

CAMPERS IN CALIFORNIA

TRAVEL PATTERNS AND ECONOMIC IMPACTS

A Cooperative Project of

The California Roundtable on Recreation, Parks and Tourism
&
California Tourism

CAMPERS IN CALIFORNIA

TRAVEL PATTERNS AND ECONOMIC IMPACTS

A Cooperative Project of

The California Roundtable on Recreation, Parks and Tourism
&
California Tourism
801 K Street, Suite 1600
Sacramento, CA 95814

Prepared by

Dean Runyan Associates
815 SW Second Avenue, Suite 620
Portland, Oregon 97204
(503) 226-2973, www.dra-research.com

July 2000

Table of Contents

| | |
|--|-----------|
| 1. INTRODUCTION | 1 |
| RESEARCH METHODOLOGY | 1 |
| RESEARCH METHODOLOGY LIMITATIONS..... | 2 |
| CAMPGROUND FACILITIES IN CALIFORNIA | 3 |
| 2. CAMPING TRIPS IN CALIFORNIA..... | 5 |
| 3. CAMPING PARTIES..... | 13 |
| 4. CAMPING ACTIVITIES..... | 21 |
| 5. TRIP PLANNING INFORMATION SOURCES | 23 |
| 6. CAMPING TRIP SATISFACTION..... | 25 |
| 7. EARLY CAMPING EXPERIENCES..... | 29 |
| 8. ECONOMIC IMPACTS OF CAMPING..... | 34 |
| ECONOMIC IMPACTS..... | 34 |
| OVERNIGHT CAMPING EXPENDITURES BY TYPE OF BUSINESS..... | 36 |
| TOTAL OVERNIGHT CAMPING TRIP EXPENDITURES..... | 38 |
| AVERAGE DAILY SPENDING PER PARTY BY TYPE OF CAMPGROUND | 39 |
| TOTAL TRIP EXPENDITURES PER PARTY TO AND FROM CAMPGROUND | 40 |
| 9. SUMMARY OF FINDINGS & CONCLUSIONS..... | 41 |
| SUMMARY OF FINDINGS..... | 41 |
| <i>Camping Trips in California.....</i> | <i>41</i> |
| <i>Camping Parties.....</i> | <i>41</i> |
| <i>Camping Activities.....</i> | <i>41</i> |
| <i>Trip Planning Information Sources.....</i> | <i>41</i> |
| <i>Camping Trip Satisfaction.....</i> | <i>41</i> |
| <i>Early Camping Experiences.....</i> | <i>43</i> |
| <i>Economic Impacts of Camping.....</i> | <i>43</i> |
| CONCLUSIONS..... | 43 |
| APPENDIX A: ETHNIC FACTORS | 45 |
| APPENDIX B: SURVEY METHODOLOGY..... | 53 |
| APPENDIX C: SURVEY INSTRUMENT..... | 59 |

Acknowledgments

This project was made possible by the efforts of many individuals and groups who were instrumental in providing information, guidance and other assistance. Eileen Hook, Research Manager and Rural Tourism Liaison, California Division of Tourism, was responsible for coordinating the partners involved and for several important aspects of data collection. She was a key player in making this project a success, providing important leadership and decision-making every step of the way. Ken Martin, Parks and Recreation Specialist, California State Parks, was also involved coordinating project partners and aiding the data collection process on behalf of the California Roundtable on Recreation, Parks and Tourism (The Roundtable). Ken Martin's responsibilities were taken over by Rick LeFlore following Mr. Martin's Spring 2000 retirement.

Other key members of The Roundtable that assisted with the planning of this project and data collection include: Tug and Judy Miller of the California Travel Parks Association, Mary Cahill of Sunrise Recreation and Park District and the California Parks and Recreation Society (CPRS), Andrew Kirkham of Reserve America, Tim Smith of BLM, Trinidad Juarez of the USFS, Jeni Bradley of the USFS/Recreation Solutions and Emilyn Sheffield of California State University Chico.

1. Introduction

This study of camping in California provides a comprehensive profile of camping travel patterns, camping activities, travel spending patterns and demographics of campers. Also included are estimated economic impacts of camping in the state, which quantify total travel expenditures, payroll, employment and tax receipts generated by camping activity. A primary purpose of this report is to highlight the importance and magnitude of camping as part of California's tourism industry.

This study builds upon a July 1994 study of the same title also prepared by Dean Runyan Associates. This report describes 1999-2000 original camping data collected from campers throughout the state of California. It summarizes and interprets results for all campers and also provides a breakout of results according to management category (e.g. State Parks, Local Parks, National Parks, Private/Commercial) where camping parties stayed overnight. Important similarities, differences and characteristics are noted which may offer insights to camping managers and tourism officials.

Camper expenditures are a primary focus of this study as well. Campers made a variety of expenditures, some while traveling to and from the campsite and others in the area where the campsite is located. These expenditures help support a wide variety of businesses in areas where camping is frequent, particularly in smaller communities adjacent to recreation areas with government or private campgrounds. Economic impacts include purchases of meals, retail items, recreation-related fees, vehicle expenses, and fees associated with the use of campsites.

Camping continues to be one of the most widespread outdoor recreation activities in California, for both residents and visitors to the state. Camping is an activity in itself, taking families and groups to recreation areas throughout the state's coastal, mountain, desert, river and other recreation locations. Camping also represents a form of visitor accommodation—used by many travelers who visit historic sites, sightsee, hike, fish and participate in a wide range of recreation activities while staying at a campsite. In a state facing increased population growth, increased ethnic diversification and increased pressures on natural resources, camping and the activities and expenditures of campers is an important topic for public and private interests alike.

Research Methodology

Data for this study was gathered from a survey of camping parties who stayed at least one night in a campground in California during 1999 or the spring of 2000. The sample of campers was selected from several sources that are described in Appendix B.

Self-administered questionnaires were distributed to members of the selected sample using two different sampling methods: mail distribution and on-site distribution. The questionnaires distributed on-site are referred to as intercept questionnaires in this report. Copies of each questionnaire appear in Appendix C.

Response rates for the mailed version of the questionnaire were excellent, averaging 36.8% overall. The response rate for the intercept questionnaire is unknown and will not be reported due to survey distribution issues that will be explained below.

Research Methodology Limitations

Several aspects of the research design affect the extent to which the research results are representative of all campers in California. These limitations are due primarily to budgetary constraints and normal respondent error issues.

First, the process by which the intercept questionnaires were distributed by USFS was not fully documented despite the best efforts of agency managers. This was due to budgetary and seasonal staffing constraints. In addition, due to seasonal factors at the time USFS personnel were dispersing surveys, staff found it difficult to locate enough on-site campers to whom they could distribute questionnaires. The effort was also constrained by inadequate training of USFS personnel assigned to distribute the questionnaires; they may not have distributed them randomly to camping parties. It may also be true that many of the questionnaires were not distributed at all, since the quantity of returned questionnaires from USFS sites was especially small. The result of these problems is the possibility of sampling error and under-representation of USFS campers in the study.

A second limitation is that while the study represents all major categories of campgrounds in California, some campground facility types are not equally represented in the study.

These factors do not appear to represent major limitations on the validity and usefulness of the findings. The research findings show that campers tend to make use of different types of camping facilities on different trips, or for different segments of the same trip. For this reason, a sample of campers selected because they used a particular facility also represents use at other types of facilities, reducing the extent of possible bias.

In reporting the findings throughout most of this report, figures for campers using each type of campground are presented separately, with a combination of respondents shown as "all campers." This classification of campers with respect to type of facility used is based primarily on where camping parties spent the majority of their time during their most recent camping trip. Respondent data are weighted to properly represent the mix of camping facilities in California. Additional discussion of research methodology appears in Appendix B.

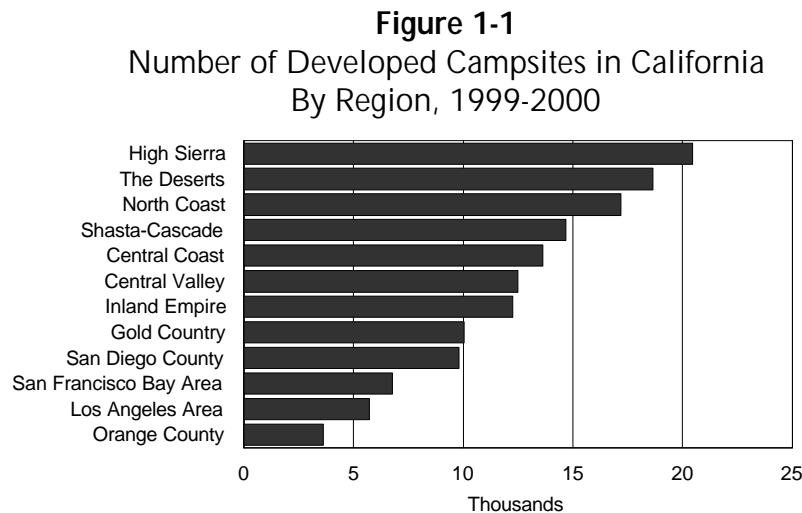
Campground Facilities in California

The number of developed campsites in California by tourism region are illustrated in Figure 1-1. The quantities shown represent developed campsites only. The highest concentration of campsites is in the High Sierra region. This region is home to Sequoia National Forest, Yosemite National Park and Lake Tahoe. The High Sierra has the greatest number of U.S. Forest Service campsites and National Park Service campsites in the state.

The second highest concentration of campsites is in The Deserts region. This region borders the High Sierra region and includes Death Valley and Palm Springs. Nearly 70% of the campsites in The Deserts region are private/commercial.

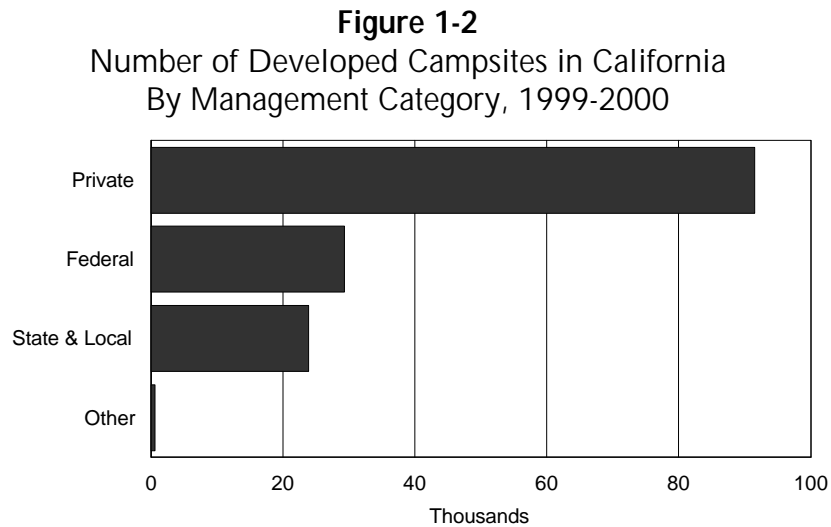
The North Coast region, which extends southward to San Francisco, has the third largest concentration of campsites, which are primarily private/commercial campgrounds. In fact, the North Coast region has the highest number of private campsites in the state.

The four urban tourism regions have the lowest concentration of campsites. Orange County has just 2.5% of all campsites in California.



Source: Dean Runyan Associates, California Dept. of Housing & Community Dvpt. (private), California Dept. of Parks & Rec. (State Parks), Foghorn CA Camping Guide (all other agencies)

The total quantities of California camping sites by management category are summarized in Figure 1-2. Private/Commercial campgrounds account for over two-thirds of all campsites in the state.



Source: Dean Runyan Associates, California Dept. of Housing & Community Dvpt. (private), California Dept. of Parks & Rec. (State Parks), Foghorn CA Camping Guide (all other agencies)

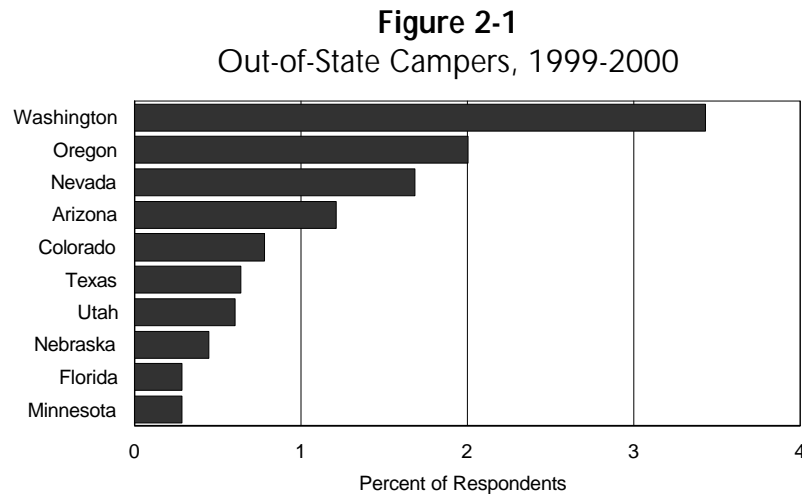
A more detailed listing of the number of developed campsites in California is shown in Appendix B, Table B-6.

2. Camping Trips in California

This section reviews the characteristics and behavior of campers and camping trips in California, based on the findings of the survey conducted for 1999 - Spring of 2000.

The majority of campers in California are in-state residents.

Eighty-seven percent of campers in California are California state residents. Regionally, 92% of campers are concentrated in the Pacific Northwest states of the country. The top 10 state origins of out-of-state visitors are shown in Figure 2-1.



Source: Dean Runyan Associates

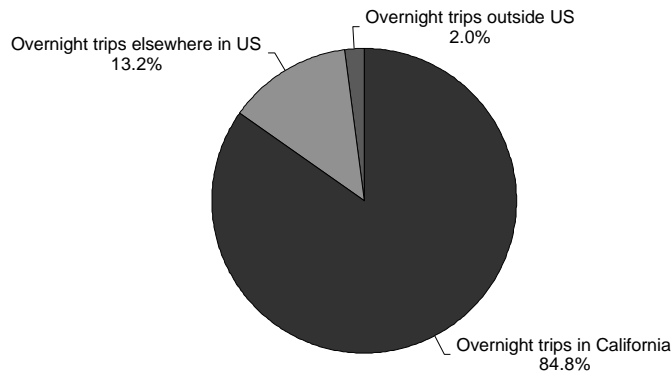
Most campers take trips within the state of California only.

Of the total number of camping trips taken during 1999-2000 by all campers, 84.8% were within the state of California, as shown in Figure 2-2. Overnight camping trips outside the U.S. accounted for the smallest average number of camping trips at just 2.0%.

Almost half of all campers took five or fewer camping trips during the past year; almost one-quarter took 11 or more trips.

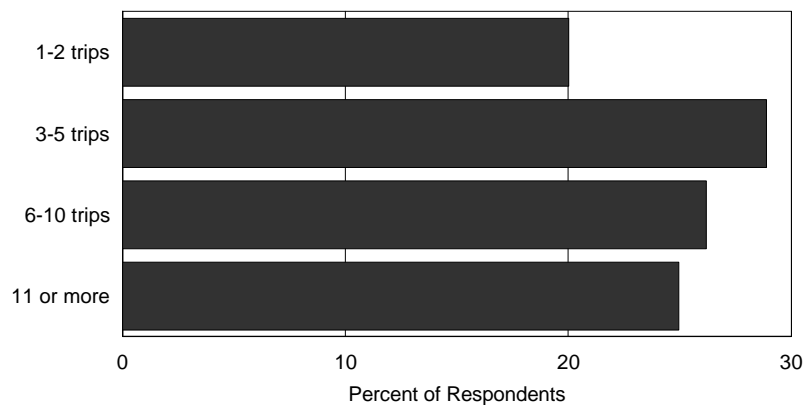
While 48.9% of all campers took five or fewer camping trips during the past year, the average number of overnight camping trips was 8.5 trips. The average is affected by the fact that some campers took many more camping trips. Just over one-quarter took 6 to 10 trips and just under one-quarter took more than 11 trips, as shown in Figure 2-3.

Figure 2-2
Total Camping Trips By Destination, 1999-2000



Source: Dean Runyan Associates

Figure 2-3
Annual Average Total Overnight Camping Trips, 1999-2000



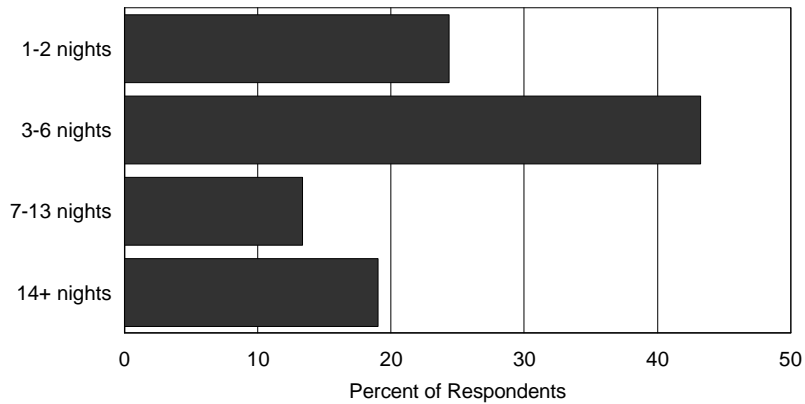
Source: Dean Runyan Associates

As shown in Table 2-1 on page 8, private/commercial campers took the greatest number of annual trips and State Park campers took the fewest number of annual camping trips.

The majority of camping trips are one week or less.

While the average number of nights away from home was 8.8 nights, or about one and a half weeks, the majority of camping trips were one week or less as shown in Figure 2-4. The higher average number of nights away from home was the result of some campers taking longer trips of 14 nights or more.

Figure 2-4
Average Length of Stay, 1999-2000



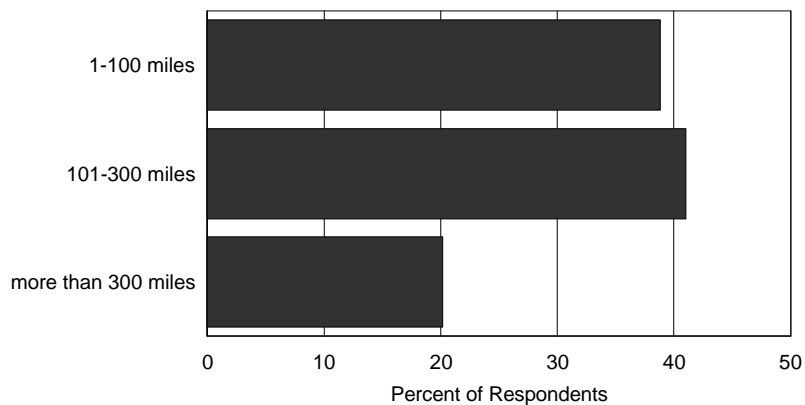
Source: Dean Runyan Associates

As summarized in Table 2-1, users of National Park facilities took the longest trips, an average of 10.0 nights, while State Park users took the shortest trips, an average of 4.3 nights. State Park users were also least likely to stay over 14 nights. Note that these averages do not represent average lengths of stays at individual management group facilities because campers often stay at more than one campground during a trip, as discussed later in this chapter.

Most overnight camping trips are to locations within 300 miles.

As shown in Figure 2-5, most camping parties traveled less than 300 miles to reach their camping destinations. Almost 40% traveled less than 100 miles and just over 40% traveled between 100 and 300 miles. The average number of miles to each camping party's destination was 220 miles.

Figure 2-5
Average Number of Miles Traveled To Camping Destination, 1999-2000



Source: Dean Runyan Associates

Over two-thirds of Local Parks users and over half of State Parks users traveled 100 miles or less to their main camping destinations. Accordingly, both user groups also had the lowest average travel distance from home. Private/Commercial campers travel the farthest average distance from home. These results are found in Table 2-1.

Table 2-1
Average Number of Overnight Camping Trips,
Average Length of Stay & Distance From Home, 1999-2000
By Management Category

| | Percent of Respondents | | | | | |
|--|------------------------|------------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | National Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Average Number of Overnight Camping Trips | | | | | | |
| In California | 6.4 | 5.5 | 5.4 | 7.4 | 5.6 | 6.9 |
| Elsewhere in US | .9 | .9 | .3 | 1.3 | .5 | 1.1 |
| Outside US | .2 | .3 | .1 | .2 | .1 | .2 |
| Total Trips | 7.9 | 7.3 | 6.0 | 9.2 | 6.8 | 8.5 |
| Average Length of Stay | | | | | | |
| 1-2 nights | 31.9 | 22.5 | 40.3 | 17.9 | 42.1 | 24.4 |
| 3-6 nights | 44.0 | 27.7 | 45.1 | 44.3 | 37.4 | 43.2 |
| 7-13 nights | 10.4 | 20.7 | 10.9 | 14.6 | 8.9 | 13.4 |
| 14+ nights | 13.6 | 29.1 | 3.8 | 23.1 | 11.6 | 19.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average # Nights | 7.6 | 11.4 | 4.3 | 10.0 | 6.0 | 8.8 |
| Distance From Home (miles) | | | | | | |
| 1-100 | 35.8 | 31.9 | 53.5 | 34.3 | 63.9 | 38.8 |
| 101-300 | 48.4 | 48.6 | 39.7 | 40.4 | 28.7 | 41.0 |
| More than 300 | 15.8 | 19.5 | 6.8 | 25.3 | 7.3 | 20.2 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Miles | 208.2 | 232.7 | 138.2 | 248.0 | 122.2 | 220.0 |

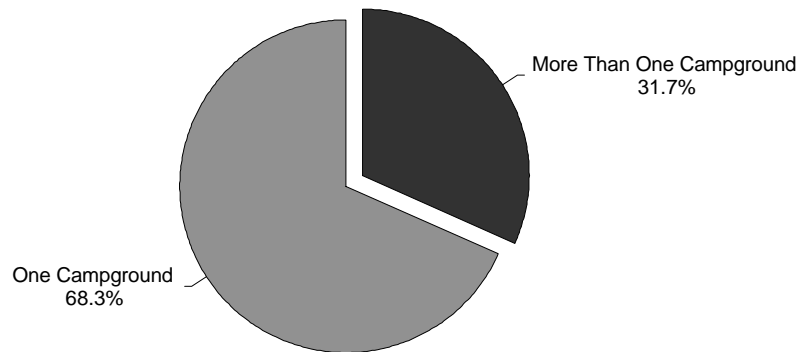
Note: Totals may not equal 100% due to rounding
Source: Dean Runyan Associates

Camping at one campground is most popular on individual camping trips.

Nearly 69% of camping parties spent their time at one campground during their most recent overnight camping trip. The remainder spent time in multiple locations, as illustrated in Figure 2-6. This was an increase over 1994 results that indicated fewer than half of all campers stay at one location only during individual camping trips.

State Park users were most likely to stay at one campground, while National Parks users were most likely to spend time at more than one campground. Nearly three-fourths of BLM/Forest Service/Corps users stayed at one campground, as summarized in Table 2-2 on page 12.

Figure 2-6
Single Campground Versus Multiple Campground Use
On Individual Overnight Camping Trips, 1999-2000

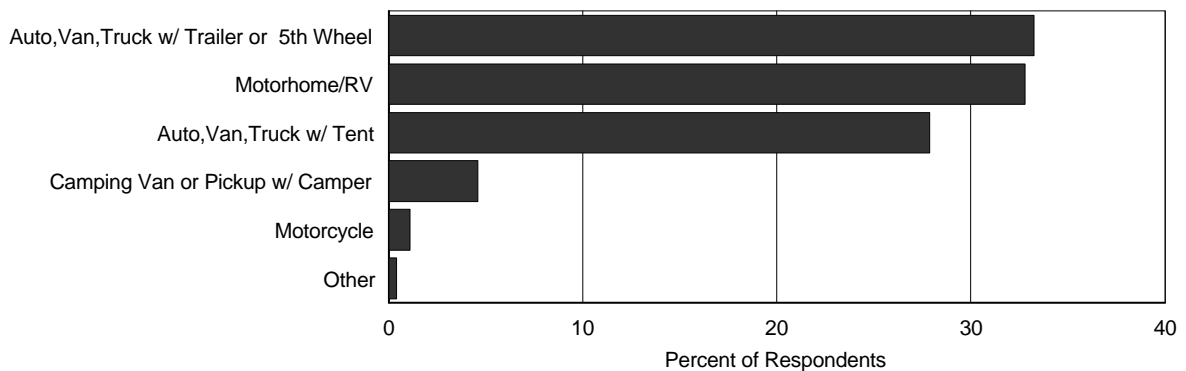


Source: Dean Runyan Associates

Vehicles used to travel to campgrounds are more often trailers or motorhomes/RVs.

Two-thirds of all campers travel to their camping destinations using 5th wheel trailers or motorhomes/RVs as shown in Figure 2-7. This finding is dominated by the large proportion of Private/Commercial facility campers who use these modes of transportation. Over half of National Park and State Parks users prefer automobiles or trucks with tents. Campers using a camping van or pickup with camper are slightly more likely to be BLM/Forest Service/Corps facility users. Refer to Table 2-2 for a summary of vehicle use by management category.

Figure 2-7
Type of Vehicle Used to Travel to Campground, 1999-2000



Source: Dean Runyan Associates

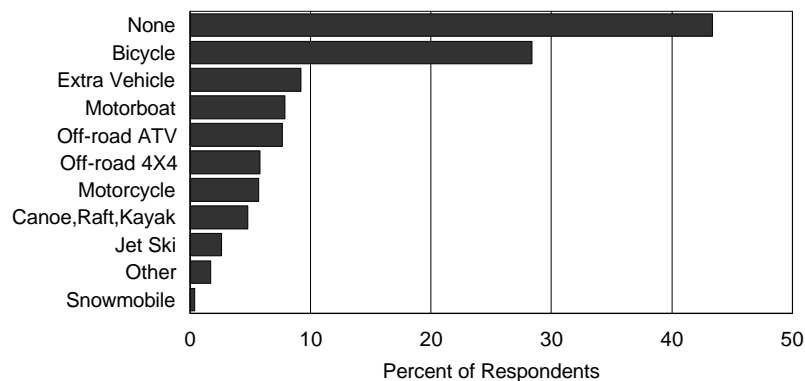
Many camping parties use no additional equipment.

Nearly half of all campers reported bringing no additional equipment along on camping trips. Of those that reported bringing additional equipment, a bicycle was most common. Another prominent addition was an extra vehicle, brought by 9.2% of camping parties. These extra vehicles were either towed by motorhomes/RVs or 5th wheel trailers or were vehicles belonging to other camping party members (especially for larger party size groups). Campers who brought extra vehicles were most often Private/Commercial facility users.

Motorized sporting equipment including motorboats, off-road vehicles and motorcycles were each used by less than 9%. Users of motorboats were most often Local Parks campers, while users of off-road vehicles and motorcycles were most often BLM/Forest Service/Corps facility users.

It is likely that snowmobiles are underrepresented in these findings, since the questionnaires were distributed off-season for winter recreation activities. A summary of additional equipment used by all camping parties is summarized in Figure 2-8 and a summary breakout by management category is shown in Table 2-2.

Figure 2-8
Additional Equipment Used, 1999-2000



Note: Total exceeds 100% due to multiple response
Source: Dean Runyan Associates

Table 2-2
 Single Campground Versus Multiple Campground Use,
 Type of Vehicle Used, Additional Equipment Used, 1999-2000
 By Management Category

| | Percent of Respondents | | | | | |
|---|------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Single Campground Versus Multiple Campground Use | | | | | | |
| One Campground | 72.6 | 47.8 | 87.0 | 64.0 | 82.9 | 68.3 |
| More Than One | 27.4 | 52.2 | 13.0 | 36.0 | 17.1 | 31.7 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Type of Vehicle Used to Travel to Campground | | | | | | |
| Auto, Van, Truck w/ 5 th Wheel | 19.7 | 14.3 | 20.9 | 39.3 | 20.2 | 33.3 |
| Motorhome/RV | 29.5 | 26.3 | 17.4 | 45.3 | 23.9 | 32.7 |
| Auto, Van, Truck w/ Tent | 39.7 | 51.8 | 53.8 | 10.9 | 47.1 | 27.9 |
| Camping Van or Pickup w/ Camper | 8.9 | 6.7 | 6.7 | 3.2 | 7.7 | 4.6 |
| Motorcycle | .6 | 0 | .1 | 1.1 | 0 | 1.1 |
| Other | 1.7 | .9 | 1.0 | .4 | 1.0 | .4 |
| Additional Equipment Used | | | | | | |
| None | 31.3 | 45.8 | 40.8 | 47.5 | 38.1 | 43.4 |
| Bicycle | 17.1 | 35.5 | 30.3 | 29.8 | 37.3 | 28.4 |
| Extra Vehicle | 5.4 | 4.4 | 2.9 | 12.1 | 3.0 | 9.2 |
| Motorboat | 8.8 | 7.9 | 6.5 | 7.2 | 14.6 | 7.9 |
| Off-Road ATV | 25.7 | 3.4 | 13.3 | 3.0 | 1.5 | 7.7 |
| Off-Road 4x4 | 14.6 | 6.9 | 8.5 | 3.0 | 4.9 | 5.8 |
| Motorcycle | 14.0 | 4.4 | 9.6 | 3.4 | 1.9 | 5.7 |
| Canoe, Raft, Kayak | 4.9 | 6.9 | 6.2 | 4.2 | 7.8 | 4.8 |
| Jet Ski | 2.3 | 2.0 | 2.5 | 2.3 | 7.1 | 2.6 |
| Other | 3.1 | 0.5 | 3.6 | 0.8 | 4.5 | 1.7 |
| Snowmobile | 0.6 | 0.0 | 0.2 | 0.4 | 0.0 | 0.4 |

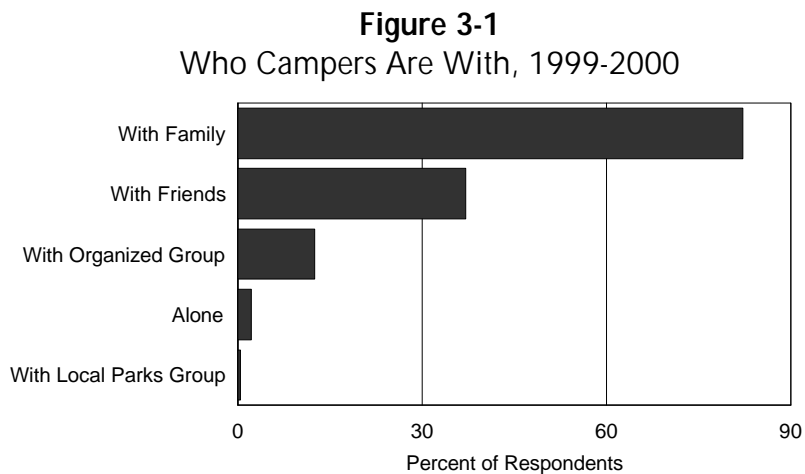
Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response
 Source: Dean Runyan Associates

3. Camping Parties

This section describes the characteristics and demographics of campers and camping parties. Camping parties were defined in the survey as those in the “immediate traveling party” -- persons traveling together and sharing expenses. “Immediate traveling party” was not to include others in an organized group.

Most campers are with family members on camping trips.

As shown in Figure 3-1, a dominant 82.2% of all campers were with family members on camping trips. Slightly more than one-third of all campers reported being with friends. A smaller proportion of campers also participate in camping as part of an organized group, such as a family reunion or church outing. Another group camping option is a trip organized by local parks. This type of trip was reported by .4% of all campers.



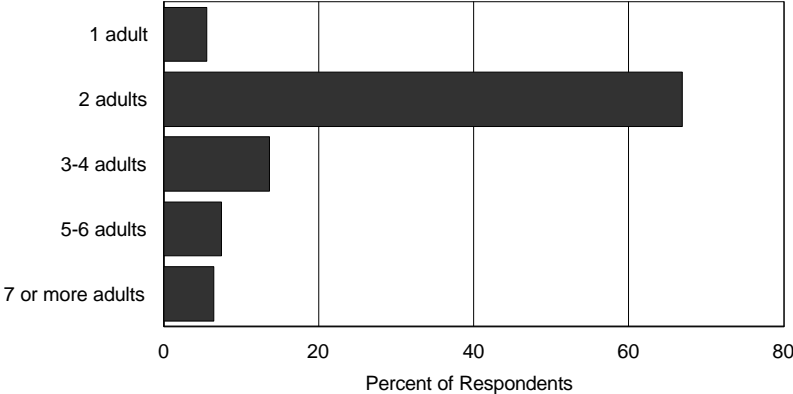
Note: Total exceeds 100% due to multiple response
Source: Dean Runyan Associates

Campers who travel alone are more likely to be users of BLM/Forest Service/Corps facilities, although just 2.2% of all campers report camping alone. Campers with organized groups are somewhat more likely to be users of Local Parks, as shown in Table 3-1 on page 15.

The most common camping party had two adults and no children.

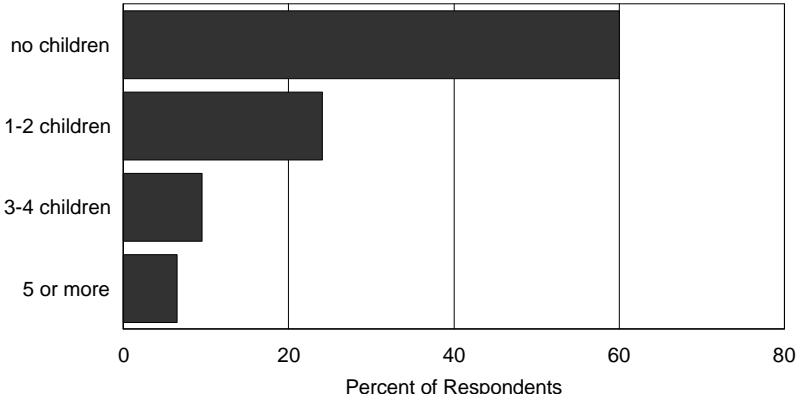
More than two-thirds of camping parties had two adults. In addition, six out of ten camping parties had no children. The average camping party size was 4.14 persons, as some camping parties were relatively large. Percentage breakouts for adults and children in camping parties are summarized in Figure 3-2 and Figure 3-3.

Figure 3-2
Average Number of Adults in Camping Party, 1999-2000



Source: Dean Runyan Associates

Figure 3-3
Average Number of Children in Camping Party, 1999-2000



Source: Dean Runyan Associates

Table 3-1
 Who Campers Are With,
 Average Number of Persons in Camping Parties, 1999-2000
 By Management Category

| | Percent of Respondents | | | | | |
|--|------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Who Campers Are With | | | | | | |
| Alone | 5.1 | 3.1 | 1.8 | 1.4 | 2.0 | 2.2 |
| With Family | 75.0 | 78.9 | 78.1 | 85.5 | 76.5 | 82.2 |
| With Friends | 53.1 | 40.8 | 52.1 | 29.3 | 48.0 | 37.1 |
| Organized Group | 11.0 | 11.4 | 10.3 | 12.4 | 19.5 | 12.5 |
| With Local Parks | 0.0 | 0.9 | 0.3 | 0.3 | 1.0 | 0.4 |
| Other | 0.6 | 0.0 | 0.6 | 0.0 | 1.0 | .2 |
| Average Number of Adults in Camping Party | | | | | | |
| 1 adult | 9.44 | 5.3 | 7.1 | 3.9 | 9.0 | 5.5 |
| 2 adults | 55.7 | 57.7 | 46.9 | 75.1 | 48.4 | 66.9 |
| 3-4 adults | 17.2 | 19.7 | 24.1 | 10.3 | 20.1 | 13.7 |
| 5-6 adults | 8.7 | 8.7 | 11.4 | 6.4 | 8.6 | 7.5 |
| 7 or more adults | 9.1 | 8.7 | 10.5 | 4.3 | 14.0 | 6.5 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Number | 3.2 | 3.3 | 3.6 | 2.7 | 3.7 | 3.0 |
| Average Number of Children in Camping Party | | | | | | |
| 0 children | 57.2 | 50.7 | 39.6 | 65.7 | 44.3 | 60.0 |
| 1-2 children | 24.3 | 28.4 | 28.7 | 22.6 | 28.8 | 24.1 |
| 3-4 children | 11.0 | 10.4 | 10.4 | 7.8 | 10.1 | 9.5 |
| 5 or more | 7.5 | 10.4 | 13.3 | 3.9 | 16.9 | 6.5 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Number | 1.4 | 1.6 | 2.1 | 1.0 | 2.3 | 1.3 |

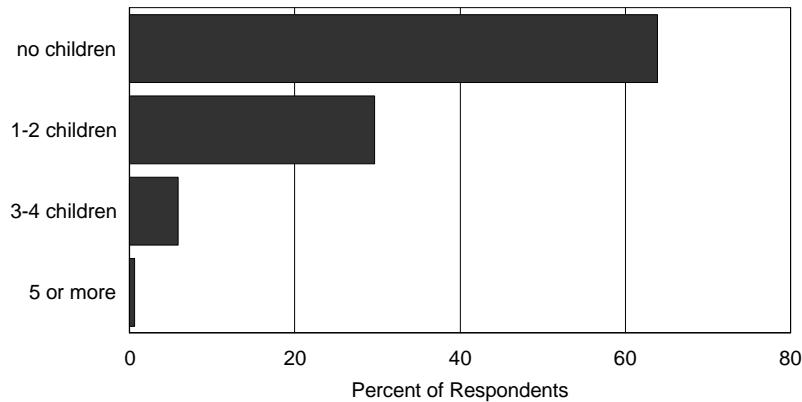
Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response
 Source: Dean Runyan Associates

Over half of all campers have no children at home; more than eight out of ten households have one or two adults.

Among all respondents, 64% have no children at home. Among camping households that used Private/Commercial campgrounds, over 70% have no children at home.

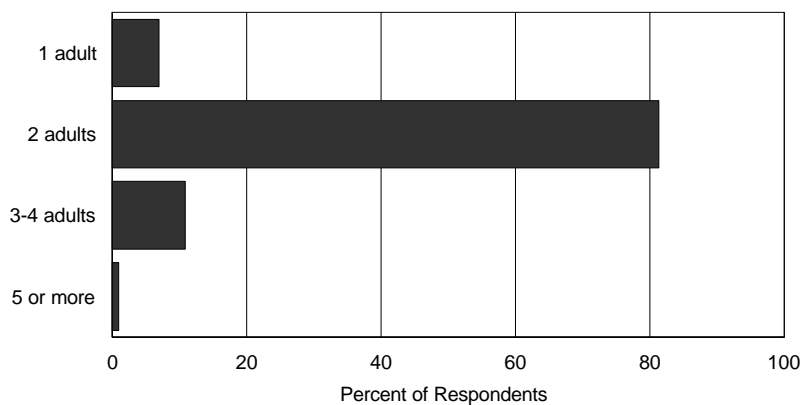
Eighty-one percent of all camping households have one or two adults. These results for all campers are in Figure 3-4 and Figure 3-5 and are shown by management category in Table 3-2.

Figure 3-4
Average Number of Children at Home, 1999-2000



Source: Dean Runyan Associates

Figure 3-5
Average Number of Adults in Household, 1999-2000



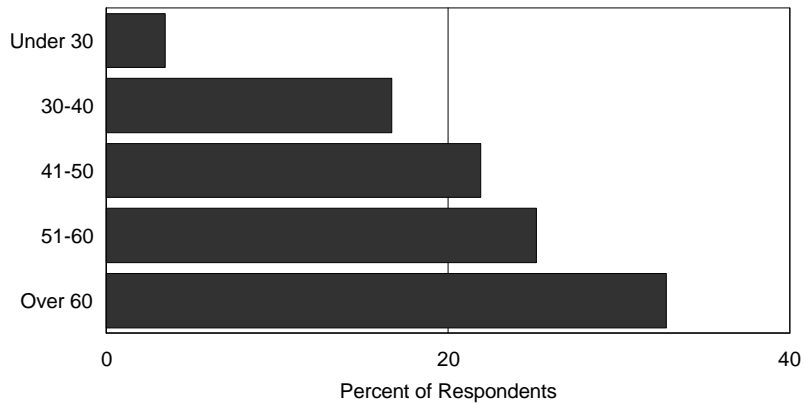
Source: Dean Runyan Associates

Few campers are under thirty years old; nearly two-thirds of all campers are over 50.

Just 3.4% of all adult campers are under thirty. The majority, 58%, are over 50. These results are shown in Figure 3-6. The findings represent adults 16 and over and do not include children that may be part of the camping party.

Private/Commercial campers are least likely to be under thirty, only 1.1%. Those under thirty are more often users of BLM/Forest Service/Corps facilities. State Park campers had the lowest average age, 44.3 years, and Private/Commercial campers the highest average at 56.7 years. Table 3-2 on page 20 lists these findings.

Figure 3-6
Average Age of Adult Campers, 1999-2000



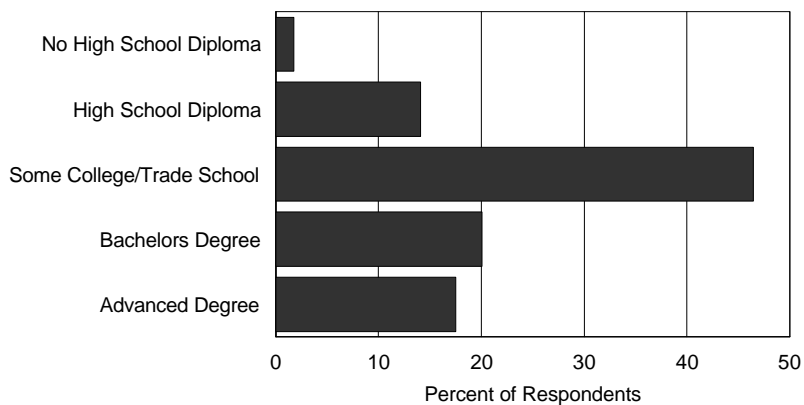
Source: Dean Runyan Associates

Campers are relatively well-educated.

The majority of campers, 84%, have had at least some college or graduated from a trade school. Less than 2% have no high school diploma. These results are illustrated in Figure 3-7.

Campers with advanced degrees were more likely to be users of National Park facilities. Those with only high school diplomas were slightly more likely to be users of BLM/Forest Service/Corp lands. A breakout of highest educational attainment of campers by management category is summarized in Table 3-2.

Figure 3-7
Highest Educational Attainment of Campers, 1999-2000



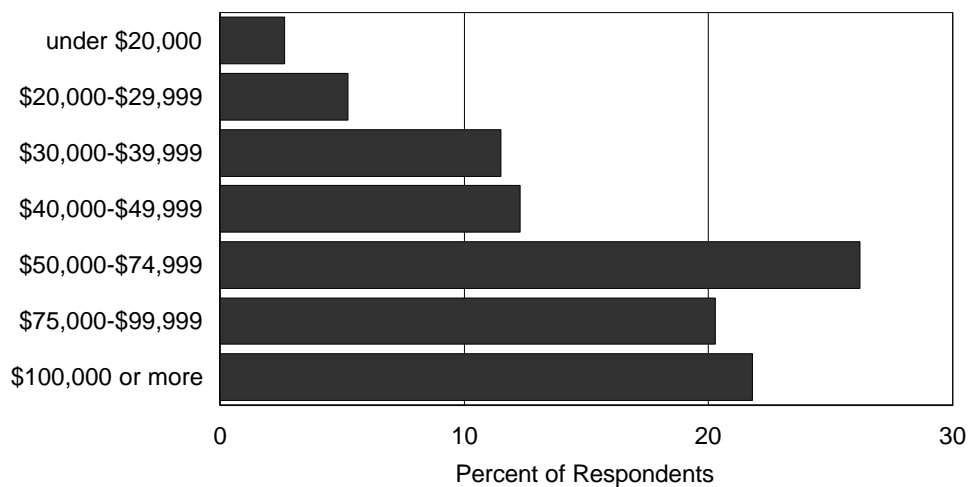
Source: Dean Runyan Associates

Campers are relatively affluent; over two-thirds have annual incomes of \$50,000 or more per year.

The \$50,000-\$74,999 income category had the highest frequency, representing 26.2% of all campers. Just 2.7% of all campers reported annual income of under \$20,000. These income percentages are shown in Figure 3-8.

Annual income levels of campers according to type of camping facility used are summarized in Table 3-2. Findings show little difference by management category.

Figure 3-8
Annual Income Levels of Campers, 1999-2000

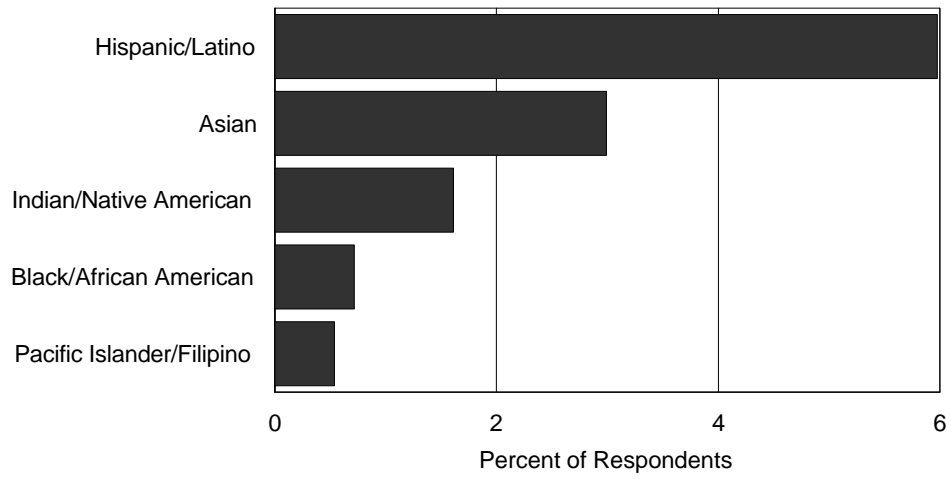


Source: Dean Runyan Associates

About one out of eight campers is non-white.

These results for ethnicity exclude survey respondents from the Sunset list. White campers represent over three-quarters of the camping population. Non-white campers represent 11.8% of all campers in California, as shown in Figure 3-9.

Figure 3-9
Ethnicity of Non-White Campers, 1999-2000



Source: Dean Runyan Associates

Table 3-2
Campers Demographics, 1999-2000,
By Management Category

| | Percent of Respondents | | | | | |
|--|-------------------------------|------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Average Number of Adults in Household | | | | | | |
| 1 adult | 10.0 | 11.4 | 8.9 | 5.2 | 9.6 | 6.9 |
| 2 adults | 74.3 | 72.4 | 73.0 | 85.5 | 76.2 | 81.4 |
| 3-4 adults | 13.6 | 14.0 | 15.6 | 9.0 | 13.5 | 10.8 |
| 5 or more | 2.2 | 2.2 | 2.6 | 0.4 | 0.7 | 0.9 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Number | 2.2 | 2.2 | 2.3 | 2.1 | 2.1 | 2.1 |
| Average Number of Children at Home | | | | | | |
| 0 children | 57.4 | 55.3 | 45.3 | 70.3 | 51.7 | 63.9 |
| 1-2 children | 34.6 | 33.3 | 42.5 | 25.1 | 39.6 | 29.6 |
| 3-4 children | 7.4 | 10.5 | 11.2 | 4.2 | 7.4 | 5.9 |
| 5 or more | 0.7 | 0.9 | 1.0 | 0.4 | 1.3 | .6 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Number | 0.8 | 0.9 | 1.1 | 0.6 | 1.0 | 0.7 |
| Average Age of Adult Campers | | | | | | |
| Under 30 | 8.6 | 7.5 | 7.4 | 1.1 | 5.4 | 3.4 |
| 30-40 | 24.2 | 24.7 | 33.3 | 11.2 | 23.0 | 16.7 |
| 41-50 | 26.7 | 29.1 | 33.0 | 17.5 | 31.8 | 21.9 |
| 51-60 | 18.9 | 13.7 | 16.0 | 29.4 | 20.3 | 25.1 |
| Over 60 | 21.6 | 25.1 | 10.3 | 40.9 | 19.6 | 32.8 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Average Age | 48.0 | 48.6 | 44.3 | 56.7 | 48.7 | 53.2 |
| Highest Educational Attainment of Campers | | | | | | |
| No H.S. Diploma | 2.7 | 2.2 | 1.7 | 1.4 | 2.7 | 1.8 |
| H.S. Diploma | 18.4 | 9.7 | 13.8 | 13.2 | 13.7 | 14.1 |
| Some College | 45.7 | 40.3 | 42.8 | 47.7 | 44.3 | 46.4 |
| Bachelors Degree | 18.4 | 24.3 | 25.2 | 19.5 | 20.7 | 20.1 |
| Advanced Degree | 14.7 | 23.4 | 16.5 | 18.1 | 18.6 | 17.5 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Annual Income Levels of Campers | | | | | | |
| Under \$20,000 | 4.0 | 4.3 | 2.7 | 1.9 | 4.7 | 2.7 |
| \$20,000-\$29,999 | 8.7 | 9.0 | 5.6 | 3.9 | 6.2 | 5.2 |
| \$30,000-\$39,999 | 14.8 | 10.0 | 8.6 | 11.3 | 10.2 | 11.5 |
| \$40,000-\$49,999 | 10.9 | 13.3 | 10.4 | 13.2 | 9.5 | 12.3 |
| \$50,000-\$74,999 | 26.9 | 24.2 | 29.7 | 25.3 | 29.1 | 26.2 |
| \$75,000-\$99,999 | 15.0 | 16.6 | 21.4 | 21.8 | 20.4 | 20.3 |
| \$100,000 or More | 19.8 | 22.7 | 21.6 | 22.6 | 20.0 | 21.8 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

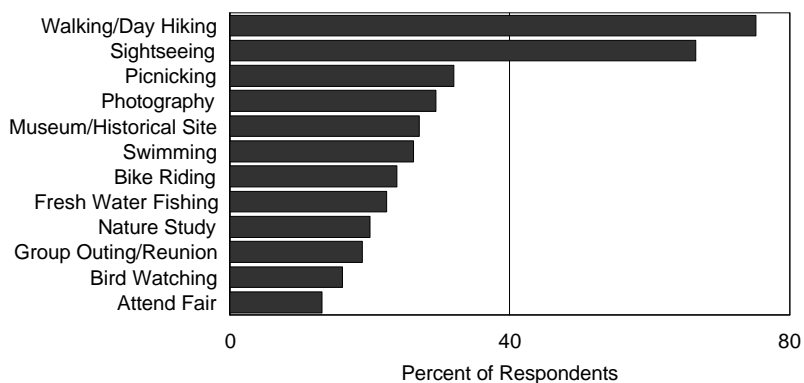
Note: Totals may not equal 100% due to rounding
Source: Dean Runyan Associates

4. Camping Activities

Walking/day hiking, sightseeing and picnicking are popular with all campers.

Survey respondents were asked about their participation in a number of camping and outdoor-related activities. The list was not exhaustive and solicited many write-in responses that were incorporated into existing and specially created categories. While there are interpretation differences among terms used to describe activities, respondents indicated activities they participated in based on personal interpretation of the activities listed. Further study would be required to learn about specific actions associated with each activity. Figure 4-1 summarizes the top 12 most popular activities. Figure 4-2 summarizes additional activities popular with camping participants.

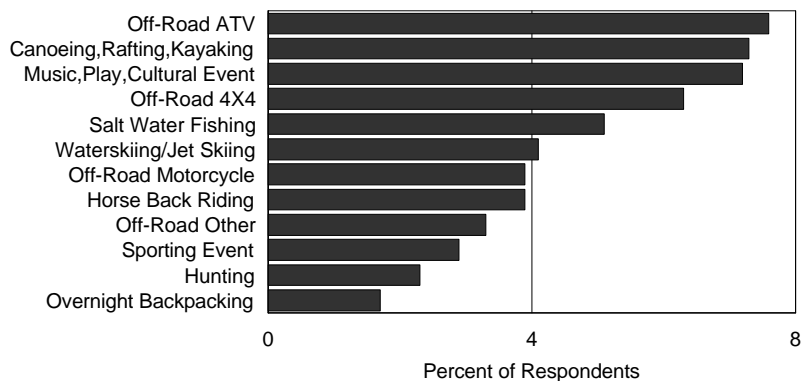
Figure 4-1
Top 12 Most Popular Activities, 1999-2000



Note: Total exceeds 100% due to multiple response

Source: Dean Runyan Associates

Figure 4-2
Other Popular Activities, 1999-2000



Note: Total exceeds 100% due to multiple response

Source: Dean Runyan Associates

Table 4-1 shows the 12 most popular camping activities according to management category. Walking/day hiking was the most popular across all groups. Sightseeing, the second most popular activity for all campers, was not as strong a favorite for Private/Commercial campers who rated visiting a museum or historical site as their second favorite activity. Sightseeing was most popular with National Parks users, as was photography.

BLM/Forest Service/Corps facility users, followed by State Park users, were most likely to participate in off-road activities of all kinds. Hunting, indicated by just 2.3 percent of all campers, was dominated by BLM/Forest Service/Corps campers. Local Parks users were most likely to be participants in fresh water fishing, water or jet skiing and sporting events.

Table 4-1
Most Popular Camping Activities, 1999-2000
By Management Category

| | Percent of Respondents | | | | | |
|---------------------------------------|-------------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Top 12 Most Popular Activities | | | | | | |
| Walking/Day Hiking | 62.9 | 88.6 | 80.8 | 76.2 | 81.1 | 75.2 |
| Sightseeing | 49.7 | 75.5 | 55.2 | 13.8 | 53.9 | 66.6 |
| Picnicking | 30.9 | 49.8 | 46.3 | 28.0 | 42.1 | 32.0 |
| Photography | 26.3 | 41.0 | 24.4 | 30.8 | 24.9 | 29.4 |
| Museum/Historical Site | 16.3 | 32.3 | 15.7 | 32.5 | 16.5 | 27.1 |
| Swimming | 21.2 | 28.8 | 30.9 | 26.2 | 30.6 | 26.2 |
| Bike Riding | 15.2 | 32.3 | 28.0 | 24.1 | 32.3 | 23.9 |
| Fresh Water Fishing | 23.8 | 26.2 | 15.0 | 21.7 | 32.0 | 22.4 |
| Nature Study | 25.2 | 31.0 | 22.9 | 17.1 | 23.9 | 20.0 |
| Group Outing/Reunion | 12.4 | 15.3 | 19.1 | 20.6 | 20.9 | 18.9 |
| Bird Watching | 18.5 | 20.5 | 13.0 | 15.7 | 15.5 | 16.1 |
| Attend Fair | 6.8 | 13.5 | 4.5 | 16.4 | 10.1 | 13.2 |
| Other Popular Activities | | | | | | |
| Off-Road ATV | 23.8 | 4.4 | 13.0 | 3.5 | 1.3 | 7.6 |
| Canoe/Raft/Kayak | 6.0 | 9.6 | 7.2 | 7.3 | 9.1 | 7.3 |
| Music/Play/Cultural Event | 3.8 | 8.3 | 3.4 | 8.7 | 5.7 | 7.2 |
| Off-Road 4x4 | 15.0 | 9.2 | 9.3 | 3.8 | 2.7 | 6.3 |
| Salt Water Fishing | 3.1 | 3.5 | 8.1 | 5.6 | 3.0 | 5.1 |
| Waterskiing/Jet Skiing | 4.4 | 3.5 | 3.7 | 3.1 | 11.8 | 4.1 |
| Off-Road Motorcycle | 13.0 | 3.9 | 8.9 | 1.0 | 1.3 | 3.9 |
| Horse Back Riding | 4.0 | 6.6 | 4.0 | 3.5 | 5.4 | 3.9 |
| Off-Road Other | 12.4 | 2.2 | 4.0 | 1.0 | 1.3 | 3.3 |
| Sporting Event | 2.7 | 3.1 | 1.7 | 2.8 | 5.4 | 2.9 |
| Hunting | 5.9 | 4.4 | 1.1 | 1.4 | 2.0 | 2.3 |

Note: Totals exceed 100% due to multiple response

Source: Dean Runyan Associates

5. Trip Planning Information Sources

Knowing where campers get information for purposes of planning their trips helps informational and marketing efforts by campground operators and regional travel organizations. Findings for this report were consistent with findings in the 1994 survey, except that the Internet is now very significant. Sources used by all campers are summarized in Figure 5-1.

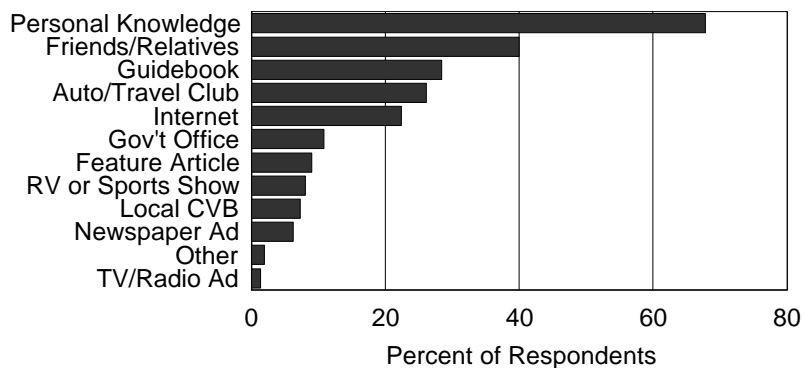
Campers rely most on their knowledge from previous trips.

Information and knowledge gained from previous trips is by far the most common source of trip planning information for all campers, reported by 68%. The second top source is friends of relatives that are used by 40% of all campers. This finding is related to the high repeat visitation of many campers.

The Internet is used by nearly one-quarter of respondents.

In 1994, the Internet was not even listed as a possible source of trip planning information. Its presence and popularity has soared in recent years and is expected to continue to grow.

Figure 5-1
Information Sources Used By Campers, 1999-2000



Note: Total exceeds 100% due to multiple response

Source: Dean Runyan Associates

Internet use for trip planning is most popular with National Park campers and least used by Local Parks campers, the group most reliant on personal knowledge and past experiences. Commercial guidebooks, the number three choice among Private/Commercial campers, is about halfway down the list for all other management categories.

Table 5-1
Information Sources Used By Campers, 1999-2000
By Management Category

| | Percent of Respondents | | | | | |
|--|-------------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Information Sources Used By Campers | | | | | | |
| Personal Knowledge | 70.6 | 65.5 | 70.3 | 65.8 | 75.6 | 67.8 |
| Friends/Relatives | 47.6 | 44.7 | 43.1 | 37.3 | 39.8 | 40.0 |
| Guidebook | 13.9 | 27.0 | 13.9 | 35.6 | 17.7 | 28.4 |
| Auto/Travel Club | 15.1 | 32.7 | 17.3 | 30.6 | 19.4 | 26.1 |
| Internet | 19.4 | 35.4 | 29.6 | 21.8 | 19.7 | 22.4 |
| Government Office | 12.6 | 22.6 | 11.5 | 8.8 | 17.1 | 10.8 |
| Feature Article | 8.3 | 16.8 | 5.6 | 9.5 | 6.4 | 9.0 |
| RV or Sports Show | 3.6 | 5.8 | 2.2 | 10.6 | 4.7 | 8.0 |
| Local CVB | 7.0 | 16.4 | 3.8 | 7.4 | 7.0 | 7.3 |
| Newspaper Ad | 5.8 | 8.0 | 2.7 | 6.7 | 5.7 | 6.2 |
| Other | 4.1 | 5.3 | 3.3 | 0.7 | 4.0 | 1.9 |
| TV or Radio Ad | 2.3 | 0.4 | 0.6 | 1.4 | 0.3 | 1.4 |

Note: Totals exceed 100% due to multiple response
Source: Dean Runyan Associates

6. Camping Trip Satisfaction

Respondents were asked to rate their most recent camping trip on a number of variables. The ratings respondents could select for each category ranged from 1 (poor) to 7 (excellent). While the categories are quite general, the results help determine overall perceptions and experiences of all campers in California.

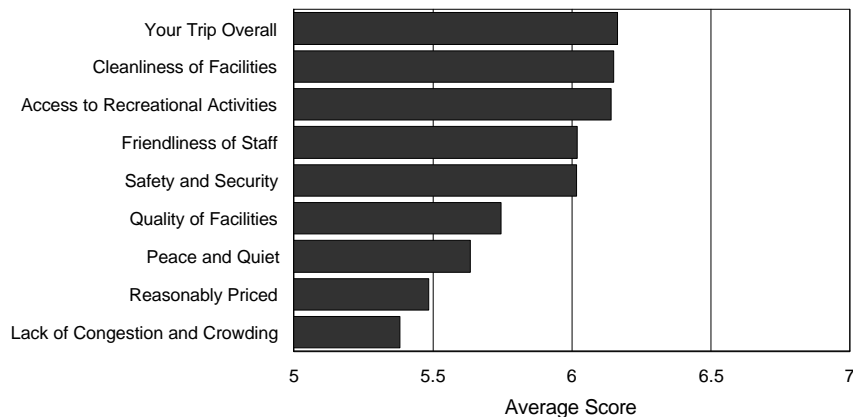
Camping satisfaction is relatively high across all categories.

Campers were most satisfied with their camping trips overall, rating the “your camping trip overall” category a 6.2 as shown in Figure 6-1. Cleanliness of facilities and access to recreational activities were also at the top of the list with ratings of just under 6.2. Campers were most concerned about congestion and crowding, which received the lowest rating, and campground fee pricing which was second from the bottom.

Considering camping trip satisfaction according to management category used, BLM/Forest Service/Corps campers were most satisfied with their camping trips overall. Among the choices, National Parks users and State Parks users gave the highest rating to the “your overall trip” category. Private/Commercial campers’ highest rating was for “cleanliness of facilities.” Local Parks campers’ highest rating was a tie between “your trip overall” and “safety and security”, which had average scores of 6.0. Complete results of camping trip satisfaction by camping management group are shown in Table 6-1.

Figure 6-1
Camping Trip Satisfaction, 1999-2000

Average Based on 7-Point Scale
1 = Poor, 7 = Excellent



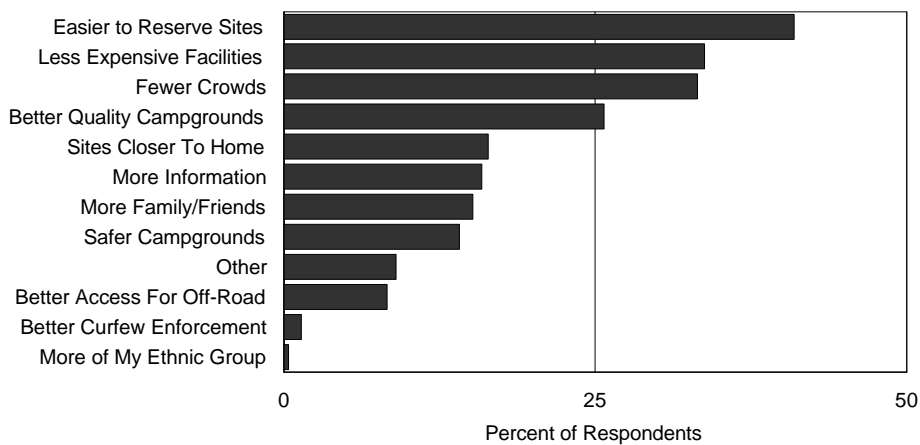
Source: Dean Runyan Associates

Easier to reserve camping sites is the top request for all campers.

Respondents were asked about conditions under which they would take more overnight camping trips. More time and more money were not included as choices since, while these are common and legitimate reasons, they are constraints faced by all consumers and are beyond the control of camping management groups. Less expensive facilities was included as an option, however, which potentially influences camping facility choices, and was selected by 33.8% of respondents.

The most often selected condition was easier to reserve campsites, noted by 41%. Other important conditions reported by all campers were fewer crowds and better quality campgrounds. A summary is shown in Figure 6-2.

Figure 6-2
Under What Conditions Campers
Would Take More Trips, 1999-2000



Note: Total exceeds 100% due to multiple response
Source: Dean Runyan Associates

Private/Commercial campers were most likely to report that they take as many trips as they prefer. This is consistent with the finding that Private/Commercial campers take the longest overnight camping trips. Better access for off-road vehicles was an important concern for BLM/Forest Service/Corps campers who participate most in off-road activities. Full results according to management category are listed in Table 6-2.

Table 6-1
Camping Trip Satisfaction, 1999-2000
By Management Category

| | Average Based on 7-Point Scale | | | | | |
|----------------------------------|---------------------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Camping Trip Satisfaction | | | | | | |
| Your Trip Overall | 6.4 | 6.3 | 6.3 | 6.1 | 6.0 | 6.2 |
| Cleanliness of Facilities | 5.4 | 5.4 | 5.7 | 6.5 | 5.7 | 6.2 |
| Access to Activities | 5.7 | 5.9 | 5.8 | 6.4 | 5.8 | 6.1 |
| Friendliness of Staff | 6.1 | 5.8 | 5.8 | 6.0 | 5.9 | 6.0 |
| Safety and Security | 5.7 | 5.7 | 5.8 | 6.2 | 6.0 | 6.0 |
| Quality of Facilities | 5.5 | 5.3 | 5.5 | 5.9 | 5.6 | 5.7 |
| Peace and Quiet | 5.5 | 5.5 | 5.4 | 5.7 | 5.7 | 5.6 |
| Reasonably Priced | 5.9 | 5.5 | 5.8 | 5.3 | 5.6 | 5.5 |
| Lack of Crowding | 5.3 | 5.6 | 5.3 | 5.4 | 5.5 | 5.4 |

Source: Dean Runyan Associates

Table 6-2
Conditions Required for Taking More Trips, 1999-2000
By Management Category

| | Percent of Respondents | | | | | |
|--|-------------------------------|---------------|----------------|--------------------|----------------|----------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/ Comm'l | Local Parks | All Campers |
| Under What Conditions Would Campers Take More Trips | | | | | | |
| Easier to Reserve Sites | 35.7 | 50.0 | 50.7 | 39.2 | 51.7 | 41.0 |
| Less Expensive Facilities | 30.4 | 32.7 | 28.9 | 35.3 | 34.7 | 33.8 |
| Fewer Crowds | 36.5 | 42.7 | 42.4 | 30.0 | 37.4 | 33.2 |
| Better Quality Grounds | 21.0 | 32.3 | 25.9 | 26.5 | 26.6 | 25.7 |
| Sites Closer To Home | 17.4 | 15.5 | 22.7 | 14.5 | 23.4 | 16.4 |
| More Information | 15.5 | 22.7 | 18.8 | 14.5 | 21.7 | 15.9 |
| More Family/Friends | 18.3 | 25.9 | 24.9 | 11.3 | 25.2 | 15.2 |
| Safer Campgrounds | 12.7 | 17.3 | 15.2 | 13.8 | 16.8 | 14.1 |
| Other | 8.5 | 7.7 | 9.7 | 9.2 | 8.4 | 9.0 |
| Better Off-Road Access | 22.1 | 10.9 | 13.3 | 3.9 | 8.0 | 8.3 |
| Better Curfew Enforcement | 2.1 | 1.8 | 1.0 | 1.4 | 0.3 | 1.4 |
| More My Ethnic Group | 1.1 | 1.4 | 0.6 | 0.0 | 1.0 | 0.4 |

Note: Totals exceed 100% due to multiple response

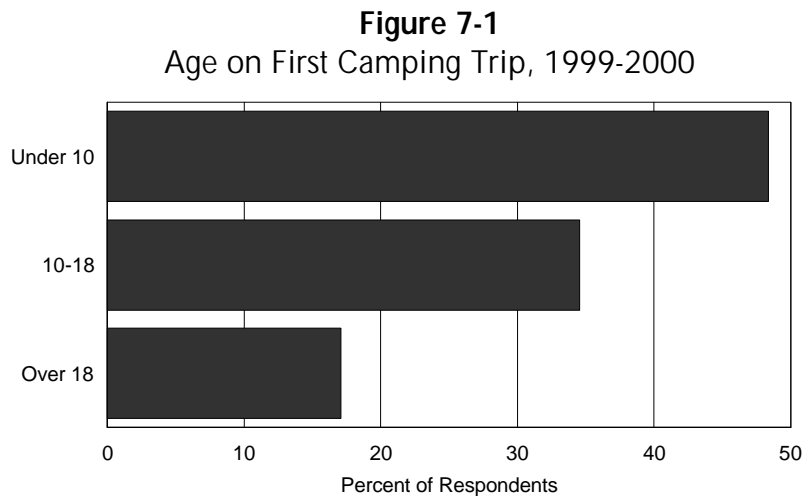
Source: Dean Runyan Associates

7. Early Camping Experiences

This section examines early camping experiences of campers. These findings offer insights into campers' current camping preferences and activities. Findings for all campers are reported first, followed by results according to ethnicity.

More than eight out of ten campers became interested in camping and spending time outdoors as children.

Almost half of all campers were under 10 on their first camping trip and 83% were under 18, as illustrated in Figure 7-1. This finding suggests that camping experiences as children have a significant impact on camping activities of adult campers.



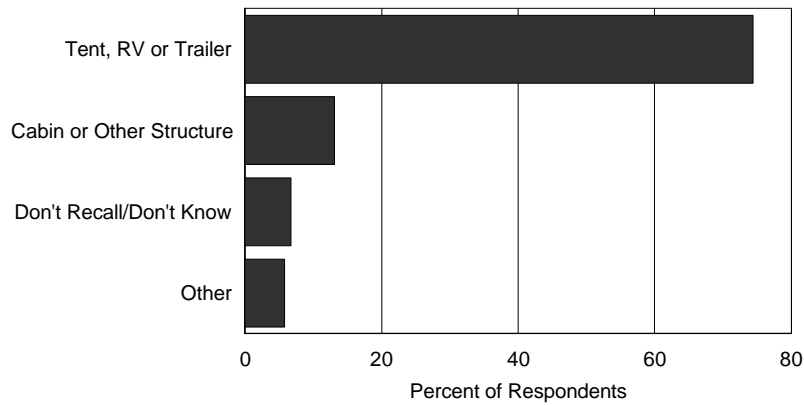
Source: Dean Runyan Associates

Whites were more likely to be under 18 on their first camping trip as compared to non-whites, as shown in Table 7-1. This finding suggests that non-whites often become interested in camping at a later age than whites.

First camping experiences were usually in a tent, RV or trailer.

The majority of campers reported spending their first camping trip in a tent, RV or trailer. It is notable that 93% of respondents were able to recall their first camping experience. The "other" category included write-in responses that most often referred to camping in the open or not in a structure. These results are shown in Figure 7-2. Findings among white and non-white ethnic groups did not suggest any significant differences.

Figure 7-2
Campground Accommodations on First Camping Trip, 1999-2000

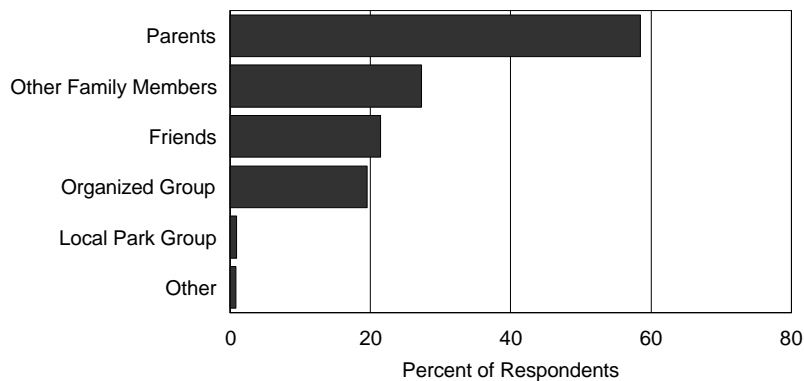


Source: Dean Runyan Associates

Over half of all campers were with parents on their first camping trip.

As shown in Figure 7-3, campers were most often with family members and friends on first camping trips. Additional early camping experiences were with family and friends as part of organized groups.

Figure 7-3
Who Campers Were With On First Camping Trip, 1999-2000



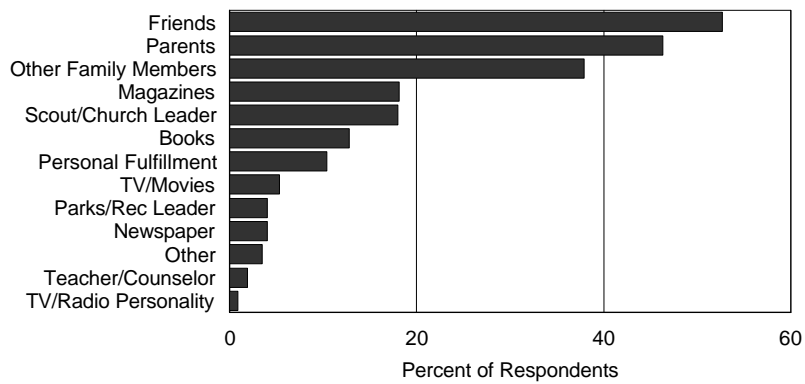
Note: Total exceeds 100% due to multiple response
Source: Dean Runyan Associates

While whites and non-whites were equally likely to be with parents on their first camping trips, non-whites were more likely to be with other family members and friends. Non-whites also reported being with a local parks group on their first camping trip slightly more often than whites. These results are summarized in Table 7-1.

Friends and parents have greatly influenced campers' interests in camping and spending time outdoors.

As shown in Figure 7-4, friends and family have most influenced campers to participate in camping activities. Media influences are also notable, including magazines reported by 18.1%. Scout or church leaders were important for nearly one in five. The personal fulfillment category was created from write-in responses that mentioned love of nature, religious influences, personal enjoyment and other such statements.

Figure 7-4
Who/What Has Influenced Campers
to Camp and Spend Time Outdoors, 1999-2000



Note: Total exceeds 100% due to multiple response
Source: Dean Runyan Associates

Non-whites reported being more influenced by media sources including magazines, books, TV/movies and newspaper than did whites. Table 7-1 illustrates this finding.

Table 7-1
 Early Camping Experiences, 1999-2000
 By Ethnic Group

| | Percent of Respondents | |
|--|------------------------|--------|
| | Non-White | White |
| Age on First Camping Trip | | |
| Under 10 | 45.1 | 48.4 |
| 10-18 | 26.3 | 35.9 |
| Over 18 | 28.5 | 15.6 |
| Total | 100.00 | 100.00 |
| Camping Accommodations on First Camping Trip | | |
| Tent, RV or Trailer | 73.8 | 73.7 |
| Cabin or Other Structure | 16.8 | 12.6 |
| Don't Know/Recall | 4.4 | 7.0 |
| Other | 3.6 | 5.9 |
| Total | 100.00 | 100.00 |
| Who Campers Were With on First Camping Trip | | |
| Parents | 57.3 | 58.1 |
| Other Family Members | 32.8 | 19.9 |
| Friends | 37.4 | 26.1 |
| Organized Group | 18.1 | 20.2 |
| Local Parks Group | 2.8 | .6 |
| Other | 2.2 | .6 |
| Who/What Has Influenced Campers to Camp and Spend Time Outdoors | | |
| Friends | 50.4 | 53.3 |
| Parents | 43.7 | 46.3 |
| Other Family Members | 34.3 | 38.1 |
| Magazines | 24.9 | 17.7 |
| Scout/Church Leader | 15.2 | 18.6 |
| Books | 16.9 | 12.6 |
| Personal Fulfillment | 9.8 | 10.5 |
| TV/Movies | 9.2 | 4.9 |
| Parks/Rec Leader | 5.7 | 3.8 |
| Newspaper | 10.2 | 3.3 |
| Other | 1.6 | 3.6 |
| Teacher/Counselor | 4.2 | 1.6 |
| TV/Radio Personality | .1 | 1.0 |

Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response

Source: Dean Runyan Associates

8. Economic Impacts of Camping

This section describes the economic impacts of camping. Campers spend money on a variety of goods, ranging from food and beverage purchases to recreation and retail sales. This spending produces business receipts for retail and service establishments located throughout the state. These establishments use a portion of their receipts to pay their employees. Another important economic benefit of travel and tourism is the tax revenue it generates for state and local governments.

The economic impacts presented have been measured using the Regional Travel Impact Model (RTIM). This model is the basis for the California Travel Impacts report, produced annually by Dean Runyan Associates. The annual report details statewide and county-by-county economic impacts of travel and tourism. Further information about RTIM methodology can be referenced through Dean Runyan Associates' web site (<http://www.dra-research.com>).

Economic Impacts

The total direct economic impact of camping was \$3 billion dollars in 1999.

This includes spending on campground fees, groceries, eating and drinking in restaurants, recreation, and transportation expenditures in the vicinity of the campsite. It does not include the costs of travel to and from the campground.

Expenditures by campers have generally increased throughout the 1990s.

While expenditures by all campers have generally increased throughout the 1990s, this was especially the case for campers using Private/Commercial campgrounds due to the increase in the number of privately owned sites. The decline in expenditures by campers in 1998 was primarily a reflection of lower fuel costs. (Approximately 22% of all expenditures by campers are on vehicle and fuel costs.)

The majority of all camping expenditures are at private campgrounds.

Expenditures by campers using Private/Commercial campgrounds were \$2.5 billion, which accounts for over 80% of all camping expenditures. Expenditures by those using public campgrounds (Local Parks, State Parks, BLM/Forest Service/Corps.) were \$500 million. The magnitude of Private/Commercial is due primarily to the greater number of privately-owned developed campsites. Campers that use private campgrounds also spend, on average, more money on campground fees, recreation and eating and drinking in restaurants as compared to campers that use public campgrounds.

Table 8-1
Expenditures By Overnight Campers in California, By Tourism Region*

| | (Millions of Dollars) | | | | | | | |
|-------------------------------|-----------------------|---------|---------|---------|---------|---------|---------|---------|
| | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 |
| North Coast | | | | | | | | |
| Private | 137.4 | 135.9 | 135.6 | 133.2 | 148.2 | 163.7 | 135.9 | 153.3 |
| Public | 46.9 | 48.0 | 48.7 | 49.6 | 51.2 | 50.3 | 43.8 | 48.7 |
| Total | 184.3 | 183.8 | 184.3 | 182.8 | 199.4 | 214.0 | 179.7 | 202.0 |
| Shasta-Cascade | | | | | | | | |
| Private | 77.8 | 77.4 | 80.6 | 81.7 | 96.6 | 99.6 | 121.9 | 106.5 |
| Public | 33.2 | 34.0 | 34.5 | 35.2 | 36.3 | 35.1 | 33.7 | 36.6 |
| Total | 111.0 | 111.4 | 115.1 | 116.9 | 132.9 | 134.7 | 155.6 | 143.1 |
| San Francisco Bay Area | | | | | | | | |
| Private | 98.7 | 109.3 | 114.0 | 117.8 | 112.1 | 139.5 | 131.2 | 157.8 |
| Public | 26.3 | 26.9 | 27.3 | 27.8 | 28.7 | 28.7 | 28.0 | 29.0 |
| Total | 125.0 | 136.2 | 141.4 | 145.6 | 140.8 | 168.2 | 159.2 | 186.8 |
| Central Valley | | | | | | | | |
| Private | 183.5 | 180.9 | 182.3 | 184.3 | 215.2 | 224.6 | 213.6 | 235.5 |
| Public | 20.8 | 21.3 | 21.6 | 22.0 | 22.7 | 20.6 | 17.3 | 19.5 |
| Total | 204.3 | 202.2 | 203.9 | 206.3 | 237.9 | 245.1 | 230.9 | 255.0 |
| Gold Country | | | | | | | | |
| Private | 111.6 | 111.6 | 113.8 | 114.7 | 127.1 | 134.2 | 126.2 | 140.1 |
| Public | 28.3 | 28.9 | 29.4 | 29.9 | 30.9 | 26.9 | 27.9 | 34.6 |
| Total | 139.9 | 140.5 | 143.2 | 144.7 | 158.0 | 161.1 | 154.1 | 174.7 |
| High Sierra | | | | | | | | |
| Private | 117.5 | 117.4 | 116.4 | 114.6 | 148.2 | 179.6 | 135.8 | 141.0 |
| Public | 92.6 | 94.7 | 96.2 | 98.0 | 101.1 | 101.7 | 99.8 | 104.7 |
| Total | 210.1 | 212.0 | 212.6 | 212.5 | 249.3 | 281.3 | 235.5 | 245.7 |
| Central Coast | | | | | | | | |
| Private | 135.0 | 132.7 | 135.9 | 137.5 | 153.8 | 164.5 | 157.5 | 178.6 |
| Public | 80.2 | 82.0 | 83.4 | 84.9 | 87.6 | 86.4 | 79.1 | 88.4 |
| Total | 215.2 | 214.7 | 219.3 | 222.4 | 241.4 | 250.9 | 236.6 | 267.0 |
| Los Angeles Area | | | | | | | | |
| Private | 79.0 | 82.0 | 82.0 | 84.5 | 89.0 | 100.2 | 107.0 | 108.7 |
| Public | 6.4 | 6.5 | 6.6 | 6.8 | 7.0 | 7.2 | 5.8 | 9.0 |
| Total | 85.4 | 88.5 | 88.6 | 91.3 | 95.9 | 107.4 | 112.8 | 117.6 |
| Orange County | | | | | | | | |
| Private | 81.1 | 80.0 | 82.0 | 80.3 | 82.5 | 87.6 | 81.2 | 83.9 |
| Public | 10.3 | 10.5 | 10.7 | 10.9 | 11.2 | 11.5 | 11.3 | 12.0 |
| Total | 91.4 | 90.5 | 92.7 | 91.2 | 93.7 | 99.1 | 92.5 | 95.9 |
| San Diego County | | | | | | | | |
| Private | 73.4 | 80.9 | 147.8 | 147.3 | 153.2 | 172.3 | 176.5 | 191.0 |
| Public | 32.4 | 33.2 | 33.7 | 34.3 | 35.4 | 29.5 | 28.2 | 29.6 |
| Total | 105.8 | 114.1 | 181.6 | 181.6 | 188.6 | 201.8 | 204.6 | 220.6 |
| The Deserts | | | | | | | | |
| Private | 404.4 | 426.5 | 474.5 | 477.8 | 547.2 | 750.2 | 593.9 | 596.3 |
| Public | 58.1 | 59.4 | 60.4 | 61.5 | 63.5 | 58.8 | 55.5 | 58.3 |
| Total | 462.5 | 486.0 | 534.9 | 539.4 | 610.6 | 809.1 | 649.4 | 654.6 |
| Inland Empire | | | | | | | | |
| Private | 252.6 | 260.3 | 263.7 | 271.7 | 347.9 | 396.7 | 316.7 | 379.5 |
| Public | 28.5 | 29.1 | 29.6 | 30.1 | 31.1 | 28.2 | 27.2 | 28.1 |
| Total | 281.0 | 289.4 | 293.2 | 301.8 | 379.0 | 424.9 | 343.9 | 407.6 |
| California Total | | | | | | | | |
| Private | 1,751.9 | 1,794.8 | 1,928.6 | 1,945.4 | 2,221.1 | 2,612.6 | 2,297.4 | 2,472.3 |
| Public | 463.9 | 474.6 | 482.2 | 491.1 | 506.5 | 485.0 | 457.4 | 498.4 |
| Total | 2,215.8 | 2,269.4 | 2,410.8 | 2,436.5 | 2,727.7 | 3,097.6 | 2,754.8 | 2,970.7 |

Note: Includes spending on campground fees, groceries, restaurants, recreation, transportation, and recreation in vicinity of campsite. Does not include costs of travel to campsite.

*Economic impacts are analyzed on an annual basis and are subject to revision.

Source: Dean Runyan Associates

More than half of all private camping expenditures are in urban regions and Southern California.

Almost 60% of all private camping expenditures are in urban regions and Southern California. This includes 22% in the urban areas (San Francisco Bay Area, Los Angeles County, Orange County, and the San Diego Area); 24% in The Deserts, and 15% in the Inland Empire. These results are shown in Table 8-1.

More than one-third of all public camping expenditures occur in the High Sierra and Central Coast regions.

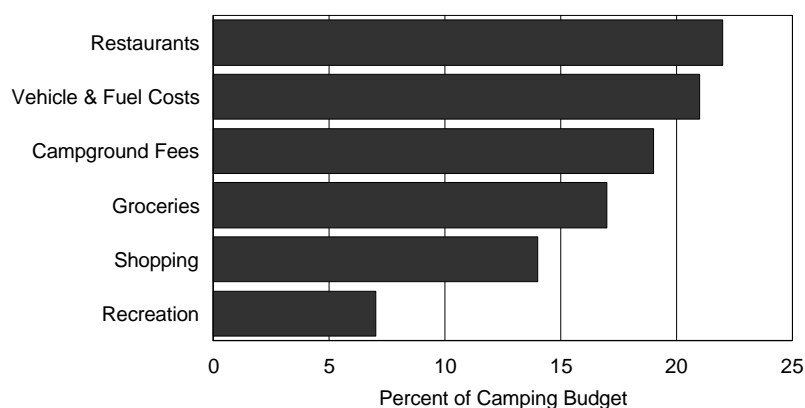
Camping expenditures in the High Sierra (21%) region and the Central Coast (18%) account for more than one-third of all public camping expenditures. Full detail of camping expenditures by California tourism region is shown in Table 8-1.

Overnight Camping Expenditures By Type of Business

Campers spend the largest percentage of their budgets on restaurants and vehicle and fuel costs.

Figure 8-1 illustrates camping expenditures by type of business. These percentages represent spending at the camping destination. Nearly one-quarter of expenditures are for eating out in restaurants. This suggests that campers often mix restaurants with eating at their campsites during their camping trips. This is especially true for the Private/Commercial campers that dominate the camping market. Public campground users spend relatively more on groceries and vehicle and fuel costs as compared to all campers.

Figure 8-1
All Camper Expenditures By Type of Business,
At Camping Destination, 1999-2000



Source: Dean Runyan Associates

The economic impacts of overnight camping expenditures for all campers in California by type of business are detailed in Table 8-2. The table includes historical economic impacts from 1992 to 1999 with breakouts for Private/Commercial campers and public campers.

Table 8-2
Overnight Camping Expenditures in California,
By Type of Business, * 1992-1999

(Millions of Dollars)

| | Campground Fees | Eating Out | Groceries | Vehicle/Fuel | Recreation | Shopping | Total Spending |
|-------------|-----------------|------------|-----------|--------------|------------|----------|----------------|
| 1992 | | | | | | | |
| Private | 333.8 | 390.2 | 272.6 | 390.4 | 130.8 | 234.1 | 1,751.9 |
| Public | 61.4 | 81.4 | 102.4 | 129.4 | 23.0 | 66.4 | 463.9 |
| Total | 395.2 | 471.6 | 374.9 | 519.8 | 153.8 | 300.5 | 2,215.8 |
| 1993 | | | | | | | |
| Private | 344.5 | 397.9 | 281.3 | 394.6 | 135.0 | 241.6 | 1,794.8 |
| Public | 63.3 | 82.9 | 105.5 | 130.6 | 23.7 | 68.5 | 474.6 |
| Total | 407.8 | 480.8 | 386.8 | 525.2 | 158.7 | 310.1 | 2,269.4 |
| 1994 | | | | | | | |
| Private | 372.8 | 426.4 | 304.5 | 417.3 | 146.1 | 261.5 | 1,928.6 |
| Public | 64.8 | 84.1 | 108.1 | 130.7 | 24.3 | 70.2 | 482.2 |
| Total | 437.7 | 510.5 | 412.6 | 548.1 | 170.4 | 331.7 | 2,410.8 |
| 1995 | | | | | | | |
| Private | 378.9 | 429.3 | 309.4 | 413.7 | 148.5 | 265.7 | 1,945.4 |
| Public | 66.6 | 85.6 | 111.0 | 131.0 | 24.9 | 72.0 | 491.1 |
| Total | 445.4 | 514.8 | 420.4 | 544.7 | 173.4 | 337.8 | 2,436.5 |
| 1996 | | | | | | | |
| Private | 431.4 | 485.6 | 352.3 | 480.2 | 169.1 | 302.6 | 2,221.1 |
| Public | 68.4 | 87.3 | 114.1 | 137.1 | 25.6 | 74.0 | 506.5 |
| Total | 499.8 | 572.9 | 466.4 | 617.3 | 194.7 | 376.6 | 2,727.7 |
| 1997 | | | | | | | |
| Private | 509.5 | 578.2 | 416.1 | 551.7 | 199.7 | 357.4 | 2,612.6 |
| Public | 65.9 | 84.8 | 109.8 | 128.5 | 24.6 | 71.3 | 485.0 |
| Total | 575.4 | 663.0 | 525.9 | 680.3 | 224.3 | 428.7 | 3,097.6 |
| 1998 | | | | | | | |
| Private | 461.9 | 525.7 | 377.2 | 427.7 | 181.0 | 323.9 | 2,297.4 |
| Public | 64.6 | 83.4 | 107.7 | 107.7 | 24.2 | 69.9 | 457.4 |
| Total | 526.5 | 609.0 | 484.8 | 535.5 | 205.2 | 393.8 | 2,754.8 |
| 1999 | | | | | | | |
| Private | 488.0 | 553.3 | 398.5 | 498.8 | 191.3 | 342.3 | 2,472.3 |
| Public | 68.8 | 88.4 | 114.6 | 126.6 | 25.7 | 74.4 | 498.4 |
| Total | 556.8 | 641.7 | 513.2 | 625.3 | 217.0 | 416.7 | 2,970.7 |

*Economic impacts are analyzed on an annual basis and are subject to revision.

Source: Dean Runyan Associates

Total Overnight Camping Trip Expenditures

Most camping trip expenditures occur in the vicinity of the campground.

Campers spent an average total of \$789 on each camping trip in 1999-2000. Of this amount, over 80% or \$659 was spent in the vicinity of the campground.

About one-fifth of the total economic impacts of camping are the result of travel expenditures incurred by campers traveling to and from campgrounds.

In terms of total economic impacts, travel expenditures to and from the campground amounted to \$588 million in 1999-2000. This amounts an average total of \$130 per camping trip. This spending was primarily for vehicle costs and food in restaurants.

Private/Commercial campers spend over two-thirds more on the average camping trip than Public campers.

The average trip expenditures of Private/Commercial campers were \$924 as compared to \$563 spent by Public campers, as shown in Table 8-3. The primary reason for this large differential is that Private/Commercial facility campers have longer stays. A further explanation is that average daily spending by campers utilizing Private/Commercial facilities is higher.

Table 8-3
Expenditures at Campground &
Travel To & From Campsite/Residence, 1999-2000

| | Per Party (\$) | Total Impacts (\$M) |
|--|-------------------|------------------------|
| Private Campgrounds | | |
| Avg. Daily Spending at campground | 119 | |
| Total Spending at campground | 787 | 2,472.3 |
| Expenditures to & from campground/home | 138 | 432.1 |
| Total Camping Trip Expenditures | 924 | 2,904.4 |
| Public Campgrounds | | |
| Avg. Daily Spending at campground | 93 | |
| Total Spending at campground | 446 | 498.4 |
| Expenditures to & from campground/home | 117 | 131.2 |
| Total Camping Trip Expenditures | 563 | 629.6 |
| All Campgrounds | | |
| Avg. Daily Spending at campground | 110 | |
| Total Spending at campground | 659 | 2,970.7 |
| Expenditures to & from campground/home | 130 | 588.0 |
| Total Camping Trip Expenditures | 789 | 3,558.7 |

Source: Dean Runyan Associates

Average Daily Spending Per Party By Type of Campground

Campers at National Parks outspend other public campground users.

Campers at National Parks spent more both at the campground and on travel to the campground than campers at other public facilities, as shown in Table 8-4. Campers at BLM/Forest Service/Corps campgrounds spent the least at the campground vicinity.

Campers at Local Parks and State Parks facilities spent more on travel to and from the campground than BLM/Forest Service/Corps.

Total Trip Expenditures Per Party To and From Campground

Total trip expenditures by users of Local Parks and State Parks is the lowest; total trip expenditures by National Parks users is the highest.

As illustrated in Table 8-5, Local Parks and State Parks campers spent the least, under \$100, per camping trip. National Parks campers spent the most, \$174 per trip.

Table 8-4
Average Daily Spending Per Party By Type of Campground, 1999-2000

| | \$ Per Camping Party Per Day | | | | | |
|-----------------|-------------------------------------|------------|-------------|----------------|-------------|-------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/Comm'l | Local Parks | All Campers |
| Campground Fees | 9 | 15 | 15 | 24 | 17 | 20 |
| Eating Out | 15 | 24 | 18 | 27 | 14 | 23 |
| Groceries | 20 | 19 | 24 | 19 | 21 | 20 |
| Vehicle/Fuel | 26 | 26 | 23 | 24 | 19 | 24 |
| Recreation | 3 | 8 | 5 | 9 | 7 | 8 |
| Shopping | 13 | 20 | 14 | 16 | 13 | 16 |
| Total Per Day | 88 | 113 | 99 | 119 | 91 | 110 |

Source: Dean Runyan Associates

Table 8-5
Total Trip Expenditures per Party to and from Campsite and Residence, 1999-2000

| | \$ Per Camping Party | | | | | |
|----------------|-----------------------------|------------|-------------|----------------|-------------|-------------|
| | BLM, FS, Corps | Nat'l Park | State Parks | Private/Comm'l | Local Parks | All Campers |
| Accommodations | 6 | 14 | 5 | 6 | 6 | 6 |
| Vehicle/Fuel | 73 | 69 | 49 | 69 | 42 | 66 |
| Eating Out | 31 | 50 | 26 | 34 | 24 | 32 |
| Shopping | 12 | 28 | 13 | 19 | 9 | 17 |
| Other | 11 | 14 | 6 | 9 | 4 | 9 |
| Total Per Trip | 132 | 174 | 98 | 138 | 85 | 130 |

Source: Dean Runyan Associates

9. Summary of Findings & Conclusions

The preceding research and analysis uncovered several key findings about camping and campers in California. This section recaps key findings found throughout the report and presents generalized interpretations of these findings.

Summary of Findings

Camping Trips in California

- *The majority of campers in California are in-state residents.*
- *Most campers take trips within the state of California only.*
- *Almost half of all campers took five or fewer camping trips during the past year; almost one-quarter took 11 or more trips.*
- *The majority of camping trips are one week or less.*
- *Most camping trips are to locations within 300 miles.*
- *Camping at one campground is most popular option on individual camping trips.*
- *Vehicles used to travel to campgrounds are most often trailers or motorhomes/RVs.*
- *Many camping parties use no additional equipment.*

Camping Parties

- *Most campers are with family members on camping trips.*
- *More than two-thirds of camping parties had two adults; Six out of ten camping parties had no children.*
- *Over half of all campers have no children at home; More than eight out of ten households have one or two adults.*
- *Few campers are under thirty years old; nearly two-thirds are over 50.*
- *Campers are relatively well-educated.*
- *Campers are relatively affluent; over two-thirds have annual incomes of \$50,000 or more per year.*
- *About one out of eight campers is non-white.*

Camping Activities

- *Walking/day hiking, sightseeing and picnicking are popular with all campers.*
- *Some differences in camping activity preferences are found among camping management categories.*

Trip Planning Information Sources

- *Campers rely most on their knowledge from previous trips.*
- *The Internet is used by nearly one-quarter of respondents.*

Camping Trip Satisfaction

- *Camping satisfaction is relatively high across all categories.*

- *Easier to reserve camping sites is the top request for all campers.*

Early Camping Experiences

- *Over eight out of ten campers became interested in camping and spending time outdoors as children.*
- *First camping experiences were usually in a tent, RV or trailer.*
- *Over half of all campers were with parents on their first camping trip.*
- *Friends and parents have greatly influenced campers' interests in camping and spending time outdoors.*

Economic Impacts of Camping

- *The total economic impact of camping was \$3 billion dollars in 1999.*
- *Expenditures by campers have generally increased throughout the 1990s.*
- *The majority of all camping expenditures are at private campgrounds.*
- *More than half of all private camping expenditures are in urban regions and Southern California.*
- *More than one-third of all public camping expenditures are in the High Sierra and Central Coast regions.*
- *All campers spent the largest percentage of their budgets on restaurants and vehicle and fuel costs.*
- *Most camping trip expenditures occur in the vicinity of the campground.*
- *About one-fifth of the total economic impacts of camping are the result of travel expenditures incurred by campers traveling to and from the campgrounds.*
- *Private/Commercial campers spend over two-thirds more on the average camping trip than Public campers.*
- *Campers at National Parks outspend other public campground users.*

Conclusions

California campers are predominantly empty nesters and retired people.

Two-thirds of respondents are over 50 and that 60% reported having no children at home. It is also notable that two-thirds of respondents' camping vehicle of choice is a trailer or motorhome/RV.

Camping in California is an activity primarily participated in by relatively affluent, well-educated people.

The fact that over 68% of respondents reported annual income of \$50,000 and over suggests that on average camping is an activity of the relatively affluent. While educational levels are more dispersed, findings are dominated by those with at least some college experience.

Non-whites in California are relatively less likely to be campers.

Less than 13% of respondents reported non-white ethnic groups. This compares to a 20.5% overall non-white population in the state of California according to 1998 U.S. Census data.

California camping is dominated by private/commercial campground use.

Over 80% of all camping expenditures are attributable to users of private/commercial campgrounds. This is due, in part to the larger number of privately owned developed campsites. Another factor is the accessibility and convenience of private/commercial campgrounds for large trailers and motorhomes/RVs.

California campers' interest in camping has been heavily influenced by early camping experiences with family and friends.

The majority of all campers took their first camping trip when they were children. And on their first camping trip, they were most often with family members or friends. The majority of campers also reported being with family and friends most often on their most recent camping trips. These findings suggest that people currently involved in camping are carrying on traditions and camping activities they were exposed to as children.

California campers are satisfied with their camping experiences overall.

The finding that campers are generally satisfied with their camping experiences overall is consistent with the fact that 40% of all campers reported they take as many camping trips as they desire. Despite this satisfaction, however, campers do have concerns about reserving campsites and the affordability of camping facilities.

Most California campers take just a few camping trips each year.

Whether camping parties take just a few trips or many trips, they tend to have relatively short stays in primarily one campground that is within the state of California. They are also likely to be returning to the same campgrounds on return trips, as suggested by the close proximity of most campgrounds to home.

California campers are coming to rely more heavily on the Internet as a source of trip planning information.

While personal knowledge and friends/relatives are the top sources of information for planning camping trips, and are expected to remain most important sources, Internet usage is an important, emerging component.

APPENDIX A

ETHNIC FACTORS

While examining ethnic factors was not a primary objective of this camping research, some data regarding ethnic differences was obtained from the survey. This appendix reports these findings in a series of tables similar to those found in the main body of the report. Non-white ethnic groups were aggregated since the quantity of responses from individual non-white ethnic groups was too small for reporting purposes. This was the case even with addition of the augmented sample obtained from Sunset Magazine.

The results shown in this appendix are to be interpreted as possible indicators of differences between non-white and white ethnic groups only. Further and more targeted study is required to draw meaningful conclusions about how campers differ according to ethnicity.

Table A-1
Average Number of Overnight Camping Trips,
Average Length of Stay & Distance From Home, 1999-2000
By Ethnic Group

| | Percent of Respondents | |
|--|------------------------|-------|
| | Non-White | White |
| Average Number of Overnight Camping Trips | | |
| In California | 5.4 | 7.1 |
| Elsewhere in U.S. | 0.5 | 1.2 |
| Outside U.S. | 0.2 | 0.2 |
| Total Trips | 6.2 | 8.9 |
| Average Length of Stay | | |
| 1-2 nights | 35.3 | 22.5 |
| 3-6 nights | 39.2 | 44.3 |
| 7-13 nights | 14.2 | 13.7 |
| 14+ nights | 11.3 | 19.6 |
| Total | 100.0 | 100.0 |
| Average # Nights | 5.8 | 9.1 |
| Distance From Home (miles) | | |
| 1-100 | 42.7 | 38.3 |
| 101-300 | 37.3 | 41.8 |
| More than 300 | 20.0 | 19.8 |
| Total | 100.0 | 100.0 |
| Average | 204.3 | 219.5 |

Note: Totals may not equal 100% due to rounding
Source: Dean Runyan Associates

Table A-2
 Single Campground Versus Multiple Campground Use,
 Type of Vehicle Used, Additional Equipment Used, 1999-2000
 By Ethnic Group

| | Percent of Respondents | |
|---|------------------------|-------|
| | Non-White | White |
| Single Campground Versus Multiple Campground Use | | |
| One Campground | 77.4 | 66.4 |
| More Than One | 22.6 | 32.6 |
| Total | 100.0 | 100.0 |
| Type of Vehicle Used to Travel to Campground | | |
| Auto, Van, Truck w/ 5 th Wheel | 15.5 | 34.3 |
| Motorhome/RV | 28.5 | 38.8 |
| Auto, Van, Truck w/ Tent | 51.3 | 20.5 |
| Camping Van or Pickup w/ Camper | 3.7 | 4.9 |
| Motorcycle | 0.0 | 0.9 |
| Other | 1.0 | 0.6 |
| Additional Equipment Used | | |
| None | 37.7 | 44.0 |
| Bicycle | 35.6 | 27.2 |
| Extra Vehicle | 4.0 | 10.2 |
| Motorboat | 16.5 | 6.8 |
| Off-Road ATV | 5.2 | 8.2 |
| Off-Road 4x4 | 6.7 | 5.8 |
| Motorcycle | 6.6 | 5.4 |
| Canoe, Raft, Kayak | 6.4 | 4.5 |
| Jet Ski | 9.8 | 1.8 |
| Other | 1.0 | 1.8 |
| Snowmobile | 0.1 | 0.4 |

Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response
 Source: Dean Runyan Associates

Table A-3
 Who Campers Are With,
 Average Number of Persons in Camping Parties, 1999-2000
 By Ethnic Group

| | Percent of Respondents | |
|--|------------------------|-------|
| | Non-White | White |
| Who Campers Are With | | |
| Alone | 3.0 | 2.1 |
| With Family | 84.4 | 81.8 |
| With Friends | 44.5 | 37.1 |
| Organized Group | 5.1 | 13.4 |
| With Local Parks | 0.2 | 0.4 |
| Other | 0.5 | 0.2 |
| Average Number of Adults in Camping Party | | |
| 1 adult | 7.1 | 5.4 |
| 2 adults | 44.8 | 69.1 |
| 3-4 adults | 17.9 | 13.2 |
| 5-6 adults | 14.9 | 6.7 |
| 7 or more adults | 15.2 | 5.5 |
| Total | 100.0 | 100.0 |
| Average Number | 4.0 | 2.8 |
| Average Number of Children in Camping Party | | |
| 0 children | 36.6 | 62.2 |
| 1-2 children | 31.5 | 23.9 |
| 3-4 children | 11.3 | 9.2 |
| 5 or more | 20.6 | 4.7 |
| Total | 100.0 | 100.0 |
| Average Number | 2.7 | 1.1 |

Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response
 Source: Dean Runyan Associates

Table A-4
Camper Demographics, 1999-2000,
By Ethnic Group

| | Percent of Respondents | |
|--|------------------------|-------|
| | Non-White | White |
| Average Number of Adults in Household | | |
| 1 adult | 8.8 | 6.7 |
| 2 adults | 69.1 | 82.6 |
| 3-4 adults | 20.0 | 9.9 |
| 5 or more | 2.1 | 0.8 |
| Total | 100.0 | 100.0 |
| Average Number | 2.3 | 2.1 |
| Average Number of Children at Home | | |
| 0 children | 43.0 | 66.1 |
| 1-2 children | 45.9 | 28.1 |
| 3-4 children | 10.0 | 5.2 |
| 5 or more | 1.1 | 0.5 |
| Total | 100.0 | 100.0 |
| Average Number | 1.1 | 0.7 |
| Average Age of Adult Campers | | |
| Under 30 | 5.3 | 3.3 |
| 30-40 | 26.1 | 15.8 |
| 41-50 | 29.5 | 20.9 |
| 51-60 | 22.1 | 25.6 |
| Over 60 | 17.0 | 34.5 |
| Total | 100.0 | 100.0 |
| Average Age | 47.9 | 53.8 |
| Highest Educational Attainment of Campers | | |
| No H.S. Diploma | 3.6 | 1.5 |
| H.S. Diploma | 15.6 | 14.2 |
| Some College | 42.2 | 47.2 |
| Bachelors Degree | 19.6 | 19.8 |
| Advanced Degree | 14.0 | 17.3 |
| Total | 100.0 | 100.0 |
| Annual Income Levels of Campers | | |
| Under \$20,000 | 2.4 | 2.7 |
| \$20,000-\$29,999 | 6.3 | 5.1 |
| \$30,000-\$39,999 | 17.7 | 10.7 |
| \$40,000-\$49,999 | 4.8 | 13.6 |
| \$50,000-\$74,999 | 20.9 | 27.4 |
| \$75,000-\$99,999 | 27.6 | 18.6 |
| Over \$100,000 | 20.4 | 22.0 |
| Total | 100.0 | 100.0 |

Note: Totals may not equal 100% due to rounding
Source: Dean Runyan Associates

Table A-5
Most Popular Camping Activities, 1999-2000
By Ethnic Group

| | Percent of Respondents | |
|---------------------------------------|-------------------------------|-------|
| | Non-White | White |
| Top 12 Most Popular Activities | | |
| Walking/Day Hiking | 82.4 | 73.4 |
| Sightseeing | 57.7 | 68.0 |
| Picnicking | 55.1 | 29.2 |
| Photography | 39.7 | 27.9 |
| Museum/Historical Site | 23.0 | 27.5 |
| Swimming | 37.4 | 25.2 |
| Bike Riding | 30.9 | 23.0 |
| Fresh Water Fishing | 46.7 | 18.7 |
| Nature Study | 27.0 | 18.9 |
| Group Outing/Reunion | 19.2 | 19.1 |
| Bird Watching | 19.4 | 15.3 |
| Attend Fair | 12.4 | 12.8 |
| Other Popular Activities | | |
| Off-Road ATV | 5.5 | 8.0 |
| Canoe/Raft/Kayak | 12.2 | 6.6 |
| Music/Play/Cult. Event | 6.4 | 7.0 |
| Off-Road 4x4 | 9.1 | 6.1 |
| Salt Water Fishing | 7.3 | 4.7 |
| Waterskiing/Jet Skiing | 8.5 | 3.5 |
| Off-Road Motorcycle | 2.4 | 3.9 |
| Horse Back Riding | 12.7 | 2.5 |
| Off-Road Other | 1.7 | 3.5 |
| Sporting Event | 2.3 | 3.0 |
| Hunting | 4.1 | 2.0 |

Note: Totals may not equal 100% due to rounding; Totals exceed 100% in cases of multiple response
Source: Dean Runyan Associates

Table A-6
Information Sources Used By Campers, 1999-2000
By Ethnic Group

| | Percent of Respondents | |
|--|-------------------------------|-------|
| | Non-White | White |
| Information Sources Used By Campers | | |
| Personal Knowledge | 61.9 | 67.9 |
| Friends/Relatives | 57.0 | 37.7 |
| Guidebook | 15.6 | 30.0 |
| Auto/Travel Club | 28.4 | 25.2 |
| Internet | 19.2 | 23.0 |
| Government Office | 12.2 | 10.7 |
| Feature Article | 14.5 | 8.2 |
| RV or Sports Show | 7.8 | 8.3 |
| Local CVB | 6.9 | 7.5 |
| Newspaper Ad | 9.9 | 5.6 |
| Other | 1.5 | 2.0 |
| TV Radio Ad | 6.2 | 0.7 |

Note: Totals exceed 100% in cases of multiple response

Source: Dean Runyan Associates

Table A-7
Camping Trip Satisfaction, 1999-2000
By Ethnic Group

| | Average Based on 7-Point Scale | |
|----------------------------------|---------------------------------------|-------|
| | Non-White | White |
| Camping Trip Satisfaction | | |
| Your Trip Overall | 6.1 | 6.2 |
| Cleanliness of Facilities | 5.8 | 6.0 |
| Access to Activities | 6.0 | 6.0 |
| Friendliness of Staff | 6.0 | 6.0 |
| Safety and Security | 6.1 | 6.0 |
| Quality of Facilities | 5.8 | 5.7 |
| Peace and Quiet | 5.9 | 5.6 |
| Reasonably Priced | 5.7 | 5.5 |
| Lack of Crowding | 5.4 | 5.4 |

Source: Dean Runyan Associates

Table A-8
 Conditions Required For Taking More Trips, 1999-2000
 By Ethnic Group

| | Percent of Respondents | |
|--|-------------------------------|-------|
| | Non-White | White |
| Under What Conditions Would Campers Take More Trips | | |
| Easier to Reserve Sites | 49.6 | 40.1 |
| Less Expensive Facilities | 46.6 | 32.4 |
| Fewer Crowds | 36.7 | 32.4 |
| Better Quality Grounds | 36.5 | 23.9 |
| Sites Closer To Home | 24.8 | 15.0 |
| More Information | 24.5 | 14.9 |
| More Family/Friends | 28.0 | 13.6 |
| Safer Campgrounds | 31.0 | 11.8 |
| Other | 7.3 | 8.9 |
| Better Off-Road Access | 11.1 | 8.1 |
| Better Curfew Enforcemt. | 0.6 | 1.6 |
| More My Ethnic Group | 2.5 | 0.1 |

Source: Dean Runyan Associates

Ethnic Factors Summary

- White campers take more overnight camping trips and have longer stays.
- Non-white campers are more than twice as likely to travel to the campground in an auto, van or truck with a tent.
- Non-white campers are with family and friends slightly more often.
- White campers are much more likely to have no children along on camping trips.
- Non-white campers are an average of 5.9 years younger.
- Non-white campers are more than twice as likely to participate in fresh water fishing.
- White campers use guidebooks almost twice as often as non-white campers; non-white campers rely more on information from friends/relatives as compared to non-white campers.
- Regarding conditions required for taking more camping trips, non-white campers have greater concerns in most categories; for example, twice as many non-white campers would prefer more participation of family/friends as compared to white campers.

APPENDIX B

SURVEY METHODOLOGY

Data for this study was gathered from a survey of camping parties who stayed at least one night in a campground in California during 1999 or the spring of 2000. The sample of campers selected from six different sources that are summarized and described in Table B-1.

Table B-1
Sample Composition

| Sample Source | Description | Composition of Sample |
|---|--|--|
| California State Parks | Camping parties that reserved a campsite at a state park during 1999. | Random sample of campsite registration addresses. |
| Commercial Campgrounds | Camping parties that stayed at one of 10 selected commercial campgrounds or RV parks. | Random sample of 100 addresses of patrons during 1999 from each of 10 facilities selected to represent large urban, medium-sized community and rural areas of the state. |
| Local Parks Districts | Camping parties that stayed at one of 10 selected local parks. | Random sample of 100 addresses of patrons during 1999 from each of 10 facilities selected to represent large urban, medium-sized community and rural areas of the state. |
| Sunset Magazine Outdoor Source Mailing List | Selected subscribers to Sunset Magazine reported to have shown an interest in outdoor recreation and thought to be either Hispanic/Latino or African American/Black. | Random sample of 2,000 households throughout California. |
| Bureau of Land Management (BLM) | Camping parties that stayed in BLM managed campgrounds Fall 1999 or Winter/Spring 2000. | Questionnaires were distributed in the field to camping parties on actual camping trips. Surveys were distributed to represent a variety of facilities throughout the state. |
| United States Forest Service (USFS) | Camping parties that stayed in USFS managed campgrounds Fall 1999 or Winter/Spring 2000. | Questionnaires were distributed in the field to camping parties on actual camping trips. Surveys were distributed to represent a variety of facilities throughout the state. |

Self-administered questionnaires were distributed to a sample of patrons from Local Parks, California Travel Parks Association (representing private/commercial campers) and California State Parks by mail. The names and addresses used in the sample were obtained from reservation systems of participating campground facilities. Tables B-2 and B-3 list the participating facilities for Local Parks and private/commercial campgrounds. The sample for California State Parks was randomly selected from all campers in the reservation system.

Table B-2
Sample Attributes,
Participating Facilities Representing Local Parks

| Jurisdiction |
|--|
| City of South Lake Tahoe (Campground by the Lake) |
| East Bay Regional Park District |
| Inyo County |
| Monterey County Parks (Laguna Seca, San Antonio Lake) |
| Riverside County |
| San Diego County |
| San Mateo County |
| Santa Barbara County Parks (Cachuma Lake) |
| Santa Clara Parks |
| Sonoma County Parks |

Table B-3
Sample Attributes,
Participating Facilities Representing Private/Commercial

| Organization |
|-----------------------------|
| East Shore RV Park |
| Far Horizons 49er Village |
| Fawndale Oaks RV Park |
| Lake Isabella RV Resort |
| Orangeland RV Park |
| Pismo Coast Village RV Park |
| Maple Leaf RV Park |
| Lake Elsinore Marina |
| Boulder Creek RV Park |
| Santee Lakes RV Park |

Questionnaires were distributed to patrons of selected BLM and U.S. Forest Service camping facilities *without reservation systems*, on-site by BLM and U.S. Forest Service personnel (on-site questionnaires administered are referred to as intercept questionnaires in this report). This distribution method was an improvement over the 1994 study that, due to budget constraints, only surveyed campers who had reserved campsites in advanced. This inclusion of campers who stay in non-reservation campgrounds improves the accuracy of the results.

Table B-4 lists locations where intercept questionnaires were distributed by BLM personnel. The majority of questionnaires were distributed from the El Centro office at the Imperial Sand Dunes where there are mandatory stops to hand out dunes and safety information. Field Office Recreation Management Supervisors at each location provided direction for distributing the questionnaires.

Table B-4
Sample Attributes,
Field Offices Representing BLM

| Field Offices & Facilities |
|--|
| El Centro Imperial Sand Dunes Long term visitor areas McCain Valley (Cottonwood and Lark) |
| Barstow Owl Campground Afton Canyon Campground |
| Palm Springs Long term visitor areas Corn Springs Campground |
| Needles California side of Colorado River |
| Ridgecrest Jawbone Canyon Fossil Wells Campground |

In addition, surveys were mailed to potential California campers from a purchased mailing list of a subset of Sunset Magazine subscribers. This effort was in response to concerns of The Roundtable that ethnic minorities would be underrepresented in the study if only camping party addresses were used. The purchased Sunset Magazine list was a special "Outdoor Source Enhanced List" consisting of subscribers with an interest in outdoor recreation; the specific names and addresses purchased from the "Outdoor Source Enhanced List" were selected according to probable ethnic group identification (Hispanic/Latino and African American/Black subscribers were selected). According to Maldunn Associates, the list broker for Sunset Magazine, subscribers are assigned to probable ethnic groups using a variety of methods including surname analysis, U.S. census tract data analysis and self-disclosure.

The mailed and intercept versions of the four-page self-administered questionnaire used for this study were very similar. The mailed version asked respondents to answer questions based on their *most recent camping trip within California*. The intercept version asked respondents to answer the questions *based on the trip they were currently on*. The mailed version was sent via first class mail from Portland, Oregon on January 21, 2000 to each address, followed by a reminder postcard sent five days later. Both versions of the questionnaire were enclosed in an envelope of the California Trade and Commerce Agency, Division of Tourism. Each survey package included a questionnaire and a return envelope with first class postage (addressed to the California Trade and Commerce Agency, Division of Tourism). Copies of each questionnaire and the reminder postcard appear in Appendix A.

Questionnaire Response Rates

Response rates for the mailed version of the survey were excellent, averaging 36.8% overall. The response rate for the Sunset Magazine list was the lowest at 28.0%. This was expected since the potential respondents on the list were not known campers in the state of California. The response rate for the intercept surveys is unknown and will not be reported due to survey distribution issues that will be explained below. The quantities of questionnaires distributed, delivered and returned are shown in Table B-5, along with response rates by sample source.

Table B-5
Delivered Sample & Response Rate By Sample Source

| Sample Source | Number Distributed | Undelivered | Delivered Sample | Responses | Response Rate |
|--------------------------------|--------------------|-------------|------------------|-----------|---------------|
| California State Parks | 1,000 | 66 | 934 | 413 | 44.2% |
| Private/Commercial | 1,000 | 40 | 960 | 370 | 38.5% |
| Local Parks | 1,000 | 36 | 964 | 442 | 45.8% |
| Sunset Magazine | 2,000 | 12 | 1,988 | 558 | 28.0% |
| Total Mailed Surveys | 5,000 | 154 | 4846 | 1782 | 36.8% |
| BLM & USFS | 7,000 | n/a | n/a | 617 | n/a |
| Total Intercept Surveys | 7,000 | n/a | n/a | 617 | n/a |

California Developed Campsite Inventory

The inventory of developed campsites in California was compiled from several sources. The inventory for Private/Commercial campsites is based on figures from the State of California Department of Housing and Community Development (HCD). The HCD, through its Mobile Home Parks Program, issues annual permits to private campgrounds that record the total number of campsites each facility maintains. The Private/Commercial inventory obtained from HCD records was compared to figures obtained from Woodall's Camping Directory for verification purposes. Figures for California State Parks were obtained from the California Department of Parks and Recreation and figures for all other agencies were compiled from Foghorn Outdoors California Camping Guide.

Data Weighting Procedure

Aside from illustrating the quantity and location of campsites in the state, campsite inventories by region provided a key input for weighting the camping survey data. The purpose of weighing the data was to properly represent the mix of campers in the state, which helps provide the most accurate representation of campers in California.

The weighting applied was based on both statewide campsite inventories and occupancy rates for each type of campground (e.g. Private/Commercial, State Parks, National Parks, Local Parks, BLM, Forest Service). Occupancy rates for Private/Commercial campgrounds were estimated based on a monthly regional survey of California Travel Parks Association (CTPA) member campgrounds. Occupancy rates for State Parks were estimated based on attendance figures. Occupancy rates for other public facilities were estimated from Private/Commercial and State Parks occupancy rates and other factors (e.g. attendance, nature of campsites). Weights were also adjusted to account for regional variations. A quantified listing of California's campsites by management category and by region used to calculate the weights is shown in Table B-6.

Table B-6
California Campsite Inventory, 1999-2000

| Region | State & Local | | | Federal | | | | | | Total |
|------------------------|---------------|--------------------------|-------------------|------------|--------------|------------|---------------|--------------|------------|----------------|
| | Private | City, County Regional | CA State Parks | BLM | COE | RCLM | USFS | NPS | Utilities | |
| North Coast | 12,822 | 730 | 2,360 | 67 | 417 | 0 | 652 | 133 | 15 | 17,196 |
| Shasta-Cascade | 8,071 | 0 | 707 | 144 | 0 | 0 | 4,663 | 645 | 441 | 14,671 |
| San Francisco Bay Area | 4,812 | 631 | 1,324 | 0 | 0 | 0 | 0 | 0 | 0 | 6,767 |
| Central Valley | 10,123 | 482 | 1,119 | 23 | 551 | 0 | 203 | 0 | 0 | 12,501 |
| Gold Country | 7,658 | 120 | 644 | 16 | 1,166 | 299 | 146 | 0 | 0 | 10,049 |
| High Sierra | 5,080 | 1,309 | 1,126 | 332 | 77 | 0 | 9,616 | 2,734 | 177 | 20,451 |
| Central Coast | 6,709 | 1,341 | 3,238 | 0 | 991 | 0 | 1,262 | 92 | 0 | 13,633 |
| Los Angeles Area | 4,417 | 50 | 674 | 0 | 0 | 0 | 580 | 0 | 0 | 5,721 |
| Orange County | 2,926 | 320 | 370 | 0 | 0 | 0 | 0 | 0 | 0 | 3,616 |
| San Diego County | 7,000 | 678 | 1,662 | 0 | 0 | 0 | 476 | 0 | 0 | 9,816 |
| The Deserts | 12,757 | 1,730 | 1,226 | 169 | 0 | 0 | 697 | 2,064 | 0 | 18,643 |
| Inland Empire | 9,123 | 1,301 | 728 | 0 | 0 | 0 | 1,096 | 0 | 0 | 12,248 |
| State Total | 91,498 | 8,692 | 15,178 | 751 | 3,202 | 299 | 19,391 | 5,668 | 633 | 145,312 |

Sources: California Department of Housing and Community Development (Private), California Department of Parks and Recreation (State Parks), and Foghorn Outdoors California Camping Guide (all other agencies).

Inventory refers to developed campsites only. However, services provided at developed campsites vary.

APPENDIX C
SURVEY INSTRUMENT



CALIFORNIA TRADE AND COMMERCE AGENCY

Gray Davis

Governor

Lon S. Hatamiya

Secretary

Dear Camper:

You can help us by completing this survey about your current camping trip. Your answers will provide information we need to better serve campers in California.

The California Division of Tourism and the California Roundtable on Recreation, Parks and Tourism are sponsoring this survey to gather information that is not available from any other source. **Your answers will be used for statistical purposes only and will be kept strictly confidential.**

To express our gratitude for your help, we will award prizes to twelve randomly selected respondents. Two will receive a \$50 U.S. Savings Bonds, and an additional ten will receive an annual day-use pass for any of California's 265 State Parks.

Thank you for your assistance,

Caroline Beteta, Director of Tourism

Division of Tourism

801 K Street,
Suite 1600
Sacramento, CA
94814-3520

SPECIAL DRAWING!

Twelve winners will be randomly selected:

Two will receive a \$50 U.S. Savings Bond;
Ten will receive an annual day-use pass for any California State Park

Winners will be selected by random drawing from completed surveys

YOUR OVERNIGHT CAMPING TRIPS

1. How many overnight camping trips did you take during 1999? (fill in number of trips)

| | |
|-------|---|
| _____ | trips just in California |
| _____ | trips in California combined with camping at other places |
| _____ | trips elsewhere in the U.S. (please specify) _____ |
| _____ | trips outside of the U.S. (please specify) _____ |
| _____ | total camping trips |

2. What is your zip or postal code ? _____

12. During this overnight camping trip, what activities are you participating in?

(Check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> walking/day hiking | <input type="checkbox"/> canoeing, rafting or kayaking | <input type="checkbox"/> hunting |
| <input type="checkbox"/> overnight backpacking | <input type="checkbox"/> sailing | <input type="checkbox"/> bike riding |
| <input type="checkbox"/> sightseeing | <input type="checkbox"/> wind surfing | <input type="checkbox"/> horse riding |
| <input type="checkbox"/> picnicking | <input type="checkbox"/> water skiing | <input type="checkbox"/> attend a fair, festival or rodeo |
| <input type="checkbox"/> group outing/family reunion | <input type="checkbox"/> swimming | <input type="checkbox"/> attend a music, play or other cultural event |
| <input type="checkbox"/> snowmobiling | <input type="checkbox"/> off-road ATV use | <input type="checkbox"/> visit museum, historical site |
| <input type="checkbox"/> skiing | <input type="checkbox"/> off-road motorcycle use | <input type="checkbox"/> photography |
| <input type="checkbox"/> fresh water fishing | <input type="checkbox"/> off-road 4X4 use | <input type="checkbox"/> attend or participate in organized sporting event |
| <input type="checkbox"/> salt water fishing | <input type="checkbox"/> off-road – other activity | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> nature study | <input type="checkbox"/> bird watching | |

13. How would you rate this overnight camping trip on each of the following?

(Check a number from 1 to 7, where “1” is poor and “7” is excellent)

| | <i>Poor</i> | | | | | | <i>Excellent</i> |
|------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| •safety and security | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •cleanliness of facilities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •quality of facilities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •access to recreational activities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •friendliness of staff | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •peace and quiet | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •reasonably priced | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •lack of congestion and crowding | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •your trip overall | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

WHAT YOU ARE SPENDING ON YOUR CURRENT CAMPING TRIP

14. In the county or area where you are camping _____, how much are you and your immediate traveling party spending each day for the following items?

(Please estimate the amount as closely as possible; Check “No Expenses” if you will have no expenses for an item.)

| | No Expenses | Expenses for your party PER DAY |
|--|--------------------------|---------------------------------|
| •Campground fees | <input type="checkbox"/> | \$ _____ |
| •Accommodations other than campground fees (hotel, motel, etc.) | <input type="checkbox"/> | \$ _____ |
| •Tours & recreation (admissions, rentals, local tours, charters, etc.) | <input type="checkbox"/> | \$ _____ |
| •Transportation & vehicle costs (gas, rental fees, service, etc.) | <input type="checkbox"/> | \$ _____ |
| •Food & drink in restaurants & bars, fast food, coffee shops | <input type="checkbox"/> | \$ _____ |
| •Groceries, liquor, snacks from a store | <input type="checkbox"/> | \$ _____ |
| •Retail (shopping for gifts, clothing, souvenirs, equipment, etc.) | <input type="checkbox"/> | \$ _____ |
| •All other items (please specify) _____ | <input type="checkbox"/> | \$ _____ |

15. While traveling between your home and the location where you camped and back again _____, how much will you spend for the following items? (please include the total estimated cost of all purchases you will make while traveling)
(Please estimate the amount as closely as possible; Check “No Expenses” if you will have no expenses for an item.)

| | No Expenses | TOTAL Expenses for your party |
|---|--------------------------|-------------------------------|
| •Accommodations other than campground fees (hotel, motel, etc.) | <input type="checkbox"/> | \$ _____ |
| •Vehicle costs (gas, rental fees, service, etc.) | <input type="checkbox"/> | \$ _____ |
| •Food & drink in restaurants & bars, fast food, coffee shops | <input type="checkbox"/> | \$ _____ |
| •Shopping for gifts, clothing, souvenirs, equipment, etc. | <input type="checkbox"/> | \$ _____ |
| •All other items (please specify) _____ | <input type="checkbox"/> | \$ _____ |

YOUR PREVIOUS CAMPING EXPERIENCES

16. How old were you when you went on your first overnight camping trip? _____
17. Was your first overnight camping trip at a campground in a tent, RV or trailer
OR was it in a cabin or other structure?
 in a tent, RV or trailer don't know or don't remember
 in a cabin or other structure other _____
18. Who were you with on your first overnight camping trip? (Check **Ö**all that apply)
 parents organized group -- Scouts, church group, YMCA, other
 friends camping group organized by local parks & recreation district
 other family members other _____
19. Who or what has influenced you the most to camp and spend time outdoors? (Check **Ö**all that apply)
 parents teacher or counselor magazines
 other family members scout or church leader TV or movies
 local parks & recreation leader TV or radio personality newspapers
 friends books other _____
20. Under what conditions would you take more overnight camping trips? (Check **Ö**all that apply)
 less expensive facilities more participation of family & friends safer campgrounds
 easier to reserve camp sites more participation by my ethnic group better quality camping facilities
 campgrounds closer to home more information about campgrounds I take as many trips as I prefer
 fewer crowds at campgrounds better access for off-road vehicles other _____

ABOUT YOURSELF

21. Number of adults in your household? _____
22. Number of children (age 17 or under) in your household ? _____
23. What is your age ? _____
24. How would you describe yourself?
 Asian Hispanic/Latino White/Caucasian
 Black/African American Indian/Native American other _____
25. Please check your highest education level:
 no high school diploma some college or two year degree bachelors degree
 high school diploma graduate degree
26. In what range was your total family income (before taxes) in 1999?
 under \$20,000 \$30,000 - \$39,999 \$50,000 - \$74,999 \$100,000 or more
 \$20,000 - \$29,999 \$40,000 - \$49,999 \$75,000 - \$99,999

THANK YOU FOR YOUR ASSISTANCE

Please fill in your name and address if you wish to be entered in the random drawing.

Name: _____

Address: _____ Phone: () _____

City: _____ State/Province: _____ ZIP/Postal Code: _____



CALIFORNIA TRADE AND COMMERCE AGENCY

Gray Davis
Governor

Lon S. Hatamiya
Secretary

If you or someone in your household took an overnight camping trip in California during 1999, you can help us by completing and returning this survey. Your answers will provide information we need to better serve campers in California.

The California Division of Tourism and the California Roundtable on Recreation, Parks and Tourism are sponsoring this survey to gather information that is not available from any other source. **Your answers will be used for statistical purposes only and will be kept strictly confidential.** Enclosed is a postage-paid envelope for your convenience.

Please return the completed survey by February 15, 2000.

To express our gratitude for your help we will award prizes to twelve randomly selected respondents. Two will receive a \$50 U.S. Savings Bonds, and an additional ten will receive an annual day-use pass for any of California's 265 State Parks.

Thank you for your assistance,

Caroline Beteta, Director of Tourism

Division of Tourism

801 K Street,
Suite 1600
Sacramento, CA
95814-3520

SPECIAL DRAWING!

Twelve winners will be randomly selected:

Two will receive a \$50 U.S. Savings Bond;
Ten will receive an annual day-use pass for any California State Park

Winners will be selected by random drawing from completed surveys

YOUR OVERNIGHT CAMPING TRIPS

1. Did you or someone in your household take an overnight camping trip during the last year?

No → Please skip to question 21

Yes → How many overnight camping trips did you take during 1999? (fill in number of trips)

_____ trips just in California

_____ trips in California combined with camping at other places

_____ trips elsewhere in the U.S. (please specify) _____

_____ trips outside of the U.S. (please specify) _____

_____ total camping trips

2. What is your zip or postal code? _____

12. During this overnight camping trip in California, what activities did you participate in?

(Check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> walking/day hiking | <input type="checkbox"/> canoeing, rafting or kayaking | <input type="checkbox"/> hunting |
| <input type="checkbox"/> overnight backpacking | <input type="checkbox"/> sailing | <input type="checkbox"/> bike riding |
| <input type="checkbox"/> sightseeing | <input type="checkbox"/> wind surfing | <input type="checkbox"/> horse riding |
| <input type="checkbox"/> picnicking | <input type="checkbox"/> water skiing | <input type="checkbox"/> attend a fair, festival or rodeo |
| <input type="checkbox"/> group outing/family reunion | <input type="checkbox"/> swimming | <input type="checkbox"/> attend a music, play or other cultural event |
| <input type="checkbox"/> snowmobiling | <input type="checkbox"/> off-road ATV use | <input type="checkbox"/> visit museum, historical site |
| <input type="checkbox"/> skiing | <input type="checkbox"/> off-road motorcycle use | <input type="checkbox"/> photography |
| <input type="checkbox"/> fresh water fishing | <input type="checkbox"/> off-road 4X4 use | <input type="checkbox"/> attend or participate in organized sporting event |
| <input type="checkbox"/> salt water fishing | <input type="checkbox"/> off-road – other activity | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> nature study | <input type="checkbox"/> bird watching | |

13. How would you rate your most recent overnight camping trip on each of the following?

(Check a number from 1 to 7, where “1” is poor and “7” is excellent)

| | <i>Poor</i> | | | | | | <i>Excellent</i> |
|------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| •safety and security | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •cleanliness of facilities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •quality of facilities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •access to recreational activities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •friendliness of staff | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •peace and quiet | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •reasonably priced | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •lack of congestion and crowding | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| •your trip overall | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

WHAT YOU SPENT ON YOUR CALIFORNIA CAMPING TRIP

14. In the county or area where you camped , how much did you and your immediate traveling party spend each day for the following items?

(Please estimate the amount as closely as possible; Check “No Expenses” if you had no expenses for an item.)

| | No Expenses | Expenses for your party PER DAY |
|--|--------------------------|---------------------------------|
| •Campground fees | <input type="checkbox"/> | \$ _____ |
| •Accommodations other than campground fees (hotel, motel, etc.) | <input type="checkbox"/> | \$ _____ |
| •Tours & recreation (admissions, rentals, local tours, charters, etc.) | <input type="checkbox"/> | \$ _____ |
| •Transportation & vehicle costs (gas, rental fees, service, etc.) | <input type="checkbox"/> | \$ _____ |
| •Food & drink in restaurants & bars, fast food, coffee shops | <input type="checkbox"/> | \$ _____ |
| •Groceries, liquor, snacks from a store | <input type="checkbox"/> | \$ _____ |
| •Retail (shopping for gifts, clothing, souvenirs, equipment, etc.) | <input type="checkbox"/> | \$ _____ |
| •All other items (please specify) _____ | <input type="checkbox"/> | \$ _____ |

15. While traveling between your home and the location where you camped and back again , how much did you spend for the following items? (please include the total cost of all purchases you made while traveling)

(Please estimate the amount as closely as possible; Check “No Expenses” if you had no expenses for an item.)

| | No Expenses | TOTAL Expenses for your party |
|---|--------------------------|-------------------------------|
| •Accommodations other than campground fees (hotel, motel, etc.) | <input type="checkbox"/> | \$ _____ |
| •Vehicle costs (gas, rental fees, service, etc.) | <input type="checkbox"/> | \$ _____ |
| •Food & drink in restaurants & bars, fast food, coffee shops | <input type="checkbox"/> | \$ _____ |
| •Shopping for gifts, clothing, souvenirs, equipment, etc. | <input type="checkbox"/> | \$ _____ |
| •All other items (please specify) _____ | <input type="checkbox"/> | \$ _____ |

YOUR CAMPING EXPERIENCES

16. How old were you when you went on your first overnight camping trip? _____
17. Was your first overnight camping trip at a campground in a tent, RV or trailer
OR was it in a cabin or other structure?
 in a tent, RV or trailer don't know or don't remember
 in a cabin or other structure other _____
18. Who were you with on your first overnight camping trip? (Check all that apply)
 parents organized group -- Scouts, church group, YMCA, other
 friends camping group organized by local parks & recreation district
 other family members other _____
19. Who or what has influenced you the most to camp and spend time outdoors? (Check all that apply)
 parents teacher or counselor magazines
 other family members scout or church leader TV or movies
 local parks & recreation leader TV or radio personality newspapers
 friends books other _____
20. Under what conditions would you take more overnight camping trips? (Check all that apply)
 less expensive facilities more participation of family & friends safer campgrounds
 easier to reserve camp sites more participation by my ethnic group better quality camping facilities
 camp sites closer to my home more information about campgrounds I take as many trips as I prefer
 fewer crowds at campgrounds better access for off-road vehicles other _____

ABOUT YOURSELF

21. Number of adults in your household? _____
22. Number of children (age 17 or under) in your household? _____
23. What is your age? _____
24. How would you describe yourself?
 Asian Hispanic/Latino White/Caucasian
 Black/African American Indian/Native American other _____
25. Please check your highest education level:
 no high school diploma some college or two year degree graduate degree
 high school diploma bachelors degree
26. In what range was your total family income (before taxes) in 1999?
 under \$20,000 \$30,000 - \$39,999 \$50,000 - \$74,999 \$100,000 or more
 \$20,000 - \$29,999 \$40,000 - \$49,999 \$75,000 - \$99,999

THANK YOU FOR YOUR ASSISTANCE

Please fill in your name and address if you wish to be entered in the random drawing.

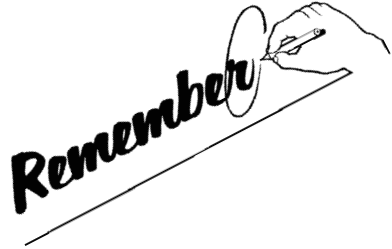
Name: _____

Address: _____ Phone: () _____

City: _____ State/Province: _____ ZIP/Postal Code: _____

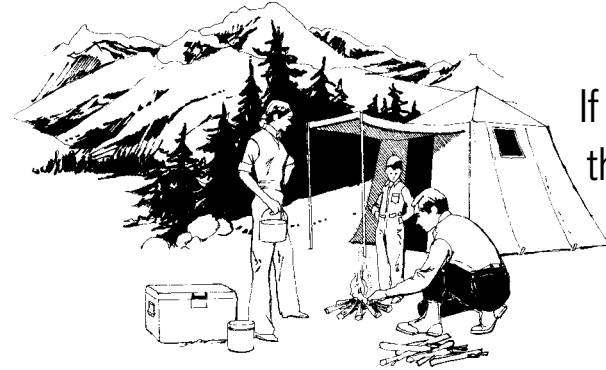
CALIFORNIA TRADE AND COMMERCE AGENCY

Division of Tourism
801 K Street, Suite 1600
Sacramento, CA 95814-3520



The California Division of Tourism and The California Roundtable on Recreation

Thanks you for participating in its 2000 California Camping Study

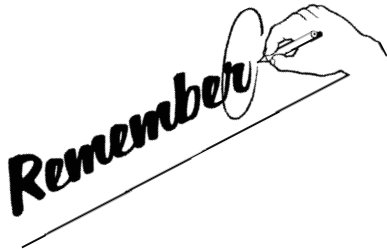


If you have not yet returned
the camping survey, please
complete and return it
by **February 15, 2000**

Your opinions are important to us and your responses are confidential.

CALIFORNIA TRADE AND COMMERCE AGENCY

Division of Tourism
801 K Street, Suite 1600
Sacramento, CA 95814-3520



The California Division of Tourism and The California Roundtable on Recreation

Thanks you for participating in its 2000 California Camping Study



If you have not yet returned
the camping survey, please
complete and return it
by **February 15, 2000**

Your opinions are important to us and your responses are confidential.