NORTH AMERICAN GLAMPING REPORT

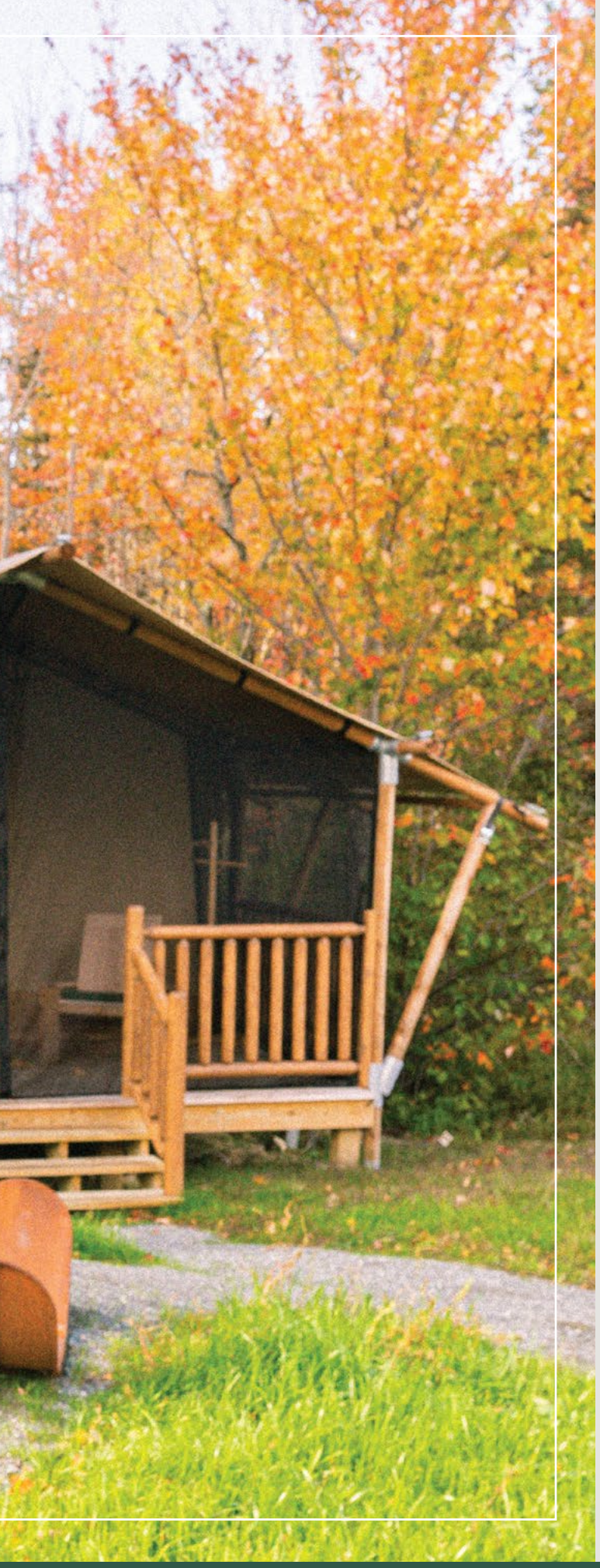
2022

The first annual survey of the Glamping Industry

Sponsored by Terramor Outdoor Resorts / KOA, Inc.
in partnership with Sage Outdoor Advisory.

IS GLAMPING HERE TO STAY?

Contents



In 2020, the travel world was rocked with the onset of COVID-19. This new pandemic brought the world and travel industry to a halt, while businesses worked to determine how to continue to operate, leisure travelers canceled trips and began looking at new ways to plan vacations.

The new demand for access to the outdoors was unprecedented. Glamping, which had been emerging as a new travel experience, was immediately thrust into the spotlight with new travelers wanting to experience the outdoors with all the luxuries of a resort stay.

> What was once considered a niche market, glamping is fast becoming a standard option for travelers by gaining broad-based awareness and acceptance across all segments of leisure travel.

Unlike traditional camping which requires purchasing gear and managing logistics, glamping offers the same outdoor experience while eliminating the barriers and unknowns for individuals who have never spent a night under the stars. The glamping experience fills the gap between resort stays and camping, making the transition among non-campers easier.

A new report from Kampgrounds of America, Inc. (KOA), for its newest brand Terramor Outdoor Resort, and in partnership with Sage Outdoor Advisory provides a glimpse into the mindset of the leisure traveler post-COVID-19. What the report reveals about glamping is that it is no longer an isolated idea but has now become a household word. Glamping is certainly not a new concept. However, since the pandemic, there has been exponential growth in the industry, creating widespread interest in glamping like never before seen in recent years.

As reflected in this first ever North American Glamping Report, while glamping may have found its audience due to the pandemic, the attraction to comfortably experience the outdoors is here for the long haul.

The Growth in Glamping

The term glamping was added to the Oxford's Dictionary in 2016 and ever since has seen a steady increase in awareness. However, the pandemic dramatically increased both awareness and experiences in glamping over the past two years.

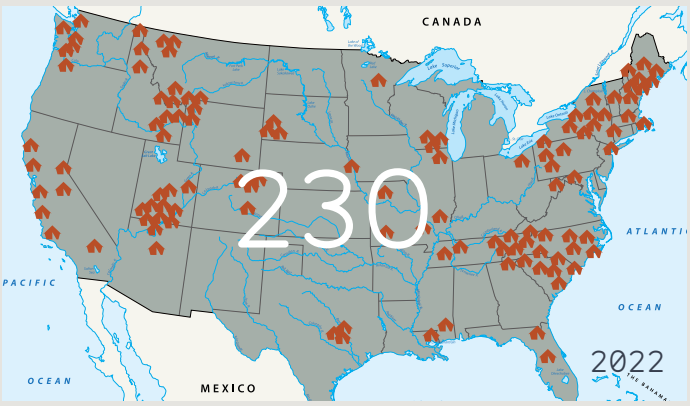
It is estimated that about

17 MILLION

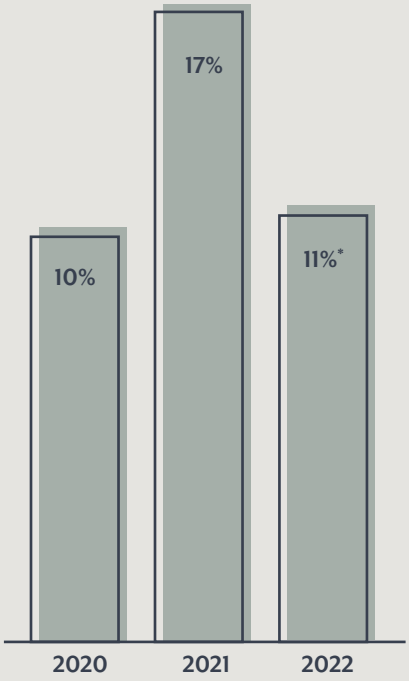
households took at least one glamping trip in 2021; a 155% increase from 2019

GROWTH IN GLAMPING LOCATIONS

The growth in exposure to glamping has been substantial in the past 6 years, which has closely tracked the growth in the number of glamping providers. Not only are glamping business brands emerging and growing, short-term rental options for glamping are entering the market at a similar pace.

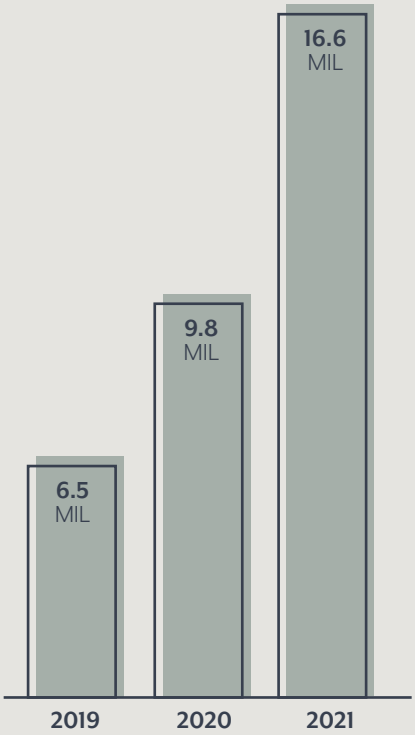


PERCENTAGE OF NORTH AMERICAN HOUSEHOLDS THAT GLAMP



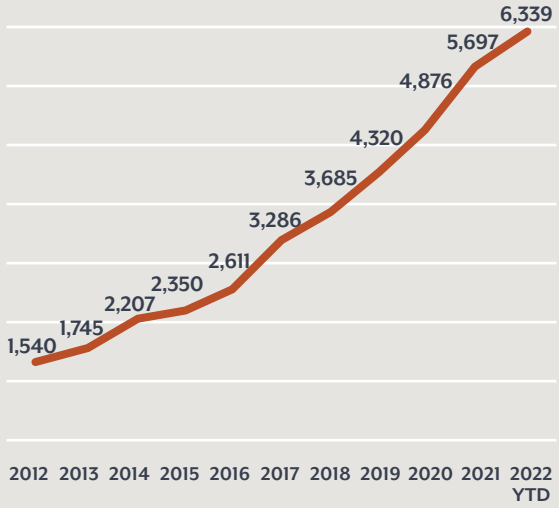
*as of August 2022

HOUSEHOLDS GLAMPING IN THE PAST 3 YEARS



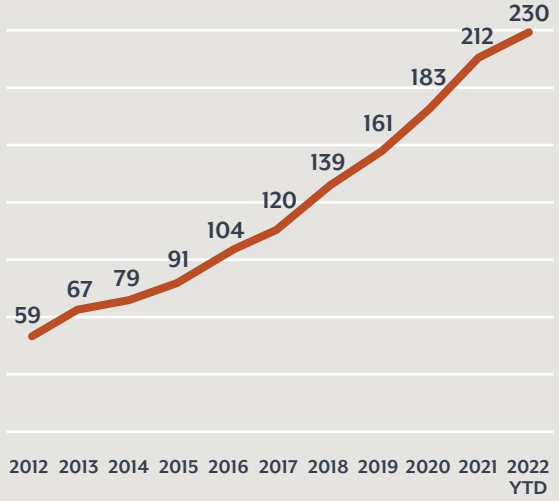
INDUSTRY GROWTH OVER THE PAST 10 YEARS

Available Glamping Accommodations Through Online Short-Term Rental Platforms

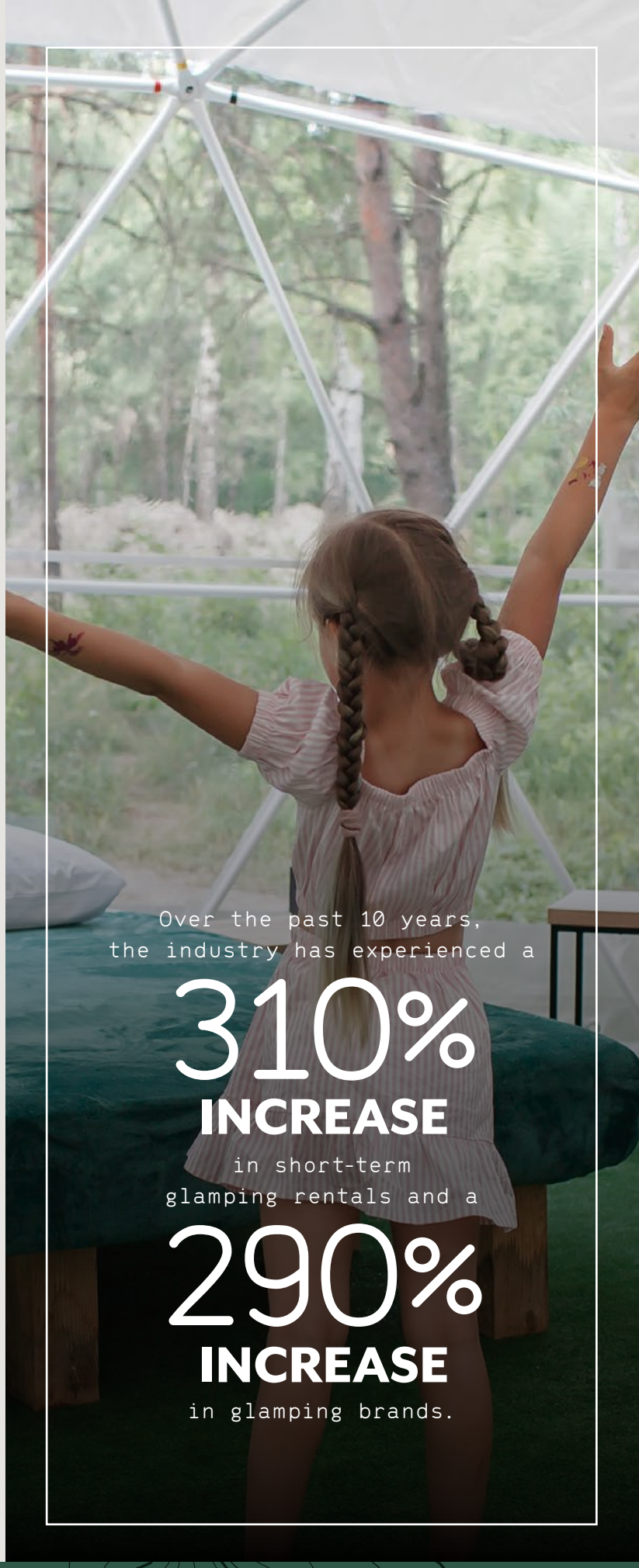


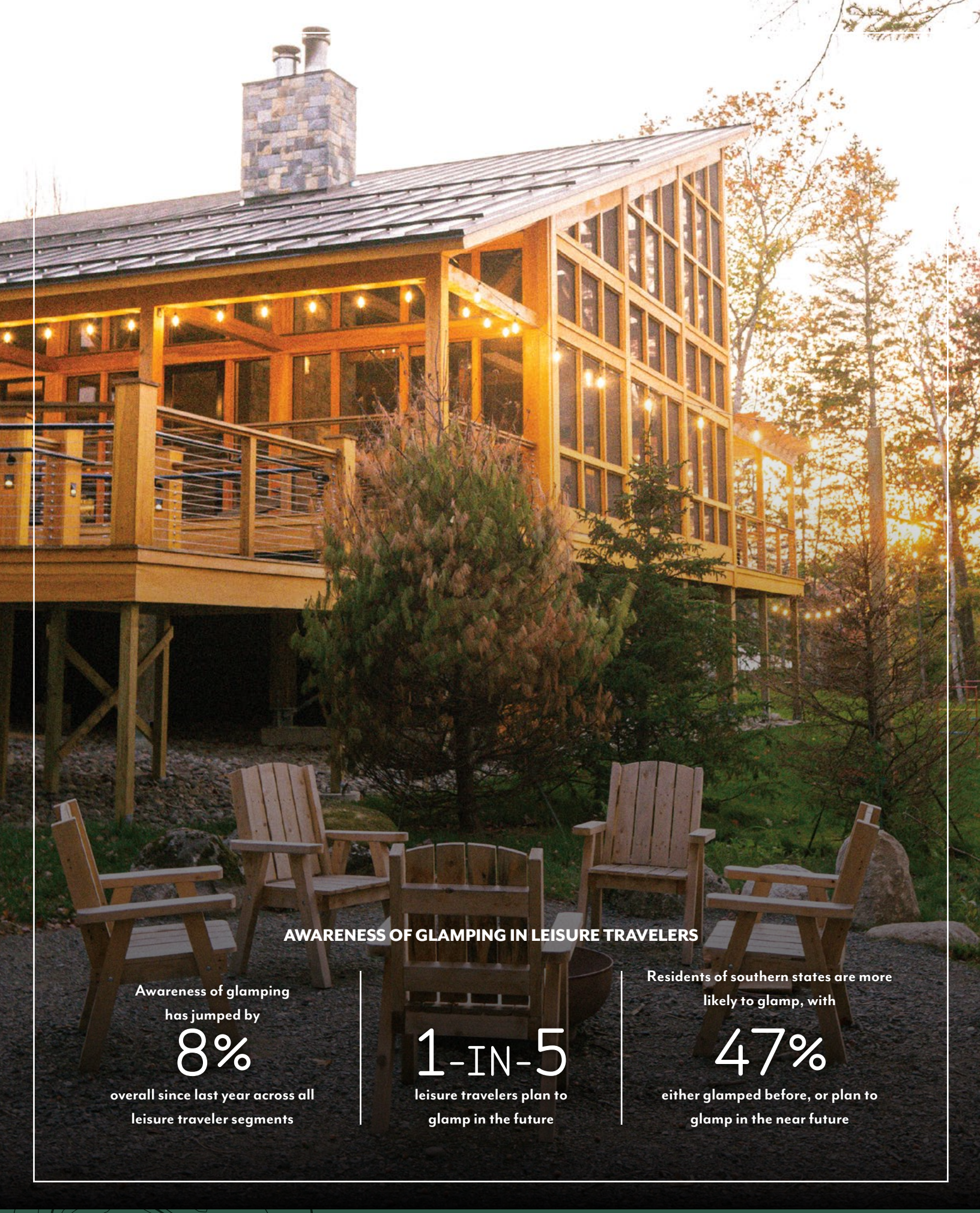
Short-term rentals are defined as accommodations available to rent through online vacation rental sites such as VRBO and AirBnB. Source: AirDNA.

Operating Glamping Businesses



Compiled data by Sage Outdoor Advisory. Glamping businesses are defined as having multiple units available and have a business website where customers can make direct bookings.





AWARENESS OF GLAMPING IN LEISURE TRAVELERS

Awareness of glamping has jumped by

8%

overall since last year across all leisure traveler segments

1-IN-5

leisure travelers plan to glamp in the future

Residents of southern states are more likely to glamp, with

47%

either glamped before, or plan to glamp in the near future

Fast Facts

Both campers and leisure travelers are seeking longer glamping trips than standard one-or two-night stays.

7-out-of-10

prefer a 3-5 night stay

Unique accommodations & access to the outdoors

are the top reasons people choose to glamp

Glampers will pay more for trips in the **Mountain West & Alaska** (CO, ID, MT, UT, WY); genuinely

43%

more expensive per night than in other parts of the country

52%

of all travelers expect to have Wi-Fi while glamping, the highest expected amenity

61%

of glampers use social media to find inspiration when booking travel, compared to just 39% non-glampers

Who is Glamping

Glamping appeals most to Millennials and Gen Z, however all generations indicate a level of awareness and interest in glamping. While the younger generations are more interested in glamping with friends and family, Baby Boomers and the Silent/Mature generations are most interested in a couple's getaways.

Other key differentiators include:

- **Price Sensitivity:** Baby Boomers are the most cost conscious when booking a glamping trip, while Millennials are the least cost sensitive
- **Plugging In.** Gen Z is more inclined to pay more for an experience that guarantees Wi-Fi
- **Inspiration.** Both Gen Z and Millennials look to Instagram to find travel inspiration, while Gen X heavily utilizes YouTube. Baby Boomers and Silent/Mature groups look at more traditional platforms such as travel magazines and travel agencies when making travel plans

Of those who glamp, families and groups hold a large percentage of the market.

WHO IS THE TYPICAL GLAMPER?

Leisure travelers who actively glamp are most likely to include:

Millennials

Have children in the household

Household income of $100,000 or more

Stay 3-5 nights per trip

Travel more than 100 miles for a glamping trip

THE FAMILY GLAMPER

75%
of leisure travelers are interested in a glamping experience that includes activities for both children and adults

4-IN-10
of family glampers plan to include glamping as part of their regular travel plans

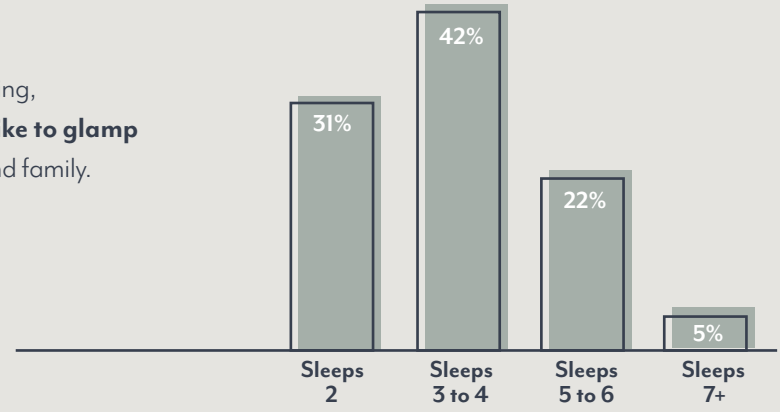
62%
of households who went glamping did so with young children

More adventurous in accommodation
such as a treehouses, yurts or covered wagons verses cabins

THE GROUP GLAMPERS

Among those who are interested in future glamping, **33% of leisure travelers indicate they would like to glamp with a large group** that includes both friends and family.

PERCENTAGE OF MARKET THAT CAN ACCOMMODATE FAMILIES & GROUPS



THE GROUP GLAMPER

Group glamping is more desired in the Southern States, with

41%

of **leisure travelers** based in the south indicating they would **prefer a group experience**

Less cost sensitive,
put a higher importance on services offered over costs

Very socially influenced

80% of **Millennial group glampers**

70% of **GenZ group glampers**

find vacation inspiration via social media, compared to half of all other leisure travelers

ACCESS TO THE OUTDOORS FOR ALL

Awareness and participation in glamping continues to grow among all demographics. While interest in glamping is highest among Asian and Hispanic leisure travelers, participation in glamping has grown the most amongst Black travelers, having doubled since 2021. Of particular interest, **1-in-5 Black leisure travelers indicate they have taken a glamping trip in the last 12-months**; a higher percentage than any other demographic.

WHAT DRAWS EACH DEMOGRAPHIC TO GLAMPING

Hispanic Glampers
are more interested in unique accommodations and family travel

Black Glampers
are more inspired by social media and want an experience that combines both friends and family

Asian Glampers
are most likely to seek a couples getaway

White Glampers
are inspired by access to the outdoors and campfire experiences

How They Glamp

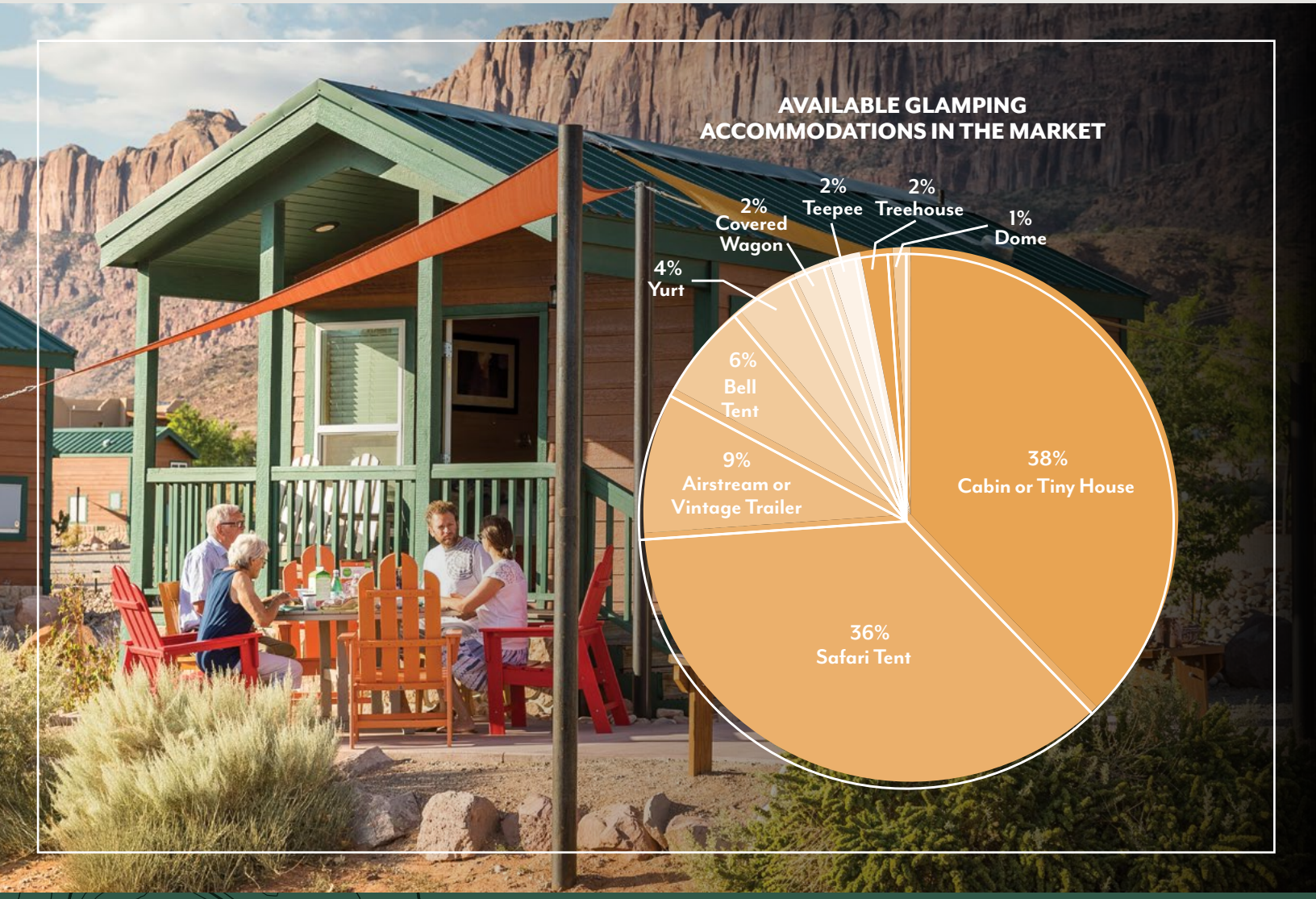
While cabins are the preferred accommodation style during a glamping trip, there has been increased awareness among different options as glamping has become more mainstream. When asked to rate a preference in accommodation style, canvas tents and covered wagons increased by six percentage points over last year. Further, results suggest that as travelers experience glamping, their comfort level in staying in an alternative accommodation increases; with covered wagons increasing 27%, canvas tents increasing 20%, and yurts increasing 14%.

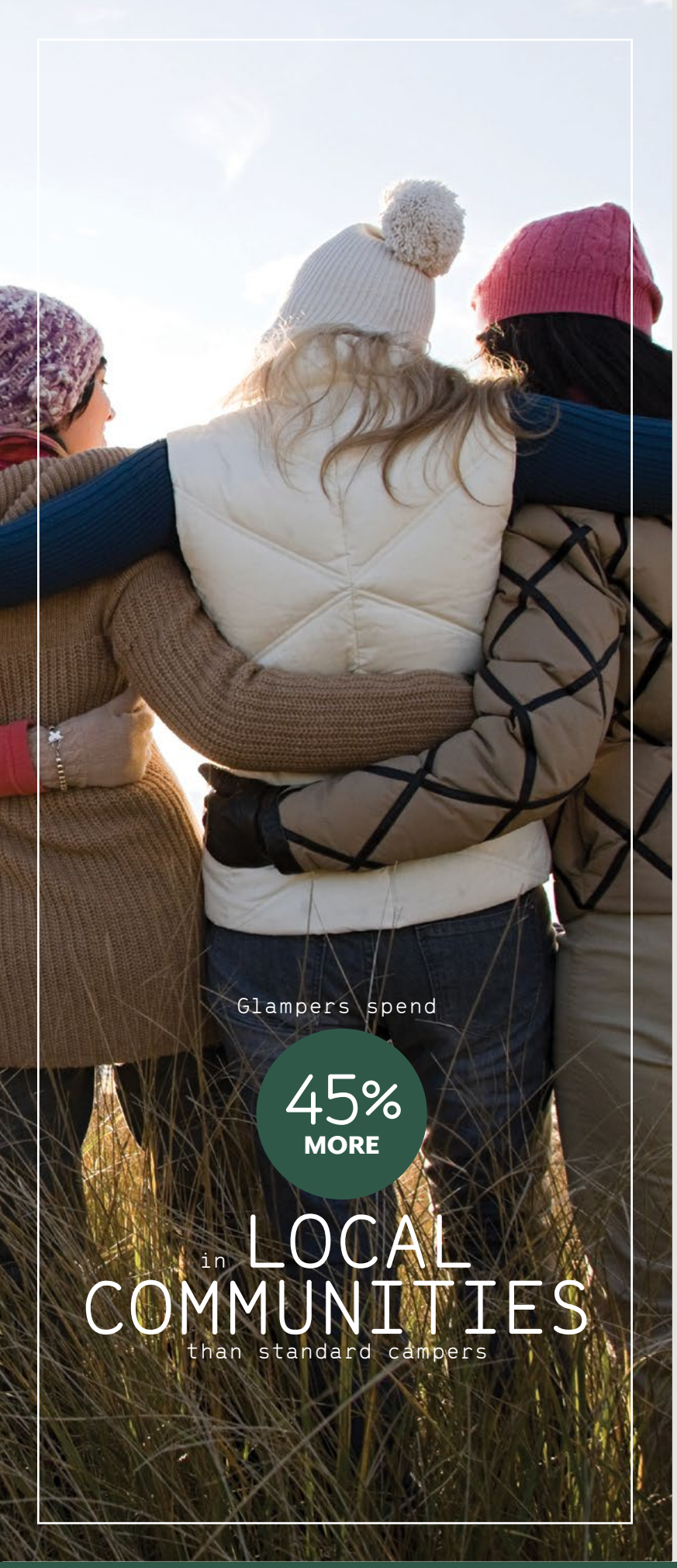
THE MUST-HAVES

While Millennials prefer a glamping experience that incorporates family experiences, they are also the most comfortable demographic to experience a solo trip. More socially driven, GenZ travelers desire group experiences with friends as much as a couple's getaway. Baby Boomers are mostly interested in couple's retreats while glamping and the least interested in a solo trip.

GENERATIONAL EXPERIENCE & AWARENESS

	GenZ	Millennial	GenX	Baby Boomer	Silent/Mature
Taken a glamping trip in the past 12 months	25%	26%	17%	8%	7%
Taken a glamping trip more than 12 months ago	14%	14%	12%	8%	9%
Plan to take a glamping trip in the next 12 months	9%	17%	14%	8%	9%
Heard of glamping, no plans to take a glamping trip	19%	18%	13%	25%	20%
Heard of glamping only	17%	13%	26%	29%	24%
Never heard of glamping	16%	13%	19%	22%	30%





GLAMPERS DESIRE LOCAL EXPERIENCES

While glampers indicate onsite preferences are important, overall selection of where they stay is heavily influenced by the local attractions.

Foodies. Across the board, glampers are most likely to say that dining out is their top off-site activity

Day Drives. Scenic drives fall just under eating out as their secondary most anticipated event

Park Passes. Access to National Parks are top of the list for glampers when researching destinations

TOP REASONS TO GLAMP IN 2022

	Campers Who Camp	Glampers
An experience that blends the benefits of staying at a resort and the outdoors	63%	34%
Wanting to stay in unique accommodations	53%	42%
Having services and amenities that aren't available with camping	40%	33%
Do not want to go camping, but still want to have an outdoors experience	33%	11%
Want a new or different kind of experience	33%	37%
Spouse or significant other want to go glamping	23%	39%

The Future of Glamping

Glamping is quickly setting up roots in the leisure travel industry. As reported, findings show that families are flocking to glamping, which bodes well for the future of glamping. Glamping also provides an option for the "comfort camper" who now has an avenue for outdoor experiences without the need to buy an RV or additional camping gear.

THE FUTURE LOOKS POSITIVE

Repeat Glampers.
Of those who have glamped,
74%
plan to glamp again in the near future

New Trailblazers.
Glamping appeals to
32%
of leisure travelers who have never glamped before

A New Tradition.
Among those who have glamped,
4-IN-10
have made glamping a part of their regular vacation plans

The industry is also seeing a proliferation of new, unique glamping businesses being driven by traveler demand for different experiences. New resorts, accommodations and developments have seen significant growth in the past three years, with new brands entering the glamping market at an exceptional rate. Further, individual short-term rentals are taking advantage of the latest trend, which accounts for over 90% of glamping accommodations available.

Looking ahead, glamping is staking out a place within the leisure travel sector. In particular, glamping offers an option for both existing campers and leisure travelers by creating a space that incorporates the outdoors with the comforts of a resort stay. Glamping has taken travel by storm and is proving it is here to stay.

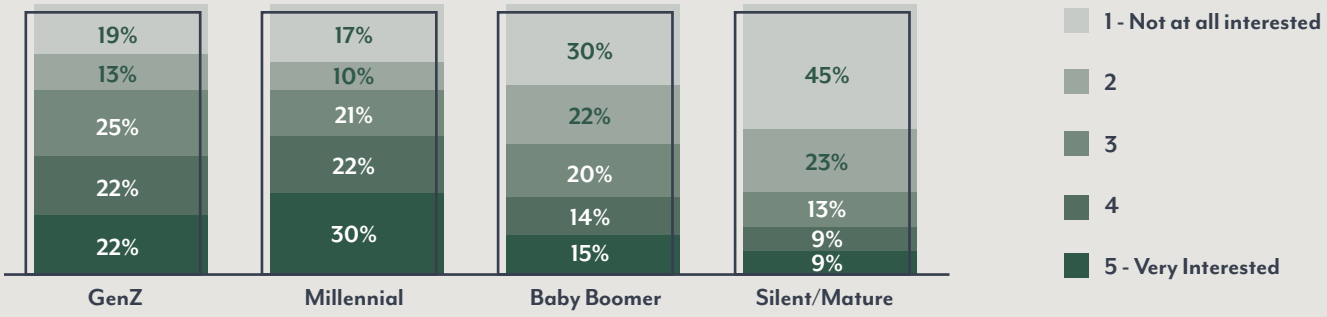
Further Demographics of Glamping

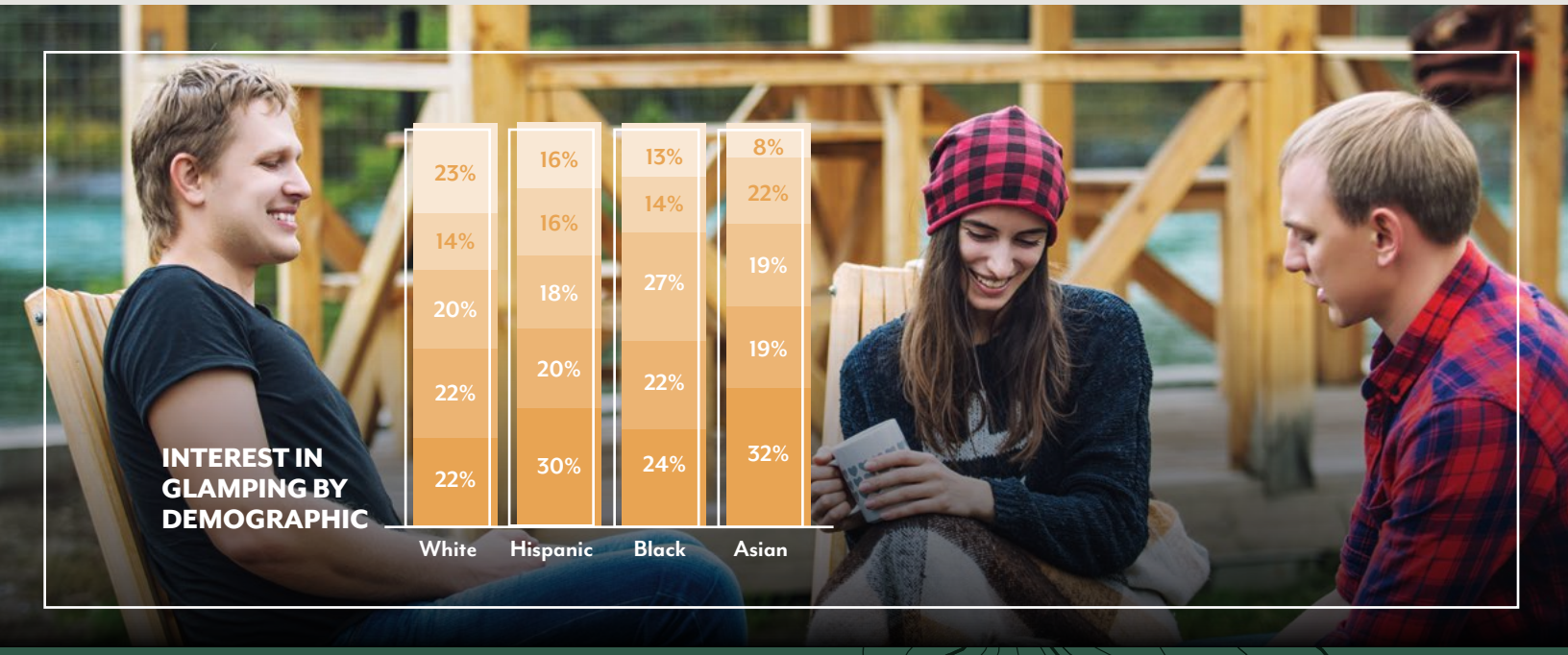
The data shared within the North American Glamping Report is a selection of key findings from research driven by Terramor Outdoor Resort, Cairn Consulting and Sage Outdoor Advisors. Further insights on age and demographics are highlighted below.

DESIRED GLAMPING EXPERIENCES PER GENERATION

	GenZ	Millennial	GenX	Baby Boomer	Silent/Mature
A family experience with activities for both adults and children	43%	63%	49%	38%	10%
A couples experience	50%	48%	44%	60%	50%
A group experience that includes friends (eg. weekend getaway)	50%	39%	31%	22%	40%
A larger group experience including friends/extended family members	39%	33%	29%	20%	40%
A solo experience	11%	22%	13%	7%	10%
Other types of experience	7%	5%	4%	5%	0%
Uncertain	7%	2%	0%	5%	10%

INTEREST IN GLAMPING BY GENERATION





Survey Methodology

The results summarized in this report represent a survey effort to measure perceptions, behaviors, and preferences surrounding glamping as a function of the space it occupies in leisure travel. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households who participate in leisure travel. Sampling was designed to obtain n=1,200 completed surveys among representative U.S. and Canadian households stratified by participation in both leisure travel activities and camping. A sample of n=1,200 households is associated with a margin of error of +/-2.83%. This survey represents the second iteration of the Glamping Survey, with results compared to previous findings where applicable. All surveys were completed online via an outbound solicitation sent to a randomly selected cross-section of households. The general population sample of households from which the surveys were completed was statistically balanced to ensure that the results are in line with overall population figures for age, gender and ethnicity.

For the purpose of this survey, the Pew Research definition for generations were used:

- **GenZ (1997 – 2004)**
- **Millennials (1981 – 1996)**
- **GenX (1964 – 1980)**
- **Baby Boomers (1946 – 1964)**
- **Silent/Mature (1928 – 1945)**

**we did not allow respondents under the age of 18 in the survey*

SAGE OUTDOOR ADVISORY DATA COLLECTION METHODOLOGY

Process:

Sage Outdoor Advisory's U.S. based research team gathered this data by reviewing company's website, social media, news, online reviews and phone interviews with company staff to confirm information.

Rates are collected from company booking calendars and include gathering average weekday vs. weekend rates in peak, shoulder and low season.

**some businesses utilize dynamic pricing which means their rates change depending on when the booking is made*

Market Map

Maps used on page 4, were developed using an estimated 80% of U.S. Glamping Businesses in the U.S.

This report was compiled with the knowledge and data from outdoor hospitality partners. The is a first-of-its-kind comprehensive report for the glamping industry.

Terramor Outdoor Resorts, a business unit of Kampgrounds of America, Inc. KOA is the largest privatized camping company in the world. Their new brand Terramor Outdoor Resort was recently named the Hospitality Design Awards Best New Brand in 2021. Terramor provides the experience of camping with the comforts of a resort.

Sage Outdoor Advisory. Sage is the leader in outdoor hospitality consulting and appraisal in North America. SOA empowers launching glamping, campground and RV resorts, and they specialize in preparing businesses to secure investment. Sage has completed over 150 feasibility studies and appraisals in outdoor hospitality, and they own the largest proprietary glamping business database in the world. For access to the USA glamping database or services, visit sageoutdooradvisory.com.

Cairn Consulting Group. A longstanding partner of KOA for the annual North American Camping Report, Cairn Consulting is a leader in outdoor research, collection and analytics.

AirDNA. The leading provider of short-term rental data and insights, with the largest historical dataset in the industry covering over 10 million properties in 120,000 global markets. This includes over 100,000 glamping unit rentals in the U.S. Their range of online and exportable reports offers a solution for everyone in the industry to analyze trends, price rentals, identify new investment opportunities, and benchmark performance.

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