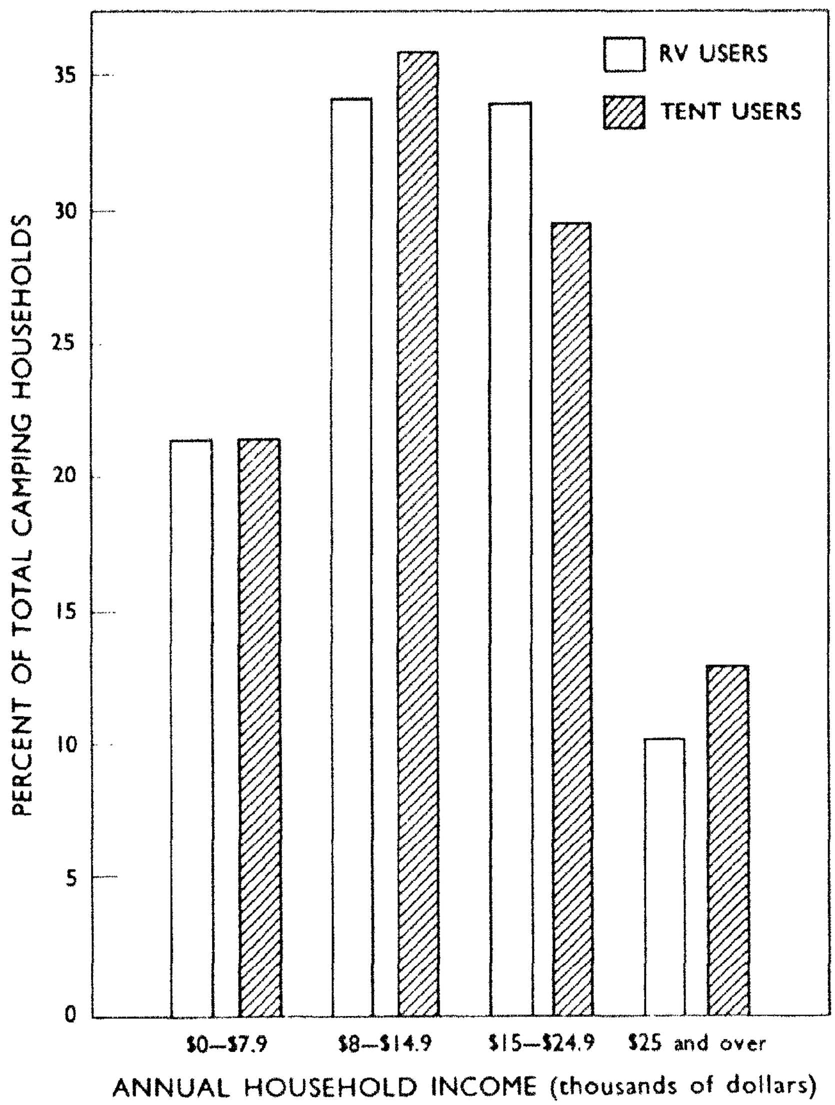


Table 11.—Percentage of campers who prefer various levels of campground development, by income of campers, Delaware, 1975

Income	Facility groups[a]							
	I Least developed	II	III	IV	V	VI	VII Most developed	Total
Under $6,000	0.0	22.2	33.3	11.2	33.3	0.0	0.0	100.0
$ 6,000–9,999	10.0	23.3	20.0	20.0	23.3	0.0	3.4	100.0
$10,000–14,999	15.9	34.9	11.1	15.9	12.7	6.3	3.2	100.0
$15,000–24,999	10.2	37.2	13.6	8.5	16.9	8.5	5.1	100.0
$25,000 and over	0.0	23.5	23.5	11.9	17.6	17.6	5.9	100.0
Combined income groups	10.7	32.0	15.7	13.5	17.4	6.8	3.9	100.0

[a]Facility development groups are as follows:

Group I—Water, picnic tables; no recreational facility development in the campground.

Group II—Water, showers, flush toilets, picnic tables, level campsites, and firewood; minimal activity development. May or may not include security patrol.

Group III—Electricity and water hookup. Minimal activity development.

Group IV—Group II features plus electric hookup.

Group V—Three way hookup. Minimal activity development.

Group VI—Group II features plus extensive development, including swimming pool, sports areas, store, laundry, and playground.

Group VII—All the features of Group VI plus destination-oriented activities similar to Disney World.

Source: Brokaw and Cole, 1977.

Energy and economic situation

The energy situation and camping. In response to President Carter's presentation of a national energy policy on April 20, 1977, the Executive Director of the North American Family Campers Association (NAFCA) wrote to the President:

> Yes, energy conservation is crucial, but an undue burden placed on camping vehicle owners and not shared equitably by other large users of petroleum products, would not only be unfair, but could seriously curtail enjoyment of the great outdoors by some 50 million American campers . . . NAFCA will encourage the planning of camping trips that will require fewer annual miles and at lower highway speeds.

The Federal Energy Administration responded to NAFCA by saying, basically, that the President's energy proposals would not disproportionately affect the leisure camping industry, the idea being not to discourage activity of this kind but merely to provide "incentives" for doing it more economically (i.e., incentives against lower mile-per-gallon vehicles, such as campers, could be expected).

A study conducted by the Opinion Research Corporation in 1977 for the U.S. Bureau of Outdoor Recreation (USDI) measured changing recreational habits in this time of voluntary energy conservation. According to this study, the recreational habits of 76 percent of U.S. Forest recreation area users were unaffected by the prevailing energy situation. Among the 24 percent whose habits had changed, equal numbers cited (1) increased transportation costs and (2) desire to conserve fuel as the reasons for change.

The 1977 NE-100 study[1] of recreational patterns shows that Northeastern campers are traveling farther from home than they did a few years ago (Table 12). In fact, the percentage of campers who traveled farther was twice that of those who camped closer to home.

The 1976 National Travel Survey (U.S. Travel Data Center 1977) shows that camping trips are longer in terms of miles than other types of trips taken by Americans

[1]NE-100 Technical Research Committee, Northeastern States Agricultural and Forestry Experiment Stations. December 1977. Preliminary unpublished data. Results are based on telephone interviews with 3,900 persons in the northeastern states.

Table 12.—Change in distance traveled from home location to campsite, Northeastern states campers, 1977 study (in percent of participants)

Type of camping	Location of place most often camped in last 2 years		
	No change	Closer to home	Farther from home
Backpack	46	16	38
Tent	48	16	36
Recreation vehicle	51	17	32

Source: NE-100 Technical Research Committee, Northeastern States Agricultural Experiment Stations. 1977. Unpublished data.

(Table 13). About 66 percent of all camping trips involved more than 400 miles of round-trip travel; only 62 percent of all trips fell in this range. Twenty-six percent of camping trips involved more than 1,000 miles of travel, compared with 22 percent of all trips.

The economic situation and travel. The U.S. economy experienced a recession in 1975, unemployment reached a high of 8.5 percent, and consumer purchases of goods and services stagnated (in constant dollars) (U.S. Bureau of the Census 1976). The economy experienced a return to more normal conditions in 1976, with a real gain in the gross national product of 6.1 percent over 1975 (adjusted for inflation). As a result, purchases of goods and services increased 9.6 percent over 1975 levels (Marketing Handbooks 1978:87).

Looking at the longer-range trends (1966 to 1976), the aggregate annual income of the lower middle-class worker ($5,000 to $15,000) grew at a slower rate than the income of persons in higher economic classes. Travel experts believe that the $5,000 to $15,000 sector holds the greatest potential for growth in the travel industry (Marketing Handbooks 1978:87). Quite possibly, income tax reform measures will accelerate such growth. How and where persons in the lower middle class spend travel funds will depend in part on the relative cost of accommodations—a factor with major implications for the camping industry.

SUPPLY SITUATION FOR DEVELOPED CAMPING

Number of campsites and campgrounds—private inventories

No one can confidently say how many developed campsites exist in the public and private sectors of the nation's campground industry. Lack of accurate campsite enumeration data can be attributed to many factors, including the dynamics of the camping industry and the lack of a reliable, recurring camping supply inventory.

Table 13.—Number of camping-related person-trips categorized by distance traveled, 1976[a]

Round-trip miles	All trips		Camping trips	
	Thousand	Percent	Thousand	Percent
200– 299	136,937	19.4	10,356	16.1
300– 399	129,499	18.4	11,402	17.8
400– 599	139,987	19.8	13,777	21.5
600– 999	117,301	16.6	8,720	13.6
1,000–1,999	79,750	11.3	7,882	12.3
2,000 and over	73,895	10.5	8,947	13.9
Outside U.S.	28,339	4.0	3,099	4.8
Total	705,708	100.0	64,183	100.0

[a]A person-trip results when one person takes one trip. Thus, a family of four taking a trip together would count as four person-trips.

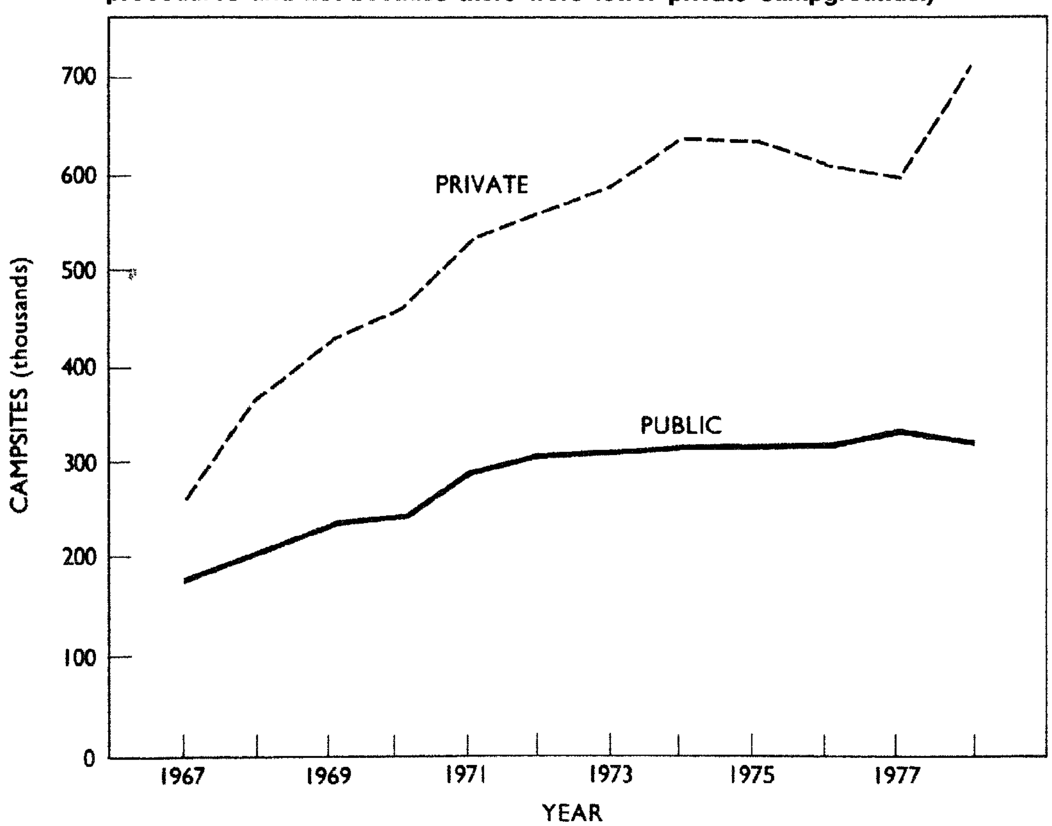
Source: U.S. Travel Data Center 1977:34, 103.

Table 14.—Developed campsites in the United States, 1967–1978, as listed in the Woodall directory

Year	Campsites			Annual change in total sites
	Public	Private	Total	
	Thousands			*Percent*
1967	177	267	444	
1968	205	373	578	+30.2
1969	230	403	633	+ 9.5
1970	247	442	689	+ 8.9
1971	286	515	801	+16.3
1972	306	562	868	+ 8.4
1973	306	584	890	+ 2.5
1974	321	644	965	+ 8.4
1975	322	643	965	0.0
1976	322	612	934	− 3.2
1977	333	600	933	− 0.1[a]
1978	311	717	1028	+10.2[a]

[a]Woodall management has indicated that the 1977 private sector inventory may have been low because of slightly different criteria used to identify campgrounds that should be listed.

Figure 5.—Public and private developed campsites in the United States. Woodall management has indicated that 1977 private campsite numbers may be low because of changes in campground inventory procedures and not because there were fewer private campgrounds.)



NACD inventory. One recent attempt to improve information of the Nation's supply of recreation resources and opportunities was made by the National Association of Conservation Districts (NACD).[2] Findings from this national survey indicated that in 1974 transient and vacation camping areas operated by the private sector contained a total of 886,544 RV sites and 538,168 tent sites.

Woodall Directory. Although the exact number of developed campsites is unavailable, a rough but useful estimate may be made from published campground directories. *Woodall's Campground Directory* is published annually and lists those campgrounds that have a minimum of 10 recreational vehicle (RV) sites, provide drinking water, and meet Woodall's standards for cleanliness. Woodall listings indicate that between 1967 and 1973 there was an increase of 119 percent (an average of 20 percent per year) in the number of private campsites nationally, and an increase of 73 percent (an average of 12 percent per year) in public campsites (Table 14, Figure 5). Between 1973 and 1978 there was an increase of 23 percent (an average of 5 percent per year) in the number of private campsites and an increase of 2 percent (less than 1 percent per year) in public campsites. These trends are graphically presented in Figure 5. Without question, the rate of growth on the supply side is lower now than in the late sixties and early seventies.

Rand McNally Directory. Another source of camping supply statistics is the Rand McNally Campground Guide. Like the Woodall statistics, the Rand McNally summaries show significant growth in campgrounds during the sixties and early seventies, followed by a relatively stable situation in both public and private sectors in the mid-seventies. Both Rand McNally and Woodall data show that between 1973 and 1978 the number of private campgrounds decreased by approximately 10 percent (Table 15). However, Rand McNally and Woodall disagree on the trend in public campground development. For the period from 1973 to 1978 Rand McNally data indicate that public campgrounds *increased* by more than 25 percent; however, Woodall statistics show that the number of public campgrounds *decreased* by more than 27 percent. It is not known which of these two sources more accurately describes the supply of campgrounds in the United States.

Geographic distribution of supply. The geographic distribution of U.S. campgrounds in 1973 and 1978 is shown in Table 16. Significant differences are seen in Woodall and Rand McNally data, especially in the number of campgrounds in the Western states. However, looking at each region as a percentage of the total U.S. supply (Table 17), one sees similarities in the Woodall and Rand McNally statistics, especially in the listing of private areas.

Number of campsites and campgrounds—public inventories

U.S. Forest Service. An indication of recent stability in the camping supply situation is seen in an analysis of developed U.S. Forest Service camping areas. Over the past 6 pears there have been only minor fluctuations in the capacity of such areas (Table 18). From 1972 to 1977 the annual change in Forest Service campground capacity was one percent or less.

National Park Service. Following decreases in 1974 and 1975, the estimated number of campsites operated by the National Park Service (NPS) increased modestly in 1976 (Table 19). The number of NPS campsites does not include those operated by concessionaires on National Park Service lands. (See also footnotes to Table 20.) The establishment of carrying capacity limits at selected National Park Service areas resulted in the elimination of some individual campsites.

U.S. Army Corps of Engineers. Camping areas managed by the Corps increased by 17 percent from 1974 to 1977 (Table 20), a growth rate almost twice that of Corps-managed day-use areas.

[2]National Association of Conservation Districts. 1977. Inventory of private recreation facilities, 1977. League City, Tex. The NACD inventory was administered individually by each state NACD organization and included both profit and nonprofit recreation operations of the private sector. Figures do not include Puerto Rico, Texas, or the Virgin Islands.

Table 15.—Percent change in campground numbers between 1973 and 1978, by census region and state (Rand McNally and Woodall directories)

Census region/state	Rand McNally		Woodall	
	Public	Private	Public	Private
NORTHEAST	+ 56.1	+ 0.4	− 8.3	−14.7
New England	+ 54.0	− 6.2	−23.5	−11.0
Connecticut	+ 44.4	+ 15.6	− 6.7	+20.0
Maine	+ 53.5	− 15.1	−38.9	−27.1
Massachusetts	+ 65.2	+ 8.4	+ 4.2	− 1.9
New Hampshire	+ 83.3	− 5.8	−36.7	− 2.4
Rhode Island	+125.0	− 11.1	+75.0	−20.0
Vermont	+ 25.6	− 7.5	−32.5	− 3.8
Middle Atlantic	+ 57.6	+ 5.6	+ 3.7	−17.2
New Jersey	+ 5.0	+ 14.5	0.0	− 3.4
New York	+ 63.4	+ 2.2	+ 7.4	−14.1
Pennsylvania	+ 62.8	+ 6.5	0.0	−24.0
NORTH CENTRAL	+ 34.5	+ 2.3	−19.4	− 6.0
East North Central	+ 33.8	+ 9.8	−17.5	− 0.4
Illinois	+ 60.2	− 3.6	− 9.6	− 5.1
Indiana	+ 67.7	+ 0.6	+16.4	−11.8
Michigan	+ 28.9	+ 26.5	−27.1	+33.7
Ohio	+ 70.5	+ 13.0	−10.0	− 9.5
Wisconsin	+ 6.0	+ 6.2	−15.6	− 8.3
West North Central	+ 35.1	− 9.2	−21.0	−14.1
Iowa	+ 5.4	− 24.6	−40.4	−30.8
Kansas	+156.3	− 19.7	−22.2	−24.7
Minnesota	+ 28.8	− 5.8	− 6.5	−12.2
Missouri	+ 46.1	− 9.4	+11.7	+ 6.0
Nebraska	+ 11.0	− 7.4	+11.0	−19.4
North Dakota	+ 13.7	− 10.5	−19.8	−28.1
South Dakota	+ 21.9	− 3.2	−50.0	−23.1
SOUTH	+ 42.1	− 11.1	−11.7	−12.1
South Atlantic	+ 54.8	− 3.0	− 9.0	−16.8
Delaware	+ 20.0	+ 28.6	0.0	−20.0
Florida	+ 74.0	+ 2.4	−24.4	−22.7
Georgia	+ 34.8	− 34.7	−31.8	−20.0
Maryland	+ 43.8	+ 8.0	−17.4	− 3.8
North Carolina	+ 60.7	− 14.3	+ 3.8	−10.1
South Carolina	+ 59.3	− 23.8	− 2.2	−22.7
Virginia	+ 71.4	+ 19.3	+11.1	− 9.9
West Virginia	+ 39.3	+ 41.0	+15.9	+ 8.5
SOUTH				
East South Central	+ 50.0	− 10.8	− 7.5	−22.7
Alabama	+ 69.8	− 19.1	−20.6	−44.9
Kentucky	+ 54.7	+ 14.7	0.0	− 8.6
Mississippi	+ 22.2	− 13.2	−11.9	−34.5
Tennessee	+ 55.4	− 18.1	− 6.8	− 9.6
West South Central	+ 29.4	− 26.6	−15.4	+ 2.8
Arkansas	+ 27.7	− 17.2	−42.6	+32.2
Louisiana	+ 82.6	− 25.0	−25.0	−48.4
Oklahoma	+ 19.6	− 22.8	−44.5	−25.4
Texas	+ 32.7	− 29.4	+34.0	+33.7
WEST	+ 12.7	− 26.3	−42.5	−12.5
Mountain	+ 14.7	− 28.9	−39.5	−11.3
Arizona	+ 37.8	− 34.6	+ 8.2	0.0
Colorado	+ 16.1	− 27.1	−20.8	− 8.9
Idaho	+ 9.6	− 27.9	−81.9	−30.8

Continued

Table 15.—Continued

Census region/state	Rand McNally		Woodall	
	Public	Private	Public	Private
Montana	+ 5.9	− 10.6	−26.4	−20.2
Nevada	+ 33.3	+ 6.4	−37.9	+ 6.0
New Mexico	+ 5.9	− 45.0	− 8.2	− 4.0
Utah	+ 18.2	− 39.8	−53.0	− 2.9
Wyoming	+ 9.2	− 33.1	−58.7	−28.1
Pacific	+ 10.9	− 23.8	−45.2	−13.6
Alaska	+ 22.5	+ 26.7	−29.9	−31.8
California	+ 11.5	− 30.5	−38.5	− 0.3
Hawaii	+ 63.2	−100.0	−30.5	0.0
Oregon	+ 3.9	− 28.3	−61.5	−33.9
Washington	+ 10.6	+ 1.9	−45.9	−18.6
UNITED STATES	+ 25.7	− 10.1	−27.8	−11.2

Table 16.—Number of campgrounds in each census region and state, 1973 and 1978 (Rand McNally and Woodall directories)

Census region/state	Rand McNally				Woodall			
	Public		Private		Public		Private	
	1973	1978	1973	1978	1973	1978	1973	1978
NORTHEAST	371	579	1,575	1,581	336	308	1,733	1,478
New England	161	248	692	649	149	114	692	616
Connecticut	18	26	45	52	15	14	50	60
Maine	43	66	252	214	36	22	266	194
Massachusetts	23	38	95	103	24	25	104	102
New Hampshire	30	55	189	178	30	19	167	163
Rhode Island	4	9	18	16	4	7	25	20
Vermont	43	54	93	86	40	27	80	77
Middle Atlantic	210	331	883	932	187	194	1,041	862
New Jersey	20	21	110	126	17	17	119	115
New York	112	183	405	414	95	102	468	402
Pennsylvania	78	127	368	392	75	75	454	345
NORTH CENTRAL	1,777	2,390	2,047	2,094	1,980	1,596	2,278	2,142
East North Central	820	1,097	1,241	1,362	898	741	1,354	1,348
Illinois	103	165	167	161	83	75	175	166
Indiana	65	109	174	175	67	78	211	186
Michigan	356	459	260	329	409	298	267	357
Ohio	78	133	254	287	70	63	316	286
Wisconsin	218	231	386	410	269	227	385	353
West North Central	957	1,293	806	732	1,082	855	924	794
Iowa	185	195	69	52	292	174	117	81
Kansas	103	264	66	53	180	140	73	55
Minnesota	233	300	344	324	170	159	319	280
Missouri	102	149	160	145	94	105	199	211
Nebraska	127	141	54	50	118	131	67	54
North Dakota	102	116	19	17	106	85	32	23
South Dakota	105	128	94	91	122	61	117	90
SOUTH	1,453	2,065	2,223	1,977	1,232	1,088	2,473	2,175
South Atlantic	498	771	1,246	1,209	399	363	1,366	1,137
Delaware	5	6	14	18	4	4	20	16
Florida	96	167	551	564	82	62	611	472
Georgia	112	151	150	98	85	58	130	104

Continued

Table 16.—Continued

Census region/state	Rand McNally				Woodall			
	Public		Private		Public		Private	
	1973	1978	1973	1978	1973	1978	1973	1978
Maryland	32	46	50	54	23	19	52	50
North Carolina	61	98	217	186	52	54	247	222
South Carolina	54	86	80	61	46	45	88	68
Virginia	77	132	145	173	63	70	171	154
West Virginia	61	85	39	55	44	51	47	51
East South Central	284	426	323	288	254	235	392	303
Alabama	43	73	68	55	34	27	107	59
Kentucky	86	133	68	78	87	87	81	74
Mississippi	63	77	38	33	59	52	58	38
Tennessee	92	143	149	122	74	69	146	132
West South Central	671	868	654	480	579	490	715	735
Arkansas	184	235	87	72	162	93	118	80
Louisiana	23	42	92	69	20	15	126	65
Oklahoma	189	226	57	44	191	106	67	50
Texas	275	365	418	295	206	276	404	540
WEST	3,894	4,387	2,422	1,784	2,913	1,676	2,706	2,369
Mountain	1,791	2,055	1,212	862	1,399	847	1,320	1,171
Arizona	172	237	269	176	85	92	343	343
Colorado	380	441	247	180	346	274	214	195
Idaho	293	321	140	101	259	47	159	110
Montana	286	303	160	143	235	173	198	158
Nevada	60	80	47	50	58	36	67	71
New Mexico	152	161	120	66	85	78	100	96
Utah	253	299	108	65	181	85	104	101
Wyoming	195	213	121	81	150	62	135	97
Pacific	2,103	2,332	1,210	922	1,514	829	1,386	1,198
Alaska	111	136	15	19	107	75	44	30
California	1,029	1,147	735	511	680	418	663	661
Hawaii	38	62	1	0	59	41	0	0
Oregon	538	559	251	180	426	164	298	197
Washington	387	428	208	212	242	131	381	310
UNITED STATES	7,495	9,421	8,267	7,436	6,461	4,668	9,190	8,164

Table 17.—Percentage of United States campgrounds in each census region, 1978 (Woodall and Rand McNally directories)

Census region	Woodall		Rand McNally	
	Public	Private	Public	Private
Northeast	7	18	6	21
North Central	34	26	25	28
South	23	27	22	27
West	36	29	47	24
U.S. total	100	100	100	100

Table 18.—Capacity of U.S. Forest Service developed camping areas, 1972–1977

Year	Capacity (PAOT)[a]	Annual change
		Percent
1972	425,144	—
1973	424,424	−0.2
1974	424,869	+0.1
1975	429,054	+1.0
1976	431,616	+0.6
1977	429,337	−0.5

[a]The Forest Service measures capacity in terms of the number of persons who can be accommodated at one time (PAOT) at a particular area. Includes both family- and group campgrounds.

Source: U.S. Forest Service, 1972-1977.

Table 19.—Number of National Park Service-operated campsites, 1967–1976[a]

Year	Number of areas reporting	Number of campsites	Annual change
			Percent
1967	90	28,526	+0.1
1968	88	28,426	−0.4
1969	85	27,061	−4.8
1970	87	27,648	+2.2
1971	86	27,700	+0.2
1972	88	27,568[b]	−0.5
1973	90	29,489	+7.0
1974	89	29,241	−0.8
1975	89	28,987	−0.9
1976	92	29,676	+2.4

[a]According to the National Park Service, the number of campsites is not exact and should be used only as an estimate. The combined total for types A and B campsites is used in this table. Type A campsites are located in campgrounds and include parking, grills, and picnic tables. Type B campsites are located in areas other than campgrounds and are generally of a more rustic character.

[b]An additional 2,073 sites were unidentified as to type and may have been type A or B.

Source: National Park Service, 1976, 1977.

Table 20.—Number of recreation areas managed by the Corps of Engineers, 1974–1977

Type of area	Number of areas				Percent change 1974–1977
	1974	1975	1976	1977	
Day-use areas	1,063	1,078	1,142	1,163	+ 9.4
Overnight areas	869	924	982	1,020	+17.4
Total	1,932	2,002	2,124	2,183	+13.0

Source: U.S. Army Corps of Engineers, 1975 and 1976-1977.

Campground size

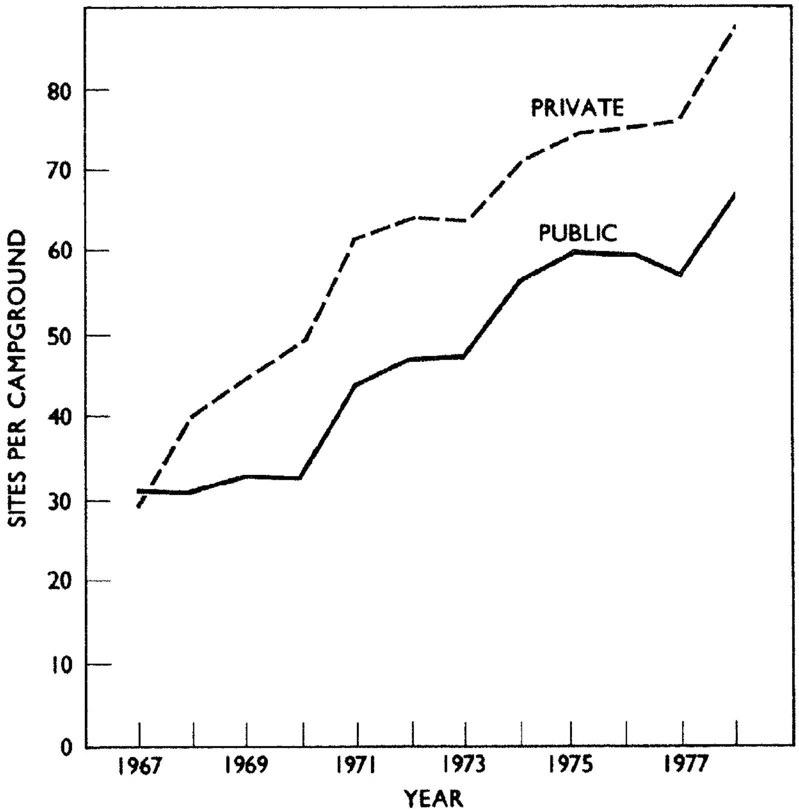
Woodall statistics indicate a trend toward larger campgrounds (Figure 6). In 1978 listed private campgrounds averaged 88 sites—a 214 percent increase over the 1967 average of 28 sites. In a study of private campgrounds in the Northeastern states, the NEM-42 Technical Research Committee found clear evidence that campgrounds with fewer than 50 sites were much less likely to be successful than larger areas (Bevins et al. 1974). Increase in the size of individual areas is additional evidence that the campground industry is maturing.

Public campgrounds have also shown a general trend toward increased size. The average size of public campgrounds has more than doubled, from 31 sites in 1967 to 67 in 1978.

Onsite conveniences

Woodall statistics indicate that in 1977 three-fourths or more of all individual private

Figure 6.—Average number of campsites per campground listed by Woodall Publishing Co., 1967-1978.



campsites had electricity and water (Table 21). Less than one-fourth of the public sites had electricity, and only one-tenth had water at each individual site.

The percentage of total public campgrounds with onsite hookups remained the same from 1976 to 1977. Generally, public campgrounds stress the aesthetic amenities of the natural environment and place little emphasis on convenience facilities at each individual site. The provision of onsite conveniences has unofficially been considered to be a responsibility of the private sector. Between 1976 and 1977, the private sector made only modest increases in the number of onsite conveniences.

Table 21.—Percentage of campsites with onsite conveniences in public and private campgrounds, 1976 and 1977

Type of convenience	Public sector		Private sector	
	1976	1977	1976	1977
Electricity	23	23	81	82
Water	10	10	73	75
Sewer	3	3	37	39

Source: Woodall, 1978.

The latest Woodall figures show that in 1978, 84 percent of private campsites listed by Woodall had at least one hookup. This percentage is substantially higher than the 24 percent of public campsites having at least one hookup.

Camping fees

Camping fees are the basis for recovery of the costs of land acquisition, facility development, and daily operations. Although most private campground owners depend entirely on site rentals and profit centers to meet these expenses, the public sector frequently recovers such costs through a combination of fees and tax dollars.

Basic fees at public and private areas—Northeast. Analysis of Rand McNally northeastern campground listings indicates that daily fees charged for trailer sites at privately operated camping areas were 43 percent higher than fees charged for similar sites at public campgrounds (Tables 22 and 23). The basic fee at private campgrounds averaged

Table 22.—Public campsites fees in the Northeast, 1973 and 1977 (same campgrounds both years)

State	Tent sites: Average campsite fee[a] 1973	Tent sites: Average campsite fee[a] 1977	Tent sites: Number of campgrounds	Trailer sites: Average campsite fee[a] 1973	Trailer sites: Average campsite fee[a] 1977	Trailer sites: Number of camp-grounds
Connecticut	$2.12	$2.12	17	$2.13	$2.13	16
Delaware	3.00	4.00	3	3.00	4.00	3
Maine	2.70	3.02	23	3.09	3.50	16
Maryland	2.53	3.00	20	2.53	3.00	20
Massachusetts	3.04	3.78	23	3.04	3.78	23
New Hampshire	2.05	2.79	29	2.07	2.87	23
New Jersey	2.11	4.17	18	2.18	4.25	17
New York	2.50	2.98	100	2.57	3.07	91
Pennsylvania	2.31	2.53	54	2.31	2.53	54
Rhode Island	2.00	2.75	4	2.25	3.00	4
Vermont	3.20	3.61	41	3.26	3.71	36
West Virginia	1.93	2.51	36	2.09	2.74	35
Regional average	2.46	3.11	31	2.54	3.22	28

Source: Rand McNally 1973, 1977.
[a]Campsite fees represent averages weighted by number of campgrounds.

Table 23.—Private campsite fees in the Northeast, 1973 and 1977 (same campgrounds both years)

State	Tent sites: Average campsite fee[a] 1973	Tent sites: Average campsite fee[a] 1977	Tent sites: Number of campgrounds	Trailer sites: Average campsite fee[a] 1973	Trailer sites: Average campsite fee[a] 1977	Trailer sites: Number of camp-grounds
Connecticut	$3.45	$4.55	32	$3.54	$4.70	36
Delaware	3.36	4.64	11	3.65	5.08	13
Maine	3.40	4.29	168	3.61	4.72	171
Maryland	3.32	4.36	37	3.41	4.65	37
Massachusetts	3.55	4.57	76	3.71	4.95	79
New Hampshire	3.30	4.27	128	3.50	4.62	136
New Jersey	3.57	4.98	90	3.75	5.25	95
New York	3.09	4.01	295	3.27	4.27	315
Pennsylvania	2.98	3.95	253	3.05	4.13	266
Rhode Island	3.30	3.46	10	4.45	4.86	14
Vermont	3.13	3.84	67	3.28	4.09	69
West Virginia	2.79	3.59	27	3.16	3.92	27
Regional average	3.27	4.21	100	3.53	4.60	105

Source: Rand McNally 1973, 1977.
[a]Campsite fees represent averages weighted by number of campgrounds.

$4.60 in 1977, compared with $3.22 at public campgrounds.

Fee changes between 1973 and 1977—Northeast. Further analysis of Rand McNally northeastern states campground listings indicates that while both public and private areas raised fees between 1973 and 1977, the increase was slightly greater at private areas —30 percent as compared with 27 percent. Disaggregation of the data shows a wide variation between states in price increases in the public sector during this 5-year period (Figure 7). Looking at the extremes, there was no price increase at Connecticut's public campgrounds, whereas there was a 95 percent increase at New Jersey's. Private campground fees in Vermont increased only 25 percent, while private campgrounds in New Jersey raised prices 40 percent.

Willingness to pay. The public's attitude toward fees was the subject of a national household survey conducted for BOR in 1975. This survey assessed public willingness to pay for several outdoor recreation activities, including camping (Economics Research Associates 1976). Respondents participating in this survey generally felt that fees at public areas should be lower than those charged at private recreation areas (Figure 8).

When asked to compare the fee paid on their last camping trip with the fee they would be willing to pay, campers "voted" for a larger increase at developed public campgrounds than at private campgrounds (Figure 9). Survey findings show that campers generally support fee increases at public areas of approximately $0.70 for tent camping and $0.66 for RV camping. Acceptable increases in camping fees at private campgrounds were approximately half those for public campgrounds—probably because current fees at private campgrounds are higher than those at public areas.

Another indication that campers may be willing to pay higher public camping fees is

PERCENTAGE FEE INCREASES AT CAMPGROUNDS
(Same areas 1973 and 1977)

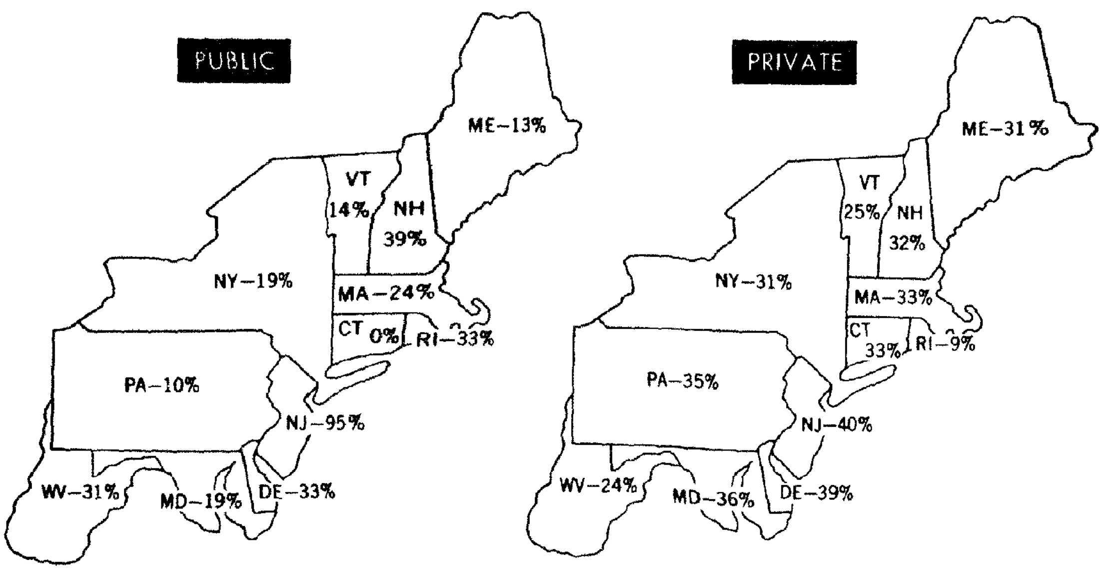
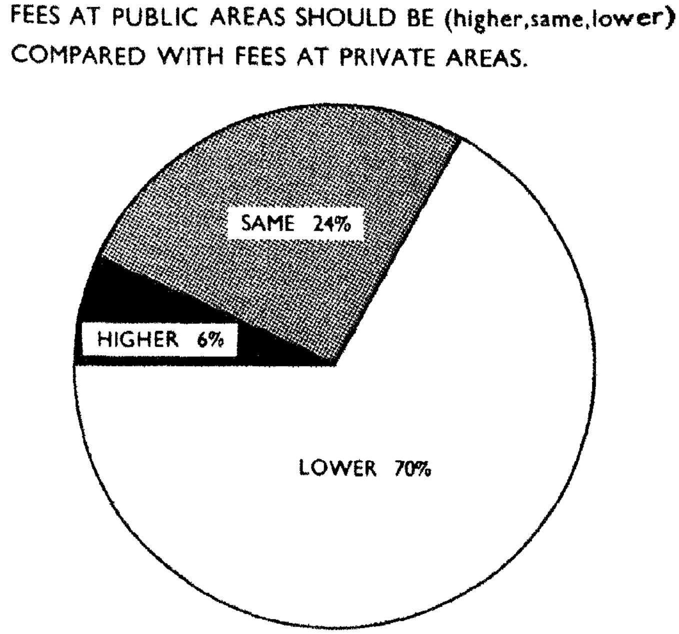


Figure 7.—Percentage change in campsite fees at campgrounds in the Northeast listed by Rand McNally, between 1973 and 1977.

Figure 8.—Responses to the statement "Fees at public areas should be (higher) (the same) (lower) compared to fees at private areas." Source: Economics Research Associates 1976.



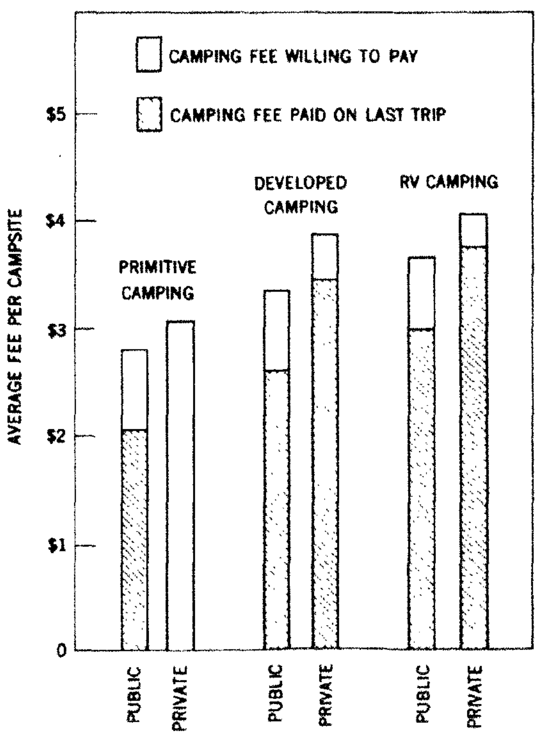


Figure 9.—Public willingness to pay for camping at public and private areas, 1975. Source: Economics Research Associates 1976.

noted in a 1975 Delaware state park camper survey (Brokaw and Cole 1977). Campers participating in this study indicated a willingness to pay 15 percent more than the actual fees being charged in 1975.

Campground development costs in 1977

In 1971 the NEM-42 Technical Research Committee found that the unit cost of campground development decreases somewhat in proportion to total campground size (Bevins et al. 1974:14). The 1971 NEM-42 campground development costs were projected to 1977 levels using the U.S. Department of Commerce's Construction Cost Index. These projected figures indicate that in 1977 small-scale campgrounds (31 sites) would have development costs of $3,000 per campsite (see

Table 24). Large campgrounds (263 sites) would have unit development costs of one-half this amount ($1,500 per site). The average unit development cost for all sizes of campgrounds in 1977 was estimated to be $2,100 per unit.

Generally, the most important factor in determining capital requirements for campground development is level of development. One measure is the number of RV service hookups provided at each campsite. Statistics compiled by the Woodall Publishing Company show that the cost of developing campsites with three-way hookups (electricity, water, and sewer) is almost triple the cost for sites with no hookups (Table 24). The estimated cost for all types of sites, according to Woodall, is $1,800 per site.

In 1977 Oertle compared campground development costs for the six major franchise campground chains (Table 24). Costs for franchise campgrounds ranged from $1,800 to $3,000 per campsite, with an average of $2,300.

The U.S. Soil Conservation Service (SCS) has also prepared capital cost estimates for campground development. Their data indicate that in 1977 persons planning to construct developed camping areas should expect to pay between $2,500 and $4,500 per campsite (Table 24).

Table 24.—Estimated campground development costs per campsite, 1977[a]

Source of estimate	Type of campground	Estimated cost per campsite
Bevins et al. 1974:14[b]	Average number of sites per campground	
	31	$3,000
	72	2,200
	108	2,000
	146	1,800
	263	1,500
	(Unweighted average)	($2,100)
Fuller 1972:2-3[b]	Onsite conveniences	
	3 hookups (electricity, water, sewer)	$2,600
	2 hookups (electricity, water)	2,100
	1 hookup (electricity)	1,700
	No hookups	900
	(Unweighted average)	($1,800)
Oertle 1977:38	Franchise campgrounds	
	Ramada	$3,000
	Trav-L-Parks	2,500
	Jellystone	2,400
	Kamp Dakota	2,000
	United Safari	2,000
	Kampgrounds of America	1,800
	(Unweighted average)	($2,300)
U.S. Soil Conservation Service 1977:8-11	All types	$2,500–$4,500

[a]Estimated costs per campsite include all land, structures, and amenities associated with campground development.

[b]The 1971 campsite development costs published in this report have been updated to reflect estimated 1977 costs by using the Construction Cost Index published annually by the U.S. Department of Commerce in Survey of Current Business.

THE CAMPING INDUSTRY— PUBLIC-PRIVATE INTERFACE

In the early years, campground development in the United States was strictly a public sector undertaking. As the desire to participate in outdoor recreation increased, the public sector responded admirably by providing spacious, rustic, wooded sites where the outdoors might be enjoyed.

Charging fees sufficient to cover development and operating costs in publicly operated areas was not a prime concern in the early years. As recently as 1960, fees in Federal or state parks were in the $1 to $2 range (Bond et al. 1973).

In the early 1960's, the advent of the recreational vehicle signaled a new era in campground development. More campers started looking for conveniences and were less concerned with spaciousness. Private enterprise saw a business opportunity in providing convenience camping and assumed a major role in developing this newly created market.

Generally, public campground administrators agree that convenience sites and intensive development should be left to the private sector. Most administrators feel a greater obligation to develop *parks* than campgrounds (Bond et al. 1973:35).

However, public campground administrators now find themselves in a dilemma. Many recreational vehicles have been sold since the early 1960's, and few have been discarded. On the one hand, some of these RV owners prefer the spacious wooded sites in National Parks and Forests to the smaller and less wooded site typical of privately operated campgrounds. However, in addition to a spacious site, they seek the convenience of onsite electricity and water. On the other hand, public administrators feel pressures from private campground operators and backcountry campers seeking a de-emphasis of convenience-type facilities and a return to the relatively primitive accommodations at public areas (Bond et al. 1973:36).

The identified role and problems of the private sector

Since the early 1960's, several commissions and task forces have been organized to define the private sector's role in supplying outdoor recreation opportunities and the problems in fulfilling this role.

The U.S. Outdoor Recreation Resources Review Commission (ORRRC)—1962. The ORRR Commission prepared the first major report to specifically identify the proper role of the private sector. In order to implement a national outdoor recreation policy "which would make accessible to all American people the [needed] quantity and quality of outdoor recreation," it is necessary that ". . . individual initiative and private enterprise should continue to be the most important force in outdoor recreation . . . [government] should stimulate desirable commercial development . . . where demand is sufficient to return a profit (U.S. Outdoor Recreation Resources Review Commission 1962:6).

The ORRR Commission concluded that:

> Camping is becoming a significant part of vacation travel in the United States. For the most part, campers have depended upon Federal and State Parks and Forests . . . Yet, it is probable that farm and forest lands could be developed and managed so as to provide camping opportunities in areas where demand exceeds the capacity of public facilities, (U.S. Outdoor Recreation Resources Review Commission 1962: 161).

Federal Work Group H Report—1972. In 1972 a team of 20 Federal experts (Group H) was organized by BOR to identify problems and alternatives relative to the private sector's involvement in outdoor recreation. In general, the Work Group agreed:

> The public sector should encourage and assist the private sector in the provision of outdoor recreation opportunities, programs, and services . . . existing problems that limit the effectiveness of the private sector in taking a greater role in the provision of recreation opportunities need to be identified and solved.[1]

[1]Federal Work Group H. 1972. A report on private sector contribution to recreation. Unpublished preliminary report.

The Work Group identified several problems caused directly by public campground development and operational policy decisions:

1) Economic success of private recreation enterprises is sometimes jeopardized by low-priced competition from public facilities.
2) The interstate sign program greatly favors public facilities.
3) The public sector's promotional and information programs tend to overshadow the private sector's efforts (See footnote 3, p. 23.)

Several alternative solutions to these problems were identified. Two of these solutions related to a needed change in public policy:

1) Public policy should increase complementary and reduce competitive relationships between the private and the public sectors.
2) The public sector should not provide services that can be more efficiently provided by the private sector.

BOR Task Force V—1977. Public Law 88-29 directs the Secretary of the Interior to formulate a national outdoor recreation plan that shall

> Identify critical outdoor recreation problems, recommend solutions, and recommend desirable actions to be taken at each level of government and by private interests.

The first "nationwide plan" was published in 1973. Although many issues were addressed, treatment of private-sector issues was, at best, sketchy. Recognizing that the PL 88-29 directive relating to private interests was not addressed in the 1973 plan, BOR took corrective action in the development of the 1978 Plan. In 1977 BOR organized a task force of university and Forest Service researchers with the express mission to:

> Develop a better understanding of the nature and capabilities of the private sector and to determine what role the federal government has in stimulating and assisting the private sector in providing outdoor recreation opportunity.[4]

In assessing the public-private interface, Dr. Clare Gunn, a member of the Task Force, stated the situation well:

> Some attention to the symbiotic and synergistic relationship [between recreation-conservation-and tourism] is now necessary on the part of both government and private enterprise . . . both business and public agency inputs are equally essential in the overall phenomenon . . . It is the public—not anti-social and money mad entrepreneurs—that demands commercial services and products. (See footnote 4.)

In an effort to identify issues of greatest concern to the private sector, a joint meeting was staged in July 1977 between Task Force members and national leaders and representatives of the private recreation industry. Discussions of specific issues took place in a workshop environment. Participants in one of the workshops concluded:

> The public and private sectors can combine to provide the user with a complete recreation experience . . . however, public recreation developments can be very damaging to the private sector when they provide unfair competition.[5]

A final report of Task Force V will be published by BOR as a resource document for the 1978 Nationwide Outdoor Recreation Plan.

National Tourism Policy Study—1977. On June 24, 1974 the U.S. Congress authorized the Senate Commerce Committee to conduct a National Tourism Policy Study (U.S. Senate Resolution 347). The results of this study, which contains extensive information from both public and private sectors of the travel and tourism industry, were published in April 1978 (U.S. Senate 1978).

In the course of this study, a series of seven meetings was held in Washington with representatives of 143 different recreation or tourism organizations. Three issues related to the U.S. camping industry emerged as most critical: (1) the need for research; (2) the need for coordinated federal and private tourism promotion; and (3) the need for raising low federal recreation fees (Table 25).

In assessing specific needs for Federal program changes, National Tourism Policy Study participants stated that:

[4]Honore, W. H., L. Askham, M. Bevins, K. Cordell, A. Epperson, R. Espeseth, C. Gunn, W. La Page, and D. Schunk. 1977. The Federal role in the private sector of outdoor recreation. Preliminary draft. U.S. Bureau of Outdoor Recreation, Washington, D.C.

[5]Financial and Technical Assistance Workshop (sponsored by U.S. Bureau of Outdoor Recreation). July 1977. Unpublished proceedings. Washington, D.C.

Tourism facilities owned and operated by the Federal Government should be managed in ways that avoid unfair competition with private sector facilities.

Regulatory restrictions should be equally applied to public sector and private sector facilities. Public sector facilities should also be required to make payments in lieu of tax in order to equalize the tax burden carried by public and private sector facilities. Federal campgrounds, for example, frequently are required to meet less strict development requirements and do not have the tax burden carried by privately owned campgrounds.

User charges for Federal recreational and tourism facilities should be increased where these are clearly shown to be engendering unfair competition with private sector facilities of equal quality and design on adjacent or nearby property.

Public investment in parklands and recreational lands often has a stimulatory effect on private sector investment in the same area. However, greater emphasis should be put on maintaining public parklands through user charges, rather than through general tax revenues where a subsidy of public sector facilities is causing unfair competition with the private sector (U.S. Senate 1977:53).

Public development impact assessment

The Heritage Conservation and Recreation Service (HCRS, formerly BOR) has taken the lead in attempting to improve relations with the private sector. It has recognized that if the needs of the camping public are to be met, a complementary development policy must be established between public and private sectors. HCRS now requires a formal site-by-site impact analysis (financial impact of public recreational development on private enterprise) before Federal Land and Water Conservation funds can be used by any public agency (U.S. Bureau of Outdoor Recreation 1973).

To properly prepare an impact assessment, basic information is needed on current occupancy rates and levels of satisfaction at existing public and private campgrounds. Such information does not exist, at least not in readily usable form for a broad geographic area.

The private campground sector is taking the initiative to fill this data void through the development of two national data series—one measuring campground occupancy and the other, camper satisfaction.

National Campground Occupancy Index. On November 14, 1977, the Board of Directors of the National Campground Owners Association (NCOA) voted to coordinate a reporting process of occupancy levels with a nationwide sample of private campgrounds. In 1978 selected campgrounds reported their occupancy on a weekly basis (see Appendix, p. 36). From these records a "National Campground Occupancy Index" was compiled and published weekly throughout the season for four identified regions of the United States (Northeast, North Central, South, and West). The devel-

Table 25.—Importance of public/private relationship policy issues, as rated by national panel of private-sector tourism/recreation representatives, 1977 (in percent of panel members assigning each rating)

Policy	Rating				
	Important	Somewhat important	Not important	No opinion	Total
Improve coordination with private sector to develop useful tourism *research* data	63	30	5	2	100
Coordinate Federal and private sector site-specific *tourism promotional programs* to expand local tourism markets rather than compete for individual market shares	58	17	6	19	100
Reduce negative impacts of *low federal recreation fees* on nearby private sector operations	33	26	25	16	100

Source: U.S. Senate 1977.

opment and maintenance of a nationwide campground occupancy monitoring system is both feasible and highly desirable, based on the quality of data reported and the industry-wide enthusiasm for the plan. A final selection of 94 campgrounds was made from the 117 volunteers contacted in the Spring of 1978, providing a sample that appeared to be representative of the nation's better-managed campgrounds. Initial selections were made from owners attending state association meetings and from national directory listings. Unrepresentative campgrounds, such as those having more than 50 percent of their capacities rented on a season-long basis, were eliminated. During the 14-week test period, the average response from the sample of campgrounds was 85 percent; the highest response (93 percent) occurred in the first week of July. This level of response, if it can be sustained, is more than adequate to provide a reliable data reporting system. (A minimum of 75 percent was the target.)

Just as the high rate of response confirms the feasibility of maintaining a monitoring system, the numerous requests received for detailed information and the voluntary financial sponsorship by the campground publishing industry attest to the need for this type of data.

The adequacy of the occupancy monitoring data can only be inferred, since there are no standards with which to compare our findings. In general, the occupancy figures appear to be reasonable for each region, with the possible exception of the West, which averaged the highest season-long level of attendance (Table 26).

The regional differences in season-long occupancy trends reflect expected differences in regional camping behavior (Figures 10 to 14). For example, the spread between weekday and weekend occupancy is narrowest in the West, where greater travel distances should produce a lower proportion of weekend camping. Similarly, the August slump in camping activity, which is universal, is least pronounced in the West. The sustained, season-long increase in northeastern campground occupancy probably reflects the generally easier access, comparative abundance, and variety of tourist attractions that characterize this smallest of the four regions.

Table 26.—Percent occupancy at sampled campgrounds, Memorial Day to Labor Day, 1978

Region	Average weekday occupancy	Weekday low	Weekday high	Average weekend occupancy	Weekend low	Weekend high	Total occupancy	Long-term rentals
Northeast	58	36	72	77	48	96	63	23
North Central	43	35	54	61	44	80	49	9
South	49	34	64	60	46	83	52	11
West	67	47	77	71	51	80	68	4
Total United States	54	39	66	68	47	85	58	14

Figure 10.—Seasonal trend in campground occupancy for Northeastern Region, May 29 to September 3, 1978.

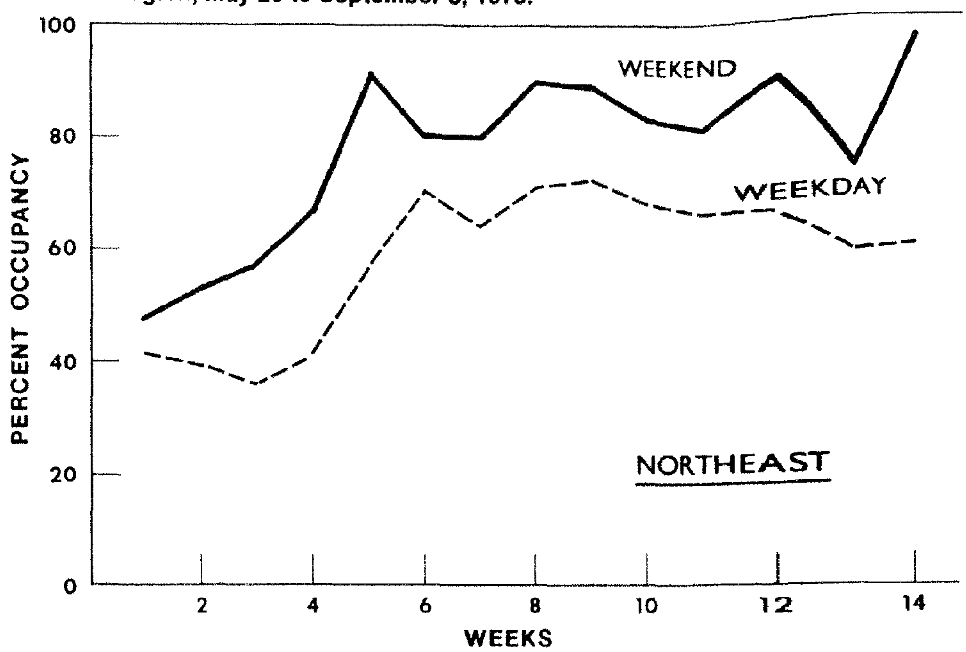


Figure 11.—Seasonal trend in campground occupancy for North-Central Region, May 29 to September 3, 1978.

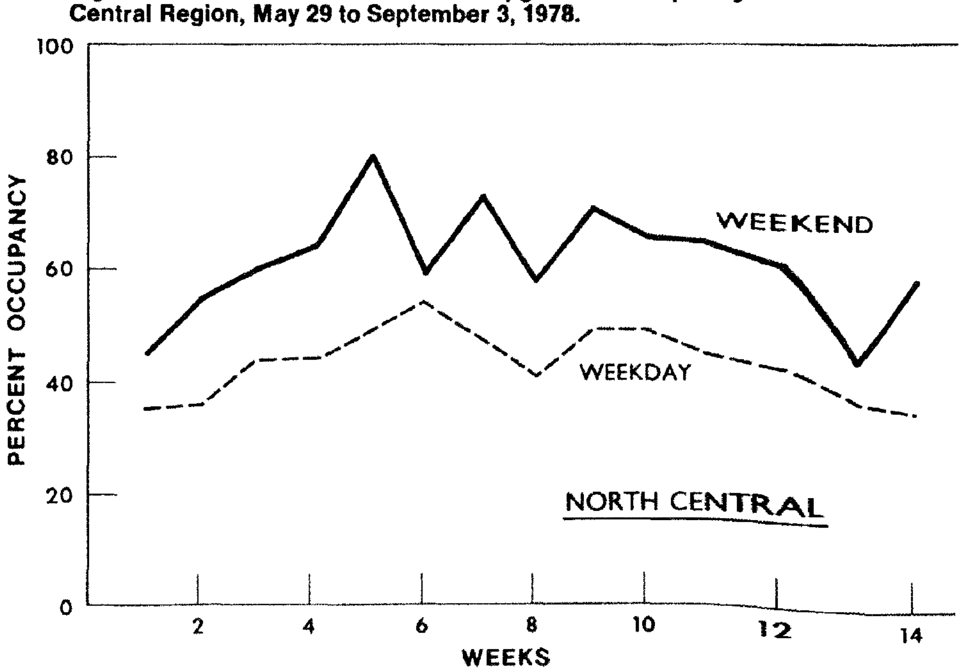


Figure 12.—Seasonal trend in campground occupancy for Southern Region, May 29 to September 3, 1978.

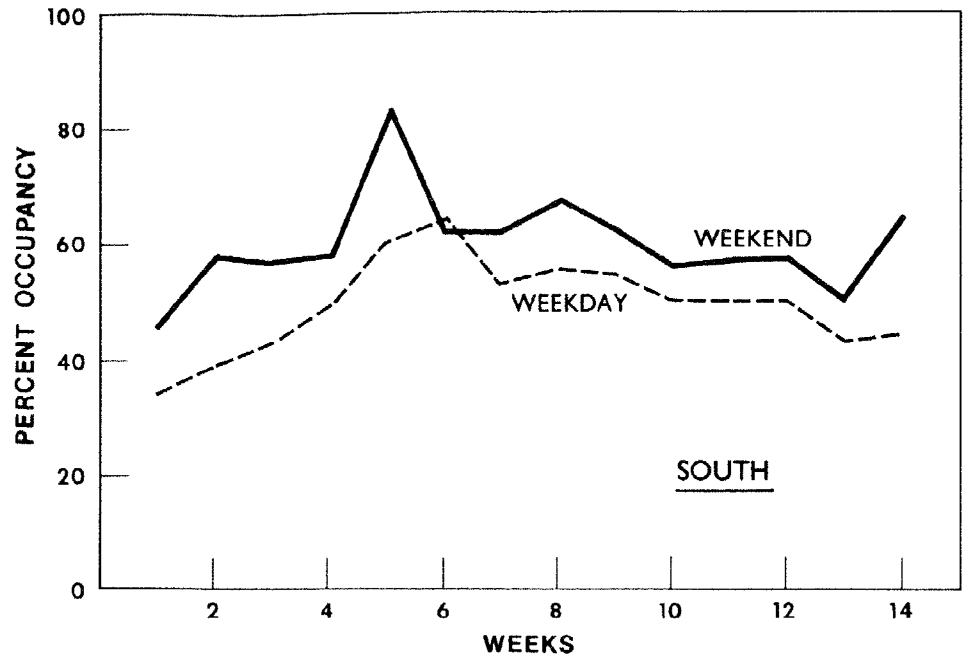


Figure 13.—Seasonal trend in campground occupancy for Western Region, May 29 to September 3, 1978.

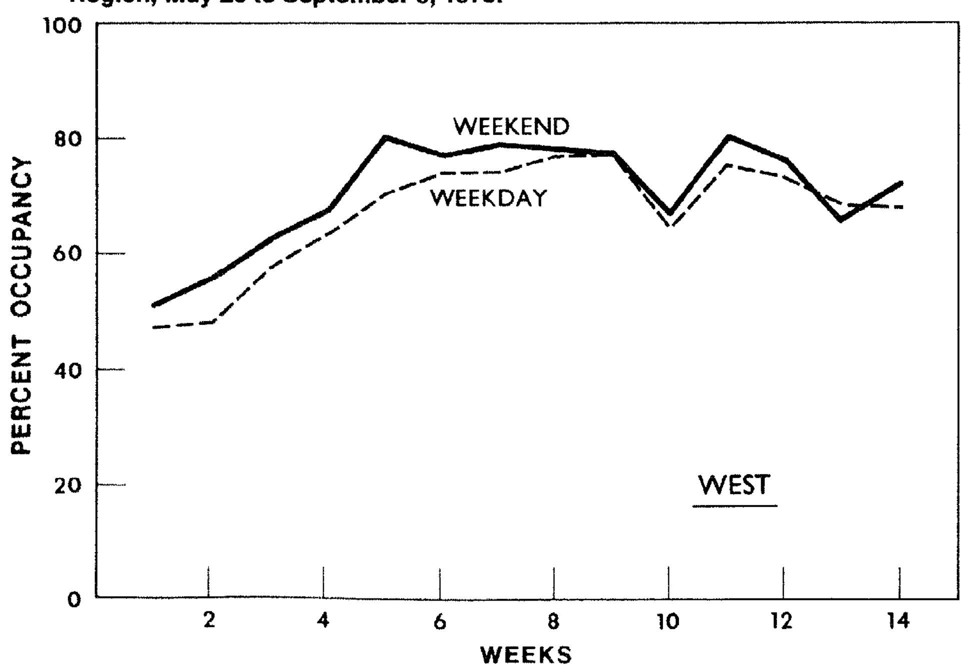
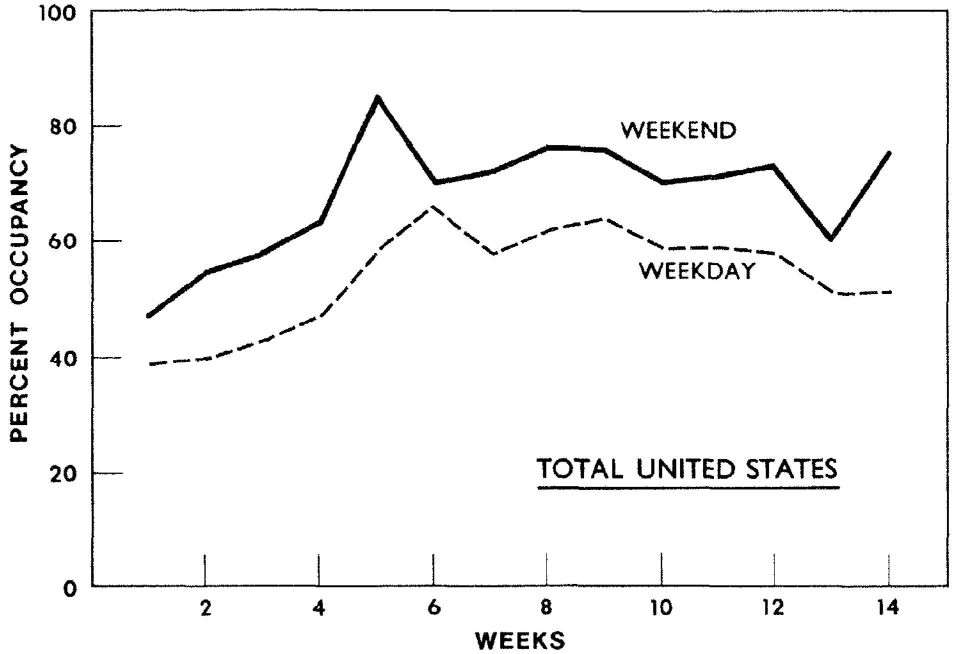


Figure 14.—Seasonal trend in campground occupancy for all regions, May 29 to September 3, 1978.



The data generated by the occupancy index network of campgrounds for national and regional monitoring purposes appear adequate. However, this information is currently useless for statewide purposes because of the small sample size. Five states were not represented in the Index at all, and 16 others had only one reporting campground. Only 14 states had more than two reporting campgrounds. Because statewide data are critical to the industry, and because such data can be aggregated to produce both regional and national statistics, it seems advisable to expand the network of reporting campgrounds. This published index fills a void and should be of immeasurable value in the development of impact statements by the public sector.

National Camper Satisfaction Index. The National Campground Owners Association similarly endorsed the development of the "National Camper Satisfaction Index." The national index includes 14 elements, several of which will be most useful to public resource managers in determining whether or not camper needs are being met by the private sector. In 1978 campers visiting any one of a nationwide network of campgrounds were asked to evaluate their camping experience (see Appendix, p. 37). Camper evaluations were summarized both nationally and regionally for the four areas identified previously. The data generated by the satisfaction monitor showed that commercial campgrounds were fully as satisfying to campers as the two state park campground systems used for comparison purposes (Table 27). The report-card evaluation approach works very well and produces high-quality data, with many campers going beyond the assigned grading system to indicate their true feelings (e.g., A++ or C−). There is an unexplained difference in response rates, however, between public and private campgrounds. The former frequently return upward of 50 percent of the report cards, while the best response rate from any of the commercial campgrounds has been only 36 percent.

Although we promptly reported the satis-

Table 27.—Ratings on the "Report Card" camper satisfaction survey conducted in 1978 at 122 public and private campgrounds

Ratings on:	State Park system A	State Park system B	Total public	Commercial campgrounds	Total public and commercial
First impression	6.2	7.0	6.9	6.5	6.5
Cleanliness of campsites	5.9	7.3	7.0	7.0	7.0
Cleanliness of restrooms	3.6	6.6	6.0	6.4	6.3
Privacy of campsites	5.9	6.6	6.4	5.8	6.0
Good size of campsites	6.8	7.2	7.1	6.3	6.4
Good choice of campsites	5.4	6.8	6.5	6.3	6.3
Availability of firewood	5.2	5.8	5.7	5.9	5.8
Availability of supplies	4.8	5.5	5.3	6.3	6.1
Recreation opportunities	5.7	6.0	5.9	6.3	6.2
Ease of check-in (speed)	5.8	7.1	6.8	7.0	6.9
Safety and security	5.7	7.0	6.8	6.7	6.7
Good rules/regulations	5.8	7.0	6.8	6.7	6.7
Helpfulness of employees	6.6	7.3	7.1	7.1	7.1
Recommendation of campground	6.3	7.3	7.1	6.8	6.9
Overall voting	5.7	6.7	6.5	6.5	6.5
Number of respondents	157	617	774	3,045	3,819
Number of campgrounds	4	11	15	107	122

Key
8 A Excellent
6 B Better than average
4 C Average
2 D Below average
0 E Poor

faction results to every participant, it is obvious that this type of data should be collected on a local basis and on a vastly larger scale than in this simple monitoring project. It therefore seems appropriate for NCOA to encourage individual campgrounds and state associations to adopt and use such a program, rather than to continue to monitor satisfaction on such a limited basis.

CAMPING IN 1985

To gain a perspective on camping in the future, an opinion survey of camping industry leaders was undertaken. During the Fall of 1977, 12 informed representatives from the camping industry were asked to respond to a set of questions relating to their impressions of what camping would be like in 1985. Camping industry leaders participating in this survey included a balanced representation from public and private sectors, organized user groups, publishers, and consultants. Results of this survey are summarized below, and response frequencies for all questions appear in the Appendix (p. 38). The following camping patterns were seen as emerging between 1977 and 1985:

1) The total number of campers will increase.
2) The percentage of all campers who are retirees will increase.
3) Future campers will seek more convenience and a greater choice of recreational activity (Table 28).
4) Interest in swimming will be strong, and a swimming pool will be favored over a natural body of water.
5) Camping vacations will be longer; however, fewer campgrounds will be visited on each trip.
6) Camping at privately operated areas and in publicly managed backcountry will increase, whereas the level of camping in publicly developed areas will remain stable.

Evaluating supply, respondents foresaw the following situation in 1985:

1) An increase in the number of developed sites in both public and private sectors. (However, one-fourth of the respondents predicted a decrease in National Forest sites, and one-third predicted a decrease in National Park sites.)
2) Daily camping fees in 1985 at private areas with a swimming pool and two-way hookup (electricity and water) will range from $10 to $15, averaging about $12. Fees at public areas with similar offerings will average $9 per day.
3) Midsummer occupancy rates at campgrounds in:
   —National Parks will average 96 percent.
   —National Forests will average 82 percent.
   —Private franchise areas will average 83 percent.

Table 28.—Number of respondents who predicted certain characteristics of campers in 1985; survey of 12 leaders in the camping industry, 1977

Camper characteristic	Demand for facility or program will		
	Increase	Remain the same	Decrease
Want convenience and service	7	5	0
Want unorganized recreation at the campground	7	4	1
Use some type of RV	7	3	2
Want swimming pool	6	6	0
Want organized recreation at the campground	5	6	1
Want natural water swimming	4	3	5
Want an environmental education program	2	8	2

—Private nonfranchised areas will average 76 percent.

Camping industry leaders expect the following campground management policies to be implemented by 1985:

A. *Public campground policies to expect in 1985:*
   1) Slower rate of *new* campground development, with continued expansion of *existing* campgrounds at the current rate.
   2) Construction of campgrounds closer to population centers.
   3) Increased separation of RV sites from tent sites within the same campground.
   4) Greater reliance on privately operated concessionaire campgrounds.
   5) More environmental education programs at campgrounds.

B. *Private campground policies to expect in 1985:*
   1) Development of new campgrounds at a *slower rate* and expansion of existing campgrounds at the same or at an increased rate.
   2) More full-season campsite rentals.
   3) More onsite RV rentals.
   4) Increased condominium campsite sales.
   5) Greater provision of organized social and recreation programs.
   6) Off-season equipment storage at the campground.

SUMMARY OF MAJOR FINDINGS

1) Demand for developed camping is increasing at a rate slightly greater than that of general population growth. The total number of campers appears to be increasing by about 1 to 2 percent per year.

2) The national supply of developed public campsites has been relatively stable over the past 5 years. Although the U.S. Army Corps of Engineers has recently developed more camping areas, the U.S. Forest Service and the U.S. National Park Service have made no significant campsite additions to their respective systems.

3) The rate of growth in the private campground sector has decreased considerably compared with growth in the 1960's. However, private-sector management and marketing techniques have become more sophisticated. Small, minimal facility campgrounds are being replaced by larger convenience-oriented areas.

4) Private campground owners continue to feel that the public sector is competing unfairly in furnishing developed camping areas. Low public camping fees and provision of convenience facilities are cited as contributing factors.

5) Fee increases at public campgrounds continue to be lower than those at privately operated campgrounds.

6) Campers have expressed a willingness to pay higher fees at both public and private campgrounds.

7) The cost of private campground development averaged more than $2,000 per site in 1977—just under $250,000 for a 100-site campground.

8) Recreational vehicles continue to be the most popular camping shelter at developed campgrounds. RV campers tend to participate more frequently than tent campers.

9) At the time this study was conducted, most campers did not appear to be affected by the energy situation. Despite fuel price increases, campers had not reduced camping-related travel.

10) There is a pressing need to improve coordination among the public and private camping suppliers if the diverse needs of the camping public are to be met.

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APPENDIX

Disaggregation of travel regions used by the U.S. Travel Data Center

1. New England
   - Connecticut
   - Maine
   - Massachusetts
   - New Hampshire
   - Rhode Island
   - Vermont
2. Eastern Gateway
   - New Jersey
   - New York
3. G. Washington Country
   - Delaware
   - District of Columbia
   - Maryland
   - Pennsylvania
   - Virginia
   - West Virginia
4. South
   - Alabama
   - Arkansas
   - Florida
   - Georgia
   - Kentucky
   - Louisiana
   - Mississippi
   - North Carolina
   - South Carolina
   - Tennessee
5. Great Lakes Country
   - Illinois
   - Indiana
   - Iowa
   - Michigan
   - Minnesota
   - Ohio
   - Wisconsin
6. Mountain West
   - Colorado
   - Montana
   - Nebraska
   - North Dakota
   - South Dakota
   - Utah
   - Wyoming
7. Frontier West
   - Arizona
   - Kansas
   - Missouri
   - New Mexico
   - Oklahoma
   - Texas
8. Far West and Hawaii
   - Alaska
   - California
   - Idaho
   - Nevada
   - Oregon
   - Washington
   - Hawaii

National Campground Occupancy Survey

NCOA Campground Occupancy Index
P.O. Box 640
Durham, NH 03824

Campground No. _____ Total developed sites: __________

Sites rented for the season: ________

Week beginning: __________

	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.
No. of vacant sites:	_____	_____	_____	_____	_____	_____	_____
No. of parties using over-flow area (if any) :	_____	_____	_____	_____	_____	_____	_____

National Camper Satisfaction Survey

1978 CAMPGROUND REPORT CARD

Campground No. 272 Date ____________

Please rate us on the following. Give us an A (for excellent), B (if better than average), C (average), D (below average) and E (poor).

	A	B	C	D	E
Your first impression					
Cleanliness of campsites					
Cleanliness of restrooms					
Privacy of campsites					
Good size of campsites					
Good choice of campsites					
Availability of firewood					
Availability of supplies					
Recreation opportunities					
Ease of check-in (speed)					
Safety and security					
Good rules/regulations					
Helpfulness of employees					
Your recommendation of us					

May we have your zip code? ________

THANKS — Please mail your completed report card today and have a good camping trip.

The Management

NATIONAL CAMPER SATISFACTION INDEX

FIRST CLASS
PERMIT NO. 33
BURLINGTON, VERMONT

BUSINESS REPLY FORM

NO POSTAGE STAMP NECESSARY IF MAILED IN UNITED STATES

POSTAGE WILL BE PAID BY

DEPARTMENT OF AGRICULTURAL & RESOURCE ECONOMICS
178 SOUTH PROSPECT STREET
BURLINGTON
VERMONT 05401

Survey of 12 National Camping Leaders

VERMONT AGRICULTURAL EXPERIMENT STATION
Department of Agricultural and Resource Economics
University of Vermont
178 South Prospect Street
Burlington, Vermont 05401

Please look into your crystal ball and try to visualize the camping situation in 1985. Check the most appropriate space when responding to questions 1 to 12.

1. The total number of people camping will probably:

Increase 11 Remain the same 1 Decrease 0

2. The population mix who will camp at developed campgrounds in 1985 as a percent of all campers will:

Type	Increase	Same	Decrease
Families with young children	7	4	1
Families with teenagers	2	9	1
Families without children (excluding retirees)	8	3	1
Retirees	11	1	0

3. Comparing 1985 with today, the percentage of the total U.S. population camping at the following types of areas will:

Type of area	Increase	Same	Decrease
Private developed campgrounds	10	2	0
Public developed campgrounds	3	6	3
Public undeveloped backcountry areas	9	1	2

4. Comparing the 1985 camper with the camper of today:

	As a percent of all campers will		
Camper characteristic	Increase	Same	Decrease
Use some type of RV	7	3	2
Want convenience and service	7	5	0
Want unorganized recreation at the campground	7	4	1
Want organized recreation at the campground	5	6	1
Want an environmental education program	2	8	2
Want natural water swimming	4	3	5
Want swimming pool	6	6	0

5. Typical family camping trips in 1985:

Trip characteristic	1985 as compared t
Number of trips per family	More 7 Same 1 F
Distance traveled per trip	Greater 0 Same 2 L
Days of camping per trip	More 9 Same 1 Fe
Number of campgrounds visited per trip	More 2 Same 2 Fe

6. Typical camping fees to expect in 1985:

	Most likely fee to expect, 1985								
Type of site	15+	14	13	12	11	10	9	8	
1. Private campground with pool and electricity and water at each site	2		1	4	2	3			
2. Public campground on water body with electricity and water at each site		1		1		2	3	2	
3. Public campground with no swimming and no electricity and no water at each site*				1		1			

7. Typical midsummer campground occupancy rates to expect in 1985:

	Occupancy rate--Midsummer						
Type of campground	100	90	80	70	60	50	4
Typical National Park campground*	7	4					
Typical National Forest campground*	2	3	3	2		1	
Typical private independent campground		2	5	4		1	
Typical private franchise campground		7	3	1	1		

*One person did not respond to this category therefore the total adds to 11 an
12.

8. Typical private campground management policies to expect in 1985:

	Policy	1985 as compared to 1977		
1.	Development of new campgrounds	Greater rate 3	Same 3	Slower rate 6
2.	Expansion of existing campgrounds	Greater rate 5	Same 6	Slower rate 1
3.	Nonfranchise campgrounds tied into nationwide reservation system	Likely 4	Possible 6	Unlikely 2
4.	Rental of sites for full season	More 11	Same 1	Less 0
5.	Rental of stationary RV at campground	More 8	Same 4	Less 0
6.	Sale of site in condominium campground	More 10	Same 1	Less 1
7.	Off-season equipment storage area at campground	More 12	Same 0	Less 0
8.	Provision of recreation programs and facilities	More 10	Same 2	Less 0
9.	Development of organized social programs	More 8	Same 3	Less 1

9. Typical public campground management policies to expect in 1985:

	Policy	1985 as compared to 1977		
1.	Development of new campgrounds	Greater rate 1	Same 4	Slower rate 7
2.	Expansion of existing campgrounds	Greater rate 1	Same 7	Slower rate 4
3.	Electricity and water at each site	More 3	Same 7	Less 2
4.	Policy of reservations only	More 4	Same 5	Less 3
5.	Environmental education programs	More 7	Same 4	Less 1
6.	Organized recreation programs	More 5	Same 3	Less 4
7.	Privately-operated concessions	More 10	Same 1	Less 1
8.	Construction of campgrounds closer to population centers	More 8	Same 3	Less 1
9.	Fees that will cover both capital and operating costs	More common 6	Same 5	Less common 1
10.	Separation of RV sites from tent sites within single campground	More common 8	Same 2	Less common 2

10. Should public agencies that currently manage "backcountry areas" construct campgrounds providing showers, toilets, supplies, information, etc., for backpackers? Yes 4 No 8

11. Should public agencies that currently manage trail systems develop hut systems providing lodging and mean services on heavily-used trails? Yes 5 No 7

12. Expected change in the number of developed campsites provided by each of the following:

	Increase	Same	Decrease
(a) Public--U.S. Forest Service	6	3	3
(b) Public--National Park Service	4	4	4
(c) Public--state or other	8	1	3
(d) Private--independent	9	3	0
(e) Private--franchise	11	1	0
(f) Concessionaire campgrounds on public lands	9	2	1

13. How should current Forest Service camping policy be modified to better meet the needs of the U.S. camping public in 1985 while at the same time not unfairly compete with private enterprise?

(7) 1. Provide primitive campsites and leave development of convenience-oriented campgrounds to the private sector.

(4) 2. Establish fees which are more competitive with the private sector and more reflective of development and operating costs.

(3) 3. Make campgrounds safer through increased security patrols.

(1) 4a. Better cooperation with private sector.

(1) 4b. Emphasize resource interpretation programs.

(1) 4c. Implement differential campground fees for areas offering special natural amenities.

(1) 4d. Use of concessionaire campgrounds when feasible.

18 Total is larger than 12 since several respondents listed more than one policy modification.

☆U.S. GOVERNMENT PRINTING OFFICE: 1979—603-011/43

Headquarters of the Northeastern Forest Experiment Station are in Broomall, Pa. Field laboratories and research units are maintained at:

- Amherst, Massachusetts, in cooperation with the University of Massachusetts.
- Beltsville, Maryland.
- Berea, Kentucky, in cooperation with Berea College.
- Burlington, Vermont, in cooperation with the University of Vermont.
- Delaware, Ohio.
- Durham, New Hampshire, in cooperation with the University of New Hampshire.
- Hamden, Connecticut, in cooperation with Yale University.
- Kingston, Pennsylvania.
- Morgantown, West Virginia, in cooperation with West Virginia University, Morgantown.
- Orono, Maine, in cooperation with the University of Maine, Orono.
- Parsons, West Virginia.
- Princeton, West Virginia.
- Syracuse, New York, in cooperation with the State University of New York College of Environmental Sciences and Forestry at Syracuse University, Syracuse.
- University Park, Pennsylvania, in cooperation with the Pennsylvania State University.
- Warren, Pennsylvania.