



MC
HOSPITALITY
HIGHLIGHTS

RV SEARCH TRENDS: FROM SEARCH INTENT TO MARKET OPPORTUNITY

Conducted by



MODERN
CAMPGROUND



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CONSULTING
GROUP

LETTERS FROM THE CEOS

I hope you're enjoying the great outdoors and ready for some fresh insights! I'm Brian Searl, the Founder and CEO of Modern Campground. I'm excited to bring you our latest report in the MC Hospitality Highlights series, created with our partners at Cairn Consulting Group. This time, we're diving into "RV Search Trends: From Search Intent to Market Opportunity." It's a topic that's stirring up our industry in the most adventurous ways.

At Modern Campground, we believe in lighting up the path for campground owners and operators with useful data. Our aim? To help you understand the new wave of travelers so you can welcome them with open arms. Each report we craft is filled with information and trends that can transform how you see your guests. We make sure these insights are not just readable, but also actionable, so you can make your campground even more inviting.

This report isn't just a one-time thing. It's part of our ongoing commitment to bring you monthly updates on the latest trends. And it doesn't stop there! At the end of each report, you'll find ways

to apply our findings at your own campground. Plus, you'll have access to ten blog articles on our website and quick tidbits on social media throughout the month. It's all about giving you the tools you need to thrive.

We want to make sure this series is as helpful as possible, so your feedback is gold to us. If there's anything you'd like to see in future reports or ways we can improve, please send your thoughts to brian@insiderperks.com. We're all ears and eager to hear from you.

Dive into this report, let the stories inspire you, and let's continue this journey together to shape amazing experiences for all travelers. Thanks for being a part of this adventure with us.

I hope this message finds you well and eager to explore new opportunities within our vibrant industry. I'm Scott Bahr, President of Cairn Consulting Group, and I am thrilled to introduce the latest edition of MC Hospitality Highlights, in partnership with Modern Campground. This month, we delve into "RV Search Trends: From Search Intent to Market Opportunity," a topic that's reshaping our industry and opening up avenues for growth and innovation.

At Cairn Consulting Group, we specialize in turning complex data into useful insights that help businesses like yours thrive. Our passion lies in uncovering the stories hidden within what we call "dark data"—information that, when properly illuminated, reveals the habits, desires, and future trends of your guests. Our team excels in primary market research and advanced analytical techniques, all aimed at giving you a clearer picture of your market landscape. Simply put, we help you understand your customers and competition so you can make informed decisions that drive growth.

We've used a mix of quantitative and qualitative analysis to explore the unique needs and preferences of the growing van life and car camping communities. This isn't just about numbers—it's about understanding the stories of the people who are redefining what it means to travel and camp in today's world.

As campground owners and stakeholders in outdoor hospitality, you are at the forefront of this exciting shift. Our report is designed to help you tap into the potential of these new traveler segments. We offer insights into customer journey design, pricing strategies, and even how to position your brand to capture this enthusiastic market. Our goal is to provide you with the strategic direction needed to not just meet, but exceed your guests' expectations.

I'm confident that this report will inspire you to think differently about the opportunities ahead. I invite you to dive in, discover the wealth of insights we've gathered, and join us on this journey of transformation. Together, we can create remarkable experiences for every traveler eager to seek adventure in the great outdoors.



Brian Searl

Founder & CEO
Insider Perks & Modern Campground



Scott Bahr

President
Cairn Consulting Group





RV SEARCH TRENDS:

FROM SEARCH INTENT TO MARKET OPPORTUNITY

The overall purpose of this report is to provide a review of the levels of interest in RVs and RVing that focuses on how interest has changed since 2019. This effort aims to highlight changes in the year prior to the COVID-19 pandemic, up to the current time frame.

This report represents a review of not only the impact of the pandemic on interest in RVing, but also how the traveler mindset toward the category might be shifting.

APPROACH TO THE ANALYSIS

This report represents the compilation of consumer interest expressed toward the RV category on a monthly basis from 2019 to the present. It also includes an overview of trends for RV retail sales over that same timeframe as reported by the RV industry.

The analysis takes into account the trends and trend lines over that time frame, and includes a scenario that forecasts what RV sales might have been in the absence of the pandemic.

These figures are designed to represent the magnitude of the disruption represented by the pandemic.

The data sources included are from figures published by RVIA, RVDA, Statistical Surveys, Inc., and KOA's 2024 Outdoor Hospitality Report.



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KEY INSIGHTS

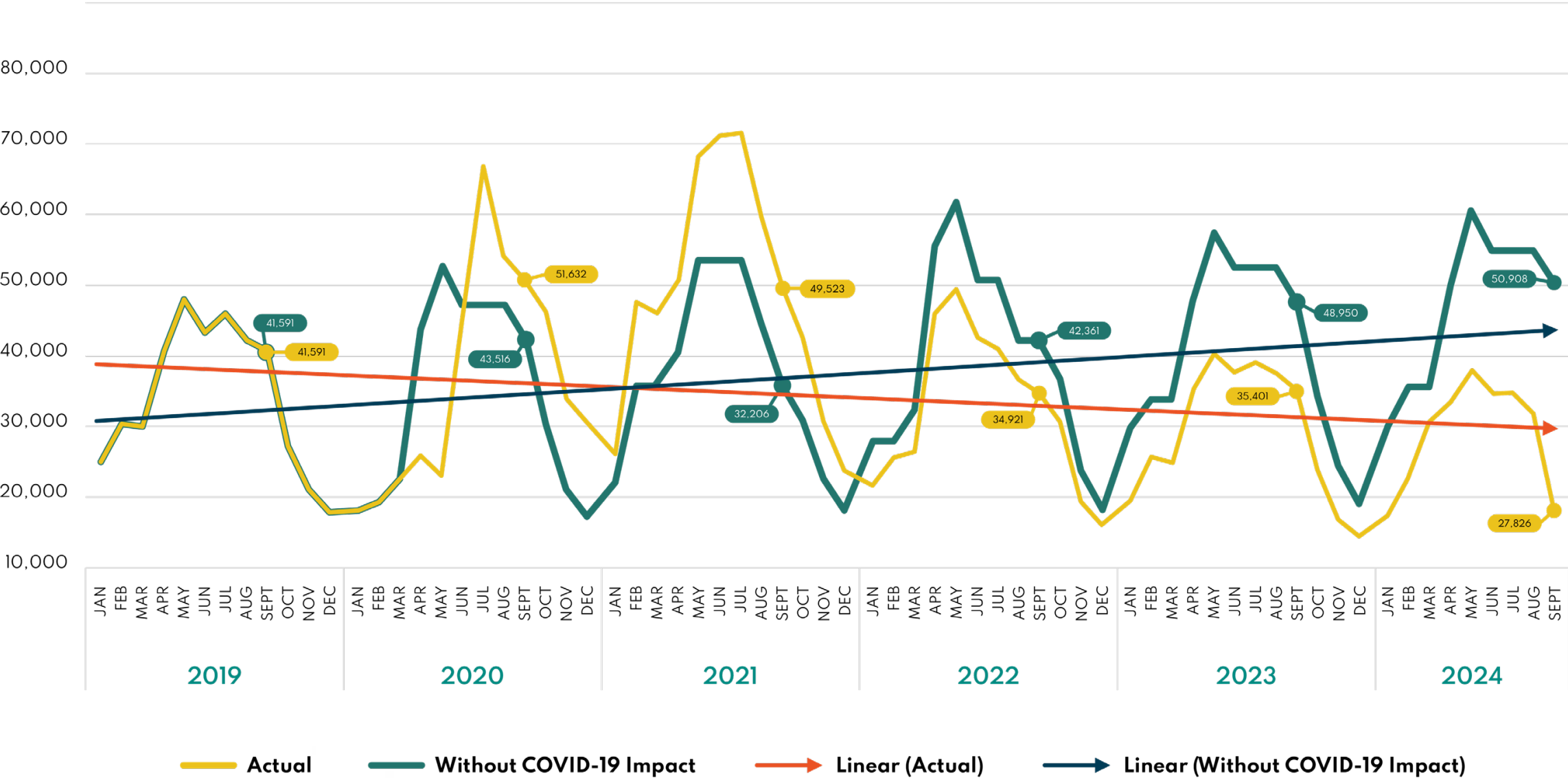
- RV sales in July 2020 surged to 67,856 units (during the height of pandemic-driven interest), but by September 2024, the number dropped to 27,826 units.
- Interest in Class A motorhomes has shown some fluctuations but an overall decline. In January 2019, consumer interest was at 2,910 searches for Class A, peaking in July 2020 at 6,412 searches, before declining to 3,669 searches in September 2024.
- For Class C motorhomes, interest was 5,186 searches in January 2019, with a peak in July 2020 at 12,927 searches, followed by a drop to 4,977 searches by September 2024.
- When non-RVers with an interest in RVing are asked what type of RV they would prefer, 1-in-5 mention Class A models, compared to 17% who are interested in Class Cs.
- Traditional travel trailers and teardrop trailers have seen a decline with teardrop trailers showing a sharper decline from 17,836 searches in January 2019 to 14,704 searches in September 2024.
- Growing interest in campervans and car camping reflects a consumer preference shift toward flexibility, affordability, and mobility.
- Enhancing facilities for campervans and car campers—such as offering more van-friendly parking spaces, simplified hook-ups, and possibly more rustic or off-grid camping options—could cater to this trend.
- Some campgrounds do not currently allow car campers, but it's worth considering, given the explosive growth in this form of camping.





IMPACT OF COVID-19 ON RV SALES

HOW DID THE COVID-19 DISRUPTION IMPACT RV SALES?



Since 2019, the trend line suggests a decline in RV retail sales, which has been heightened by the overwhelming volume that occurred during the COVID-19 pandemic. However, the pandemic was such a massive disruption, that the previously observed trends were no longer applicable. Indeed, had RV sales continued on the path that was established pre-COVID-19, it is estimated that there would have been continued consistent growth year-over-year.

TRENDS IN MOTORHOME INTEREST

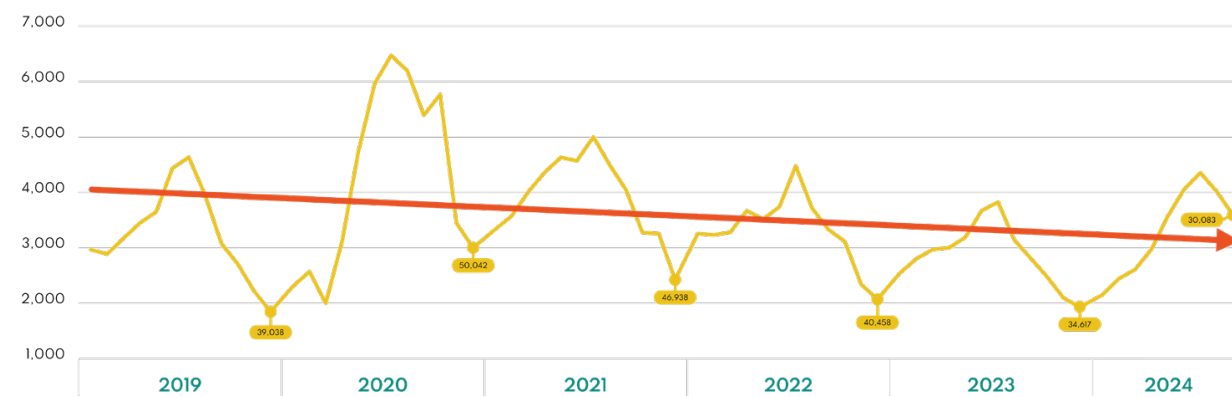
HOW HAS INTEREST IN MOTORHOMES CHANGED SINCE 2019?

Looking back, established interest in motorhomes—Class A and Class C models—suggests that there has been a moderate decline in interest for Class As and Class Cs. Notably, a Class A motorhome is aspirational, and generally, when non-RVers with an interest in RVing are asked what type of RV they would prefer, 1-in-5 mention Class A models, compared to 17% who are interested in Class Cs.

It should be noted that interest in Class As has demonstrated a slight uptick in 2024, and interest in Class Cs may be leveling out as of October 2024.

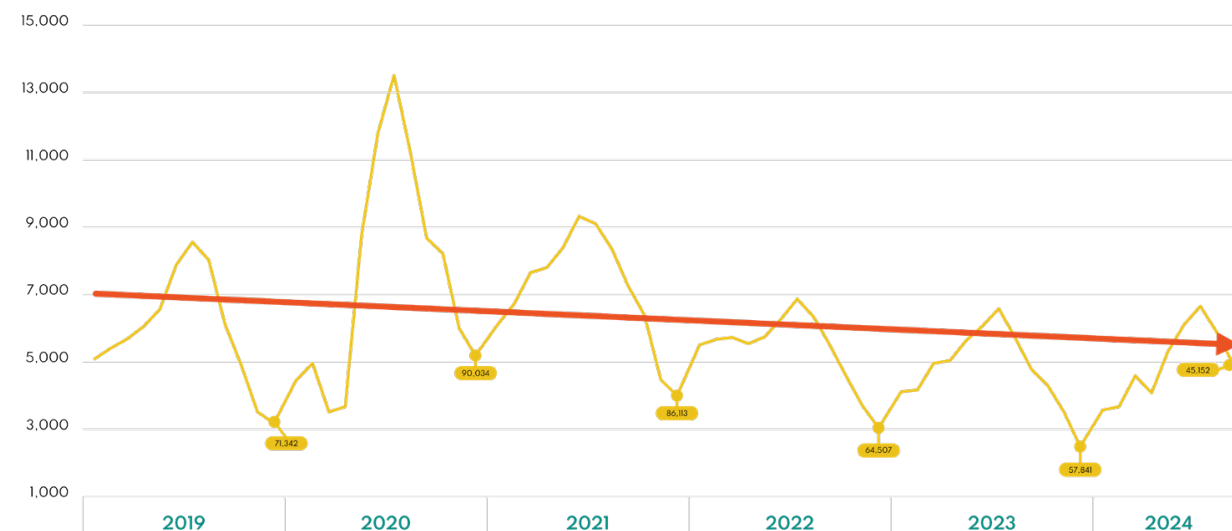
INTEREST IN A CLASS A MOTORHOME: 21%

CLASS A



INTEREST IN A CLASS C MOTORHOME: 17%

CLASS C



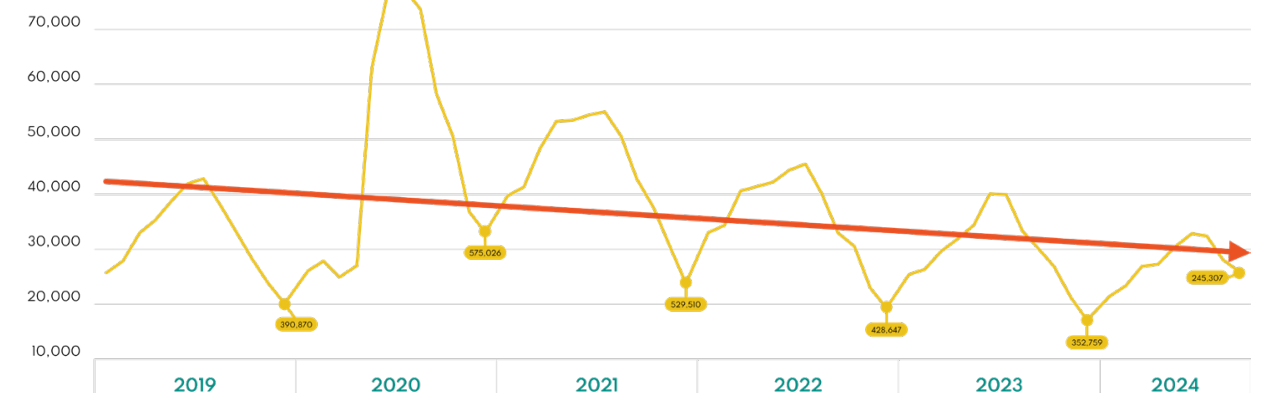
CHANGES IN TRAVEL TRAILER AND TEARDROP TRAILER INTEREST

HOW HAS INTEREST IN TRAVEL TRAILERS CHANGED SINCE 2019?

Similarly, interest in traditional travel trailers as well as teardrops has declined, with teardrops having a steeper decline overall. With leisure travelers seeking more comfortable types of accommodations, including convenience and amenities, it is not surprising that teardrops would show a sharper downward trend. Additionally, all travel trailers require the end-user to have the skills necessary to drive, park, and set up the unit, and when combined with a large number of new entrants during the pandemic, it has resulted in a greater loss of interest.

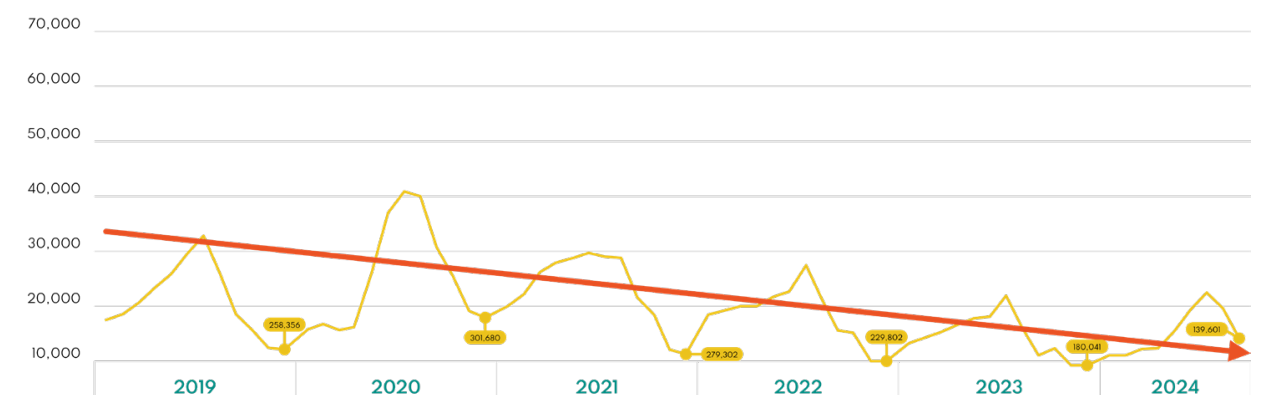
INTEREST IN A TRAVEL TRAILER: 29%

TRAVEL TRAILER



INTEREST IN A TEARDROP TRAILER: 14%

TEARDROP



GROWTH IN INTEREST FOR CAMPING VANS AND CAR CAMPING

WHERE IS INTEREST IN RVING EXPERIENCES IMPROVING SINCE 2019?

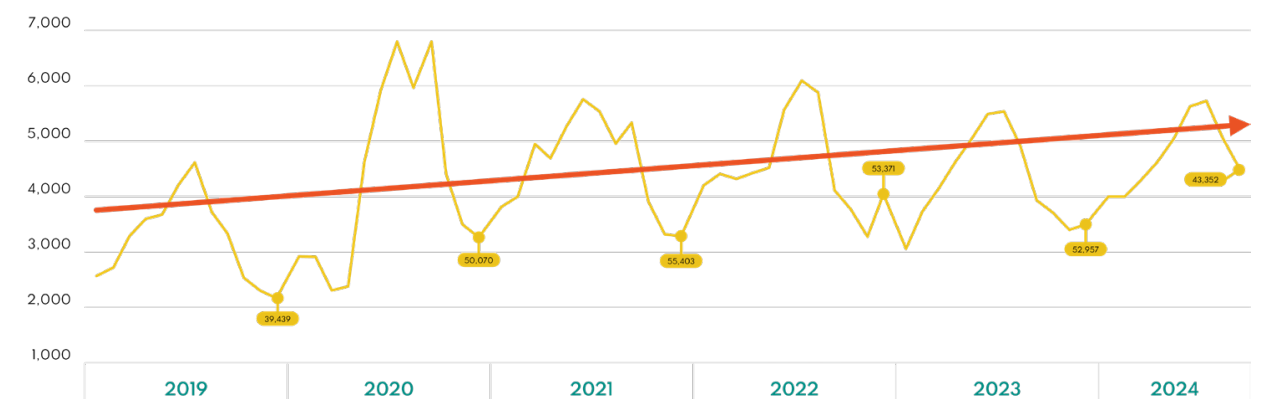


Bucking the trend overall is interest in camping vans, and similarly, car camping (defined as using a vehicle for accommodations). In recent years, there has been a great deal of attention to living the “van life”, especially during the COVID-19 pandemic, and this is expressed in the increasing levels of interest in a camping van. This result is reflective of consumers wanting convenience, something they can drive and park easily, but also is more attainable financially. Both van life and car camping are lifestyle choices, typically, and are representative of consumer who may have been impacted financially the past couple of years, but wants to enjoy the freedom—and importantly—flexibility of these types of accommodations and experiences.

Van life and car camping help the traveler to travel and explore in a more affordable manner, and with the proliferation of off-grid places to stay, lends itself to the person who wants to travel on a budget.

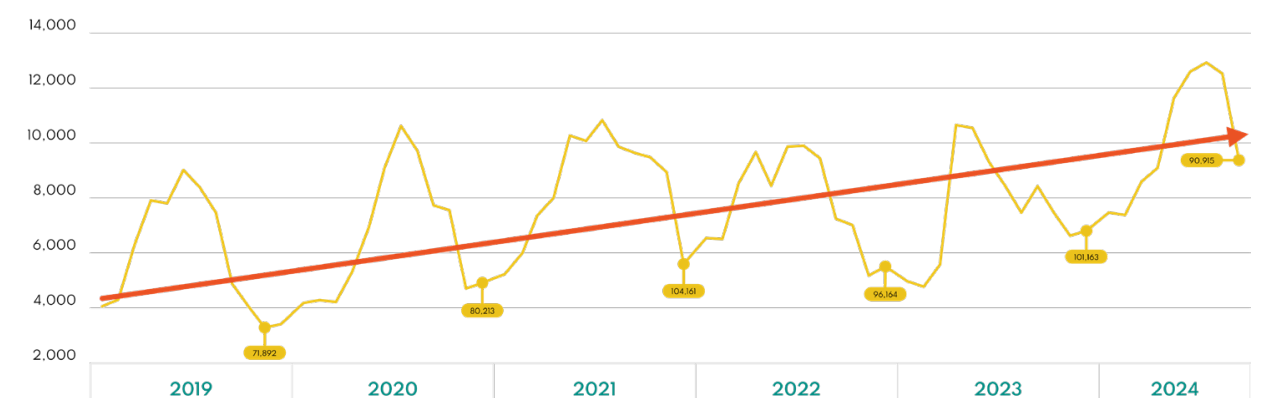
INTEREST IN A CAMPING VAN: 33%

CAMPING VAN



INTEREST IN CAR CAMPING: 18%

CAR CAMPING



SUMMARY AND IMPLICATIONS FOR CAMPGROUND OWNERS

The data presented in this report reveals key insights into consumer interest in various types of RVs, which could be valuable for campground owners aiming to adapt to shifting preferences.

The analysis indicates that while interest in traditional motorhomes and travel trailers has generally declined since the pre-COVID era, there has been a notable rise in interest in camping vans and car camping. This shift reflects a growing consumer preference for more accessible, affordable, and flexible travel options.

- For campground owners, this suggests a potential opportunity to attract a new wave of travelers who prioritize convenience and budget-friendly accommodations. Enhancing facilities for camping vans and car campers—such as offering more van-friendly parking spaces, simplified hook-ups, and possibly more rustic or off-grid camping options—could cater to this trend.
- Additionally, focusing on amenities that appeal to budget-conscious and experience-seeking travelers—like shared community spaces, scenic yet accessible locations, and digital resources for off-grid navigation—may enhance the appeal of campgrounds to these emerging consumer groups.
- Some campgrounds do not currently allow car campers, but it's worth considering given the explosive growth in this form of camping.

By aligning campground offerings with the trends identified in this report, owners can better capture the interest of travelers who prefer the freedom of “van life” and car camping, fostering a supportive and adaptable environment that accommodates the evolving RV landscape.



FROM REPORT TO REALITY: TURNING INSIGHTS INTO ACTION

As the landscape of travel continues to evolve, campground owners are uniquely positioned to capture the emerging wave of van life and car camping enthusiasts. This report highlights the growing interest in these forms of travel, and here are several actionable strategies to convert these insights into business growth.

Embrace Accessibility and Flexibility

Firstly, recognize the significant rise in campervan and car camping interest as detailed in this report. This form of travel, driven by convenience and affordability, appeals to a broad demographic, including millennials and those seeking budget-friendly adventures. Consider redesigning parts of your campground to accommodate these travelers better. For instance, create dedicated areas with simple, van-friendly parking spaces and easy hook-up solutions for vehicles. Incorporating flexible cancellation policies and pay-as-you-use facilities can further attract these spontaneous travelers.

Enhance Amenities for Modern Travelers

In line with the traveler insights, focus on providing amenities that align with the values of van lifers and car campers—community, simplicity, and adventure. Develop communal areas that encourage social interaction, like picnic spots or communal fire pits, which can enhance the experience for single travelers or smaller groups.

Furthermore, Wi-Fi zones combined with digital resources for navigation or exploring nearby attractions can appeal to technologically savvy guests.



Offer a Blend of Rustic and Modern Accommodations

To capture this diverse traveler segment, balance your offerings between rustic, off-grid experiences and modern conveniences. Many travelers are drawn to the freedom of

off-grid living, so providing options like solar-powered campsites or minimalist facilities can meet this demand without significant investment. Simultaneously, ensure that more traditional facilities are also available for those seeking a bit more comfort.

Leverage Local Attractions and Experiences

Promote local attractions and experiences to enhance your campground's appeal. Van life and car camping enthusiasts often seek unique, culturally immersive experiences. Partner with local businesses or artisans to offer exclusive tours, workshops, or cultural events that can be bundled with camping fees. This not only enriches your guests' stay but also injects money into the local economy, creating a mutually beneficial relationship.

Commit to Sustainability and Community Engagement

Finally, position your campground as eco-friendly by adopting sustainable practices. This could include waste reduction initiatives, using environmentally friendly cleaning products, and collaborating with local environmental groups for events. Today's travelers are more conscientious about their environmental footprint, and displaying a commitment to these values can differentiate your campground and foster long-term loyalty.



By implementing these strategies, campground owners like you can not only capture the burgeoning demand from new traveler segments but also future-proof operations in a rapidly changing tourism landscape. Embrace these insights to transform your campground into a preferred destination for the new wave of travelers prioritizing budget, community, and convenience.



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