



Market  
Research

# National Parks Omnibus Study

June 2016

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## National Parks Omnibus Study

Project #160036

### Background & Purpose

AAA Public Relations is preparing for a press release on national parks.

### Objectives

- Determine consumers' past behavior (e.g., transportation, accommodations, favorite activities), perception, and future interest related to visiting national parks

## Key Findings

**Note: As this is the first time this study has been conducted, historical data are not available.**

### A. Previous National Park Experience

**85% of U.S. adults have visited a U.S. national park. Of these, the majority (91%) drove to visit a national park.**

Table 2 – Mode of Transportation Among U.S. Adults Who Have Visited a U.S. National Park

	U.S. Adults who have visited a U.S. national park N= 896
Driving	91%
Flying	18%
Train	10%
Bus	10%
Cruise or Boat	7%
Other	1%

When visiting a U.S. national park, the majority (66%) typically stay in a hotel, lodge, or motel. Among those who have visited a national park:

- Significantly more Baby Boomers (73%) typically stay in a hotel, lodge, or motel when visiting a national park, compared to Gen X (59%) and Millennials (61%).
- Significantly more Millennials (46%) typically stay at a family or friend’s home when visiting a national park overnight, compared to Gen X (24%) and Baby Boomers (31%).

Table 2 – Typical Accommodations Used Among U.S. Adults Who Have Visited a U.S. National Park

	U.S. Adults Who Have Visited a National Park N= 894
Hotel, lodge or motel	66%
Tent or RV camping	41%
Vacation rental such as a house, condo, or cabin	38%
Family or friend’s home	33%
Bed and Breakfast	27%
Other	1%
None of these	2%

**B. Visiting National Parks**

Seven out of ten U.S. adults (73%) strongly agree or agree that the U.S. national parks are a must-see vacation destination.

Table 2 – Level of Agreement that U.S. National Parks are a Must-See Destination

	U.S. Adults N= 1,012
<b>Net: Strongly Agree + Agree</b>	<b>73%</b>
<b>Strongly Agree</b>	<b>41%</b>
<b>Agree</b>	<b>32%</b>
<b>Neither Agree nor Disagree</b>	<b>17%</b>
<b>Disagree</b>	<b>5%</b>
<b>Strongly Disagree</b>	<b>4%</b>
<b>Net: Strongly Disagree + Disagree</b>	<b>9%</b>
<b>Don't Know/Refused</b>	<b>1%</b>

Among U.S. adults that have visited a national park, the top two activities include walking/hiking trails (53%) and sightseeing (35%). (See page 14 for full distribution.)

- Older adults (ages 55+) are significantly more likely to mention sightseeing is their favorite activity (44%), compared to younger adults (ages 18-54, 30%).
- Women are significantly more likely to cite walking or hiking trails is their favorite activity (60%), compared to men (47%).

U.S. adults' ideal time of the year to visit a U.S. national park varies across Spring, Summer, or Fall. Only 2% feel winter is an ideal time of the year to visit.

Table 2 – Ideal Time of Year to Visit National Parks

	U.S. Adults N= 1,012
<b>Spring</b>	<b>35%</b>
<b>Summer</b>	<b>27%</b>
<b>Fall</b>	<b>33%</b>
<b>Winter</b>	<b>2%</b>
<b>Don't Know/Refused</b>	<b>3%</b>

National parks can expect more visitors in the next 12 months, as the number of U.S. adults reporting an increased likelihood of visiting is greater than the number who are less likely. One-third (37%) of U.S. adults are more likely to visit a U.S. national park in the next 12 months, versus 21% who are less likely, compared to recent years.

- Nearly half (46%) of Millennials are more likely to visit a U.S. national park in the next 12 months.

Table 2 – Change in Likelihood to Visit National Parks in the Next 12 Months

	U.S. Adults N= 1,012
More likely to visit in the next 12 months	37%
Less likely to visit in the next 12 months	21%
No change in likelihood to visit in the next 12 months	42%
Don't Know/Refused	1%

The top national parks U.S. adults most want to visit include: (See full distribution on pages 15-16)

- Yellowstone National Park (33%)
- Yosemite National Park (17%)
- Grand Canyon National Park (12%)

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## Methodology

This report presents the findings of a telephone survey administered as part of ORC's weekly survey conducted among two national probability samples (landline only and cell phone), which, when combined, consists of 1,012 adults living in the continental United States. Interviewing for this CARAVAN® Survey was conducted June 23- June 26, 2016.

This study has an average statistical error of  $\pm 3.9\%$  at the 95% confidence level for all US adults. That means there is a 95% chance that the results found in this study are within  $\pm 3.9\%$  of the results that would be found if all US adults living in private households in the continental United States were interviewed using the research methodology and questionnaire used in this study. The actual statistical error depends on the number of respondents to each question and on the observed proportions.

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## Detailed Findings/Topline Tables

Now, I have some questions about a different kind of travel...

C6 If you have ever visited a U.S. national park, what mode of transportation did you use to get there? Would you say... *(Multiple responses possible)*

N: 1,009

Base: US Adults

85%	Net: Ever Visited a National Park
78%	Driving
15%	Flying
9%	Train
8%	Bus
6%	Cruise or boat
1%	Other (Specify)
15%	Have never visited a national park

C7 What is the ideal time of year to visit a national park? Would you say...

N: 1,012

Base: US Adults

35%	Spring
27%	Summer
33%	Fall
2%	Winter
3%	Don't Know/Refused

C8 What type of accommodations do you typically use when making an overnight visit to a national park? Would you say a... *(Multiple responses possible)*

N: 894

Base: US Adults who have visited a national park

41%	Tent or RV camping
66%	Hotel, lodge or motel
38%	Vacation rental such as a house, condo, or cabin
27%	Bed and Breakfast
33%	Family or friend's home
1%	Other (Specify)
2%	None of these



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C9 What is your favorite activity at a national park? *(Multiple responses possible)*

N: 896

Base: US Adults who have visited a national park

53%	Walking/hiking trails
35%	Sightseeing
12%	Fishing
10%	Wildlife Viewing
9%	Swimming, snorkeling, or scuba diving
8%	Camping
6%	Boating, sailing, rafting, or kayaking
4%	Photography
4%	Having a picnic
4%	Biking
3%	Taking a scenic drive
3%	Taking a guided tour
2%	Visiting the visitor center/museums
2%	Horseback riding
2%	Mountain/rock climbing
2%	Eating/Grilling
1%	Snow skiing, snowboarding, snowmobiling, or other winter sport
1%	Volunteering
11%	Other (Specify)
3%	Don't have a favorite national park activity
1%	Don't Know/Refused

C10 Compared to recent years, are you...

N: 1,012

Base: US Adults

37%	More likely to visit a U.S. national park in the next 12 months
21%	Less likely to visit a U.S. national park in the next 12 months
42%	There no change in your likelihood to visit a U.S. national park in the next 12 months
1%	Don't Know/Refused

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C11 What national park do you most want to visit? *(Multiple responses possible)*

N: 1,012

Base: US Adults

1%	Acadia National Park
1%	Arches National Park
1%	Badlands National Park
1%	Big Bend National Park
<1%	Biscayne National Park
<1%	Black Canyon of the Gunnison National Park
1%	Bryce Canyon National Park
1%	Canyonlands National Park
<1%	Capitol Reef National Park
1%	Carlsbad Caverns National Park
<1%	Channel Islands National Park
<1%	Congaree National Park
<1%	Crater Lake National Park
<1%	Cuyahoga Valley National Park
<1%	Death Valley National Park
1%	Denali National Park & Reserve
<1%	Dry Tortugas National Park
1%	Everglades National Park
<1%	Gates of the Arctic National Park
1%	Glacier Bay National Park
4%	Glacier National Park
12%	Grand Canyon National Park
1%	Grand Teton National Park
<1%	Great Basin National Park
1%	Great Sand Dunes National Park and Preserve
2%	Great Smoky Mountains National Park
<1%	Guadalupe Mountains National Park
<1%	Haleakala National Park
<1%	Hawaii Volcanoes National Park
<1%	Hot Springs National Park
<1%	Isle Royale National Park
1%	Joshua Tree National Park
<1%	Katmai National Park and Preserve
<1%	Kenai Fjords National Park
<1%	Kings Canyon National Park
<1%	Kobuk Valley National Park
<1%	Lake Clark National Park
<1%	Lassen Volcanic National Park
<1%	Mammoth Cave National Park

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1%	Mesa Verde National Park
1%	Mount Rainer National Park
<1%	National Park of American Samoa
<1%	North Cascades National Park
<1%	Olympic National Park
<1%	Petrified Forest National Park
<1%	Pinnacles National Park
3%	Redwood National Park
1%	Rocky Mountain National Park
<1%	Saguaro National Park
2%	Sequoia National Park
1%	Shenandoah National Park
<1%	Theodore Roosevelt National Park
<1%	Virgin Islands National Park
<1%	Voyageurs National Park
<1%	Wind Cave National Park
<1%	Wrangell- St. Elias National Park and Preserve
33%	Yellowstone National Park
17%	Yosemite National Park
2%	Zion National Park
17%	None of these/Don't Visit National Parks
11%	Don't Know/Refused

C12 To what extent do you agree or disagree with the following statement?

'The U.S. national parks are a must-see vacation destination.'

Would you say you...

N: 1,012

Base: US Adults

73%	<u>Net:</u> Strongly Agree + Agree
41%	Strongly Agree
32%	Agree
17%	Neither Agree nor Disagree
5%	Disagree
4%	Strongly Disagree
9%	<u>Net:</u> Strongly Disagree + Disagree
1%	Don't Know/Refused

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## Appendix – Questionnaire

Now, I have some questions about a different kind of travel...

C6 If you have ever visited a U.S. national park, what mode of transportation did you use to get there? Would you say...

(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH) [RANDOMIZE]

- 01 Driving
- 02 Flying
- 03 Train
- 04 Bus
- 05 Cruise or boat
- 95 OTHER (SPECIFY)
- 98 HAVE NEVER VISITED A NATIONAL PARK
- 99 DON'T KNOW/REFUSED

C7 What is the ideal time of year to visit a national park? Would you say...

(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)

- 01 Spring
- 02 Summer
- 03 Fall
- 04 Or, winter
- 99 DON'T KNOW/REFUSED

IF VISITED A NATIONAL PARK, C6 (01-95), CONTINUE.

ALL OTHERS SKIP TO C10

C8 What type of accommodations do you typically use when making an overnight visit to a national park? Would you say a...

(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH) [RANDOMIZE]

- 01 Tent or RV camping
- 02 Hotel, lodge or motel
- 03 Vacation rental such as a house, condo, or cabin
- 04 Bed and Breakfast
- 05 Family or friend's home
- 95 OTHER (SPECIFY)
- 98 NONE OF THESE
- 99 DON'T KNOW/REFUSED

C9 What is your favorite activity at a national park?

(DO NOT READ LIST. RECORD AS MANY AS APPLY)

- 01 WALKING/HIKING TRAILS
- 02 MOUNTAIN/ROCK CLIMBING
- 03 BIKING
- 04 FISHING
- 05 BOATING, SAILING, RAFTING, KAYAKING
- 06 SNOW SKIING, SNOWBOARDING, SNOWMOBILING, OR OTHER WINTER SPORT
- 07 SWIMMING, SNORKELING OR SCUBA DIVING
- 08 WILDLIFE VIEWING
- 09 CAMPING
- 10 HAVING A PICNIC
- 11 SIGHTSEEING
- 12 HORSEBACK RIDING
- 13 TAKING A GUIDED TOUR
- 14 TAKING A SCENIC DRIVE
- 15 VISITING THE VISITOR CENTER/MUSEUMS
- 16 PHOTOGRAPHY
- 17 VOLUNTEERING
- 95 OTHER (SPECIFY)
- 98 DON'T HAVE A FAVORITE NATIONAL PARK ACTIVITY
- 99 DON'T KNOW/REFUSED

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[ASK EVERYONE]

C10 Compared to recent years, are you...

(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)

- 01 More likely to visit a U.S. national park in the next 12 months
- 02 Less likely to visit a U.S. national park in the next 12 months
- 03 Or, is there no change in your likelihood to visit a U.S. national park in the next 12 months
- 99 DON'T KNOW/REFUSED

C11 What national park do you most want to visit?

(DO NOT READ LIST. RECORD AS MANY AS APPLY)

(INTERVIEWER: PROBE FOR RESPONSE THAT MOST CLOSELY MATCHES ONE OF THE ANSWER OPTIONS BELOW. IF NONE OF THE ANSWER OPTIONS MATCH, RECORD AS 'NONE OF THESE/DON'T VISIT NATIONAL PARKS')

- 01 ACADIA NATIONAL PARK
- 02 ARCHES NATIONAL PARK
- 03 BADLANDS NATIONAL PARK
- 04 BIG BEND NATIONAL PARK
- 05 BISCAYNE NATIONAL PARK
- 06 BLACK CANYON OF THE GUNNISON NATIONAL PARK
- 07 BRYCE CANYON NATIONAL PARK
- 08 CANYONLANDS NATIONAL PARK
- 09 CAPITOL REEF NATIONAL PARK
- 10 CARLSBAD CAVERNS NATIONAL PARK
- 11 CHANNEL ISLANDS NATIONAL PARK
- 12 CONGAREE NATIONAL PARK
- 13 CRATER LAKE NATIONAL PARK
- 14 CUYAHOGA VALLEY NATIONAL PARK
- 15 DEATH VALLEY NATIONAL PARK
- 16 DENALI NATIONAL PARK & PRESERVE
- 17 DRY TORTUGAS NATIONAL PARK
- 18 EVERGLADES NATIONAL PARK
- 19 GATES OF THE ARCTIC NATIONAL PARK
- 20 GLACIER BAY NATIONAL PARK
- 21 GLACIER NATIONAL PARK
- 22 GRAND CANYON NATIONAL PARK
- 23 GRAND TETON NATIONAL PARK
- 24 GREAT BASIN NATIONAL PARK
- 25 GREAT SAND DUNES NATIONAL PARK AND PRESERVE
- 26 GREAT SMOKY MOUNTAINS NATIONAL PARK

- 27 GUADALUPE MOUNTAINS NATIONAL PARK
- 28 HALEAKALA NATIONAL PARK
- 29 HAWAII VOLCANOES NATIONAL PARK
- 30 HOT SPRINGS NATIONAL PARK
- 31 ISLE ROYALE NATIONAL PARK
- 32 JOSHUA TREE NATIONAL PARK
- 33 KATMAI NATIONAL PARK AND PRESERVE
- 34 KENAI FJORDS NATIONAL PARK
- 35 KINGS CANYON NATIONAL PARK
- 36 KOBUK VALLEY NATIONAL PARK
- 37 LAKE CLARK NATIONAL PARK
- 38 LASSEN VOLCANIC NATIONAL PARK
- 39 MAMMOTH CAVE NATIONAL PARK
- 40 MESA VERDE NATIONAL PARK
- 41 MOUNT RAINIER NATIONAL PARK
- 42 NATIONAL PARK OF AMERICAN SAMOA
- 43 NORTH CASCADES NATIONAL PARK
- 44 OLYMPIC NATIONAL PARK
- 45 PETRIFIED FOREST NATIONAL PARK
- 46 PINNACLES NATIONAL PARK
- 47 REDWOOD NATIONAL PARK
- 48 ROCKY MOUNTAIN NATIONAL PARK
- 49 SAGUARO NATIONAL PARK
- 50 SEQUOIA NATIONAL PARK
- 51 SHENANDOAH NATIONAL PARK
- 52 THEODORE ROOSEVELT NATIONAL PARK
- 53 VIRGIN ISLANDS NATIONAL PARK
- 54 VOYAGEURS NATIONAL PARK
- 55 WIND CAVE NATIONAL PARK
- 56 WRANGELL – ST. ELIAS NATIONAL PARK AND PRESERVE
- 57 YELLOWSTONE NATIONAL PARK
- 58 YOSEMITE NATIONAL PARK
- 59 ZION NATIONAL PARK
- 98 NONE OF THESE/DON'T VISIT NATIONAL PARKS
- 99 DON'T KNOW/REFUSED

C12 To what extent do you agree or disagree with the following statement?

'The U.S. national parks are a must-see vacation destination.'

Would you say you...

(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Or, strongly disagree
- 99 DON'T KNOW/REFUSED