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National Association of RV Parks & Campgrounds

GENERATIONAL CAMPING REPORT

2022

SPONSORED BY: RMS RVshare

Purpose

The findings cited in this report are based on a survey sponsored by the National Association of RV Parks and Campgrounds (ARVC).

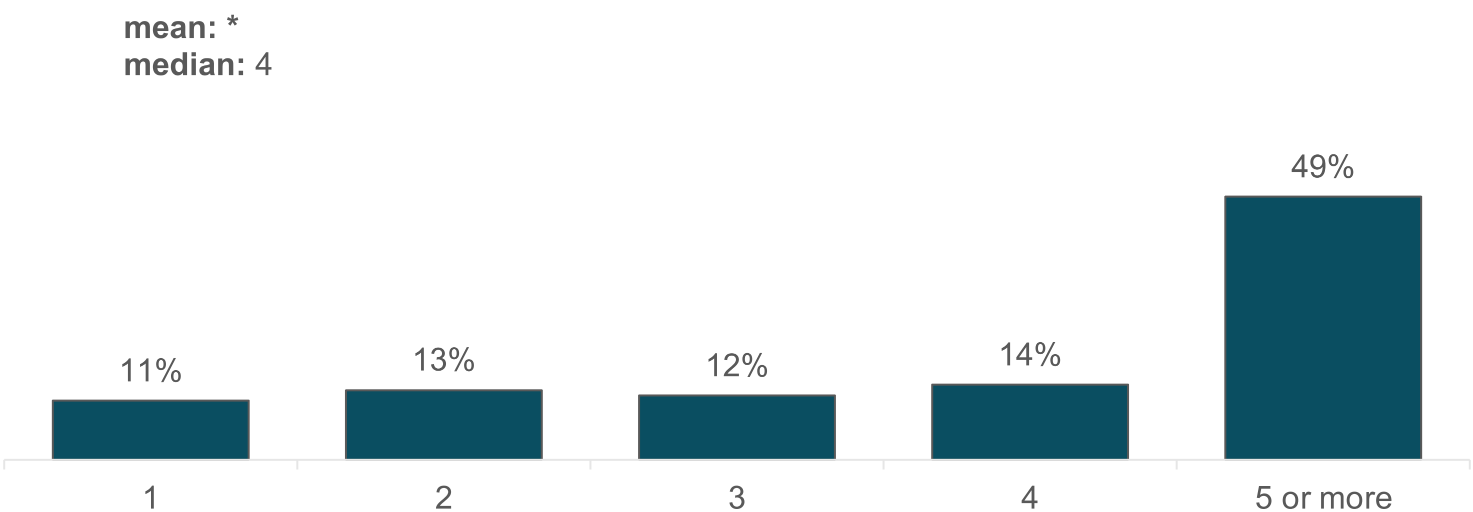
The purpose of this research project was to provide a profile on camping, RVing, and “glamping” preferences and opinions, with a particular focus on differences between campers of different generations.

Camping Behaviors and Opinions

The typical (median) respondent has gone camping, RVing, or "glamping" four times in the last 12 months.

The typical number of times camping, RVing or "glamping" is higher for Boomer/Silent Generation respondents (5 times) than it is for Gen X (4 times) and Gen Z/ Millennials (3 times).

Number of Times Camping, RVing or "Glamping" in Past 12 Months



How many times have you been camping, RVing or "glamping" in the past 12 months?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

**Due to the high proportion of respondents answering in the top category, the sample mean cannot be meaningfully calculated.*

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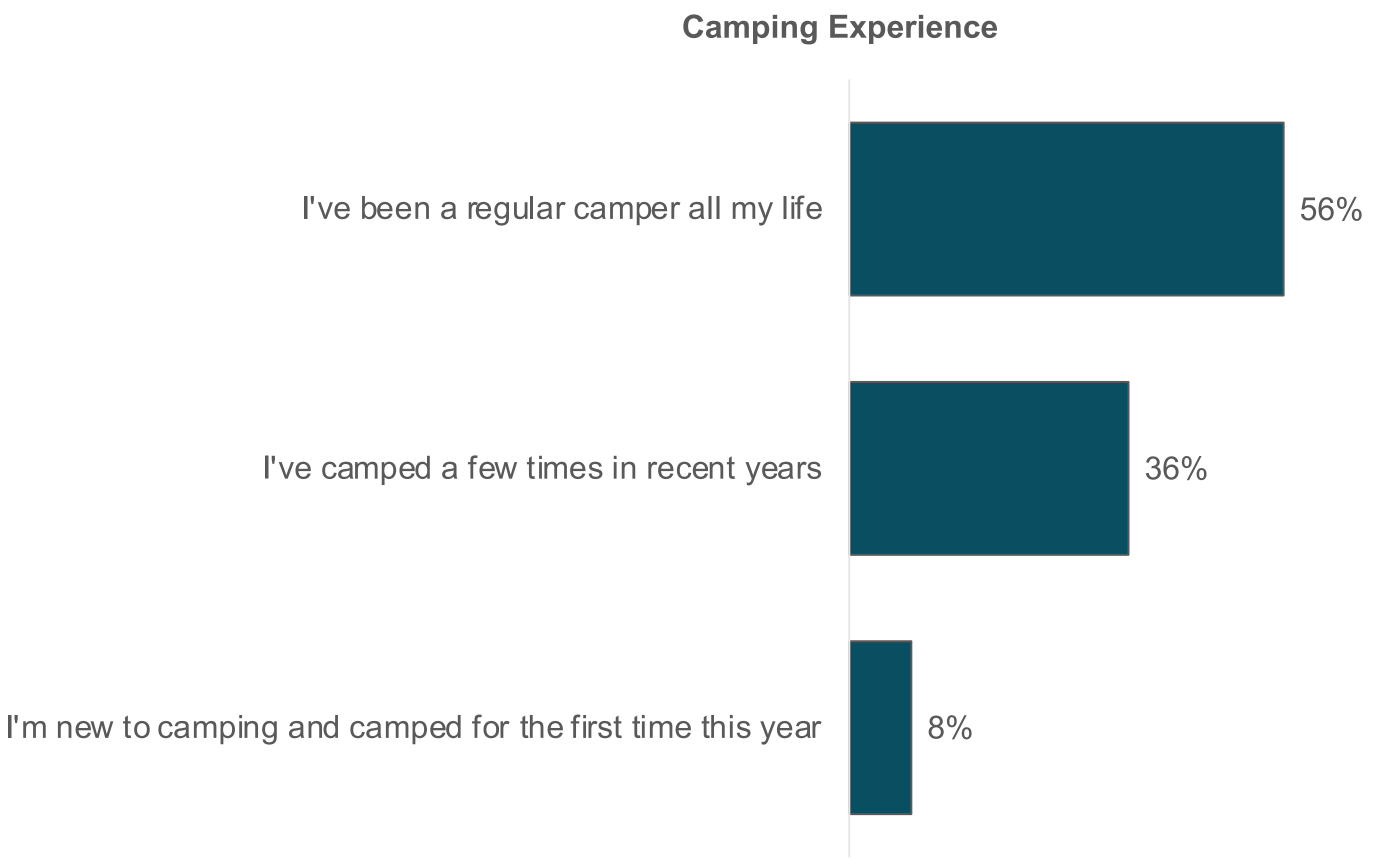
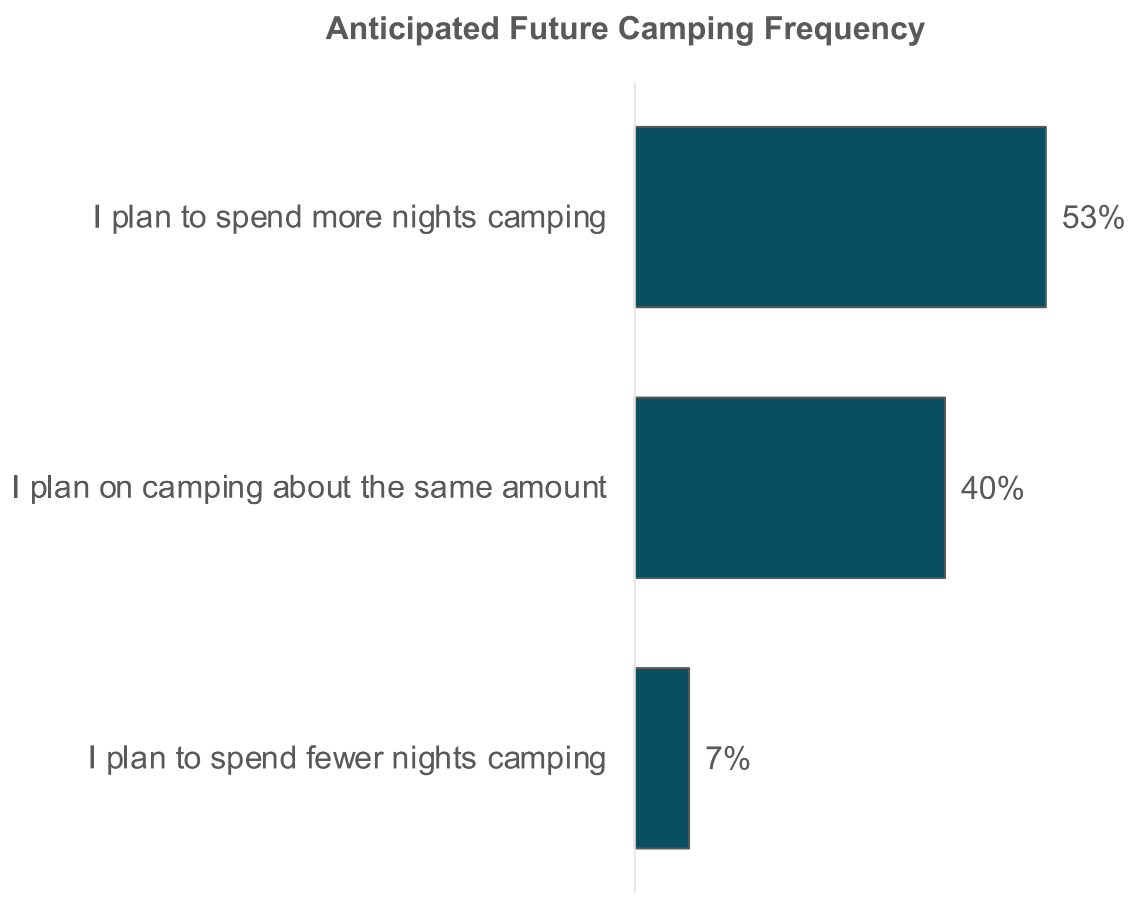
Roughly half of respondents (56%) report having been regular campers all their lives.



Which of these three statements best describes you?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

About half of respondents (53%) anticipate spending more nights camping in the next 12 months. Only 7% anticipate spending fewer nights camping.

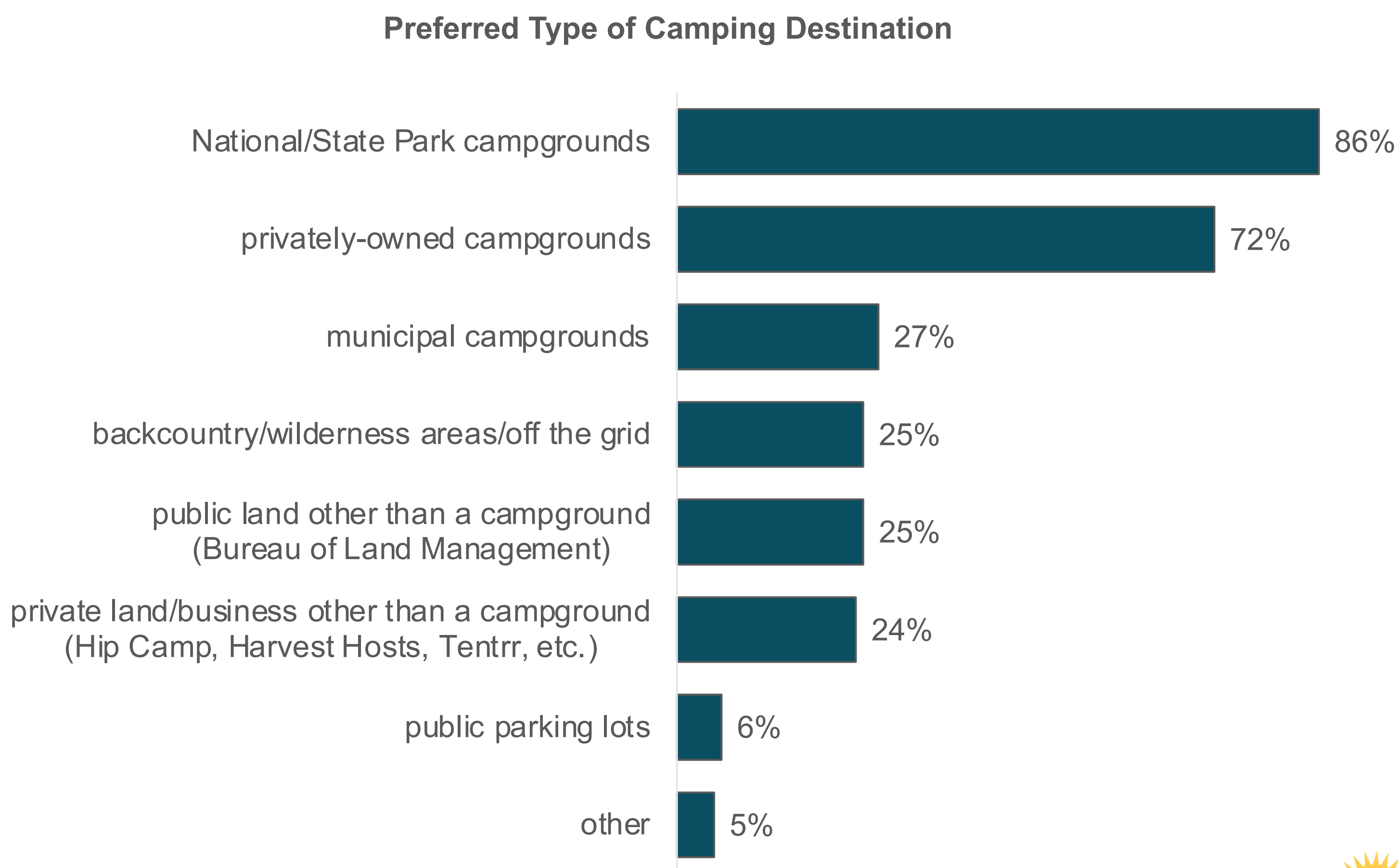


In the next 12 months, do you anticipate camping more, less, or about the same as you did in the last 12 months?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

Camping Destination and Accommodation Preferences

Four in five respondents (86%) typically prefer to camp at National/State Park campgrounds. Around three in four (72%) typically prefer privately-owned campgrounds.



Where do you typically prefer to camp?

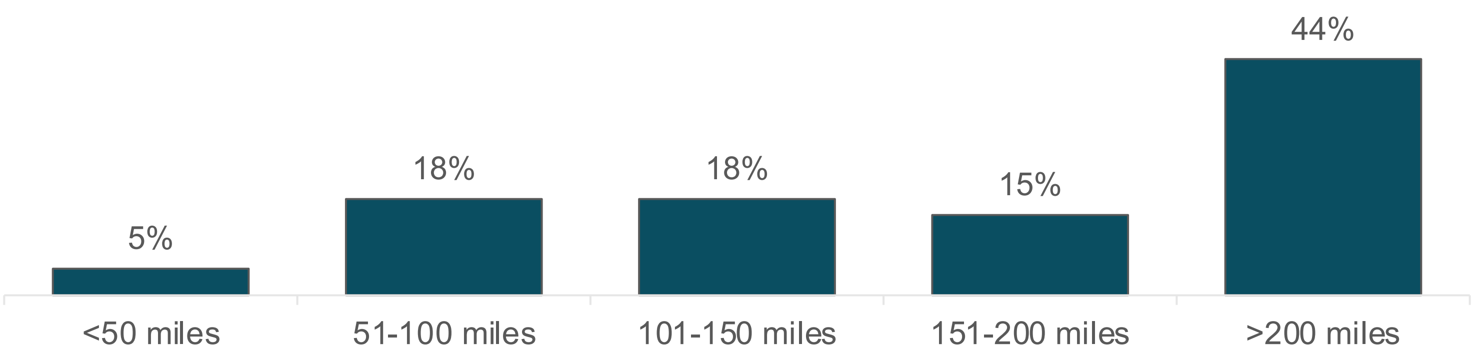
base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (multiple answers)

The typical (median) respondent travels 179 miles to go camping.

The typical distance traveled is higher for Boomer/Silent Generation respondents (197 miles) than it is for Gen X (155 miles) and Gen Z/ Millennials (101 miles).

Typical Travel Distance From Home to Camping Destination

mean: *
median: 179 miles

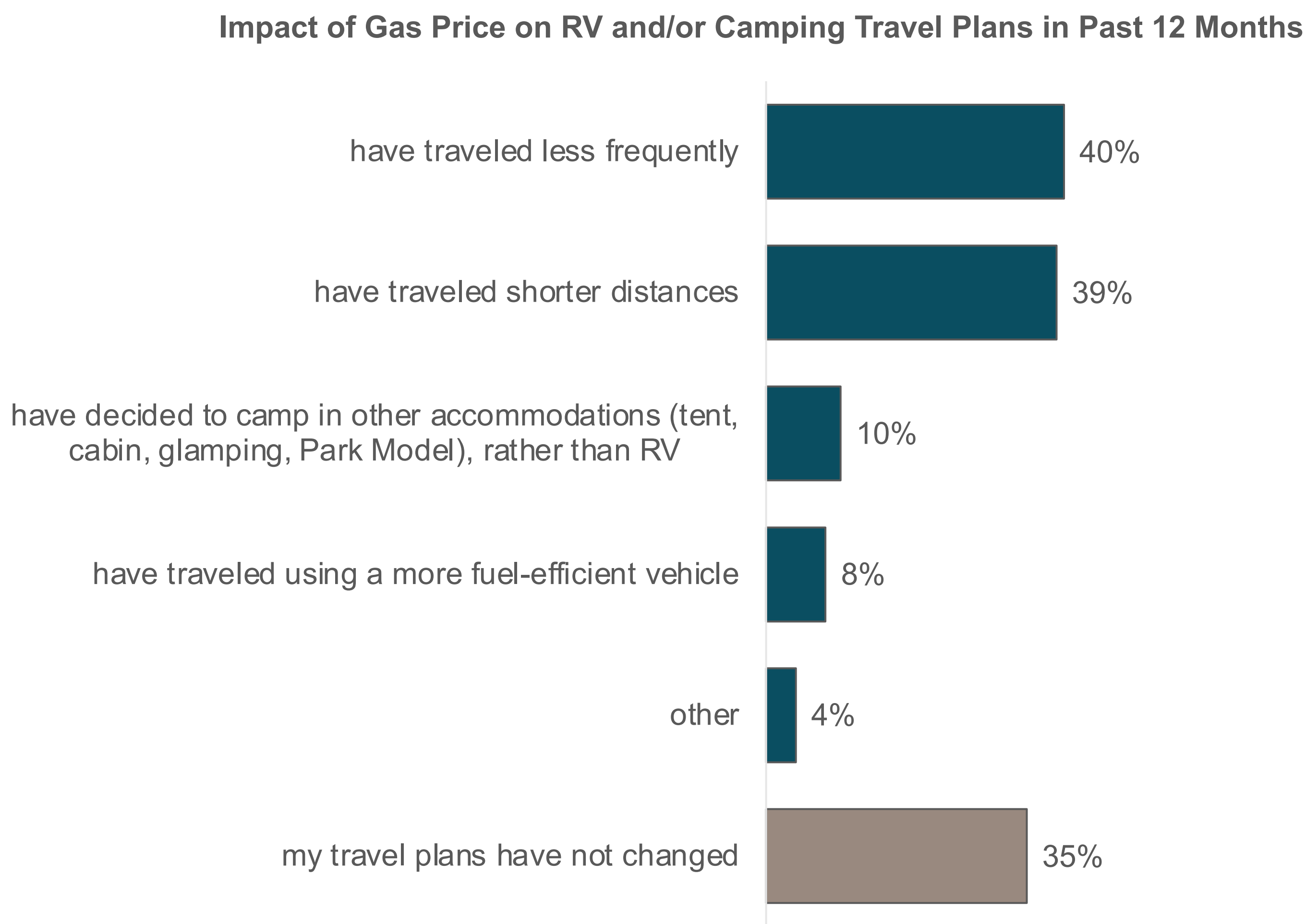


How far from home do you typically travel to go camping?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

**Due to the high proportion of respondents answering in the top category, the sample mean cannot be meaningfully calculated.*

Two in five respondents report that the price of gas has caused them to travel less frequently (40%) and/or travel shorter distances (39%) in the past 12 months.

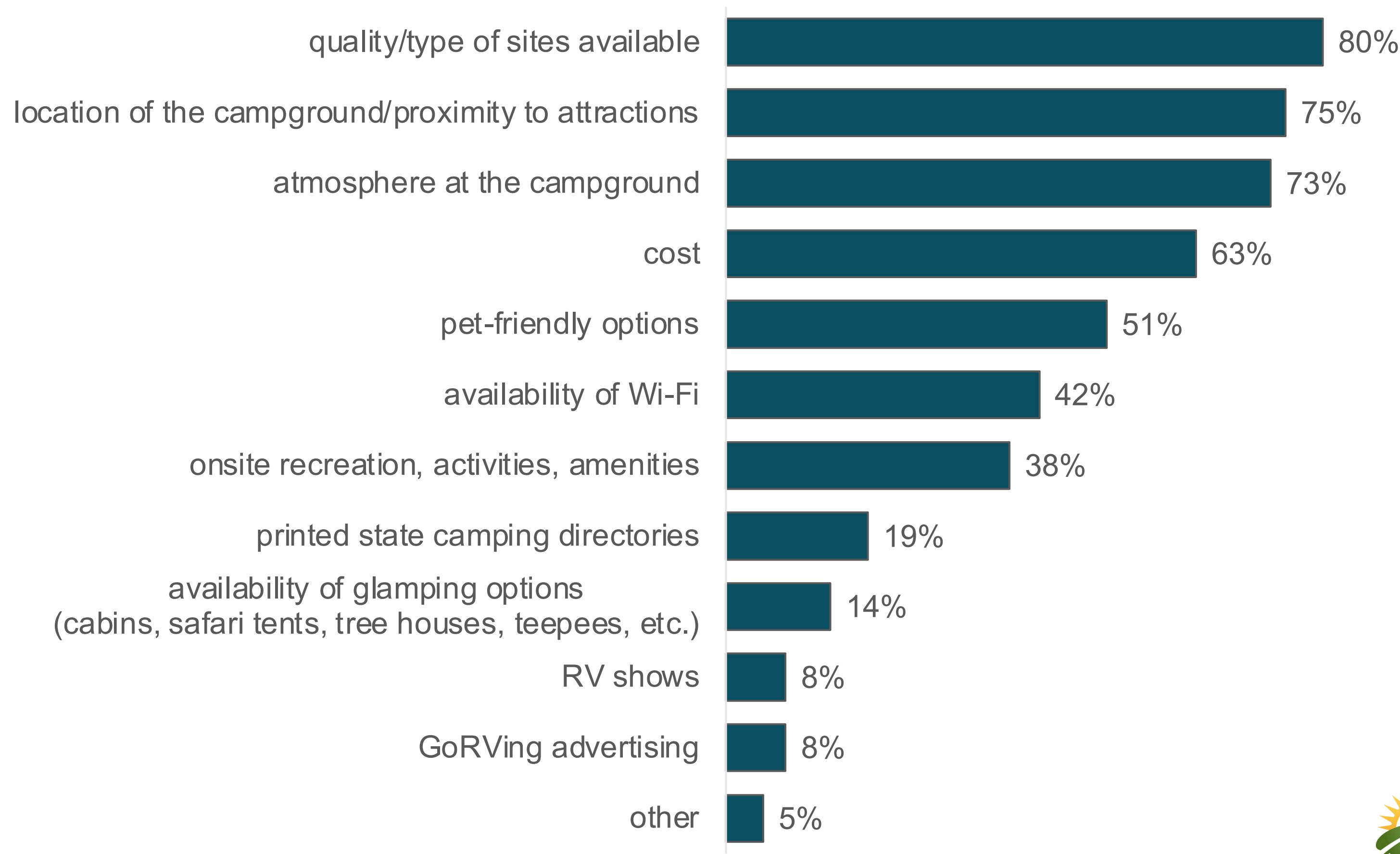


In which of the following ways has the price of gas impacted your RV and/or camping travel plans in the past 12 months?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

Three in four or more respondents reported quality/type of sites available (80%) and/or location of the campground/proximity to attractions (75%) as factors influencing their camping destination decisions.

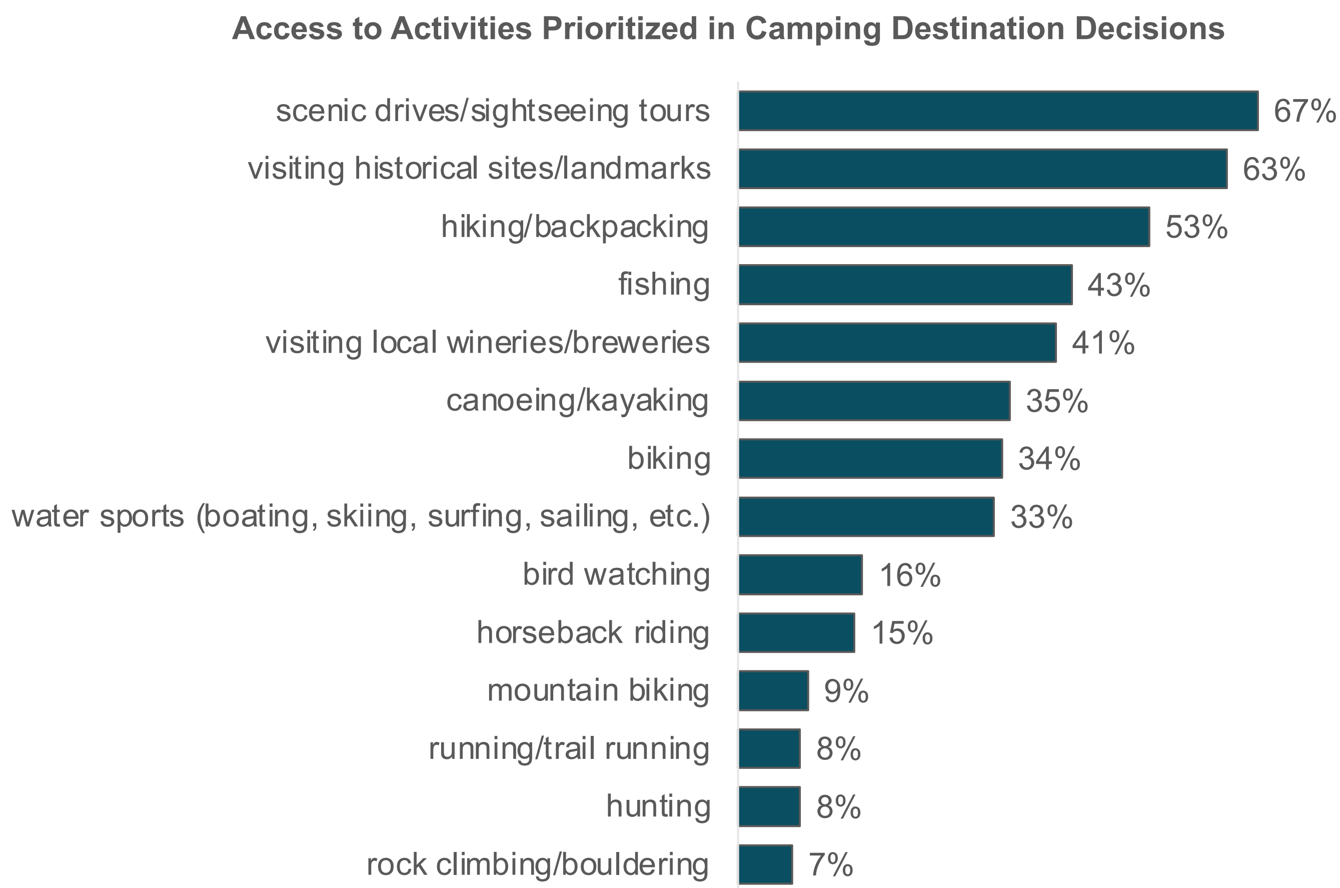
Factors Influencing Camping Destination Decisions



Which of the following factors influence your decision when selecting where to camp?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (multiple answers)

When choosing where to camp, more than half of respondents prioritized access to scenic drives/sightseeing tours (67%), visiting historical sites/landmarks (63%), and/or hiking/backpacking (53%) from their campsite.



When choosing where to camp, which of the following activities do you prioritize access to from your campsite?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

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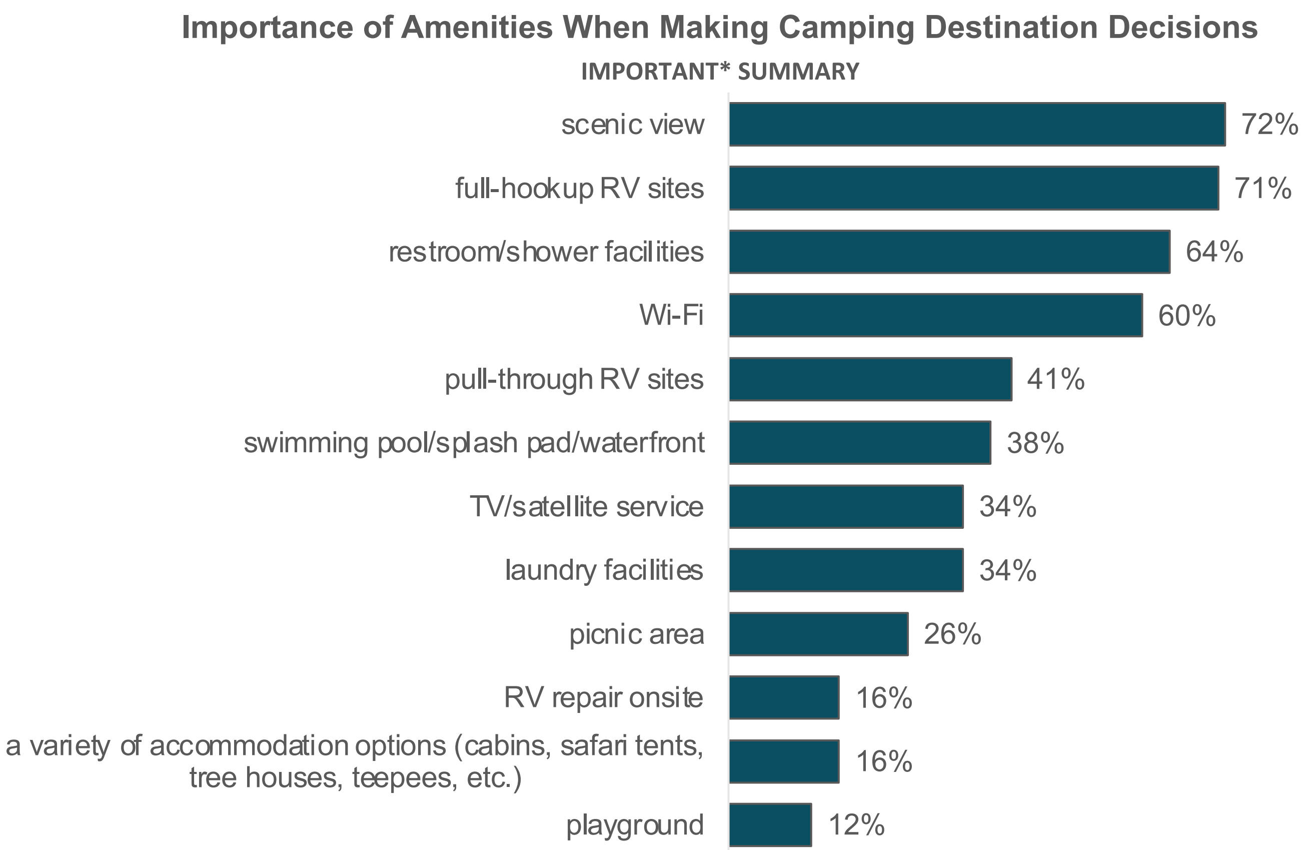
Respondents consider a number of amenities important* when making their decision about where to camp, led by scenic views (72%) and full-hookup RV sites (71%).



***IMPORTANT**= rating 4 or 5 on a 5-point scale where 5=very important and 1=not at all important

How important to you are each of the following campground features/amenities when making your decision about where to camp?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

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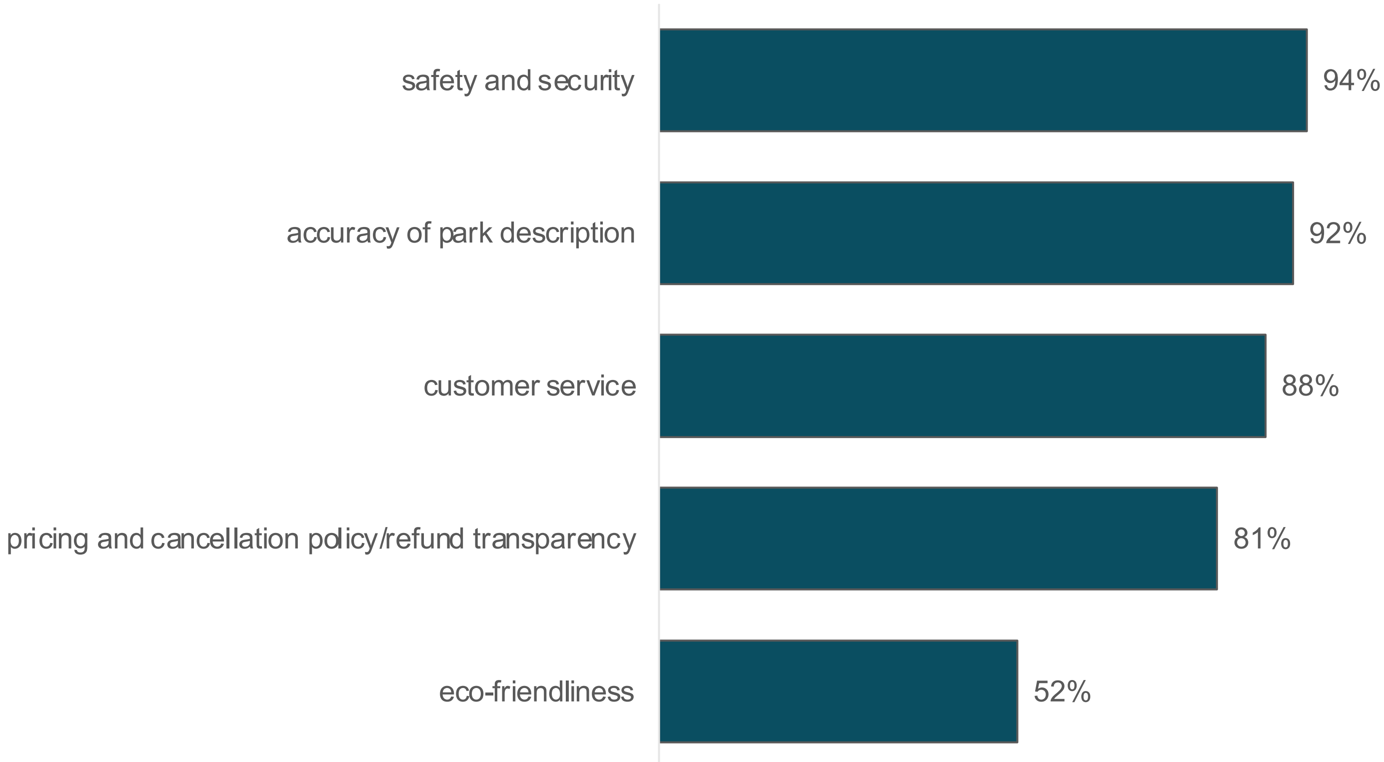
At least nine in ten respondents reported it important* that the campground they stay at meet the highest quality standards in safety and security (94%) and accuracy of park description (92%).

Importance of Campground Meeting Highest Quality Standards

IMPORTANT* SUMMARY



***IMPORTANT**= rating 4 or 5 on a 5-point scale where 5=very important and 1=not at all important

How important is it to you that the campground you stay at meets the highest quality standards in the following areas?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

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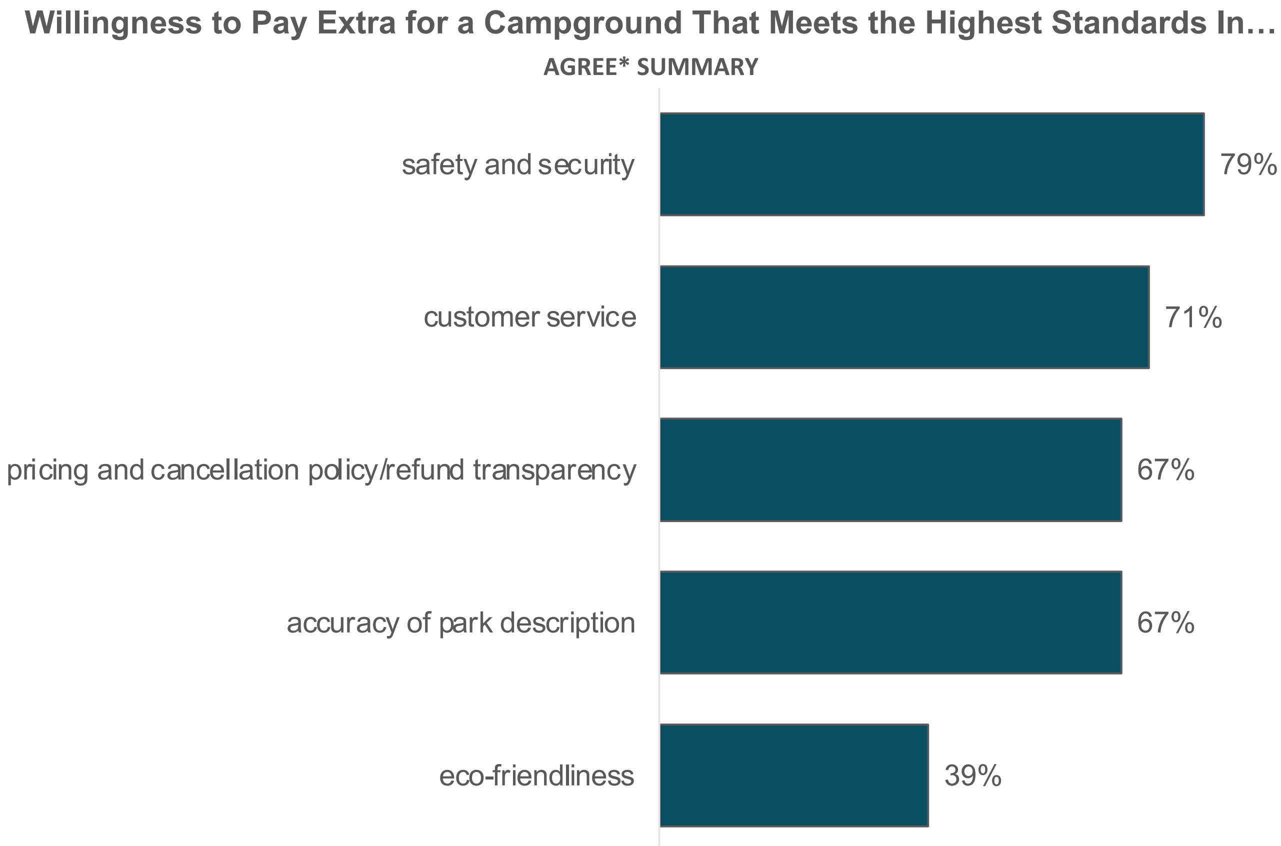
Four in five respondents (79%) would be willing to pay extra for a campground that meets the highest standards in safety and security.



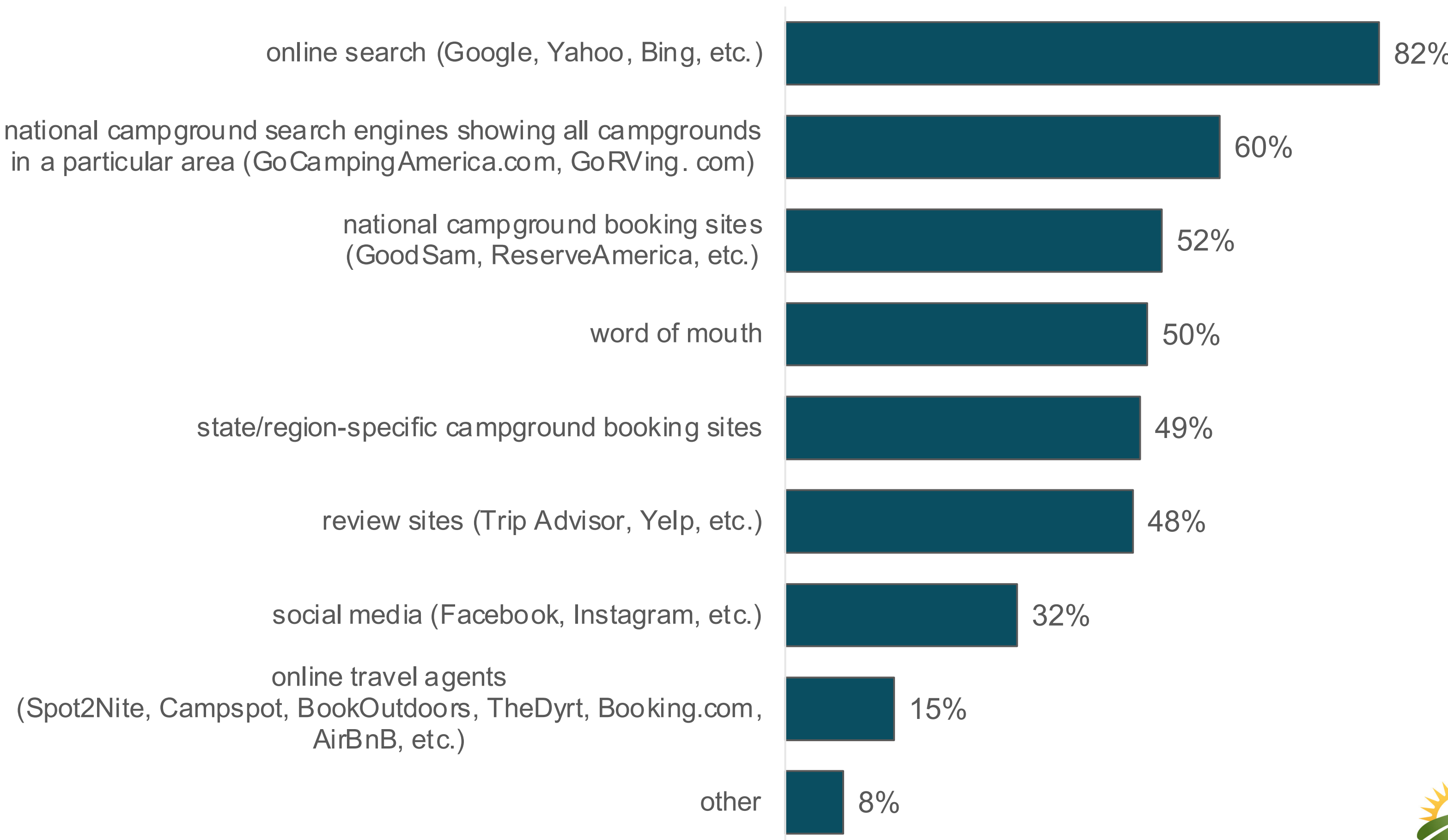
***AGREE** = rating +1 or +2 on a 5-point scale where +2=strongly agree and -2=strongly disagree

What is your level of agreement with each of the following statements?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

Four in five respondents (82%) report using an online search to help find the right campground.

Helpful Tools for Finding Right Camping Destination

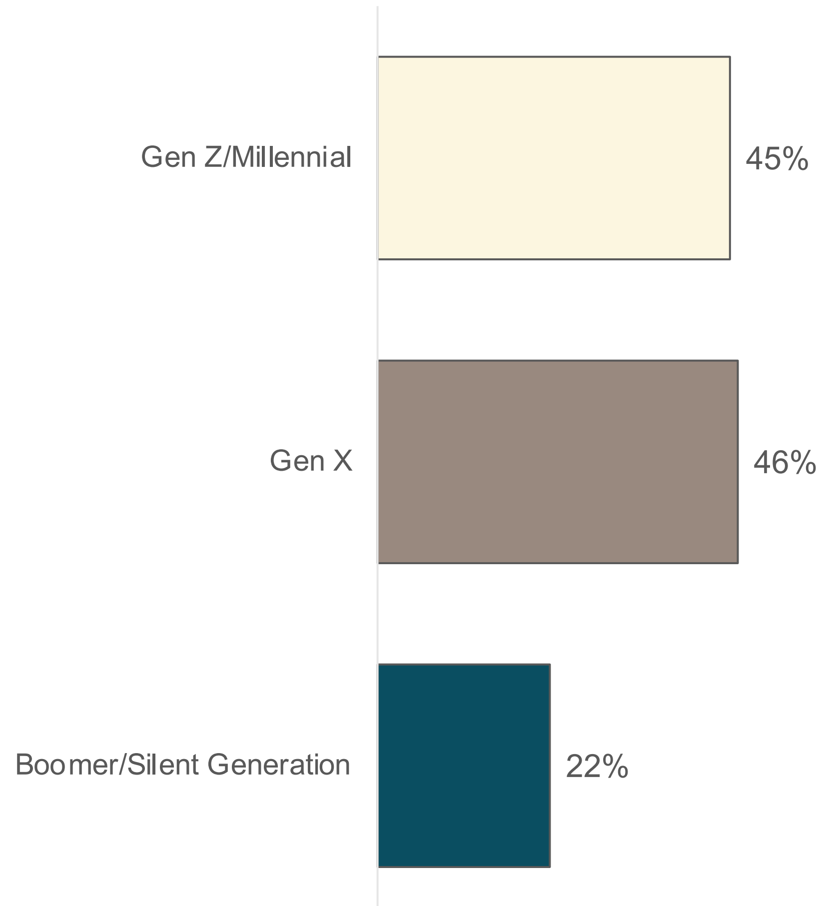


Which of the following tools do you use to help find the right campground?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (multiple answers)

Gen X (46%) and Gen Z/Millennial (45%) respondents are more likely to use social media to help find the right campground than those in the Boomer/Silent Generations (22%).

Proportion Using Social Media to Help Find the Right Campground by Generation



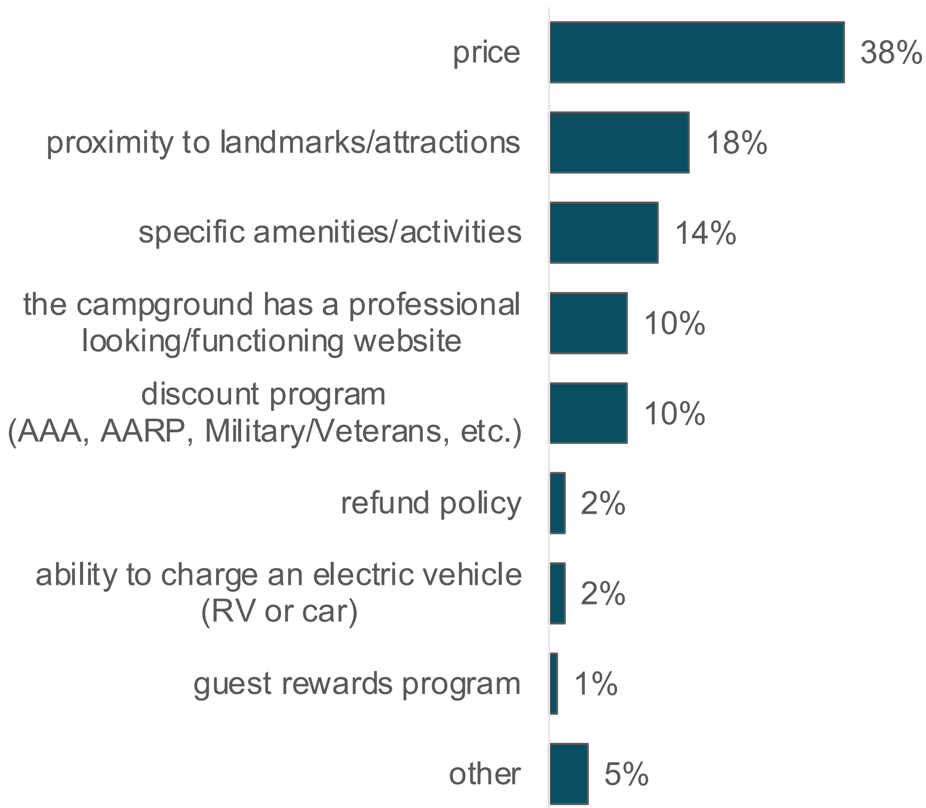
Which of the following tools do you use to help find the right campground?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (multiple answers), those in each segment

Other than location, the factor which most frequently guides destination decisions is price.

More than half of Gen Z/Millennials (58%) report that price guides their decision the most, followed by Gen X (39%), and Boomer/Silent Generation (35%).

Factors Besides Location That Guide Camping Destination Decisions



Other than location, when booking a campground reservation, what typically guides your decision the most?

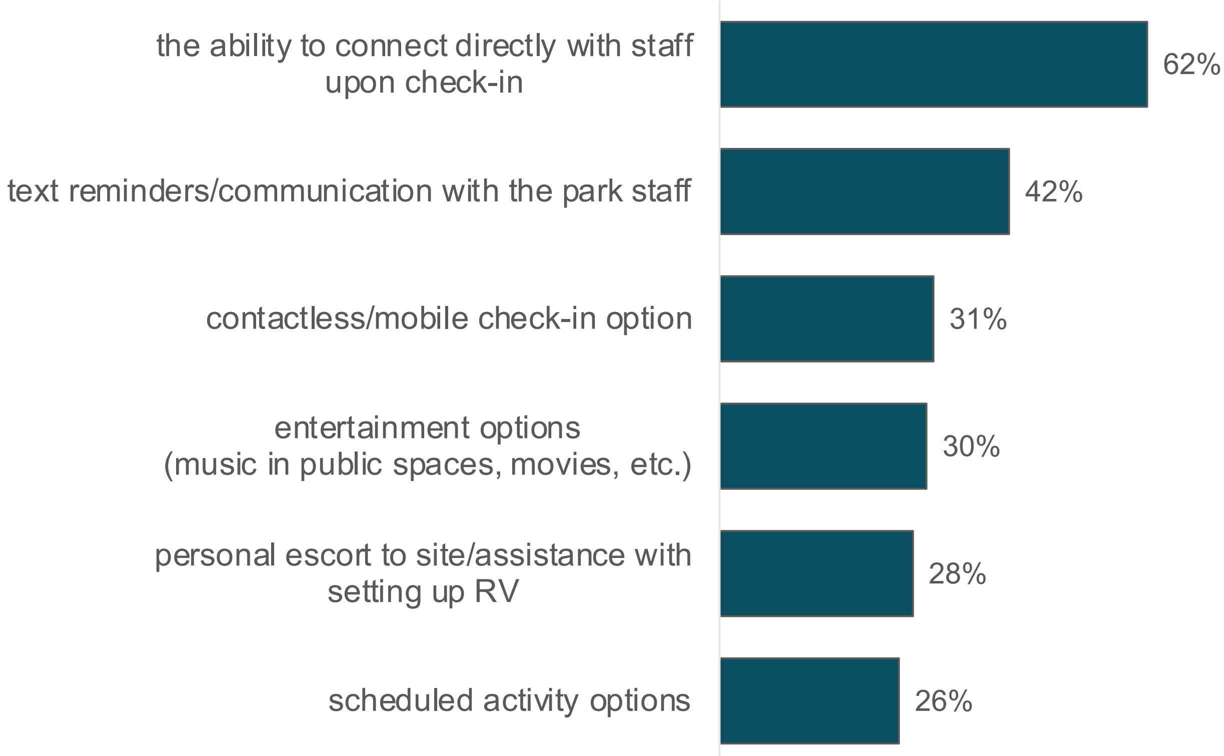
base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

Three in five respondents (62%) report that the ability to connect directly with the staff upon check-in is important* to their onsite campground experience.

Boomer/Silent Generation respondents were more likely (68%) to rate this factor as important* than Gen X (58%) and Gen Z/Millennial (42%) respondents.

Factors Important to Onsite Experience

IMPORTANT* SUMMARY



***IMPORTANT**= rating 4 or 5 on a 5-point scale where 5=very important and 1=not at all important

Once you have arrived at a campground, how important are each of the following to your onsite experience?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

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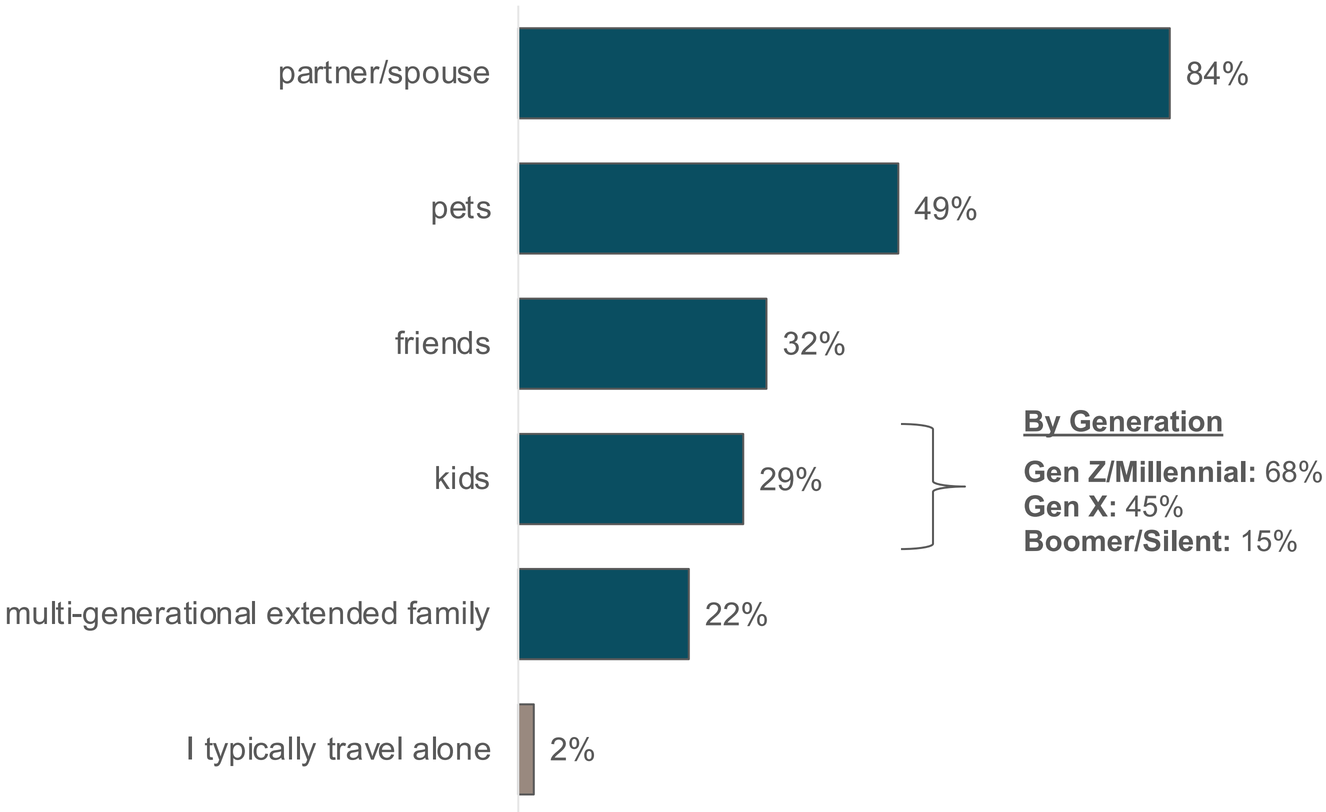
Four in five respondents (84%) are typically joined by their partner/spouse when they go camping.

Baby Boomer/Silent Generation respondents are less likely to typically camp with their kids (15%) than Gen Z/Millennial (68%) and Gen X (45%) respondents.

Typical Camping Companions



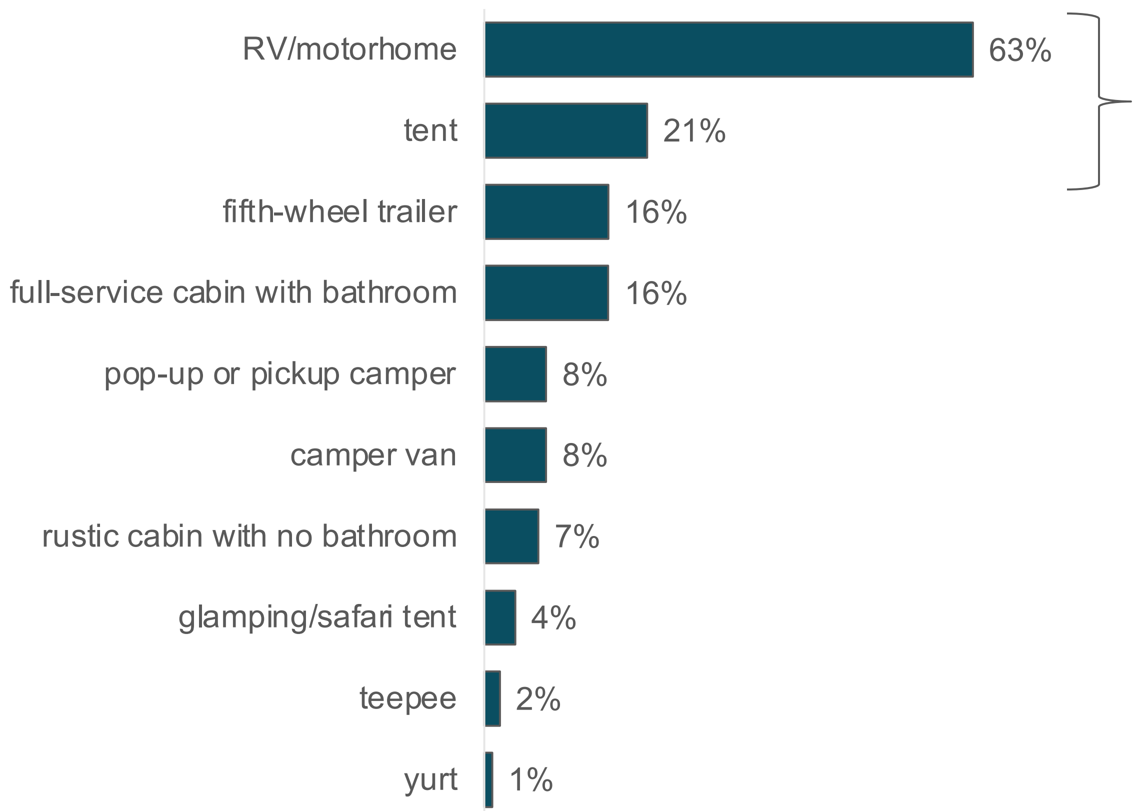
When you go camping, who typically joins you?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

An RV/motorhome was the most common camping accommodation used in the past 12 months for respondents (63%), followed by a tent (21%).

Boomer/Silent Generation respondents are the most likely to have used an RV/motorhome in the past 12 months (69%). Whereas Gen Z/Millennials are the most likely to have used a tent (58%).

Camping Accommodations Used in Past 12 Months



RV/motorhome Use By Generation

Gen Z/Millennial: 45%
Gen X: 59%
Boomer/Silent: 69%

Tent Use By Generation

Gen Z/Millennial: 58%
Gen X: 28%
Boomer/Silent: 13%

Which of the following camping accommodations have you used in the past 12 months?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (multiple answers)

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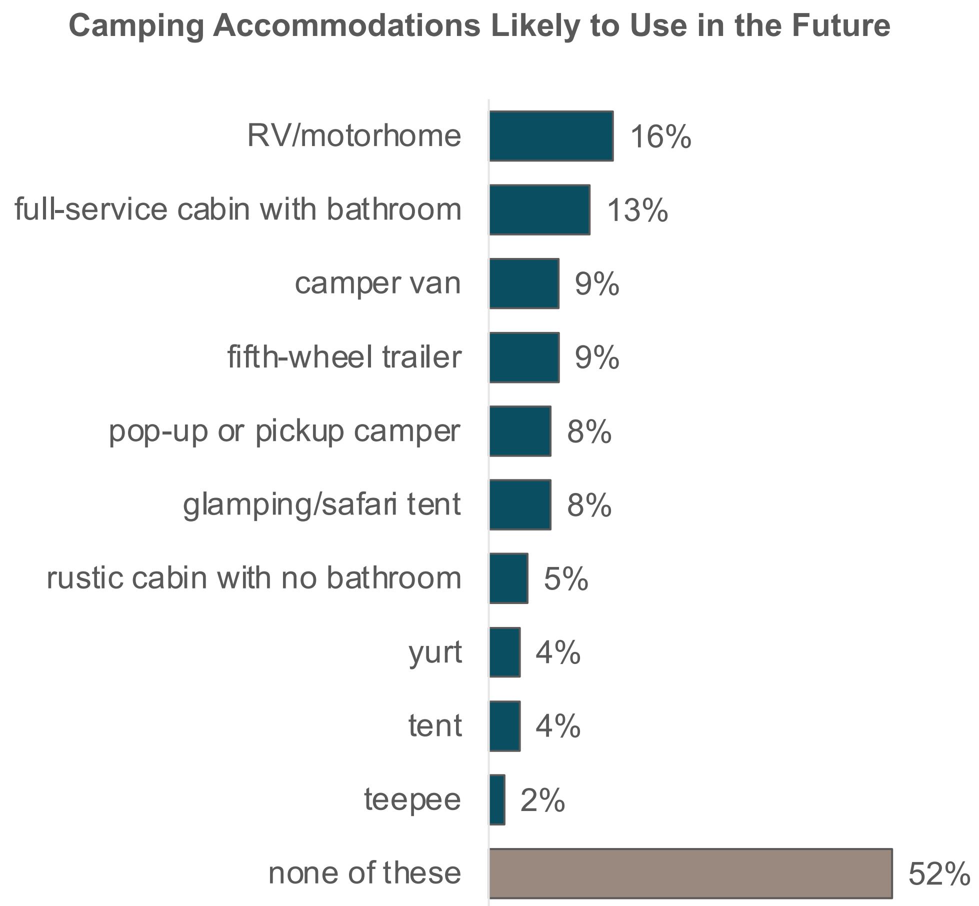
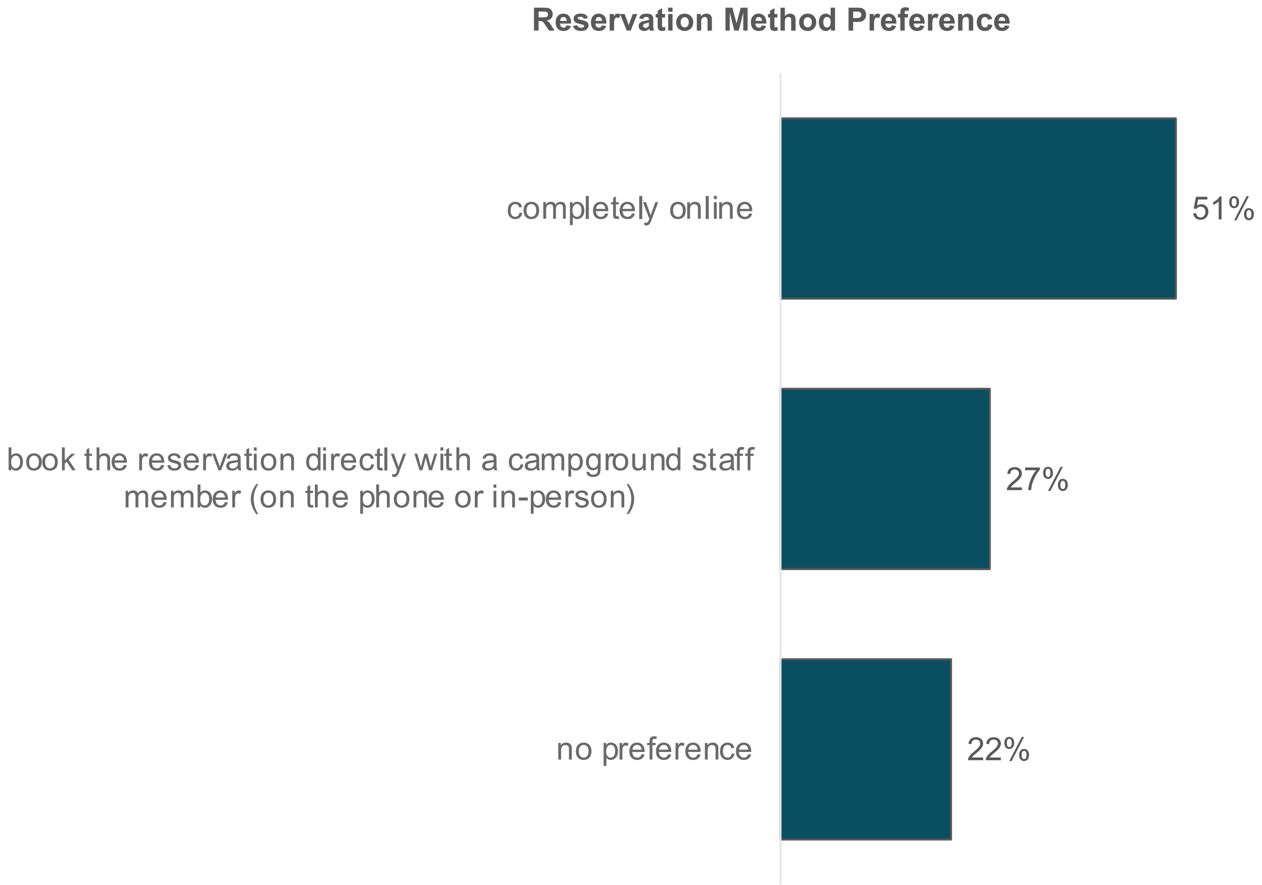
When asked which accommodations they would be most likely to use in the *next* 12 months (among those they hadn't used in the last year), respondents are most likely to use an RV/motorhome (16%) or a full-service cabin with bathroom (13%).



Which of these accommodations would you be most likely to use in the next 12 months?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

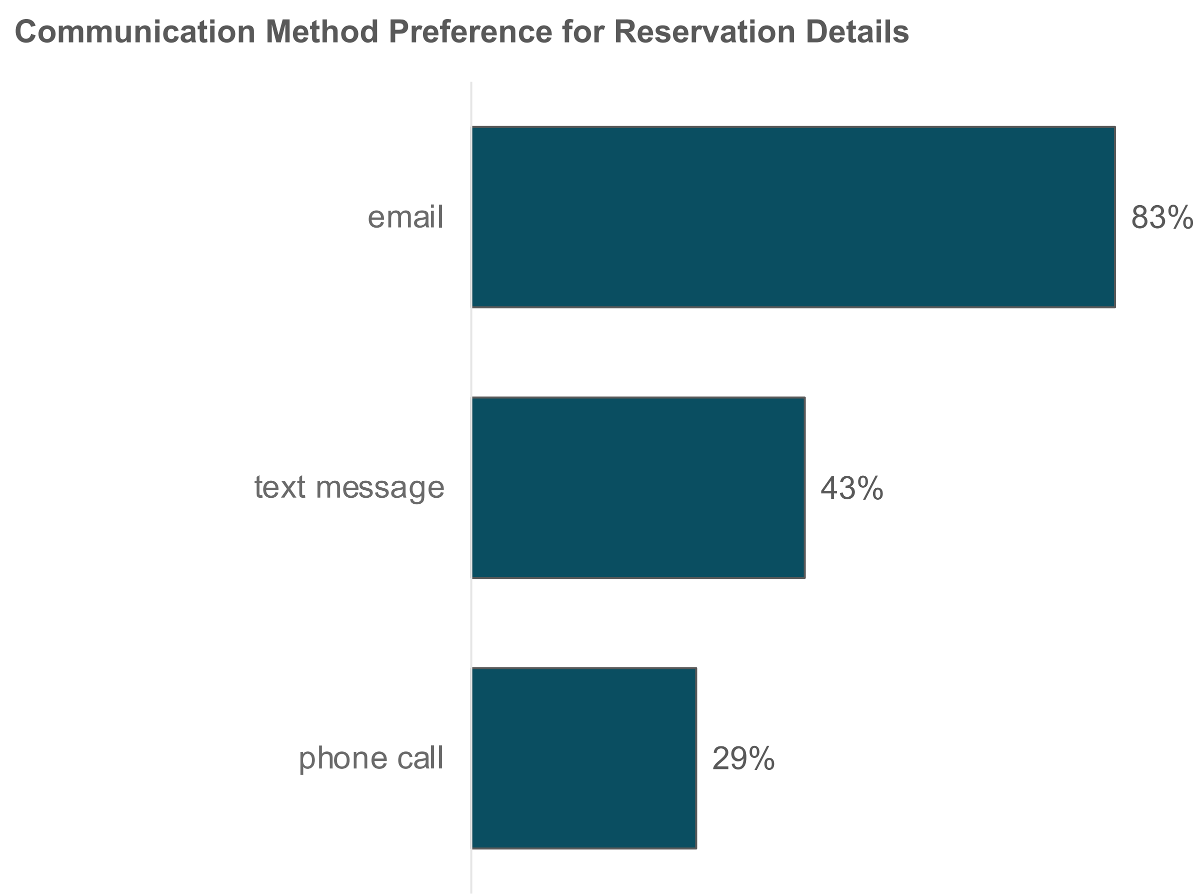
Half of respondents (51%) typically prefer to book their campground completely online.



When booking a campground reservation, how do you typically prefer to make the reservation?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

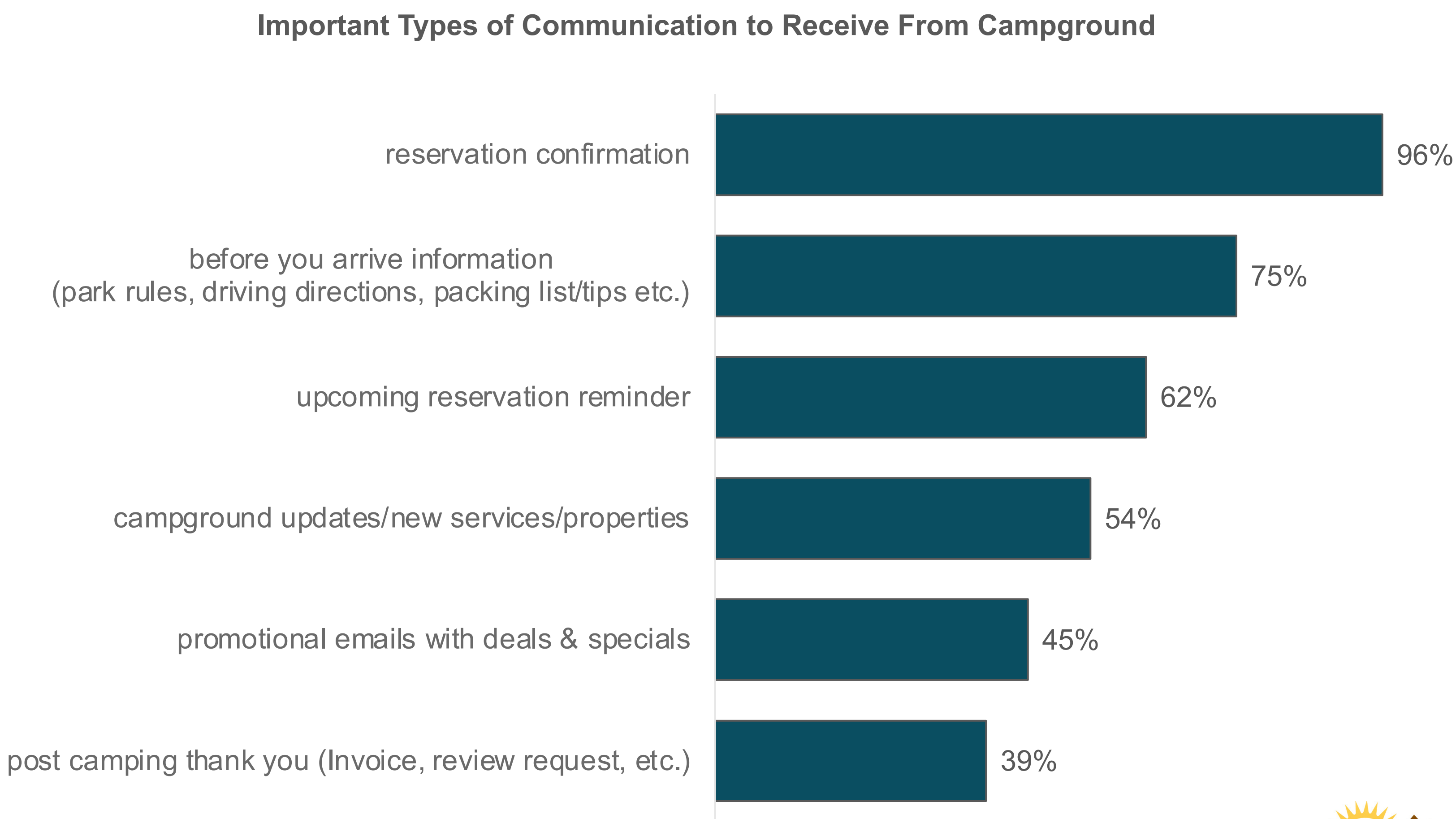
When having booked a campground reservation, four in five respondents (83%) prefer using email for their reservation details.



When having booked a campground reservation, which methods of communication do you prefer for your reservation details?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

Nearly all respondents (96%) feel it is important to receive reservation confirmation from the campground.

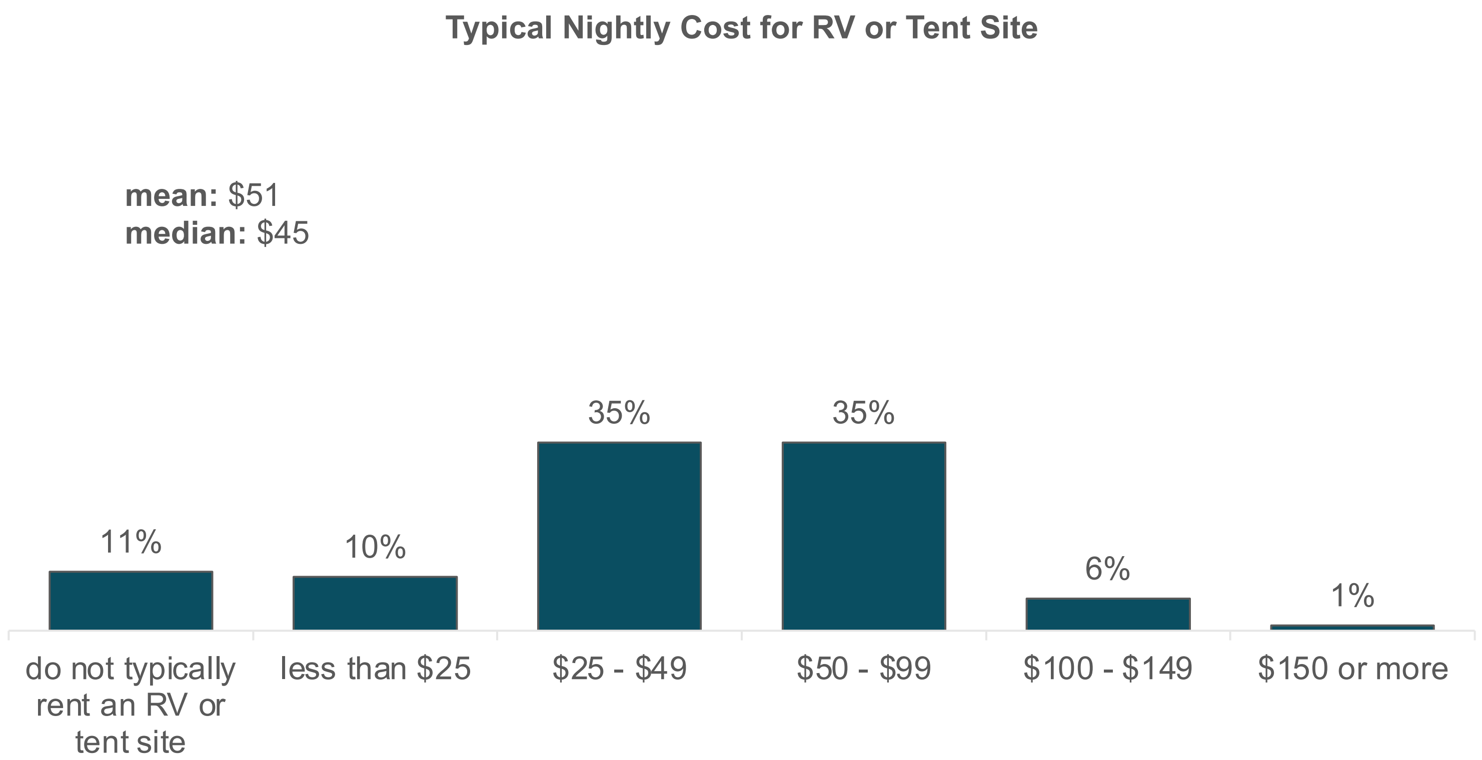


What types of communications are important for you to receive from the campground?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

Spending Habits When Camping

The typical (median) nightly amount spent by respondents for an RV or tent site is $45.



How much do you typically spend per night for an RV or tent site?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (fill-in answers)

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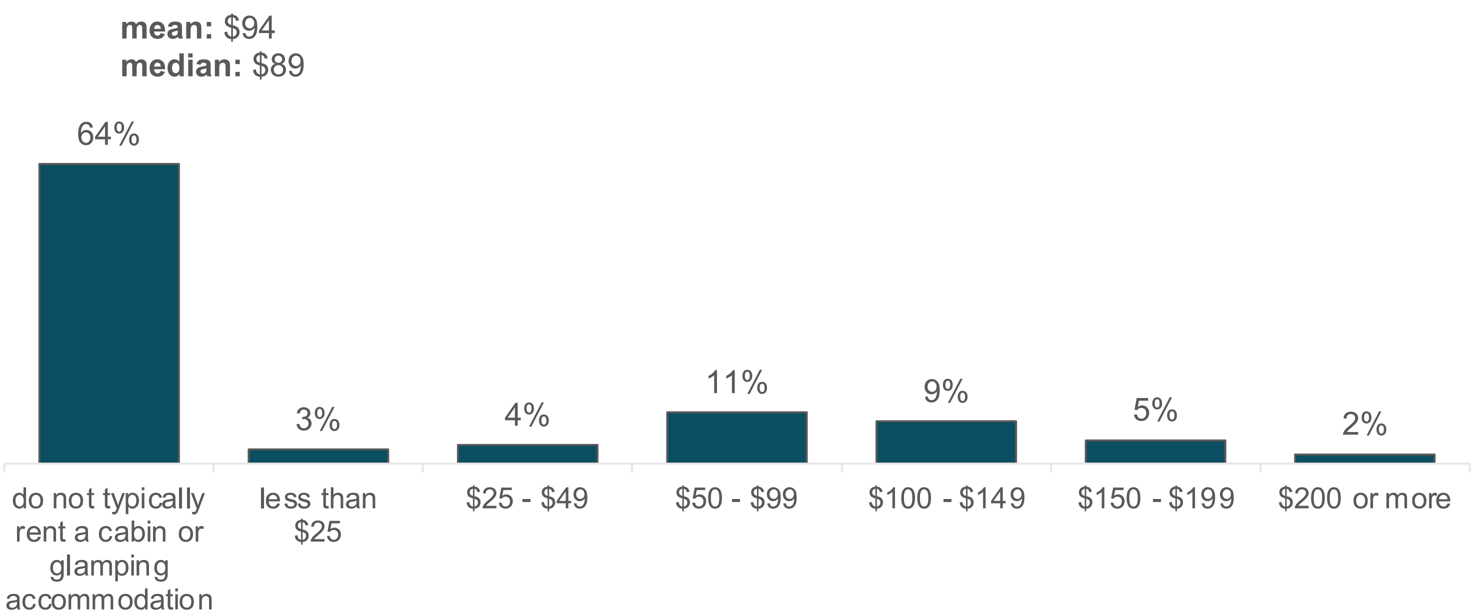
The typical (median) nightly amount spent by respondents for a cabin or glamping accommodation is $89.

Gen Z/Millennials' and Gen X typically pay more per night ($100) than Boomer/Silent Generation ($75).

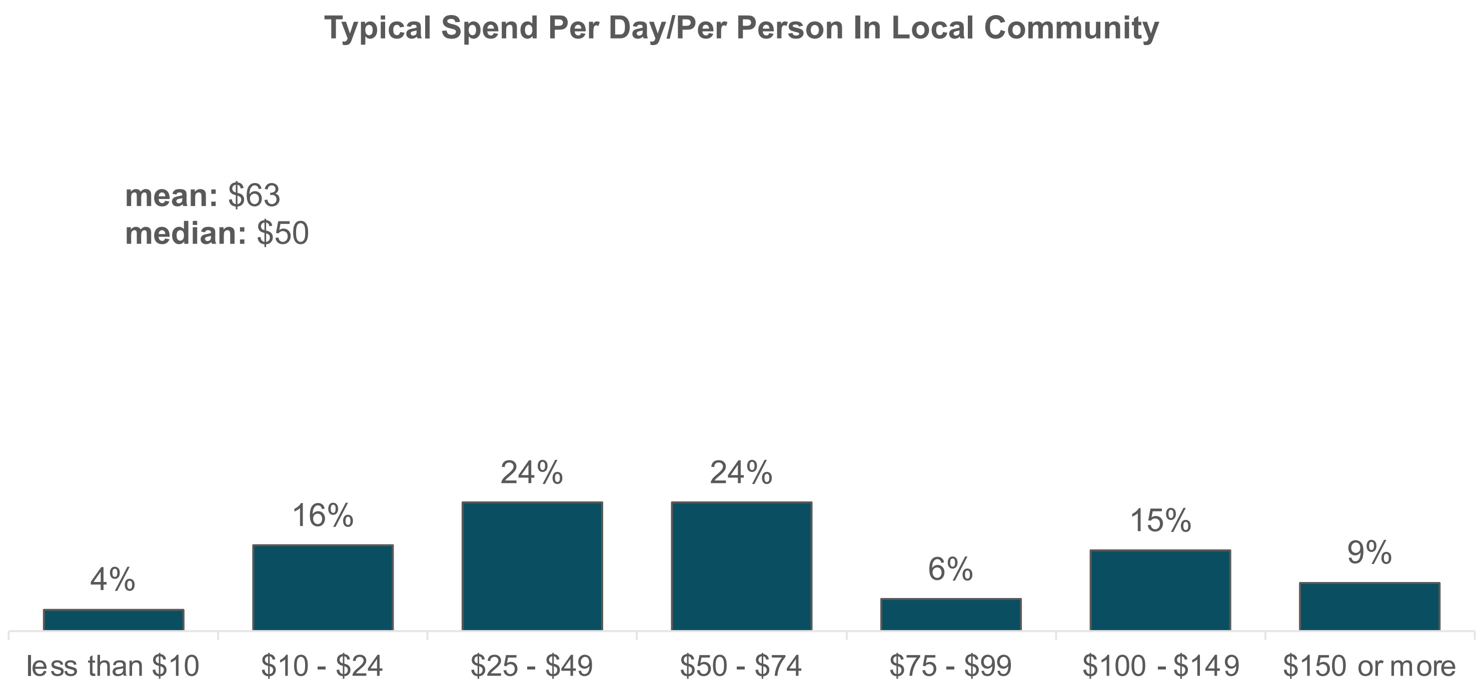
Typical Nightly Cost for Cabin or Glamping Accommodation



How much do you typically spend per night for a cabin or glamping accommodation?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (fill-in answers)

The typical (median) daily amount spent by respondents per day/person in the local community of their campground is $50.



When camping, how much do you typically spend per day/per person in the local community--including food (both groceries and restaurants), gas and entertainment?

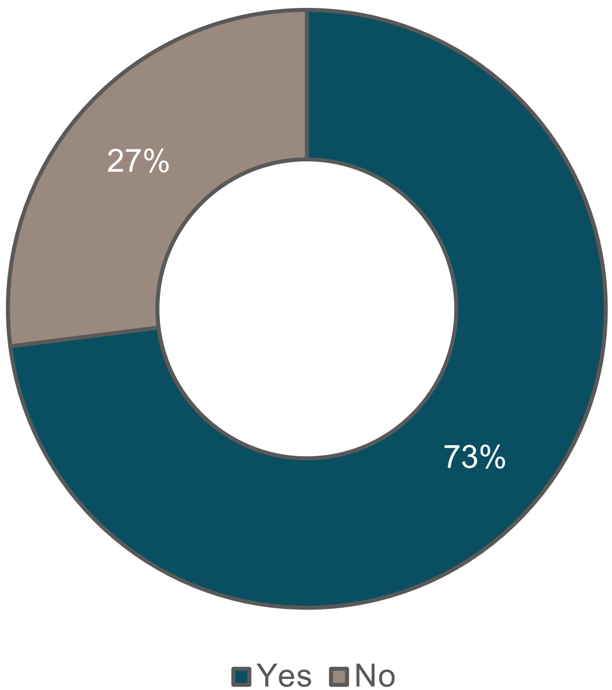
base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months (fill-in answers)

RVs and Electric Vehicles

Three in four respondents (73%) own an RV.

Boomer/Silent Generation respondents are the most likely to own an RV (82%), followed by Gen X (67%) and Gen Z/Millennial respondents (32%).

Proportion Who Own an RV



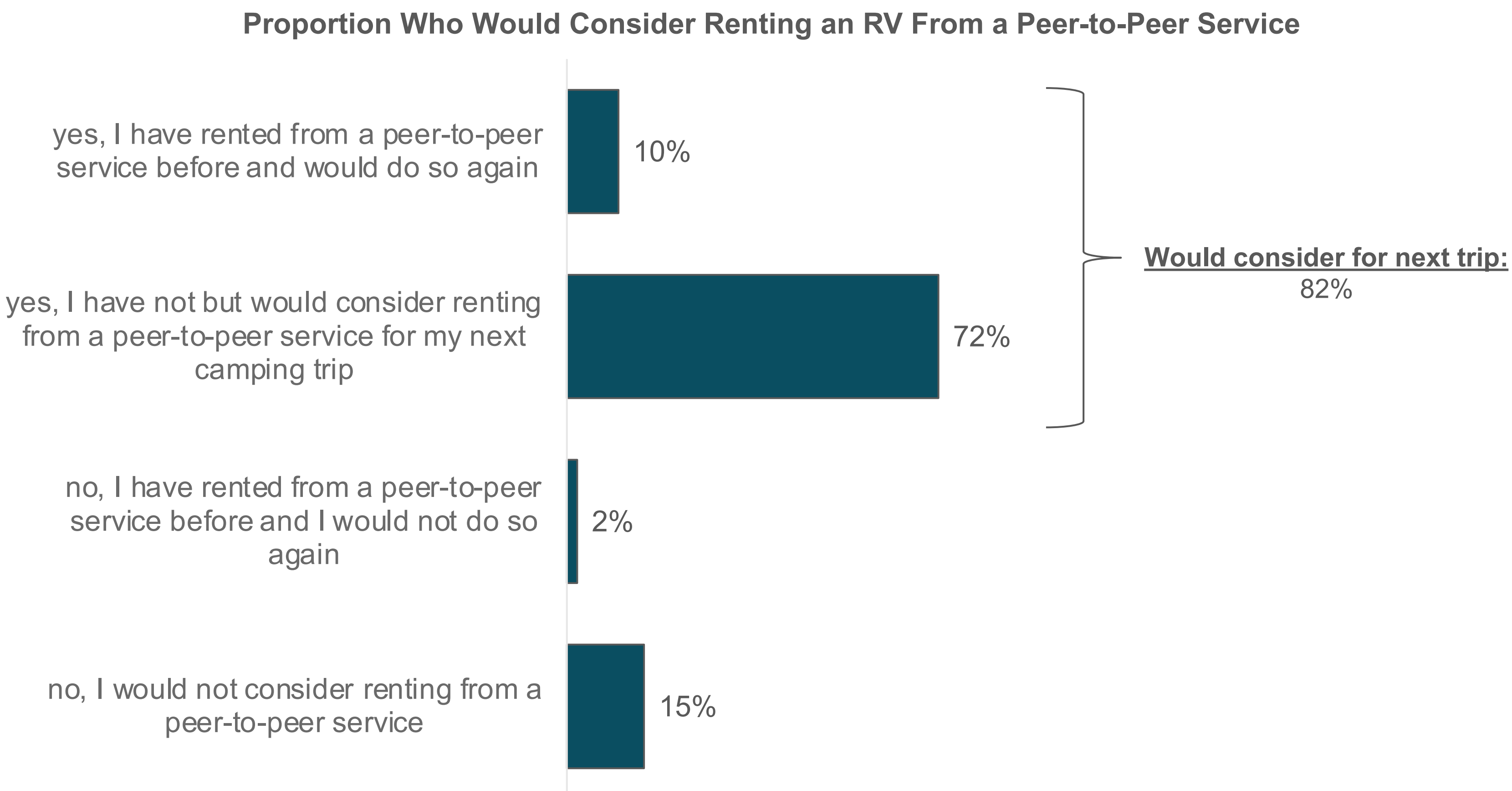
By Generation

Gen Z/Millennial: 32%
Gen X: 67%
Boomer/Silent: 82%

Do you own an RV?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months, those in each segment

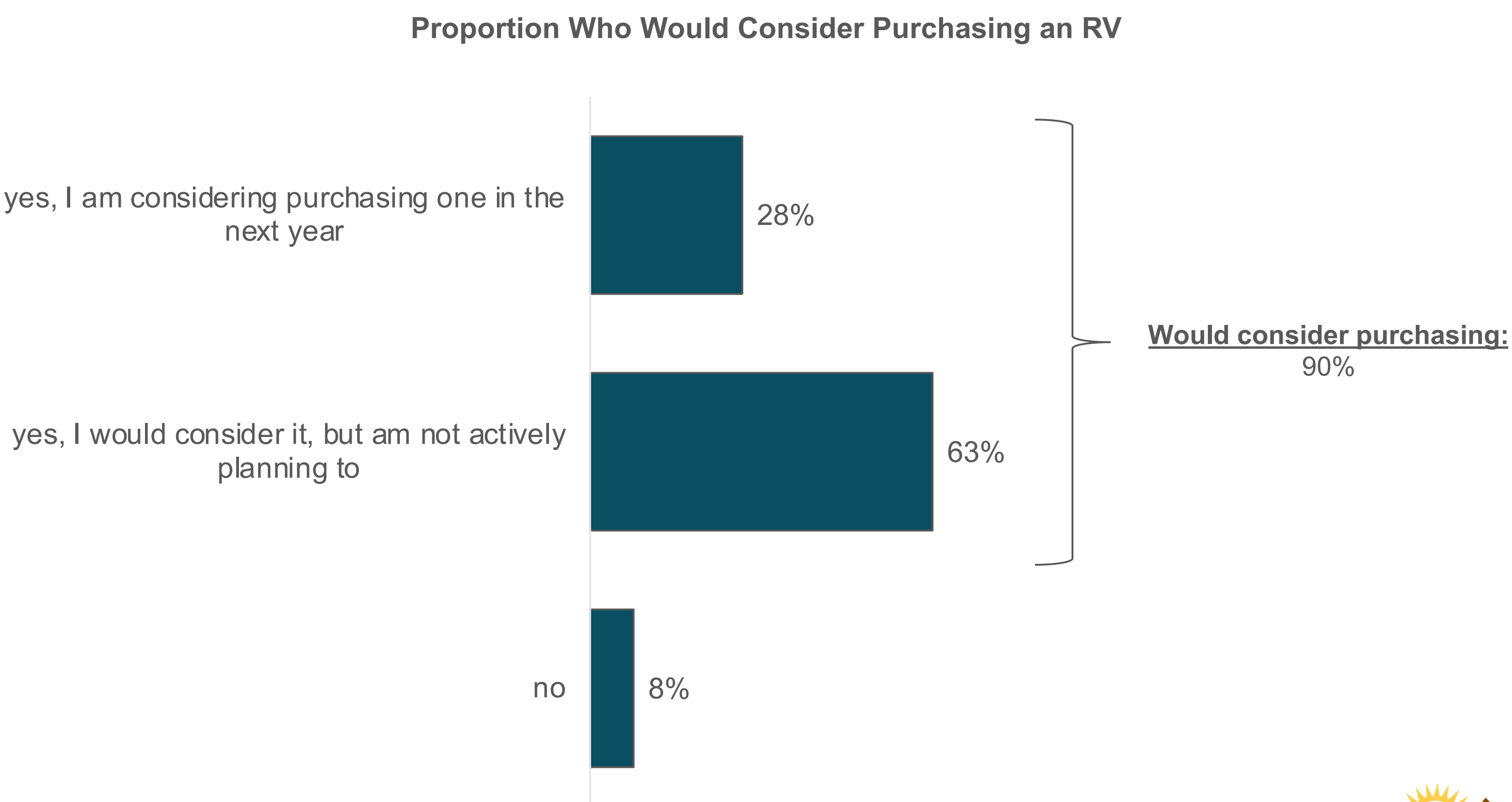
Four in five respondents who do not own an RV (82%) would consider renting from a peer-to-peer service for their next trip.



Would you consider renting from a peer-to-peer RV rental service (RVShare, etc.)?

base: 124 respondents who have gone camping, RVing, or “glamping” in the past 12 months and do not own an RV

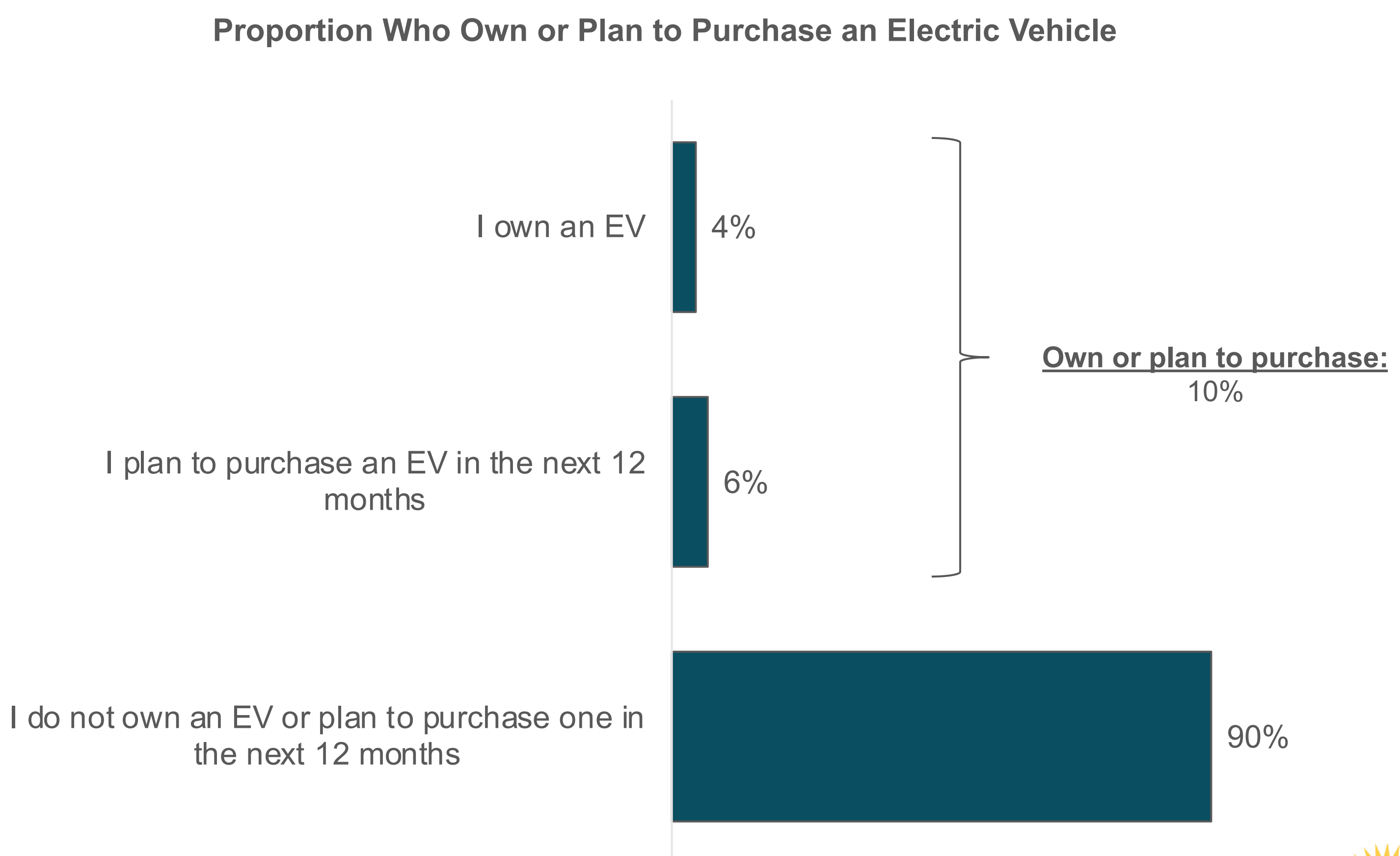
Nine in ten respondents who do not own an RV (90%) would consider purchasing one.



Would you consider purchasing an RV?

base: 124 respondents who have gone camping, RVing, or “glamping” in the past 12 months and do not own an RV

One in ten respondents (10%) own an electric vehicle or plan to purchase one in the next 12 months.

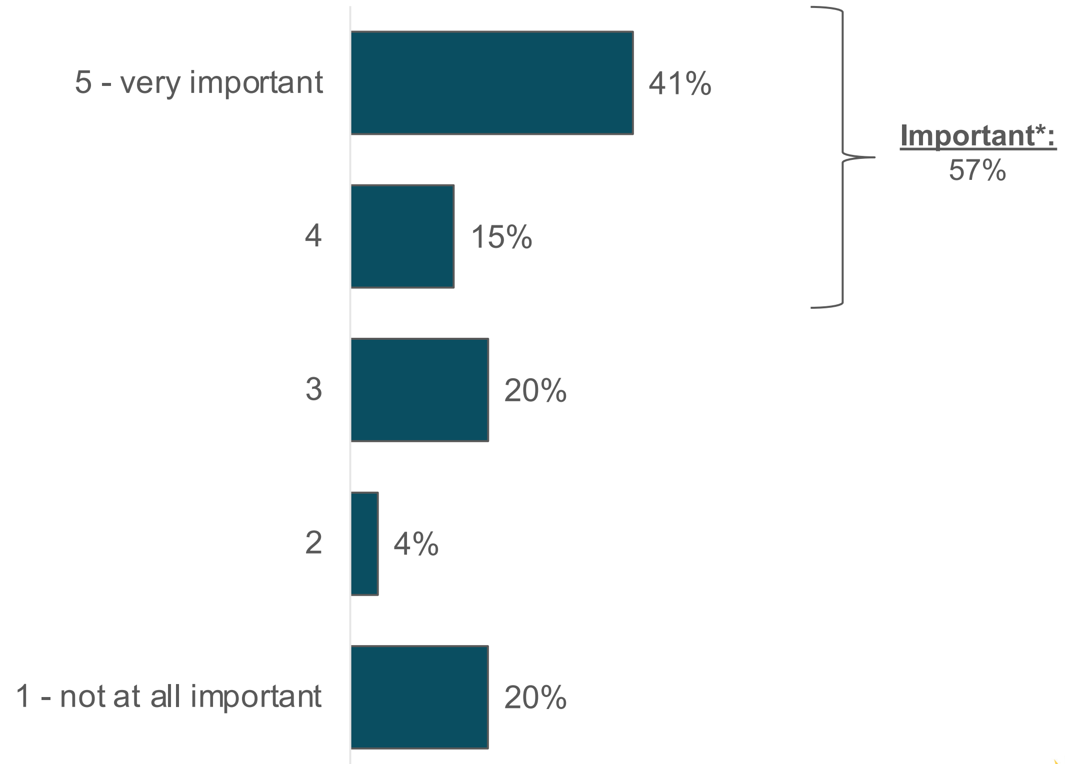


Do you own an electric vehicle (including RVs) or plan on purchasing one in the next 12 months?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

More than half of respondents who own or plan to purchase an electric vehicle in the next 12 months (57%) reported that a charging station is an important* consideration when choosing a camping destination.

Importance of Charging Station When Choosing Camping Destination



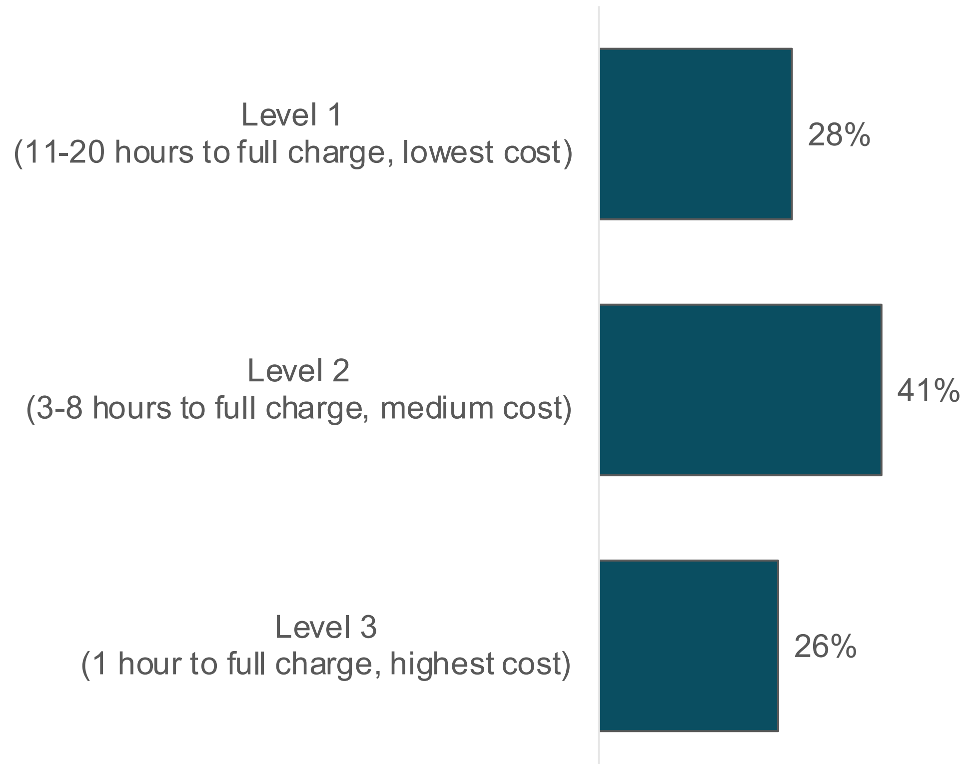
***Important**= rating 4 or 5 on a 5-point scale where 5=very important and 1=not at all important

How important is access to a charging station for your EV when choosing your camping destination?

base: 46 respondents who have gone camping, RVing, or "glamping" in the past 12 months and own or plan to purchase an electric vehicle

One in four respondents who own or plan to purchase an EV in the next 12 months (26%), find the highest cost, Level 3 charger (1 hour to full charge) most appealing when choosing their camping destination.

Most Appealing Level of EV Charging Options When Choosing Destination

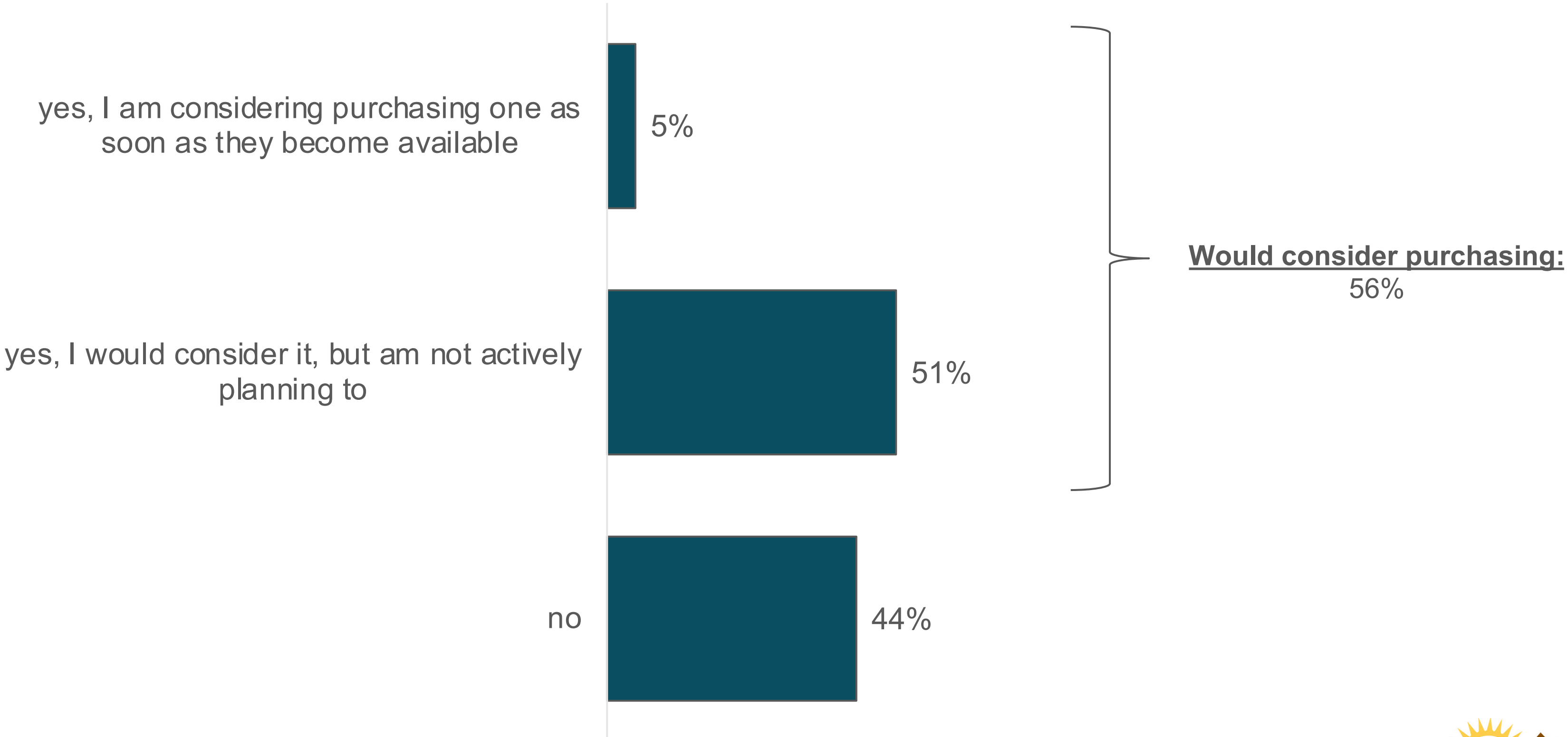


If presented with a higher cost for faster EV charger options,
what level of charger is most appealing to you when choosing your camping destination?

base: 46 respondents who have gone camping, RVing, or "glamping" in the past 12 months and own or plan to purchase an electric vehicle

Roughly half of respondents (56%) would consider purchasing an E-RV once they become available.

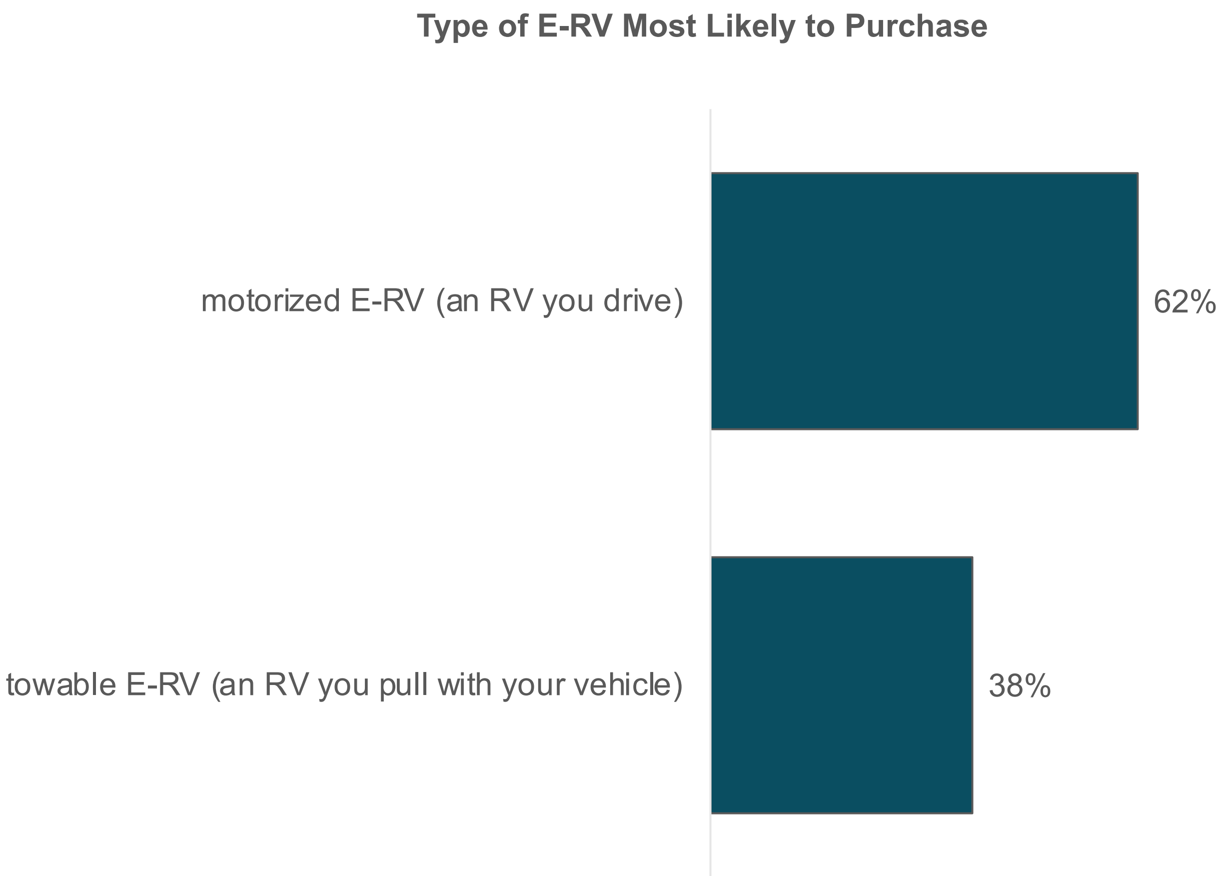
Proportion That Would Consider Purchasing an E-RV Once Available



Would you consider purchasing an E-RV once they become available?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

Three in five (62%) respondents who are planning to purchase an E-RV as soon as they become available would be most likely to purchase a motorized E-RV (an RV you drive).

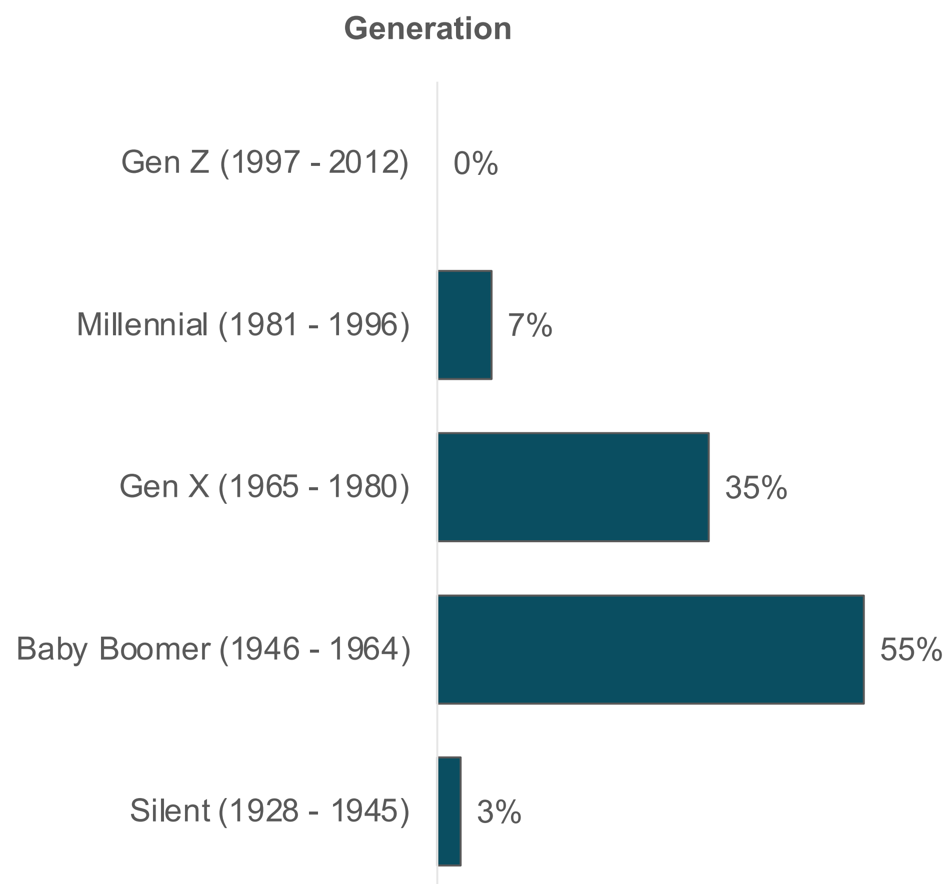


What type of E-RV would you be most likely to purchase?

base: 21 respondents who have gone camping, RVing, or “glamping” in the past 12 months and are planning to purchase an E-RV as soon as they become available*
*Results are based on fewer than 30 responses and considered statistically unstable.

Demographics

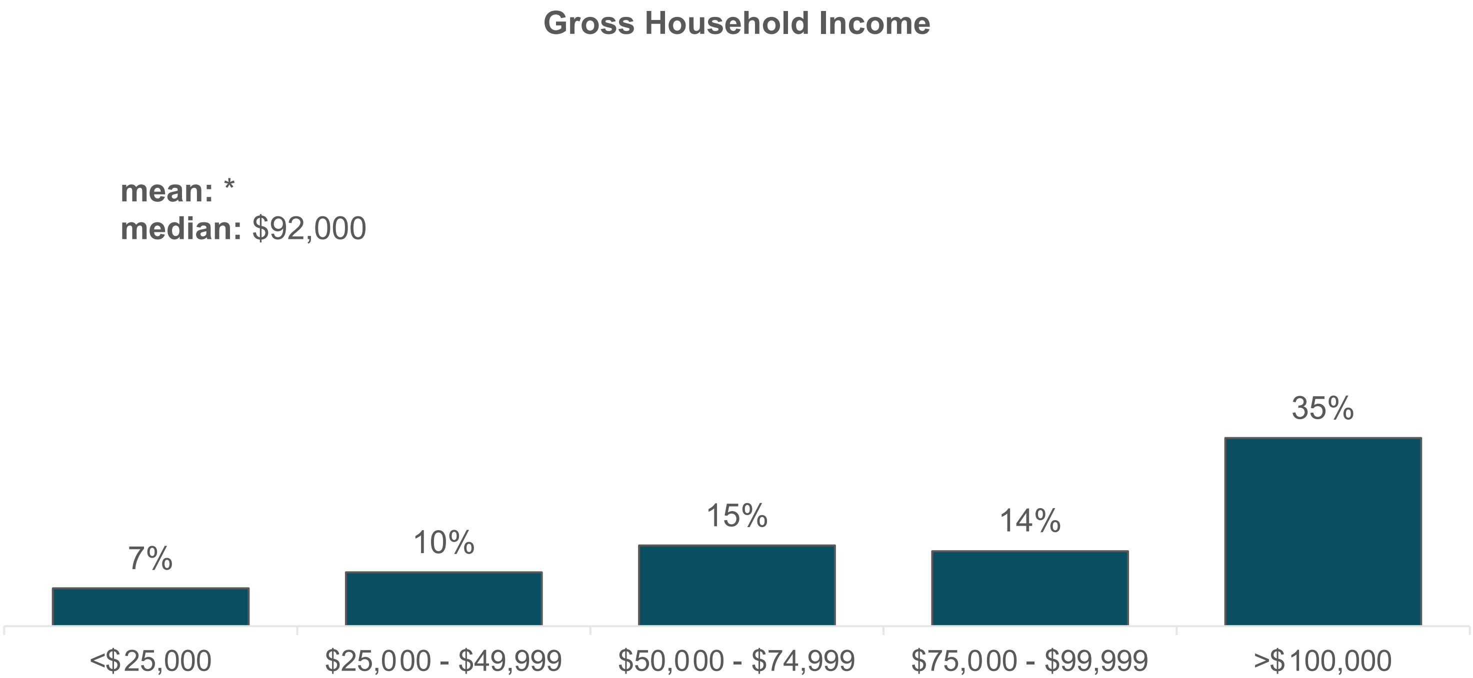
Roughly half of respondents (55%) are Baby Boomers.



Which generation best describes you?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

The median gross household income for respondents is $92,000.



What is the gross income (before taxes) of your household?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

**Due to the high proportion of respondents answering in the top category, the sample mean cannot be meaningfully calculated.*

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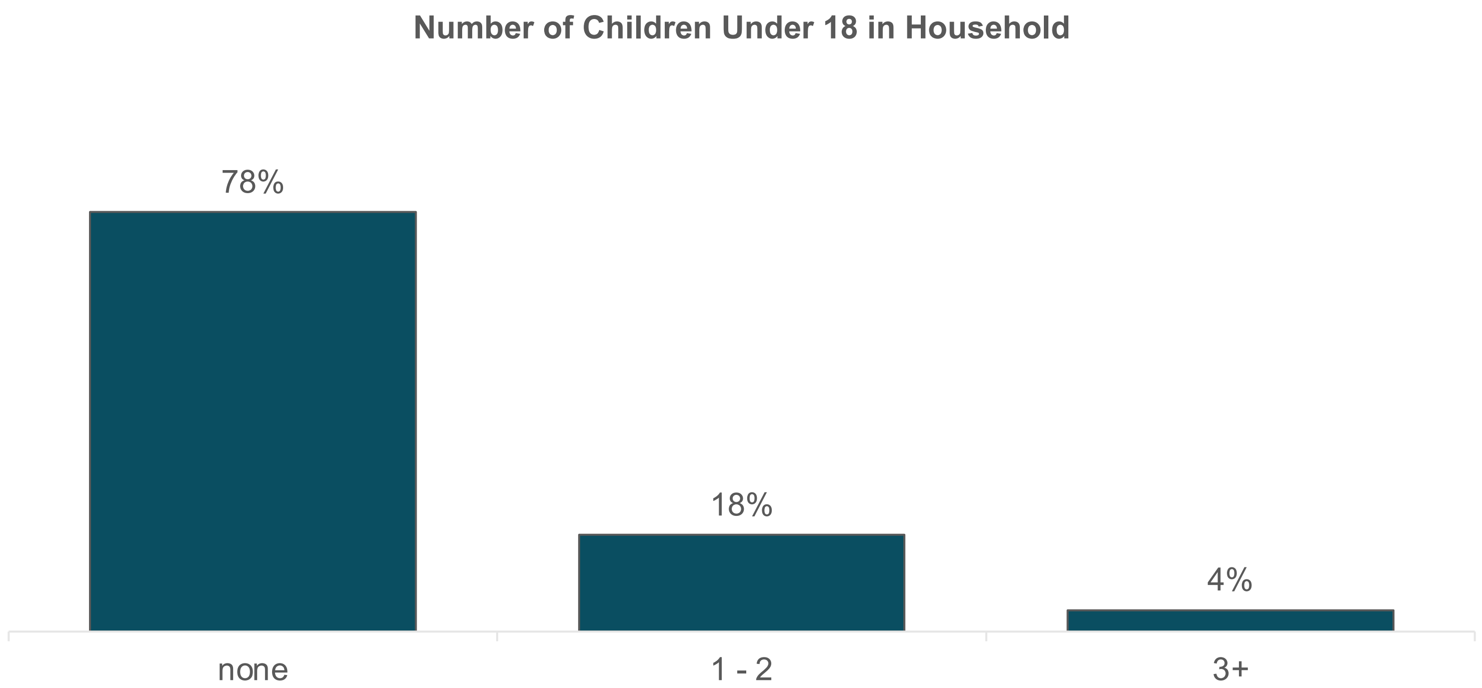
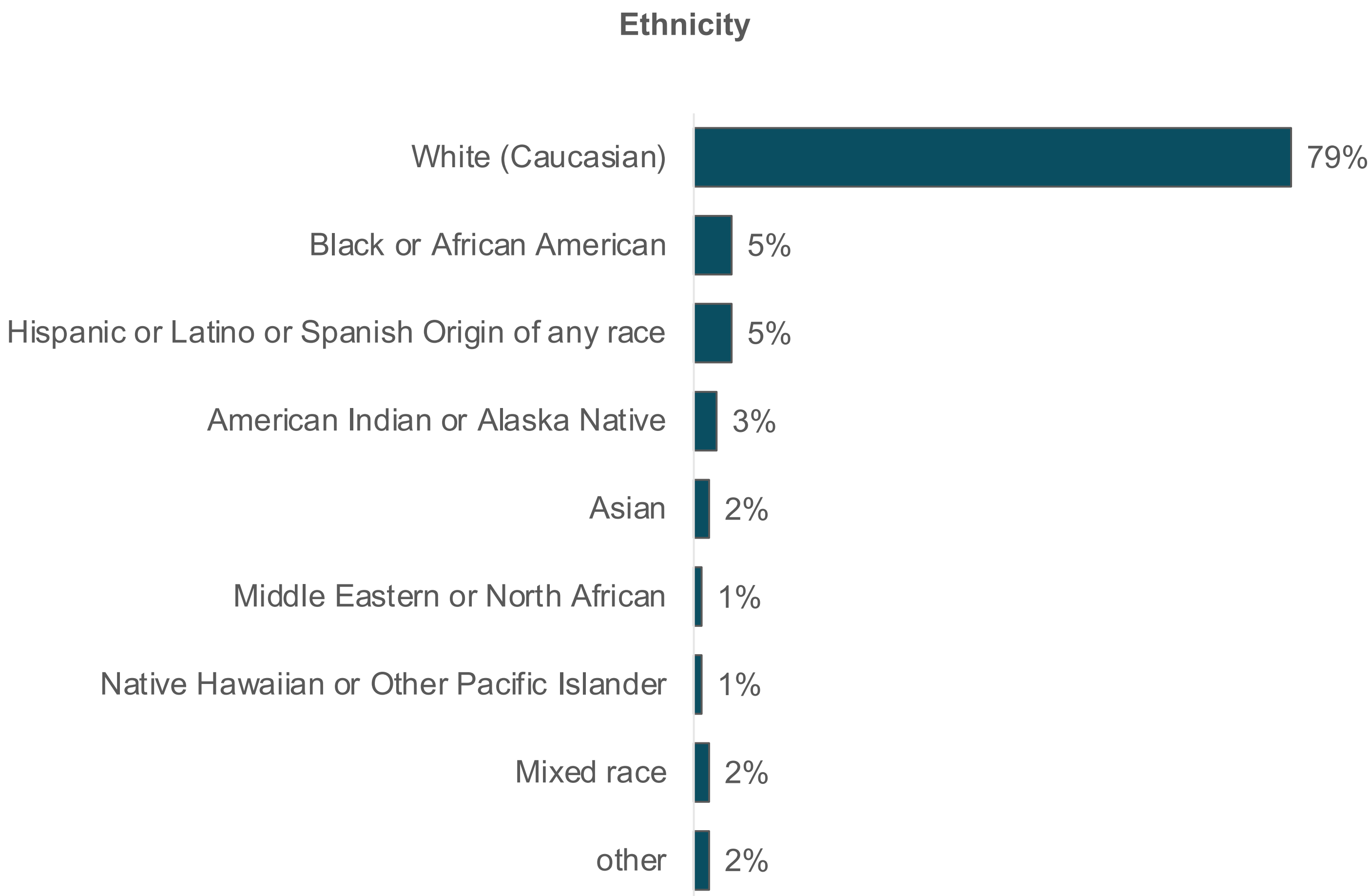
Three in four respondents (78%) have no children under the age of 18 in their household.



How many children under the age of 18 do you have living in your household?

base: 457 respondents who have gone camping, RVing or “glamping” in the past 12 months

Four in five respondents (79%) are white (Caucasian).



Do you consider yourself …?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months (multiple answers)

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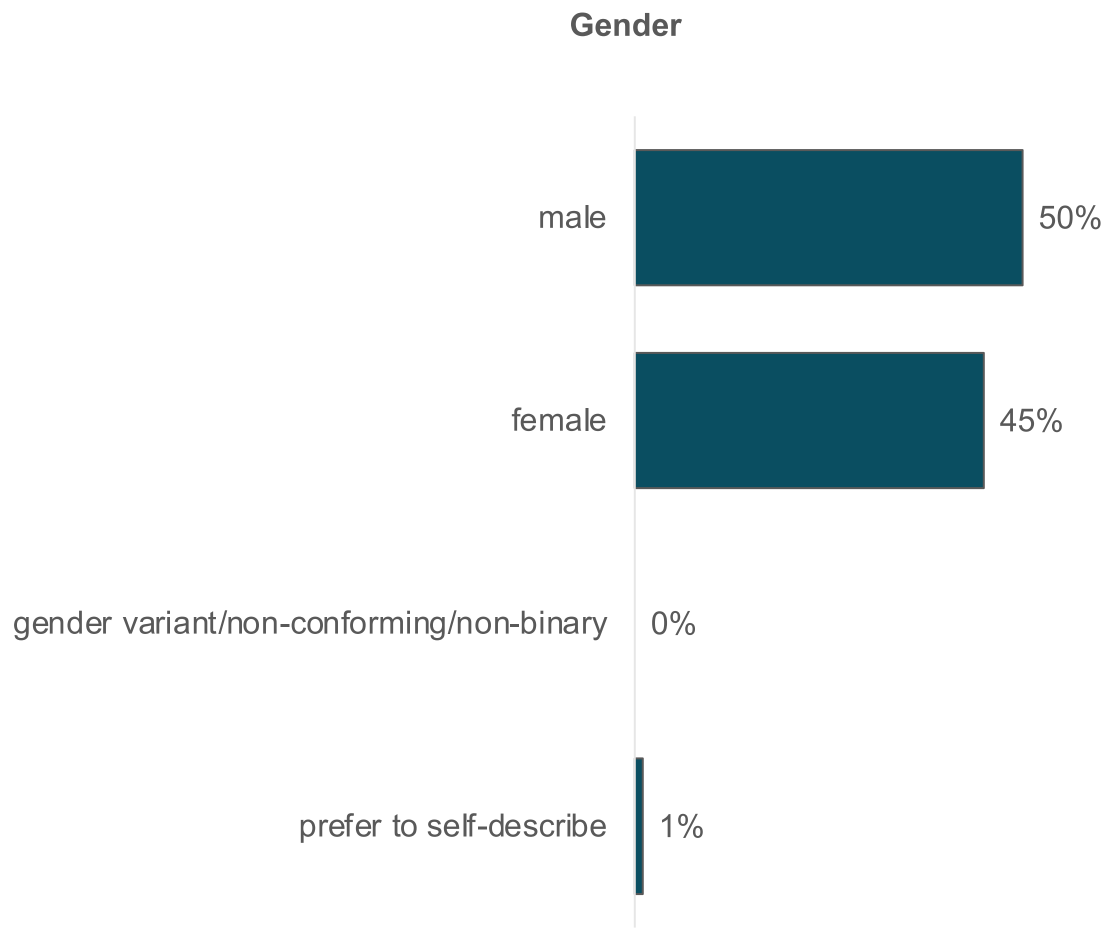
Half of respondents (50%) are male.

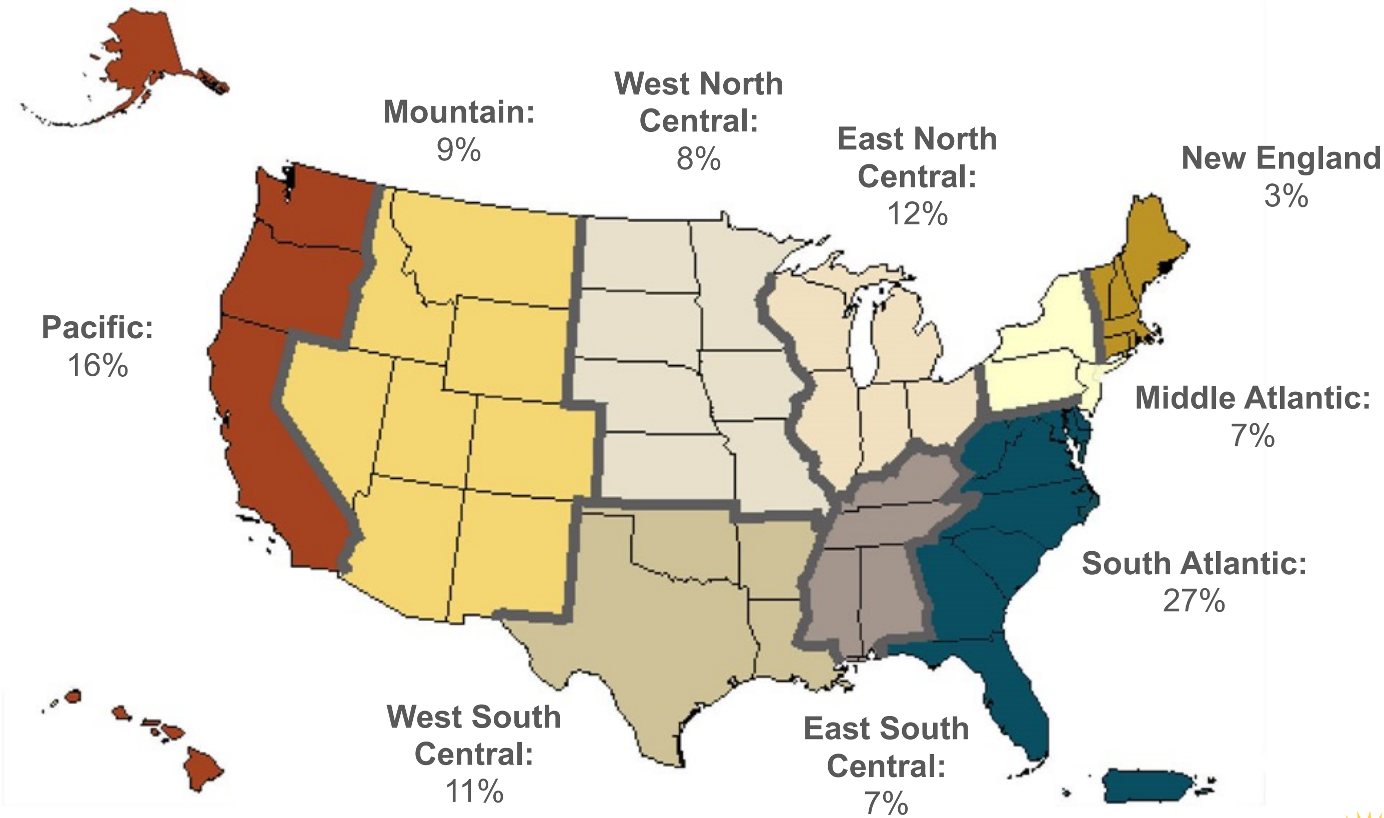


What gender do you identify with?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

Respondents most commonly live in the South Atlantic, with 27% living in that region.

Geographic Distribution



Which state do you live in?

base: 457 respondents who have gone camping, RVing or "glamping" in the past 12 months

Methodology

Methodology

- The survey sample, provided by ARVC, consisted of 32,271 emailable users of GoRving.com who expressed interest in campgrounds.
- The survey was designed jointly by ARVC and Readex.
- The online survey fielded from August 4, 2022, to August 22, 2022.
- The survey was closed for tabulation with 581 responses (2% response rate).
- To best represent the audience of interest, most results in this report are based on the 457 respondents who indicated they had gone camping, RVing, or “glamping” in the last 12 months.
- The margin of error (maximum sampling error for percentages at the 95% confidence level) based on these 457 usable responses is ±4.5 percentage points.
- As with any research, the results should be interpreted with the potential of non-response bias in mind. It is unknown how those who responded to the survey may be different from those who did not respond.

About Readex Research

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- Nationally recognized independent research company located in Stillwater, Minnesota.
- Roots are in survey research for the magazine publishing industry, but specialization in conducting high-quality survey research (by mail and/or the Internet) has served diverse clients from many other markets.
- Since its founding in 1947, Readex has completed thousands of surveys for hundreds of different clients.
- The response was tabulated and this report was prepared by Readex in accordance with accepted research standards and practices.