



MC
HOSPITALITY
HIGHLIGHTS

SEARCH EVOLUTION: THE NEW WAYS CAMPERS ARE DECIDING WHERE TO STAY

Conducted by



**MODERN
CAMPGROUND**



LETTERS FROM THE CEOS

I'm Brian Searl, Founder and CEO of Modern Campground, and I'm thrilled to share with you the latest edition of MC Hospitality Highlights. This monthly report, brought to you in partnership with Cairn Consulting Group, aims to offer you valuable insights to help you understand the current landscape of the outdoor hospitality industry. Our newest report, "Search Evolution: The New Ways Campers Are Deciding Where To Stay" explores the search behaviors of outdoor enthusiasts and reveals key trends shaping the camping world.

Our mission is simple: to provide campground owners and operators with crucial data that can help you make informed, strategic decisions. We've crafted these reports to illuminate the changing patterns in how travelers search for camping experiences. By diving deep into the most popular search terms and behaviors, we can all better anticipate what campers are looking for and adapt our services to meet those needs.

The data in this report uncovers significant changes in search habits from last year. With nearly 50 million individual searches analyzed, we've pinpointed the terms and categories driving interest in camping and outdoor hospitality. This means you get a clear picture of

what potential visitors are seeking, whether it's "RV campgrounds," "dispersed camping," or even more specific queries like "camping near me." This detailed snapshot equips you with the knowledge to fine-tune your offerings for the upcoming fall season.

But we don't stop at just presenting the data. Each report concludes with actionable insights you can directly apply to your campground operations. These insights, available on our website, show you how to leverage the information to boost your business. Plus, we're sharing 10 detailed blog articles and bite-sized posts on social media throughout the month to highlight key takeaways and help you stay ahead.

Your feedback is invaluable to us. If you have any suggestions on how we can improve our future reports or specific data you'd like to see, please reach out to me at brian@insiderperks.com. We're here to help you thrive and look forward to your thoughts.

I am Scott Bahr, President of Cairn Consulting Group, and it is with great excitement that I introduce the September 2024 MC Hospitality Highlights report, produced in partnership with Modern Campground. Our goal is to deliver actionable insights to support your data-driven decision-making and enhance the outdoor hospitality experience for campers. This month's report, titled "Search Evolution: The New Ways Campers Are Deciding Where To Stay" zeros in on the evolving search patterns of outdoor enthusiasts, providing a snapshot of the ever-changing camping landscape.

At Cairn Consulting Group, we specialize in uncovering deep market insights through comprehensive research and analyses. By tapping into primary market research—via surveys, interviews, and focus groups—and leveraging quantitative and qualitative analyses, we bring to light crucial trends shaping the industry. Whether it's designing research studies, developing questionnaires, or crafting buyer personas, our services aim to illuminate the market and guide strategic decision-making.

Our latest report examines how travelers seek information about outdoor hospitality, particularly camping, and notes significant shifts in search behaviors from 2023 to 2024.

This study synthesizes search data from nearly 50 million individual queries, spanning general terms like "camping" and "campgrounds" to more specific terms such as "RV campgrounds" and "dispersed camping." By analyzing these patterns, we hope to help you understand current trends and anticipate future demand in the outdoor hospitality sector.

To gather this information, we meticulously compiled and compared search terms from identical time frames across two years. This approach allowed us to identify not just the volume of searches, but also the popular terms and sub-categories driving those searches. This level of granularity provides you with a nuanced understanding of how and what your potential customers are searching for, helping you tailor your offerings to meet their needs more effectively.

As we enter the fall season, the insights from this report are designed to help you adjust your strategies, align your services with current trends, and ultimately boost your business. Through data-driven insights, we aim to empower you to make informed decisions that enhance the experience for campers, ensuring a successful season ahead.



Brian Searl

Founder & CEO
Insider Perks & Modern Campground



Scott Bahr

President
Cairn Consulting Group





SEARCH EVOLUTION:

THE NEW WAYS CAMPERS ARE DECIDING WHERE TO STAY

The overall purpose of this report is to provide a snapshot of search terms used by travelers who are seeking information surrounding the outdoor hospitality category, but in particular, camping. This effort aims to illustrate some of the changes that have occurred since last year in the ways these users are searching for information as way to

gauge the overall health of the outdoor hospitality industry entering into the fall season.

This information can provide guidance regarding both the volume of searches in the category, as well as the terms that are most commonly used.

APPROACH TO THE ANALYSIS

This report represents the compilation of search terms used by potential travelers seeking information or ideas on outdoor hospitality options. Search terms were extracted in order to compare identical time frames that included YTD 2023 (January through August 27th) versus 2024 (January through August 27th), allowing for a better understanding of and ability to forecast participation in outdoor hospitality options.

The search terms that were used to identify and forecast the volume included both general terms such as “camping” and “campgrounds,” but in order to dig into the topic, it was necessary to identify sub-categories across the search terms. This expansion of searches included terms such as “camping near me” or “campgrounds near me” as well as the inclusion of specific types of camping and campgrounds. These could include search terms such as “RV campgrounds,” “RV resorts,” “tent camping,” or “dispersed camping.”

To this end, multiple combinations of search terms allowed for a deeper and more nuanced understanding of how travelers are searching for outdoor hospitality options, and overall, the analysis includes 532 separate iterations of word combinations.

The analysis then categorized each of these combinations, which could include a search term being categorized into multiple topics. For example, the general term “camping” also includes “camping near me” and similarly, “campground” as a search term also includes the combination of “campgrounds near me” or even “RV campgrounds” and “RV campgrounds near me.”

In total, 49,092,928 individual searches were included in the analysis.

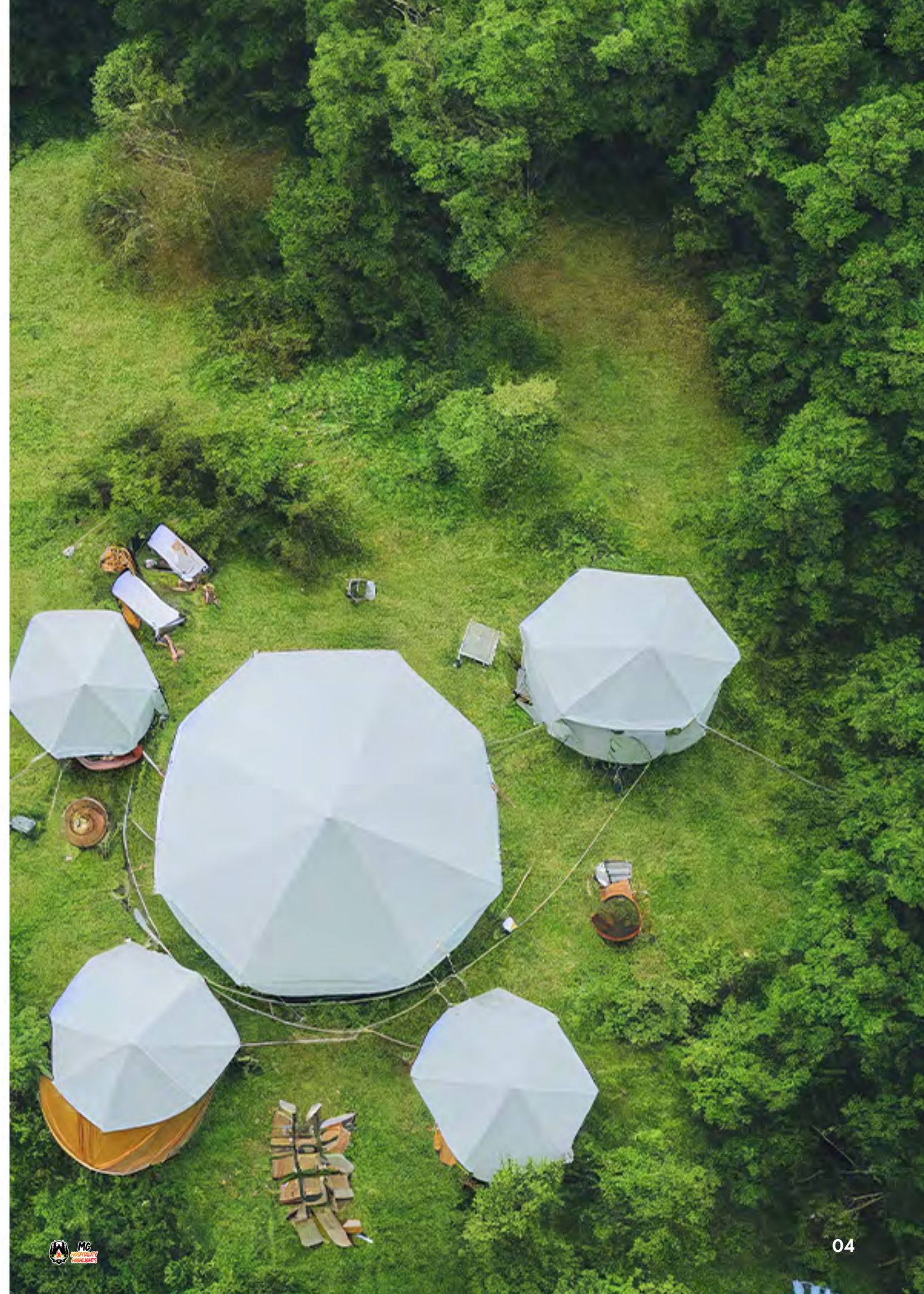




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KEY INSIGHTS

- In 2023, while participation in camping overall realized a decline of between 3% and 4%, glamping had a 13% increase overall, and a 28% increase among the set of new guests between 2022 and 2023. The look ahead suggests that glamping could increase by as much as 31%.
- Searches for glamping have improved by 29% overall, and 23% as a stand-alone term. It is worth considering that those seeking a definition of glamping has increased by 50% YOY.
- The economy has been impacting campers' attitudes and behaviors since inflation spiked, most commonly in terms of

distances traveled, as well as cutting back on expenses while camping such as food & entertainment.

- Some campers are seeking free/no cost locations during their travels, reflected in the 28% increase in volume between 2023 and 2024.
- Recent research has suggested that between 30% and 51% of campers are looking for locations within 50 miles of their residence, contributing to a 90% increase in searches for nearby camping.

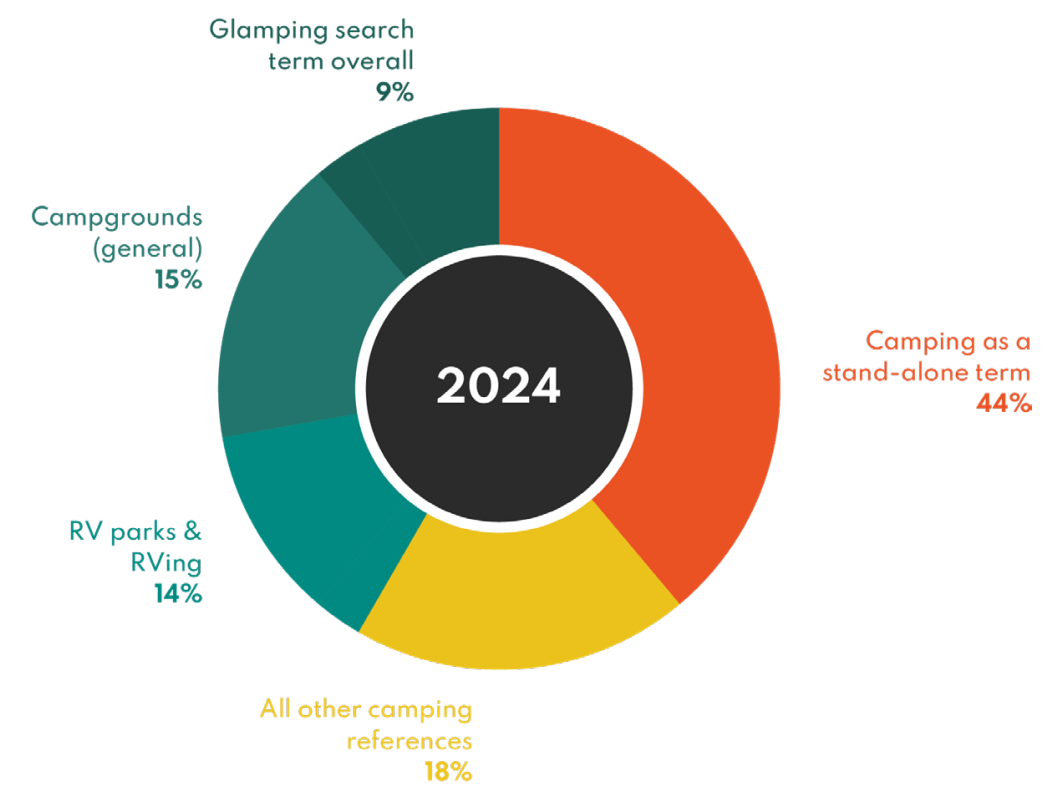
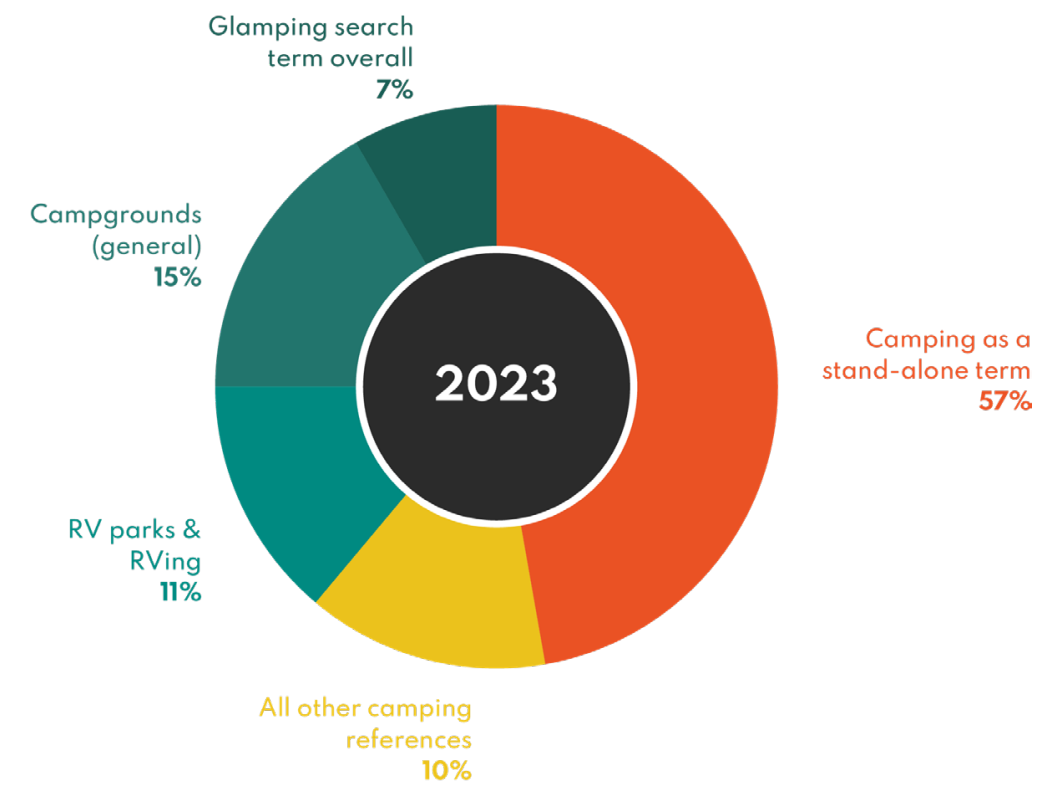


CHANGES IN SEARCH TERM VOLUME

WHAT IS THE CHANGE IN THE VOLUME OF SEARCH TERMS BETWEEN 2023 AND 2024?



In a review of the total volume the search term categories account for, there is a dramatic switch in the specificity of search terms, as well as a shift in the categories accounting for the total volume of searches. In particular, there is a 13 percentage point drop in the volume of searches accounted for by the term “camping” as a stand-alone category, while more specific search terms within the camping category have increased by 8 percentage points. These results are indicative of a traveler who wants more specific information about what they are considering for an experience, whether it is the location or the type of camping.



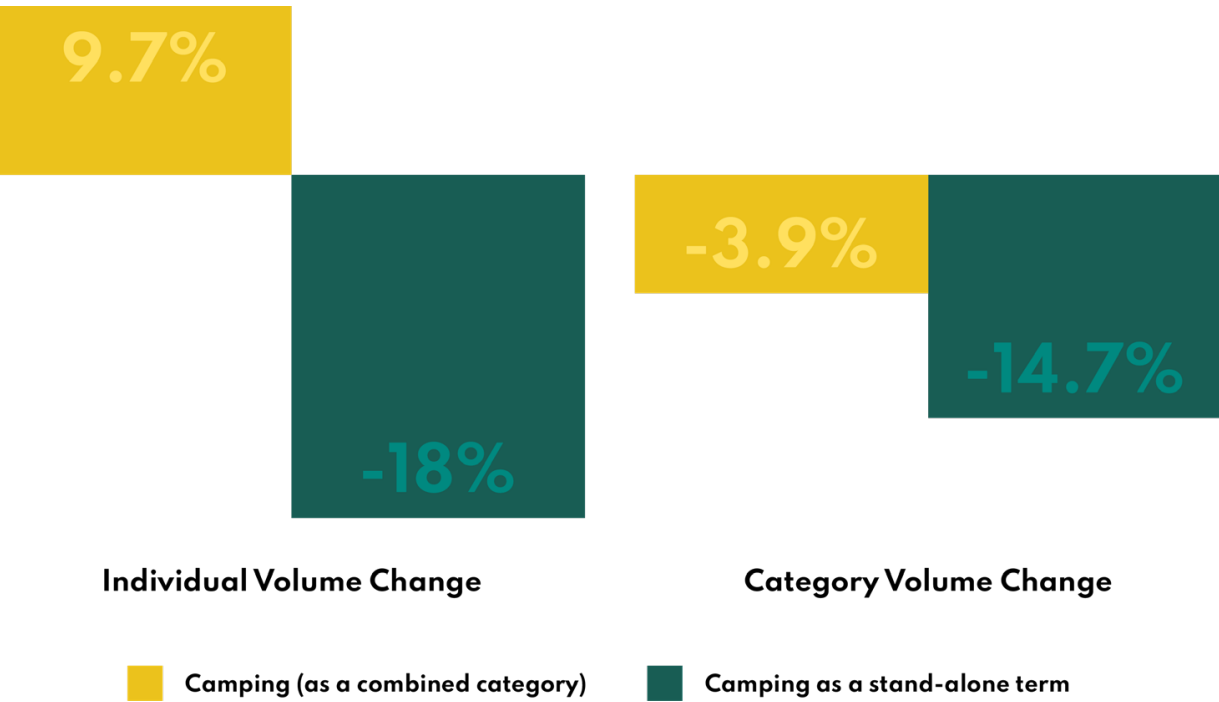


CAMPING AS A SEARCH TERM AND CATEGORY

WHAT DIRECTION IS CAMPING TRENDING AS A SEARCH TERM AND A CATEGORY?

As a category, camping searches have improved by 10% since 2023, yet the individual search term has declined a whopping 18%. As previously mentioned, within the outdoor hospitality category, camping as a search topic has decreased by 4% and 15% as a stand-alone term. This result, again, is relevant as the combination of all topics within the category have increased by 17% in total volume over the past 12 months, yet camping continues to lag.

Overall, camping as its own topic or category appears to be inadequate. Those who are seeking to gain traction in the outdoor hospitality space need to ensure that their SEO is much more inclusive of the terms that potential guests are using, given their changing behavior in how they search for information.



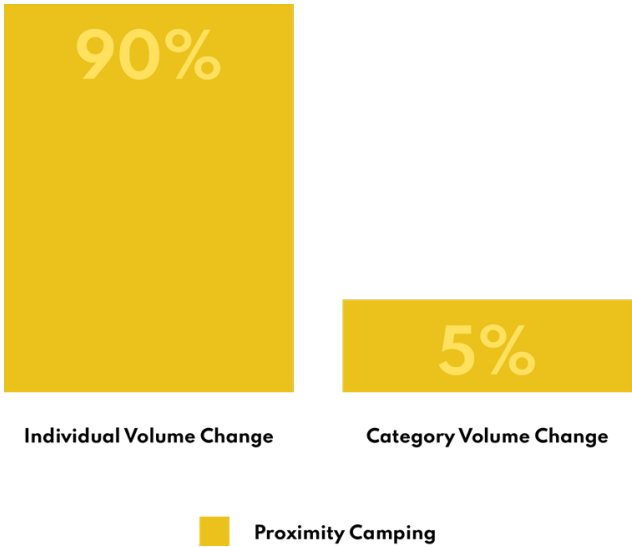
PROXIMITY CAMPING TRENDS

ARE CAMPERS SEEKING LOCATIONS CLOSER TO HOME?



Recent research has suggested that campers, for a variety of reasons, are staying closer to home this season and in the look ahead to the fall season. In particular, between 30% and 51% of campers are looking for locations closer to home, which in most cases, includes locations within 50 miles of their residence.

With this as the backdrop, there has been a 90% increase in searches for camping and campground locations that are closer to home and even with the vast category used in this camping analysis, volume has increased by 5% since 2023.

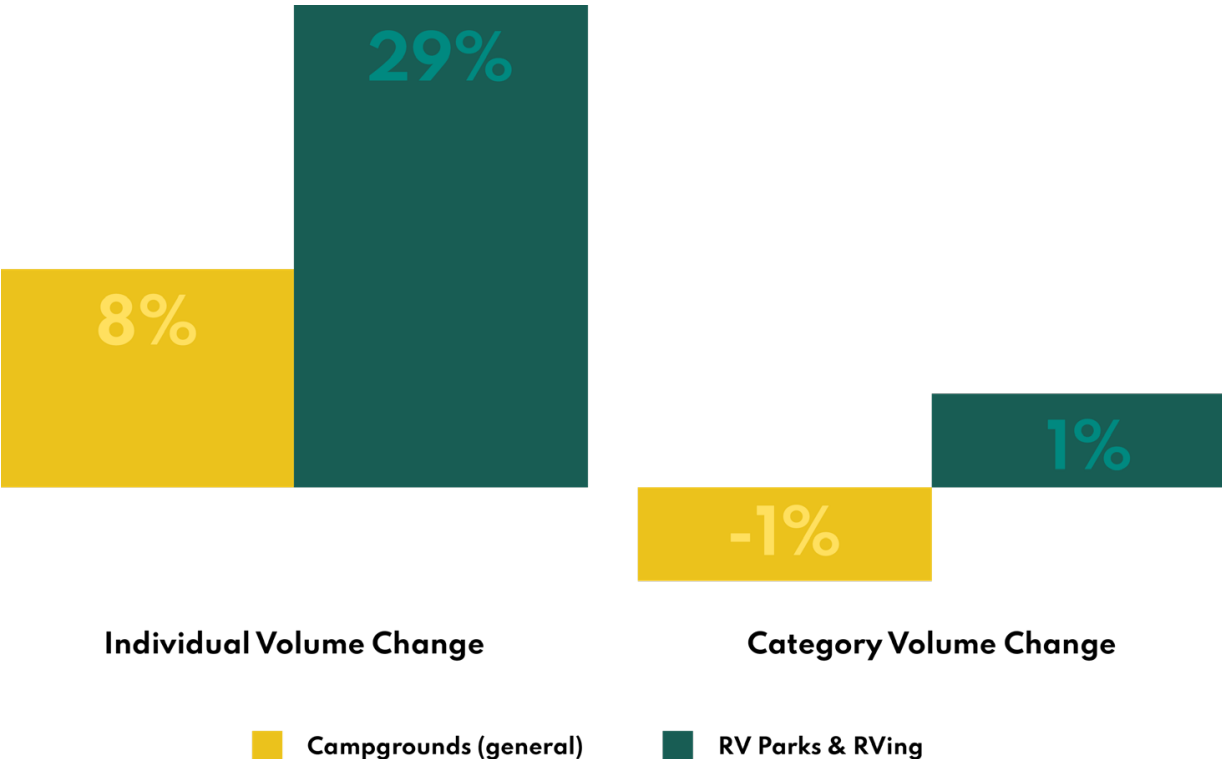


SEARCH TRENDS FOR CAMPGROUNDS AND RVING

HOW HAVE SEARCHES FOR CAMPGROUNDS AND RVING CHANGED?

Searches for campgrounds have shown a moderate 8% increase over the past 12 months, suggesting that campground searches, similar to camping, have only moderate interest, while specific types of campgrounds and campground locations are much more likely to increase. In terms of overall volume, campgrounds have decreased by only 1%.

RV parks, however, have shown some respectable improvement over last year, and as an individual search term, have improved by 29%. As part of the category of outdoor hospitality, RVing has improved by 1%. These results tend to track with the RV industry overall, which has bucked some initial trend forecasts and demonstrated solid growth YOY.



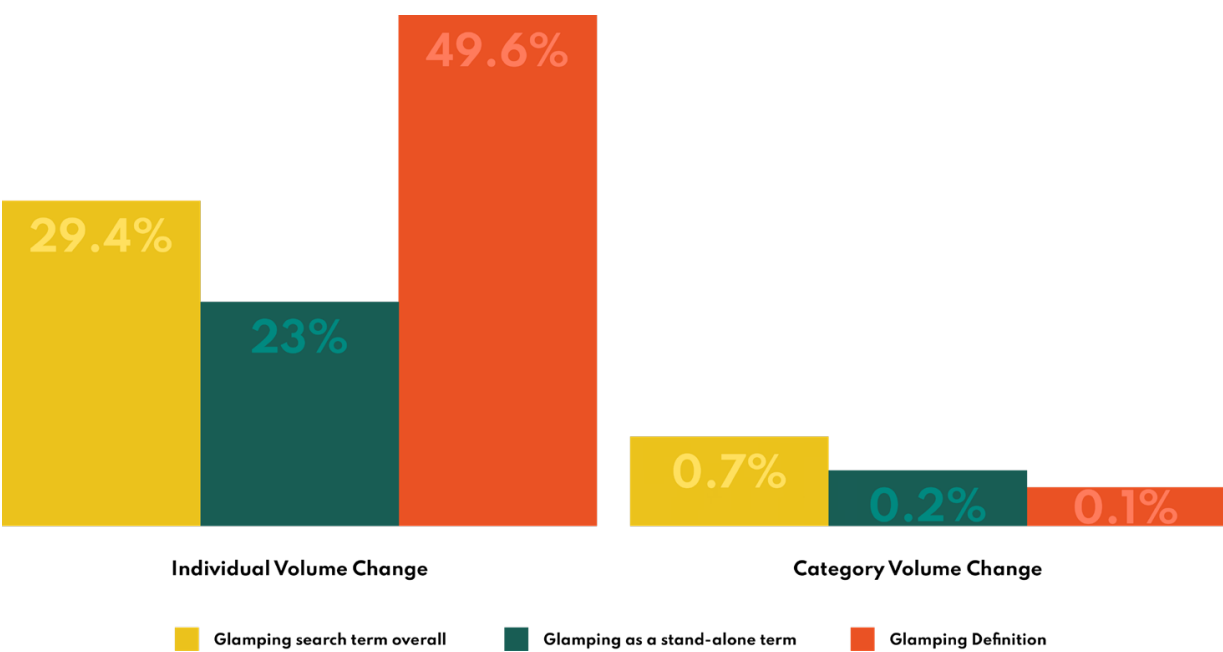
GLAMPING AS A SEARCH TERM

HOW DOES GLAMPING STACK UP AS A SEARCH TERM?

In 2023, while participation in camping overall realized a decline of between 3% and 4%, glamping had a 13% increase overall, and a 28% increase among the set of new guests between 2022 and 2023. The look ahead suggests that glamping could increase by as much as 31%.

These results tend to be mirrored in search terms used among travelers. Searches for glamping have improved by 29% overall, and 23% as a stand-alone term. It is worth considering that those seeking a definition of glamping has increased by 50% YOY.

Glamping, while showing aggressive growth both in participation and in search terms, remains a relatively small part of the overall outdoor hospitality landscape, having only a 1% category volume change.



FREE CAMPING LOCATIONS

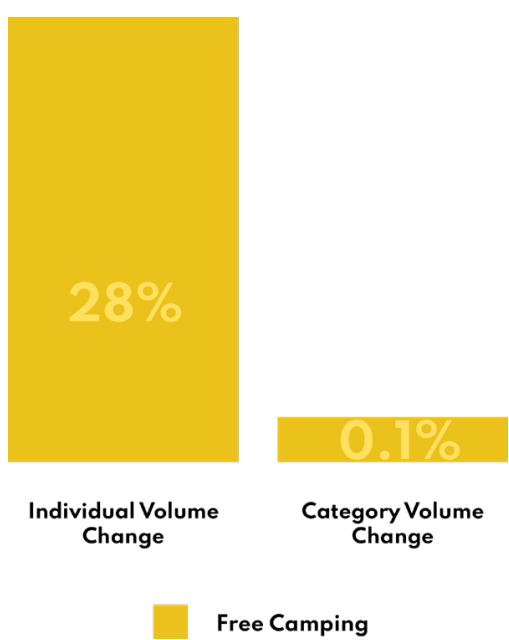
ARE CAMPERS SEEKING FREE CAMPING LOCATIONS?

The economy has been impacting campers' attitudes and behaviors since inflation spiked, most commonly in terms of distances traveled, as well as cutting back on expenses while camping such as food & entertainment.

In a way to offset costs and save money on travel, some campers are seeking free/no cost locations during their travels. This is reflected in the 28% increase in volume between 2023 and 2024 (though free camping remains a relatively small proportion of category volume).

Whether it's dispersed locations, boondocking, or parking lots, travelers are receptive to the idea of free camping, but mostly for short-term stays.

An important consideration for this topic is that free camping tends to be out of reach for those who are not equipped to stay 100% off-grid, whether they're traveling in an RV, sleeping in their vehicle, or tent camping.



CONCLUSION

WHAT DOES ALL OF THIS MEAN?

The information summarized in this report highlights significant changes in how potential campers search for outdoor experiences, suggesting a more targeted and detail-oriented approach. This shift implies that campers are planning their trips more specifically and with higher expectations for what campgrounds offer.

For campground owners, this shift should inform how they view the upcoming fall camping season as well as preparation for the 2025 camping season. With search terms becoming more specific, it suggests that campers may be planning fewer, but more deliberate trips, focusing on campgrounds that meet their precise needs. This means that to attract more campers, campgrounds should not only focus on traditional advertising but also on optimizing their online presence to align with the specific search terms that campers are using.

To increase the number of campers, campground owners can implement the following strategies:



Understand who the target is first.

Research who is searching for what you offer. Talk about the topics that are relevant, interesting, and provide value.

SEO Optimization:

Focus on optimizing for specific search terms that have gained popularity, such as “family-friendly RV campgrounds near Great Smoky Mountains” or “specialized camping near Acadia National Park.” This will help capture the attention of campers who are specifically searching for these experiences.

Targeted Content Creation:

Develop content that highlights what makes your campground unique and aligns with popular search terms. For example, if “glamping in yurts near Yellowstone” is trending, create blog posts, social media content, and website pages that showcase your glamping options.

Promotions and Packages:

Use direct communications such as email. Highlight what is different about what you offer in promotions to give them a reason to visit.

Guest Generated Content:

Encourage guests to provide content via alternative methods such as surveys that allow them to provide meaningful content surrounding their experiences. This approach is a more guided approach (versus using testimonials via guest reviews).

By adapting to these changes in camper behavior and optimizing their online strategies accordingly, campground owners can better position themselves to attract more campers this fall and beyond.



FROM REPORT TO REALITY: TURNING INSIGHTS INTO ACTION

As you reflect on the valuable insights provided in the September 2024 MC Hospitality Highlights report, it's important to turn these data points into actionable strategies that can transform your campground's operations and marketing efforts. Here are some specific steps to take to enhance your campground's appeal and performance this fall season and beyond.



Leverage Targeted SEO and Content Marketing

🔥 SEO Optimization and Keywords:

Compile a list of popular search terms identified in the report, such as “family-friendly RV campgrounds,” “glamping,” and “fall camping near me.” Optimize your website for these keywords to improve visibility and attract specific segments of campers who are actively searching for these experiences.

🔥 Content Creation:

Develop blog posts, social media updates, and web pages that highlight your unique offerings in these areas. For example, if glamping is a growing trend, create compelling content showcasing your glamping accommodations and amenities. This helps in not only attracting the audience but also in engaging them with your brand.

Emphasize Proximity and Ease of Access

🔥 Local Marketing:

With a significant increase in searches for camping locations closer to home, tailor your marketing efforts to emphasize the convenience of your campground's proximity to urban and suburban areas. Highlight the ease of a short getaway and the benefits of a quick, accessible retreat from daily life.



🔥 Local Partnerships:

Form partnerships with local businesses such as outdoor gear stores, cafes, and tourist attractions. These partnerships can offer mutual promotions that bring more visitors to your campground while supporting local commerce.

Enhance On-Site Experiences

🔥 Themed Activities:

Create fall-focused activities and events that appeal to both families and solo travelers. This could include guided hikes, campfire stories, seasonal crafts, and local food tasting events. Promoting these activities through multiple channels will help in attracting

campers looking for unique fall experiences.

🔥 Upgrade Amenities:

Consider adding or enhancing amenities that cater to both traditional campers and glampers. Providing unique and comfortable lodging options such as yurts or luxury tents can appeal to the high-demand glamping sector, which is rapidly growing and appealing to new segments.

Offer Promotions and Packages

🔥 Special Offers:

Introduce fall-specific promotions such as discounts on multi-night stays, special rates for mid-week bookings, or packaged deals that include activities and meals. Promote these offers early and across all your marketing channels, including email newsletters and social media.

🔥 Value-Added Packages:

Create packages that offer additional value, such as including firewood, discounts at local attractions, or bundled equipment rentals. These packages can make camping more accessible and appealing, especially in a tight economy where campers are looking to maximize value.

Boost Online Presence and Engagement

🔥 Collect and Showcase Reviews:

Encourage satisfied campers to leave positive reviews on major travel and review websites. Highlighting these testimonials prominently on your site and integrating them into your SEO strategy can enhance your campground's reputation and search visibility.



🔥 Engage on Social Media:

Maintain an active presence on social media platforms where you can share real-time updates, beautiful photos, camper stories, and promotional offers. Engaging content can attract new campers and keep past visitors coming back.

Adapt to Camper Budget Constraints

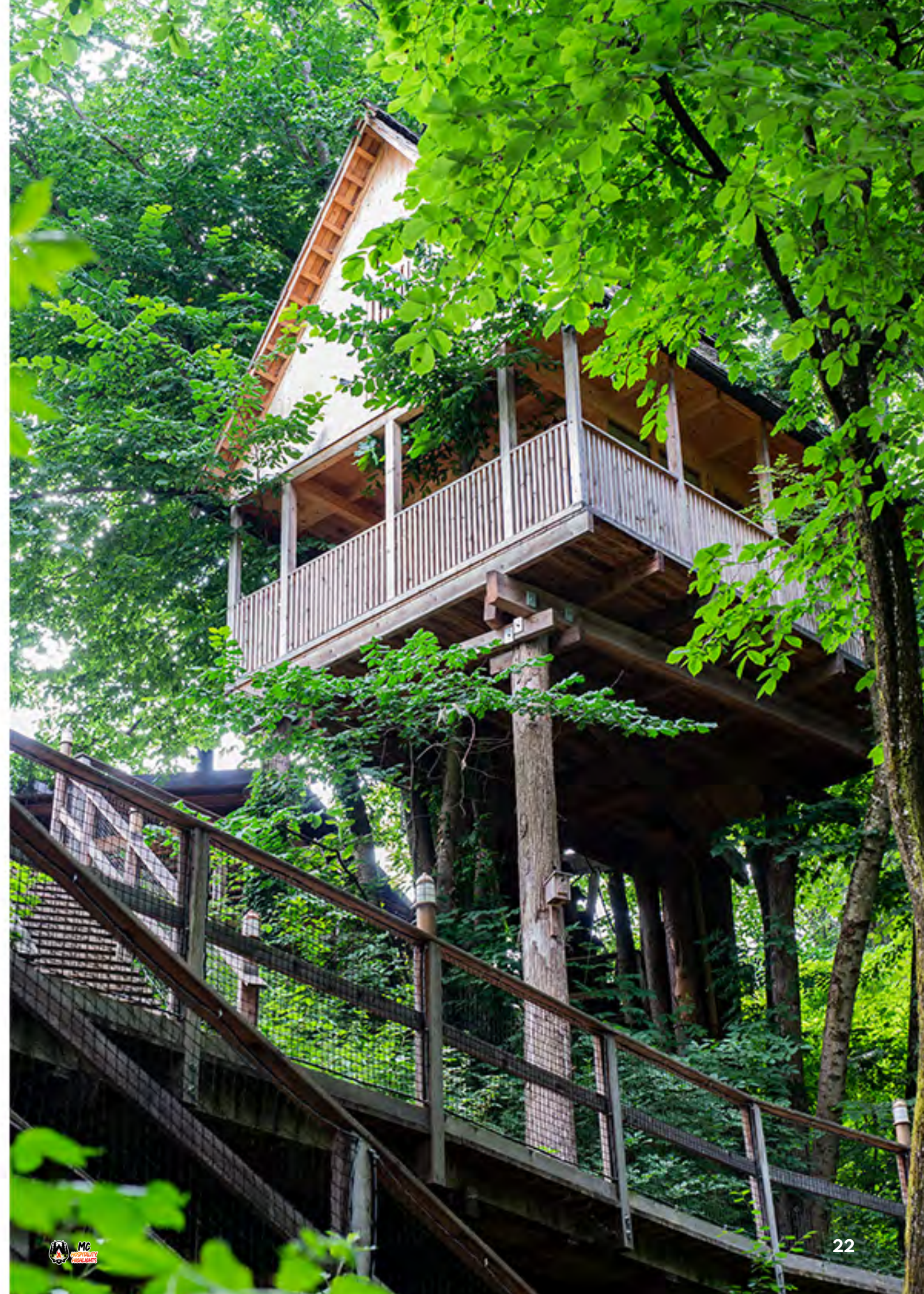
🔥 Low-Cost Options:

Offer budget-friendly options for campers looking to cut costs. This could include designating certain areas for no-frills, low-cost stays or providing basic amenities that require minimal overhead.

🔥 Flexible Booking:

Implement flexible cancellation policies and the option for staggered payments to ease financial pressure on campers. This flexibility can make your campground more attractive to cost-conscious visitors.

By implementing these strategies, campground owners can effectively utilize the insights from this report to attract more campers, enhance guest satisfaction, and ultimately boost business performance during the fall season and beyond.





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