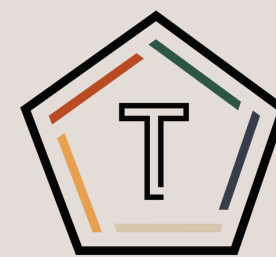


CALL IT WHAT YOU WANT

Glamping is Here to Stay.





about KOA

Largest network of privately owned
campgrounds in the world

KOA Brands: Resort, Holiday & Journey

New luxury brand, Terramor Outdoor
Resort

Camping & Outdoor Hospitality Report
since 2014





WHERE IT STARTED

10 years ago, glamping was a
fringe term, with no real definition

Limited brands

Limited booking channels

No Association



So-called **glamping**

mattresses and **overhead lighting**

appeals to **baby boomers with sore backs**

under 35 year olds who attend **hip outdoor music festivals**

not suitable for kids and dogs

Justin Bieber & Selena Gomez
Go Glamping

super **swanky** & chic

No lobby in sight...at very least a
bed and indoor plumbing

SMALL BUSINESS

Baby boomers, hipsters prefer glamorous camping or 'glamping'

PUBLISHED FRI, APR 25 2014 10:26 AM EDT

CNBC.com staff
@CNBC

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Glamping is luxury camping.

Amar Grover AWL Images | Getty Images

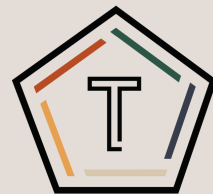
So-called glamping—which features roomy canvas tents, mattresses and



IT'S
MAINSTREAM

Need further proof glamping is here
for good...

Glamping search terms



GLAMPING 2024



100s of **Brands**
Variety of
Accommodations
Multiple Markets
Lots of **Amenities**



the Glamping show Americas

2019: 458 attendees | 41 exhibitors

2023: 1,695 attendees | 140 exhibitors

2024: XX attendees | 152 exhibitors

270%

Increase in attendees & exhibitors!





Glamping

today

THE INS, OUTS & WHY

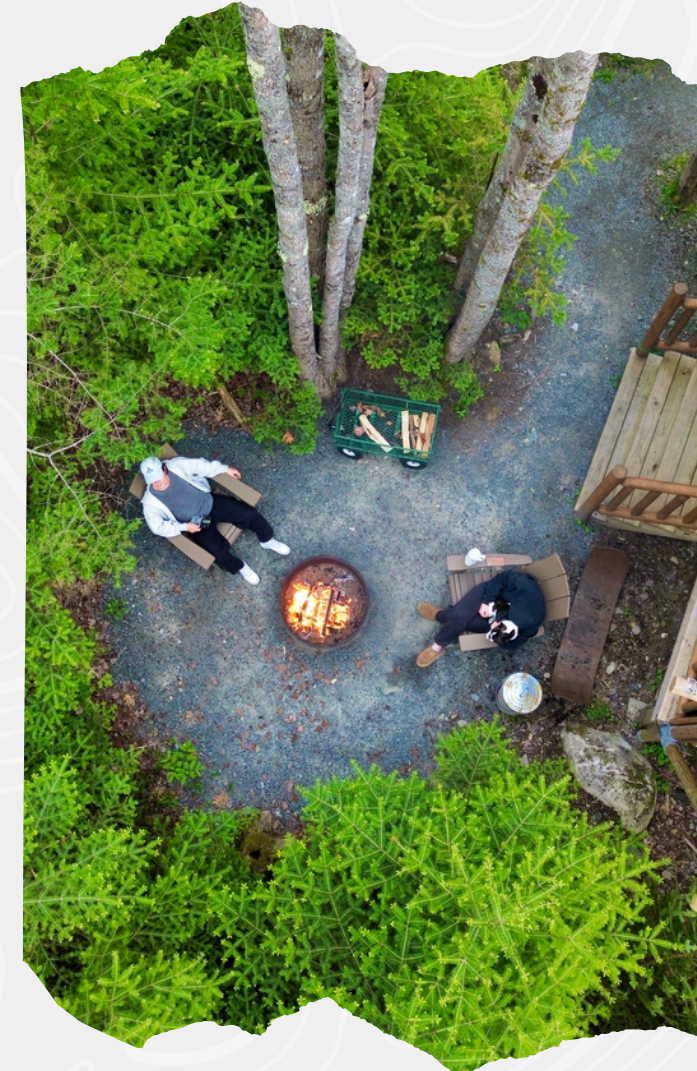
TODAY'S GLAMPER



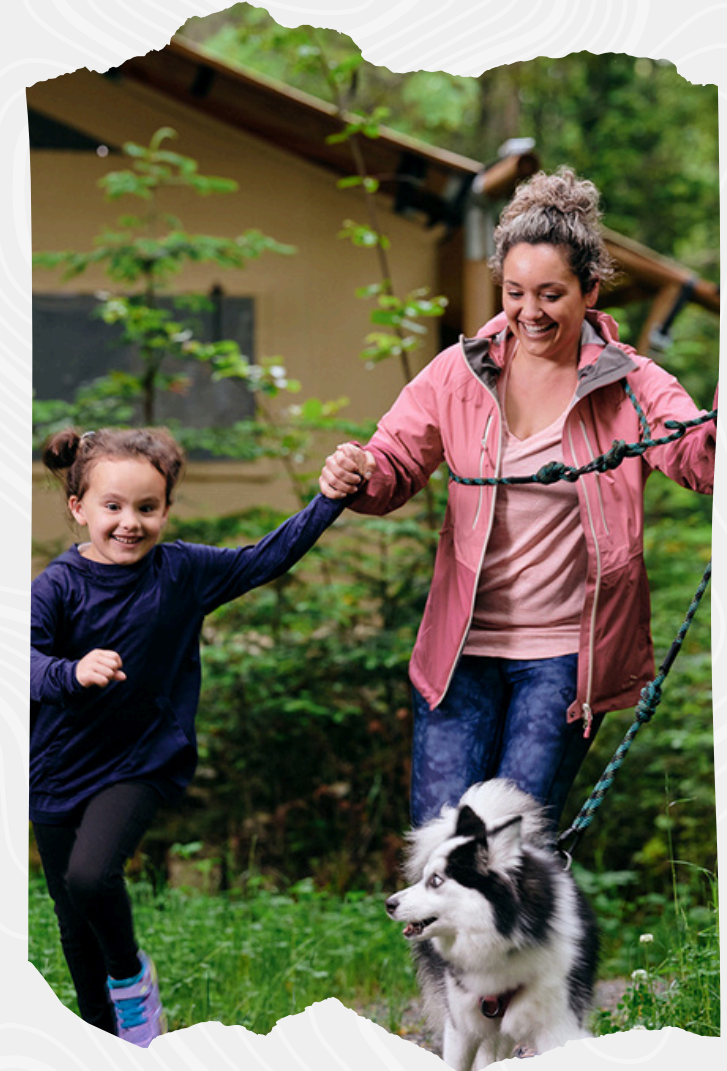
34%
first-timers



32%
\$100k HH



33%
millennials

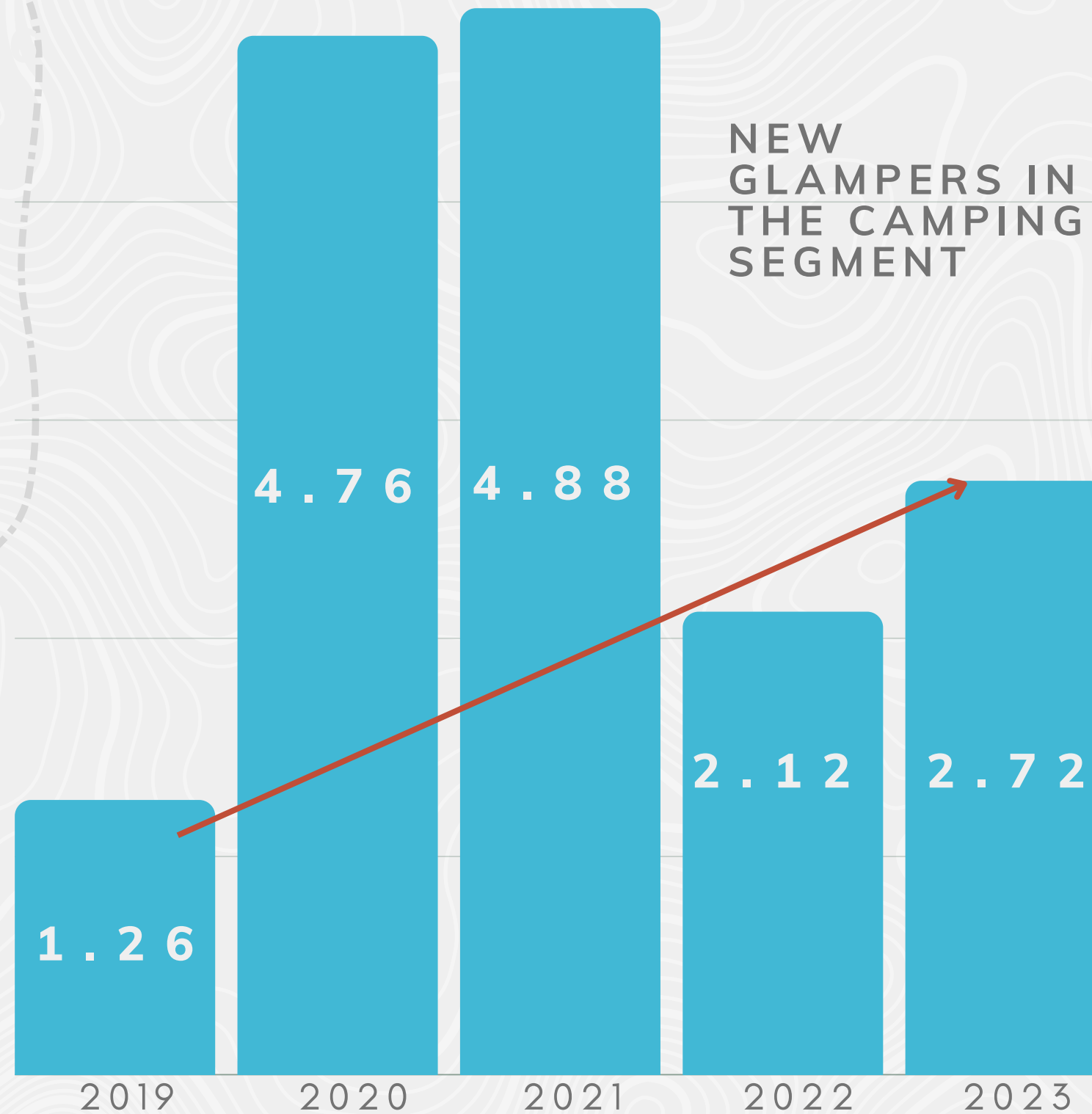


52%
families



NEW GLAMPERS

NEW
GLAMPERS IN
THE CAMPING
SEGMENT



48%
millennials

6-in-10
families

42%
from cities

71%

plan to stick
with glamping





98%
Blended
Travelers



36%
Work while
glamping



84%
Expect lots of
amenities &
services

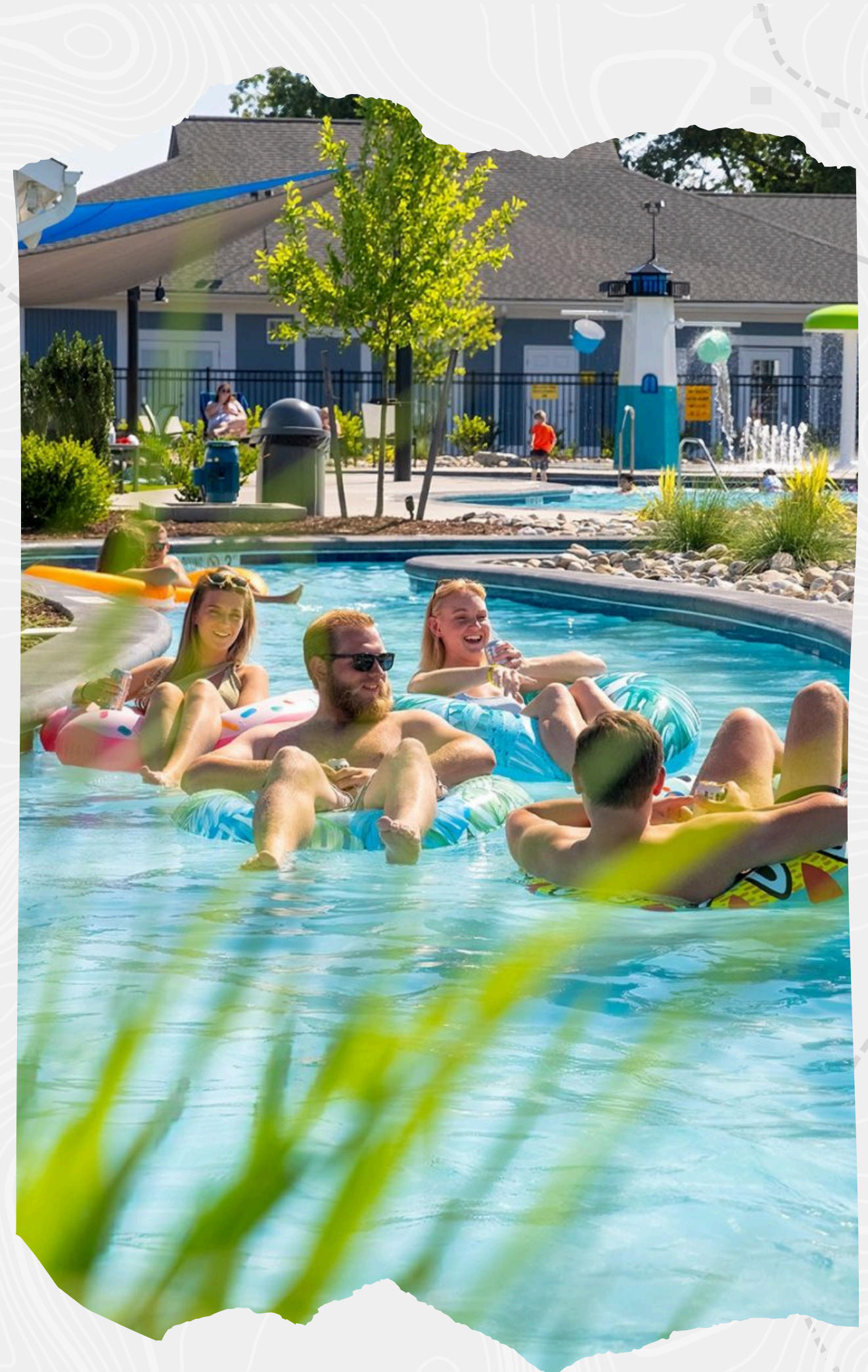
TRAVEL HABITS

Glampers are more diverse and have a higher household income than other travelers.

PREFERRED LOCATION

81%

campgrounds or glamping resorts
that have lots of services and
amenities



EXPECTATIONS



IT'S WHAT GLAMPERS CRAVE...

KEY VALUES

OUTDOOR HOSPITALITY



Technology



Security



Experiential



People





TECHNOLOGY

6 extra days glamping

51% have used **AI** to plan their trips

66% plan to use **AI** on their next trip

SECURITY

40% view glamping as safer
than other forms of
outdoor hospitality

Knowledge = Sense of Safety





EXPERIENTIAL

57%

choose to glamp to
experience natural
events

spend **\$177** per day

Desire **cultural & unique**
experiences

PEOPLE

63% want staff onsite & available when needed

Nearly **half** want staff to be **actively involved**





EXPERIENCES

Connecting with Nature

Wellness

Foodies

Water Activities

Mindful Strolls

Yoga

GOALS

Recharge, Slow Down & Simply Be
In The Moment

Travel Insights

today & tomorrow



ALL THE Vibes

90%

identify a hotel's 'mood' and
'feel' as an important factor

1,090%

increase in reviews that mention
"vibe"



M O S T C O M M O N " V I B E S "

Industrial

Historic

Hip

Party

Peaceful

Retro

Chill

Funky

Vintage

Beach

Modern

Cozy

Historic

Artsy



KEY EXPERIENCES

TRAVEL & HOSPITALITY



Destinations



Occasions



Outdoors

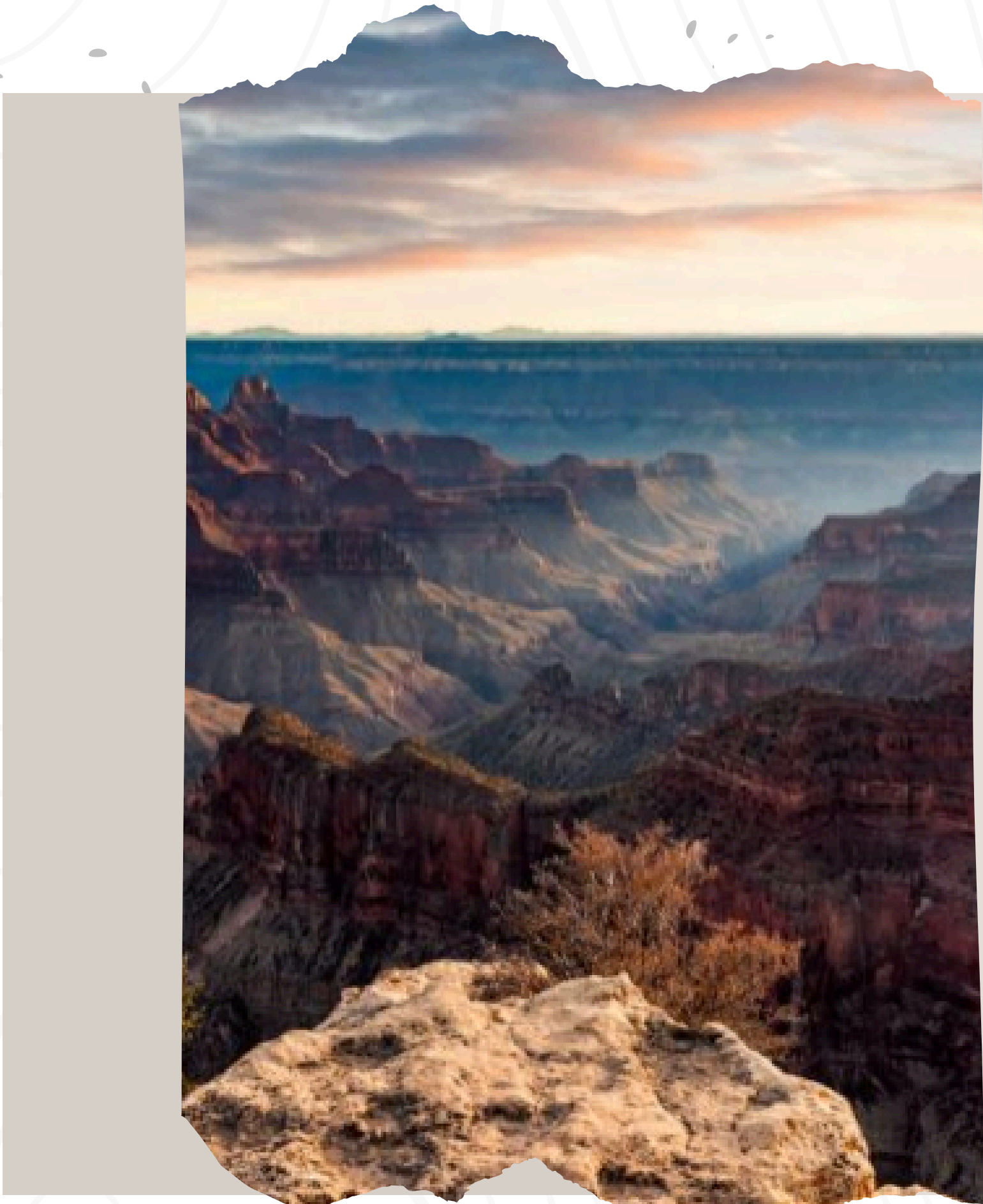


Wellness



Purpose Driven





Destinations



SET JETTING

Booking a trip after
seeing it on a show

TV shows influence
travel more than
social media





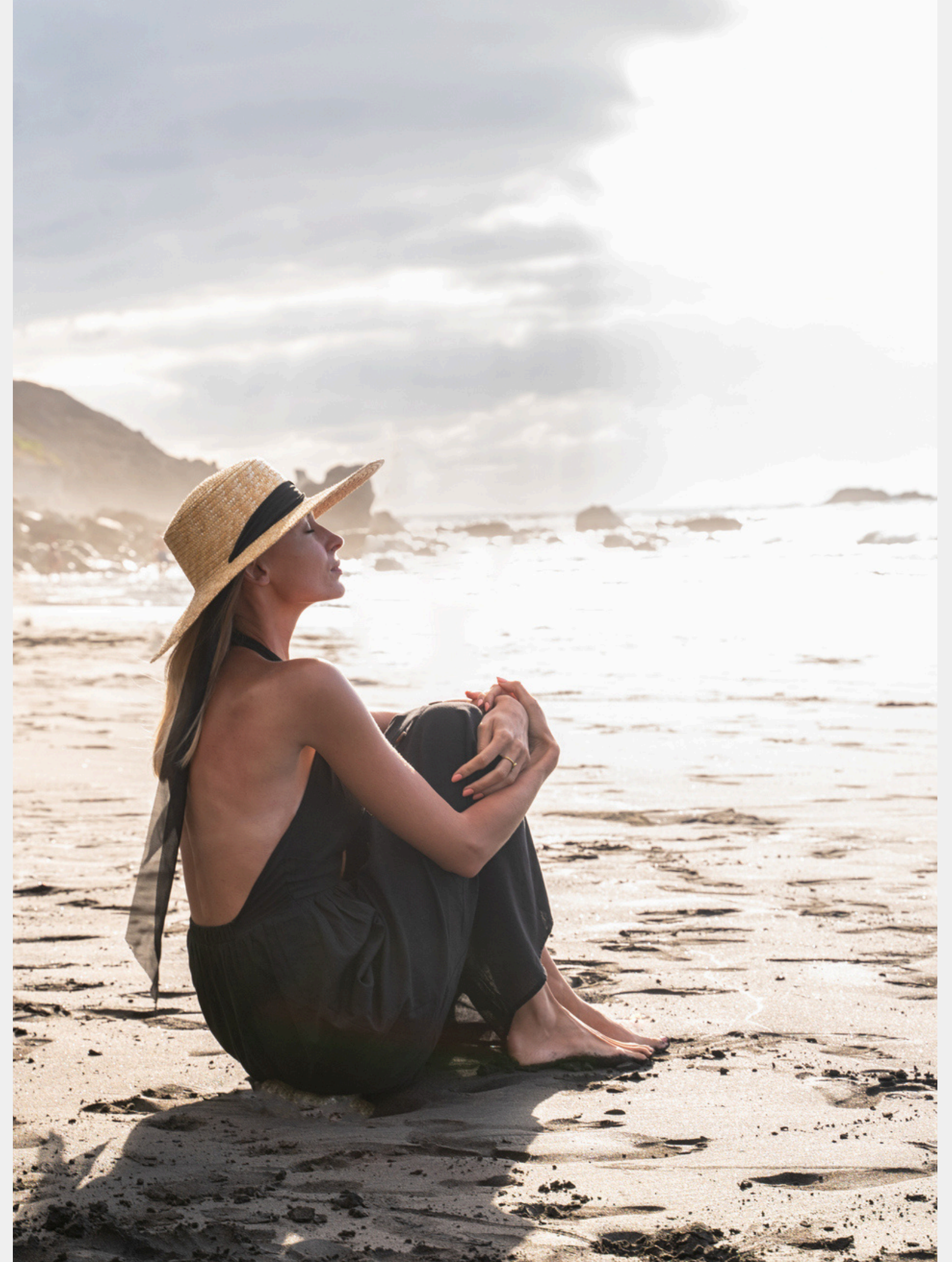
DESTINATION DUPES

Affordable
alternatives to
popular locations

Less crowded,
unexpected

1 in 3 travelers book
dupes

SOURCE: EXPEDIA & BBC





LOCAL IMMERSIONS

Engage with local communities, cultures & customs.

Local markets, farm visits, cultural festivals, etc.





Occasions





GO-CASIONS

Work-related
celebrations

Pet Adoptions

Baby Moon

Divorce Parties





GASTRONOMY TOURISM

Food as Culture

Farm-to-table

Agritourism

Cooking Classes





WORK FROM ANYWHERE

Enabling remote
work & catering to
digital nomads.

Work from Ship
(Virgin Voyages)

Work from Hamilton
(WFH)



NOSTALGIC TRAVEL

Evoke past
memories, reconnect
with simpler times

Pop Culture
Pilgrimages & Time
Periods

Heritage Travel





Outdoors

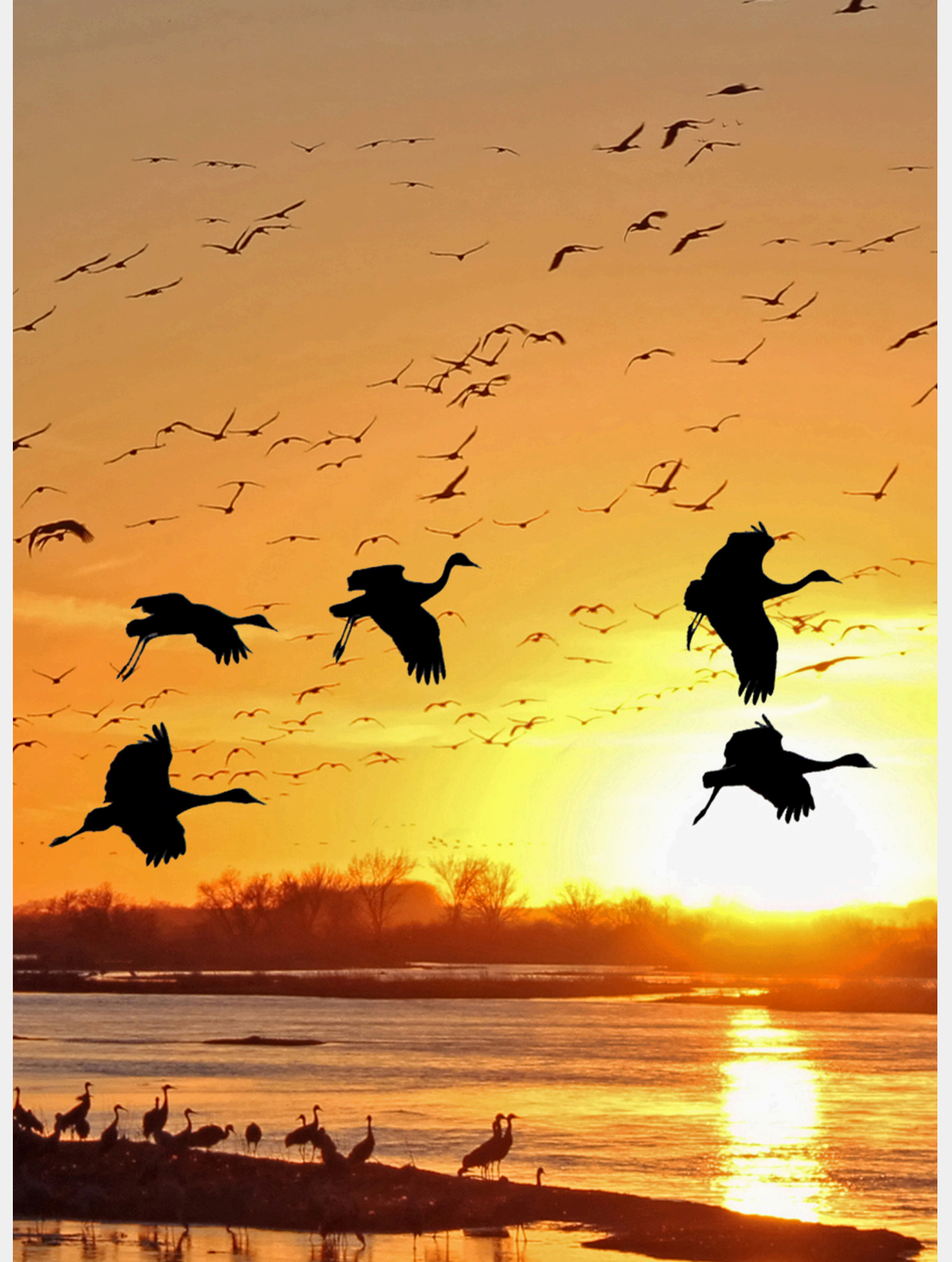


NATURAL EVENTS

Unique experiences
in nature - natural
phenomena

Solar & Lunar
Eclipses / Celestial

Wildlife Migrations



OUTDOOR-IN

“Try before you buy”
outdoor amenities
(e.g. cold plunge,
paddle boards)

30% of VRBO guests
choose homes with
outdoor amenities



NATURE IMMERSION

Forest Bathing

Wild Swimming

Ocean Soundbath

Rewilding
Experiences





Wellness



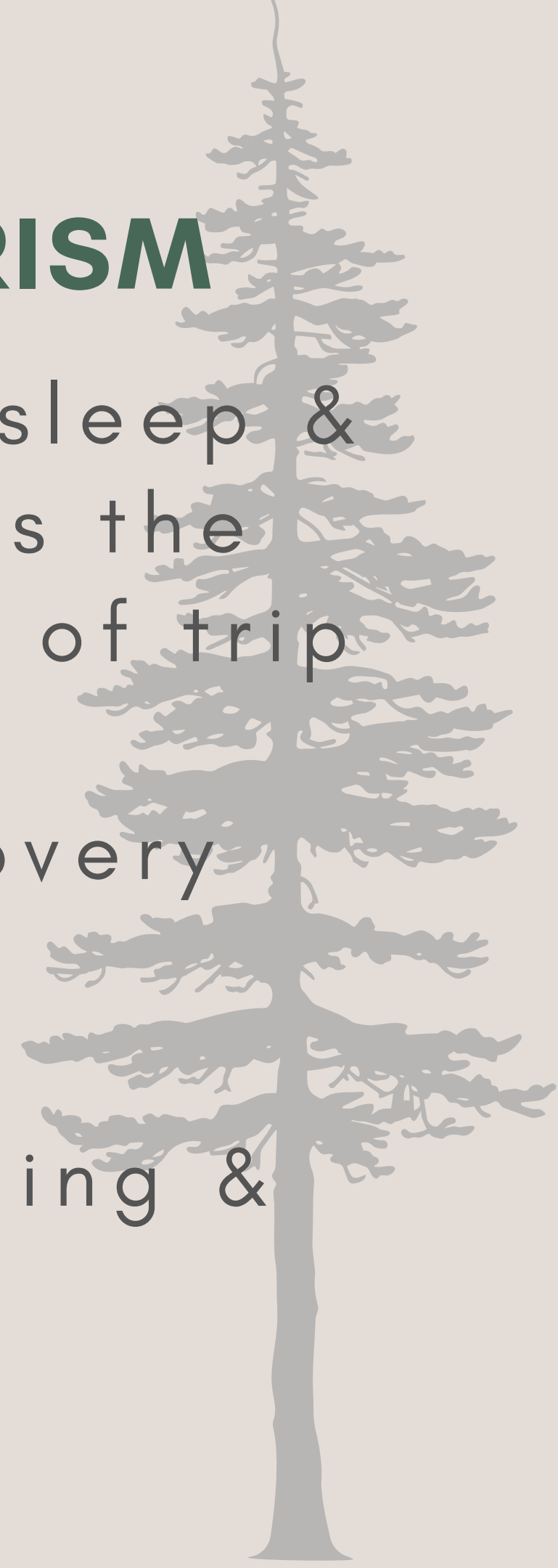


SLEEP TOURISM

Prioritizing sleep & relaxation as the centerpiece of trip

Jet Lag recovery programs

Sleep coaching & tracking





DIGITAL DETOX

Unplug from
technology & reduce
screen time

Silent Seekers

Timed - time away



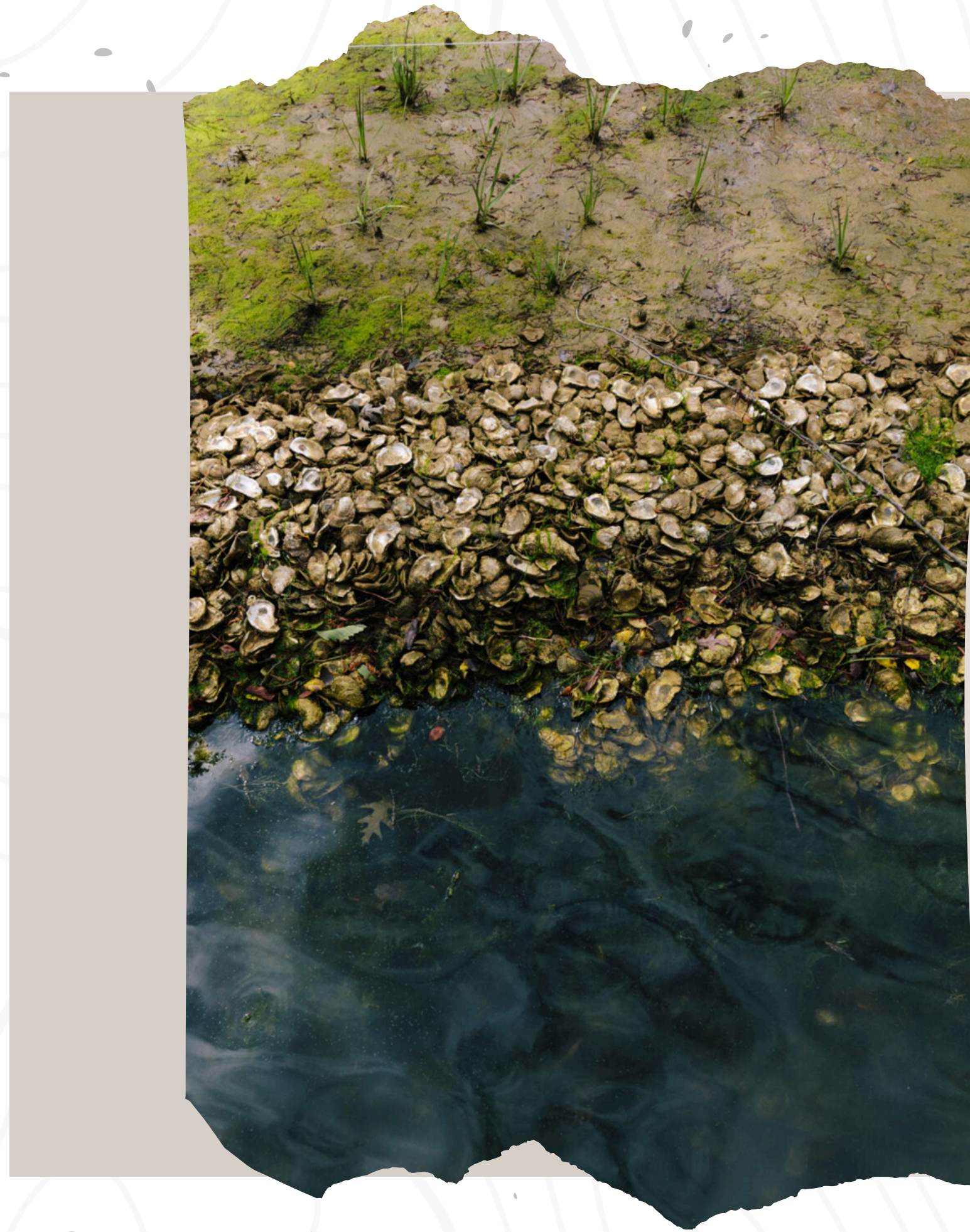


ADVENTURE TRAVEL

Pushing out of
comfort zones & into
present-moment
focus

Kayaking, climbing,
hiking, zip lining





Purpose-Driven



VOLUN- TOURISM

Giving back while
traveling

Wildlife & wild
spaces conservation

Community
development

Disaster relief





ECO-TOURISM

Responsible travel to
natural areas
promoting conservation

Eco-lodges,
sustainable resorts

Eco-trecks



KEY EXPERIENCES

TRAVEL & HOSPITALITY



Destinations



Occasions



Outdoors



Wellness



Purpose Driven



HOW WILL YOU DEFINE YOUR PROPERTY?



Expectations



Vibe



Experiences



People





Thank you!

JENNY MCCULLOUGH

KOA, Inc. / Terramor Outdoor Resort

jmccullough@koa.net

koa.com/north-american-camping-report

