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>
<thead>
<tr>
<th>Mode of Transportation</th>
<th>U.S. Adults who have visited a U.S. national park (N= 896)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driving</td>
<td>91%</td>
</tr>
<tr>
<td>Flying</td>
<td>18%</td>
</tr>
<tr>
<td>Train</td>
<td>10%</td>
</tr>
<tr>
<td>Bus</td>
<td>10%</td>
</tr>
<tr>
<td>Cruise or Boat</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>Typical Accommodations Used</th>
<th>U.S. Adults Who Have Visited a National Park (N= 894)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel, lodge or motel</td>
<td>66%</td>
</tr>
<tr>
<td>Tent or RV camping</td>
<td>41%</td>
</tr>
<tr>
<td>Vacation rental</td>
<td>38%</td>
</tr>
<tr>
<td>Family or friend’s home</td>
<td>33%</td>
</tr>
<tr>
<td>Bed and Breakfast</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>None of these</td>
<td>2%</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>U.S. Adults N= 1,012</th>
<th>Net: Strongly Agree + Agree</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>Net: Strongly Disagree + Disagree</th>
<th>Don’t Know/Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>73%</td>
<td>41%</td>
<td>32%</td>
<td>17%</td>
<td>5%</td>
<td>4%</td>
<td>9%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>U.S. Adults N= 1,012</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
<th>Winter</th>
<th>Don’t Know/Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>35%</td>
<td>27%</td>
<td>33%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>U.S. Adults</th>
<th>More likely to visit in the next 12 months</th>
<th>37%</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>Less likely to visit in the next 12 months</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>No change in likelihood to visit in the next 12 months</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>Don’t Know/Refused</td>
<td>1%</td>
</tr>
</tbody>
</table>

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%)
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 ±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 ±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.
**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
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
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 Artic 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
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% Net: Strongly Agree + Agree
41% Strongly Agree
32% Agree
17% Neither Agree nor Disagree
5% Disagree
4% Strongly Disagree
9% Net: Strongly Disagree + Disagree
1% Don’t Know/Refused
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
[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
<table>
<thead>
<tr>
<th></th>
<th>National Park Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Guadalupe Mountains National Park</td>
</tr>
<tr>
<td>28</td>
<td>Haleakala National Park</td>
</tr>
<tr>
<td>29</td>
<td>Hawaii Volcanoes National Park</td>
</tr>
<tr>
<td>30</td>
<td>Hot Springs National Park</td>
</tr>
<tr>
<td>31</td>
<td>Isle Royale National Park</td>
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<tr>
<td>32</td>
<td>Joshua Tree National Park</td>
</tr>
<tr>
<td>33</td>
<td>Katmai National Park and Preserve</td>
</tr>
<tr>
<td>34</td>
<td>Kenai Fjords National Park</td>
</tr>
<tr>
<td>35</td>
<td>Kings Canyon National Park</td>
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<td>Kobuk Valley National Park</td>
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<td>Lake Clark National Park</td>
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<td>Lassen Volcanic National Park</td>
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<td>39</td>
<td>Mammoth Cave National Park</td>
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<td>40</td>
<td>Mesa Verde National Park</td>
</tr>
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<td>41</td>
<td>Mount Rainier National Park</td>
</tr>
<tr>
<td>42</td>
<td>National Park of American Samoa</td>
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<td>43</td>
<td>North Cascades National Park</td>
</tr>
<tr>
<td>44</td>
<td>Olympic National Park</td>
</tr>
<tr>
<td>45</td>
<td>Petrified Forest National Park</td>
</tr>
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<td>Pinnacles National Park</td>
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<td>Redwood National Park</td>
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<td>Rocky Mountain National Park</td>
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<td>Saguaro National Park</td>
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<td>Sequoia National Park</td>
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<td>Shenandoah National Park</td>
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<td>Theodore Roosevelt National Park</td>
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<td>Virgin Islands National Park</td>
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<td>Voyageurs National Park</td>
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<tr>
<td>55</td>
<td>Wind Cave National Park</td>
</tr>
<tr>
<td>56</td>
<td>Wrangell – St. Elias National Park and Preserve</td>
</tr>
<tr>
<td>57</td>
<td>Yellowstone National Park</td>
</tr>
<tr>
<td>58</td>
<td>Yosemite National Park</td>
</tr>
<tr>
<td>59</td>
<td>Zion National Park</td>
</tr>
<tr>
<td>98</td>
<td>None of These/Don’t Visit National Parks</td>
</tr>
<tr>
<td>99</td>
<td>Don’t Know/Refused</td>
</tr>
</tbody>
</table>
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