



MC
CAMPER
COMPASS



MOVING TARGETS:

ADAPTING TO BOOKING WINDOW CHANGES

Conducted by



MODERN
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LETTERS FROM THE CEOS

I'm Brian Searl, the Founder and CEO of Modern Campground, I'm thrilled to share with you the latest edition of our MC Camper Compass report, "Moving Targets: Adapting to Booking Window Changes." This is a collaborative effort between Modern Campground and Cairn Consulting Group.

As the seasons change, so do the habits and expectations of campers. Imagine a world where families suddenly decide Thursday night to pack up and hit the campgrounds for the weekend. Or think about campers planning well in advance, only to cancel because of unexpected life events. Our reports aim to provide you with a telescope into these patterns, unraveling these mysteries to help you better prepare.

We've packed this report with valuable insights about the trend of "shortened booking windows," pulled from U.S. campers and outdoor lovers. Some campers dream of spontaneous weekends, while others find their plans disrupted by various circumstances. Our job is to map out these changes for you, outlining how these habits shape the industry landscape. At the report's end, we've distilled this data into actionable steps, showing you exactly how to

adapt and make your campground experience exceptional.

But the conversation doesn't stop there. We'll continue to explore these insights with 10 blog articles and spread key findings across social media in digestible nuggets throughout the month. These insights will also be live on our website, waiting for you to tap into them whenever you need a boost of inspiration or knowledge.

Finally, your voice matters to us. If you have thoughts, ideas, or specific data you'd like us to explore, please reach out to me at brian@insiderperks.com. Together, let's make camping even better for everyone.



Brian Searl

Founder & CEO
Insider Perks & Modern Campground

I'm Scott Bahr, President of Cairn Consulting Group, and I'm thrilled to introduce this month's edition of the "MC Camper Compass," a monthly report dedicated to serving the unique needs of our industry. Every month, together with Modern Campground, we aim to bring you the most up-to-date and actionable insights to help you better understand and navigate the ever-evolving patterns of camper behavior.

At Cairn Consulting Group, our mission is to shine a light on key market trends through thorough research and comprehensive analysis. We specialize in gathering and interpreting critical data, ensuring that businesses like yours can make informed decisions to enhance guest experiences and drive growth. Our focus extends beyond mere data collection; we provide carefully designed research methodologies that illuminate the market landscape, enhancing your strategic direction.

This month's report, "Moving Targets: Adapting to Booking Window Changes," focuses on the intriguing trend of "shortened booking windows." Many campers began planning trips at the last minute as their personal circumstances changed, while others decided not to camp at

all or adjusted their plans due to availability. Understanding these shifts is vital, as they reveal the push and pull between the desire for spontaneity and the realities of planning in today's world.

Through this research, supported by surveys of U.S.-based campers and outdoor enthusiasts, we've identified valuable insights for adapting to these changes. Using both quantitative and qualitative data, we've mapped out how you can respond to these new booking habits, helping you create better experiences for your visitors and ultimately a successful season.

As you delve into this report, I hope you find it as enlightening as it is practical. It is designed not only to inform but to inspire new strategies that align with your guests' evolving needs. We look forward to taking this journey with you every month, empowering your business with the intelligence needed for a thriving campground environment.



Scott Bahr

President
Cairn Consulting Group





MOVING TARGETS:

ADAPTING TO BOOKING WINDOW CHANGES

This report is devoted to summarizing what happened in terms of shortened booking windows this year, versus what the actual intent was early on.

Prior to the peak camping season, many campers indicated that they were planning to shorten the window of booking their trips, yet as the season wore on, many opted out of camping altogether, or ended up booking their trips in advance due to having their plans solidify, or availability at preferred destinations.

METHODOLOGY

The information provided in this report is a compilation of quantitative information. The primary resource that was utilized includes a survey of U.S. based campers and outdoor enthusiasts

The purpose of this report is to offer campgrounds insights how the behavior of guests can change in a short amount of time, based on both their own personal situations, as well as external factors. The results are suggestive that even though there is a desire for more spontaneous travel, there may still be some leftover jitters for those who experienced overcrowding in past years.

conducted by Cairn Consulting Group that was used to evaluate how trip planning has changed since the start of the 2024 camping season.





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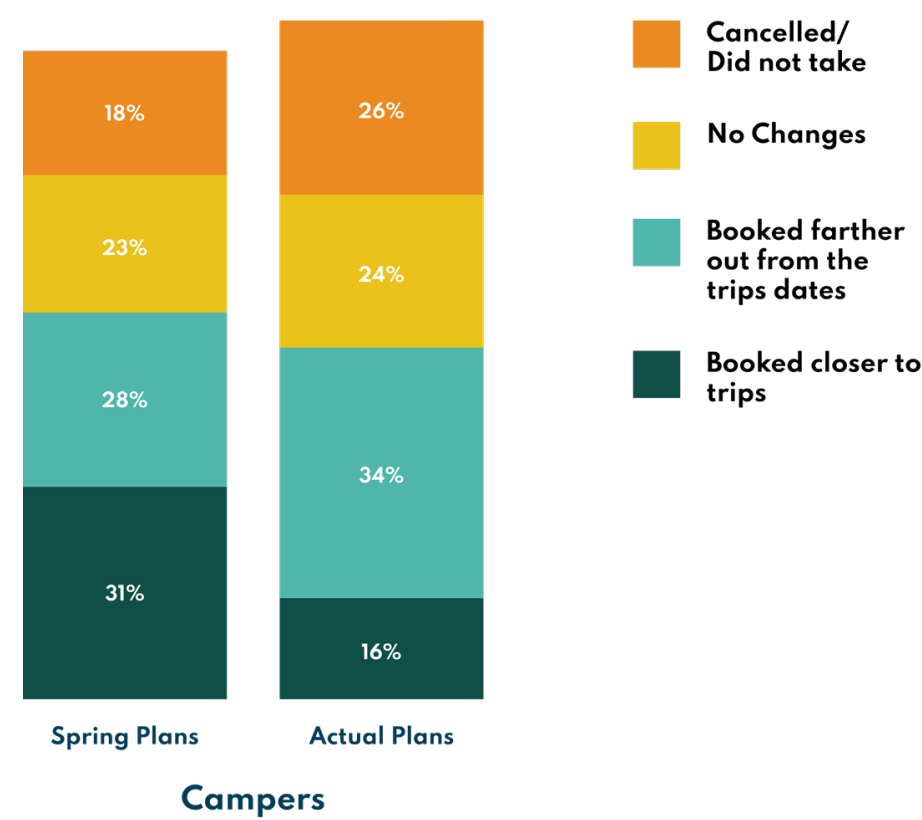
KEY INSIGHTS

- 51% of campers initially intended to book closer to their travel dates, hoping for more spontaneity.
- Reservation stacking decreased significantly, from 42% in 2022 to 18% in 2024, reflecting a decline in the need for backup bookings.
- RV users and urban travelers showed a preference for last-minute bookings, though many still opted for earlier planning due to various factors.
- Campgrounds offering flexible booking options saw a noticeable increase in spontaneous bookings.
- 23% of RV users shortened their booking windows, showing a preference for last-minute decisions.
- Only 22% of campers followed through with spontaneous trips, despite earlier intentions.
- 36% of campers cited fewer weather concerns as a reason for maintaining or extending their advance booking periods.
- Crossover travelers are more likely to keep their options open by shortening booking windows, but many eventually booked earlier to secure spots.

TRAVELER INTENTIONS VS. ACTUAL BEHAVIORS

WHAT TRAVELERS PLANNED VS. WHAT THEY ACTUALLY DID

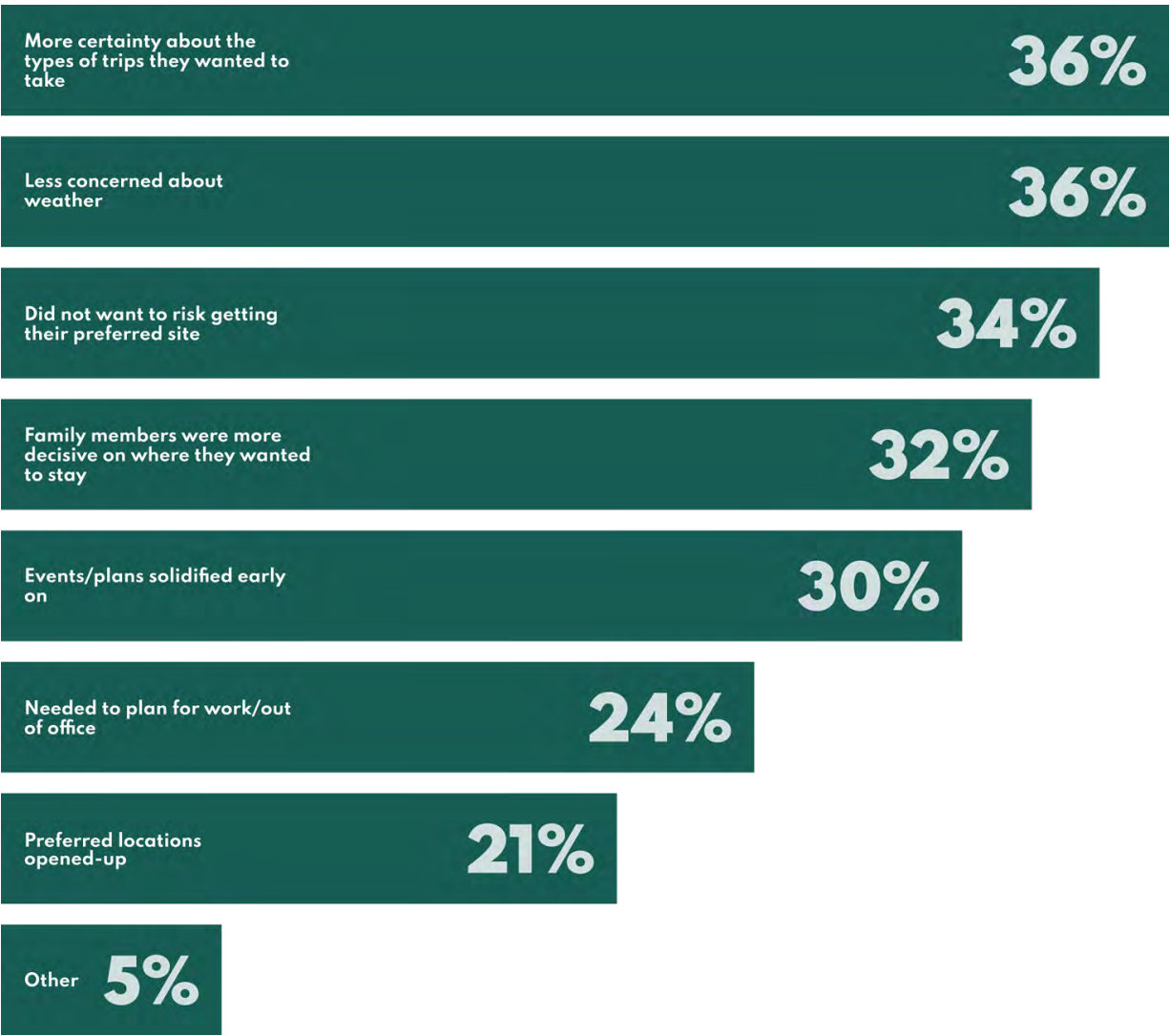
According to campers, this past spring almost a third said that they had intended to take their trips close to the dates, versus planning farther out. However, in reality, that number was about half what had been intended. Nearly one-fourth ended up not taking their intended trips, and a larger proportion planned farther out, contrary to how they viewed their planning early on.



REASONS FOR MAINTAINING TRADITIONAL BOOKING WINDOWS

WHY DID THEY NOT SHORTEN THE BOOKING WINDOW?

The reasons for not shortening the booking window are somewhat fragmented, but are centered on more certainty early on in the season, whether it's knowing the types of trips, or fewer weather concerns, or wanting to get their preferred location.

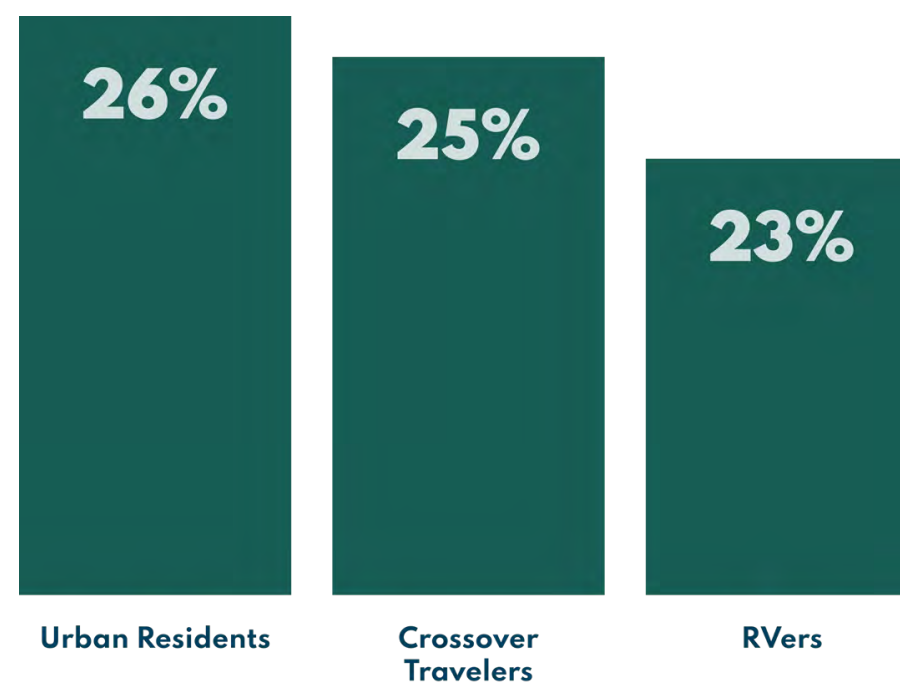




TRENDS IN SHORTENED BOOKING WINDOWS

WHO SHORTENED THE BOOKING WINDOW?

Higher rates of shortening the booking window were observed among those traveling from Urban areas, crossover travelers, and RVers. These results align with previous patterns among RVers who, in the past, expressed a desire to have more spontaneous travel, and stay where they wanted during their road trips. Additionally, the crossover traveler was more likely to shorten the window based on their desire to have multiple accommodation options.

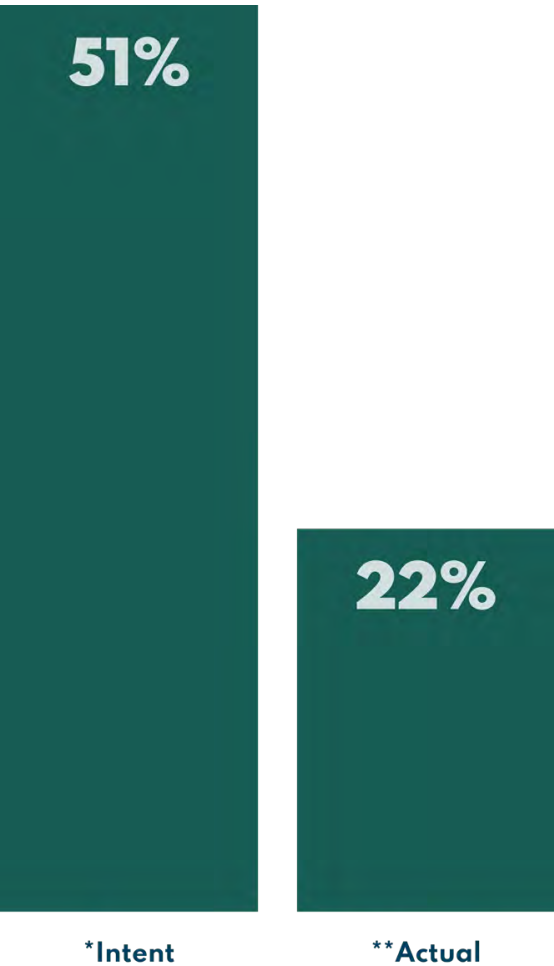




SPONTANEOUS TRIPS: INTENTIONS AND REALITY

HOW MANY TOOK SPONTANEOUS TRIPS?

Once again, early in the planning cycle, half of all campers said that they intended to take some type of spontaneous trip, yet in reality, only about 1-in-5 actually did so.

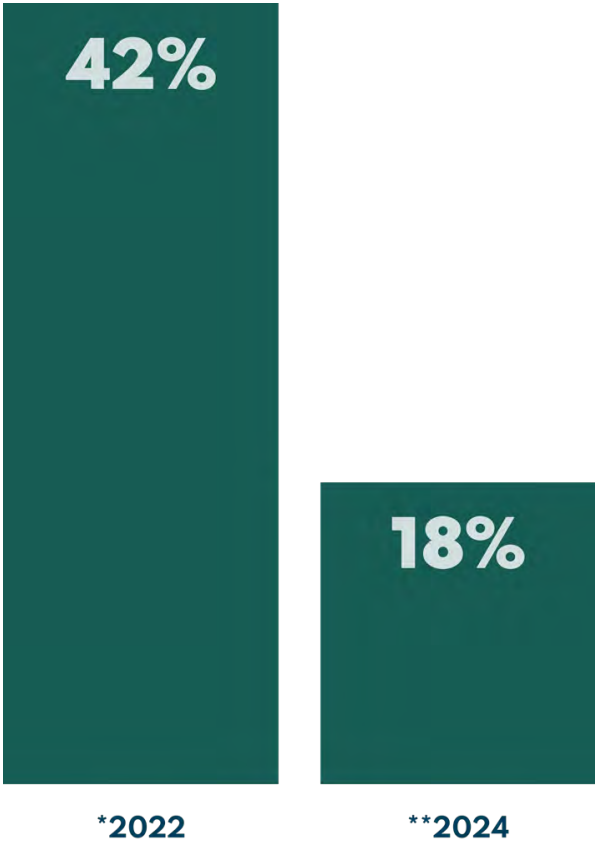


Source: * KOA Monthly Research Report: May 2024
**Cairn Consulting Group, Monthly Survey of Outdoor Recreation Participants

IMPACT ON RESERVATION PRACTICES

DID THEY STACK RESERVATIONS?

During 2022, finding a place to camp (especially at preferred locations), was difficult and resulted in a high rate of trip stacking. However, in 2024, the rate of trip stacking dropped to a rate less than half what was observed in 2022. This result highlights that the demand for campsites was down this year, and campers did not realize the levels of overcrowding they saw in the pandemic/post-pandemic years.



Source: * KOA Monthly Research Report: June 2022
**Cairn Consulting Group, Monthly Survey of Outdoor Recreation Participants

UNDERSTANDING CAMPER BEHAVIOR IN 2024

WHAT CONCLUSIONS CAN BE MADE FROM THESE RESULTS?

Intention vs. Reality

Campers' intentions to shorten booking windows did not fully materialize in 2024. While nearly a third of campers planned to book closer to their trip dates, only about half of that number actually did so.

Trip Cancellations

Approximately one-fourth of intended camping trips were not taken, indicating a significant shift in plans or priorities.

Advance Planning

Contrary to initial intentions, a larger proportion of campers ended up planning their trips further in advance.



Reasons for Maintaining Longer Booking Windows

Campers cited various reasons for not shortening their booking windows, including:

- Greater certainty about trip types early in the season
- Fewer weather concerns
- Desire to secure preferred locations

Demographics of Short-Notice Bookers

Higher rates of shortened booking windows were observed among:

- Urban travelers
- Crossover travelers (those considering multiple accommodation options)
- RV users

Spontaneous Trips

Despite half of all campers expressing intent to take spontaneous trips, only about 22% actually did so.

Decrease in Reservation Stacking

The practice of "trip stacking" (making multiple reservations for the same time period) decreased significantly in 2024 compared to 2022, dropping by more than half.



RECOMMENDATIONS FOR CAMPGROUND OWNERS AND OPERATORS

WHAT CAN CAMPGROUND OWNERS AND OPERATORS DO TO ADJUST TO THE CHANGING MINDSET OF GUESTS IN THEIR TRAVEL PLANNING?

Consider Flexible Booking Options

- Shorter minimum stays and last-minute booking opportunities to cater to spontaneous travelers.
- User-friendly online booking systems with mobile compatibility, allowing guests to secure reservations on the go.
- Flexible cancellation policies to reduce anxiety for guests whose plans may change.

Promote Comfort of Accommodation Options

- If available, promote cabins or luxury tents to attract non-traditional campers and those who seek comfort.
- Promote your facilities' modern amenities to increase appeal to urban travelers and crossover guests.

Focus on Marketing for Local and Regional Travelers

- Target marketing efforts locally to attract day trippers and short-stay guests, especially those traveling within 50 miles.

- Advertise convenient overnight escapes to encourage locals to convert their day trips into multi-night stays.

Offer Incentives for Off-Season or Last-Minute Bookings

- Provide special discounts for booking within 1-2 days of arrival to drive spontaneous stays.
- Collaborate with local businesses to create package deals, offering bundled discounts on dining, activities, or equipment rentals.



Host Events and Activities to Increase Engagement

- Schedule special events (such as seasonal festivals or outdoor yoga) that can attract a mix of day trippers and overnight campers.
- Organize community activities (e.g., nature hikes, fishing tournaments) to build a sense of connection and encourage repeat visits.

Communicate Availability and Reduce Overcrowding Concerns

- Proactively inform guests about available spaces and alternative sites to reduce concerns about missing out on preferred spots.
- Develop messaging around more relaxed campsite availability compared to previous years to reduce leftover crowd-related anxieties.

Promote your campground as a spontaneous getaway option highlighting ease of access and quick check-in options.



FROM REPORT TO REALITY: TURNING INSIGHTS INTO ACTION

As campground owners, the insights from “Moving Targets: Adapting to Booking Window Changes” can offer a strategic advantage in catering to the evolving preferences and behaviors of campers. By turning these findings into actionable steps, you can enhance guest satisfaction, optimize bookings, and improve your operational efficiency.



Embrace Flexible Booking Models

One of the key takeaways from the report is the shift in booking habits, with many campers intending to book closer to their travel dates but eventually opting for earlier bookings. To accommodate this mix, campground owners can implement flexible booking policies. Consider offering shorter minimum stay requirements and last-

minute booking deals, perhaps with special discounts, to suit the spontaneity of delayed plans. Additionally, ensure your online reservation platforms are user-friendly, with mobile accessibility to encourage ease of booking on-the-go.

Enhance Marketing Efforts Towards Local and Demographic Targets

The report highlights a trend among urban travelers, RVers, and crossover travelers who prefer more spontaneous travel. Focus your marketing strategies locally to captivate those within a 50-mile radius, promoting your campsite as a convenient weekend escape or quick getaway spot. Tailor marketing content to highlight amenities that appeal to these groups, such as cabins or upgraded camping facilities for the comfort-seeking travelers.

Engage Guests with Unique Events and Package Deals

Take advantage of quieter periods by organizing themed events, from seasonal festivals to outdoor classes like yoga, that entice both day visitors and overnight guests. Collaborate with local businesses to offer activity and dining packages, making your campground a hub for a richer experience. This not only increases footfall but also provides memorable experiences that could lead to repeat visits.

Leverage Communication to Alleviate Booking Concerns

Communicating availability effectively is crucial in reducing anxieties about booking preferred sites. Ensure potential guests are well-informed about current availability and alternative options, fostering a sense of confidence in their last-minute planning. Develop straightforward

cancellation policies and stress the reduced overcrowding compared to past seasons, which could ease leftover worries from earlier camping experiences.

Maximize Off-Season and Spontaneous Booking Incentives

Utilize your downtime by offering enticing deals during the off-season or for bookings made within a few days of arrival. Provide incentives such as bundled discounts with local attractions to add value and appeal. These initiatives not only promote increased visitor numbers but also enhance revenue streams during less busy periods.

By incorporating these strategies derived from the comprehensive data and analysis presented in the report, campground operators can effectively accommodate and capitalize on changing booking habits. This proactive approach not only meets the current desires of campers but also positions the campground for sustained success and reputation enhancement in an evolving market landscape.



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