Insider Perks

THE INSIDER PERKS OUTDOOR HOSPITALITY PRICING INDEX

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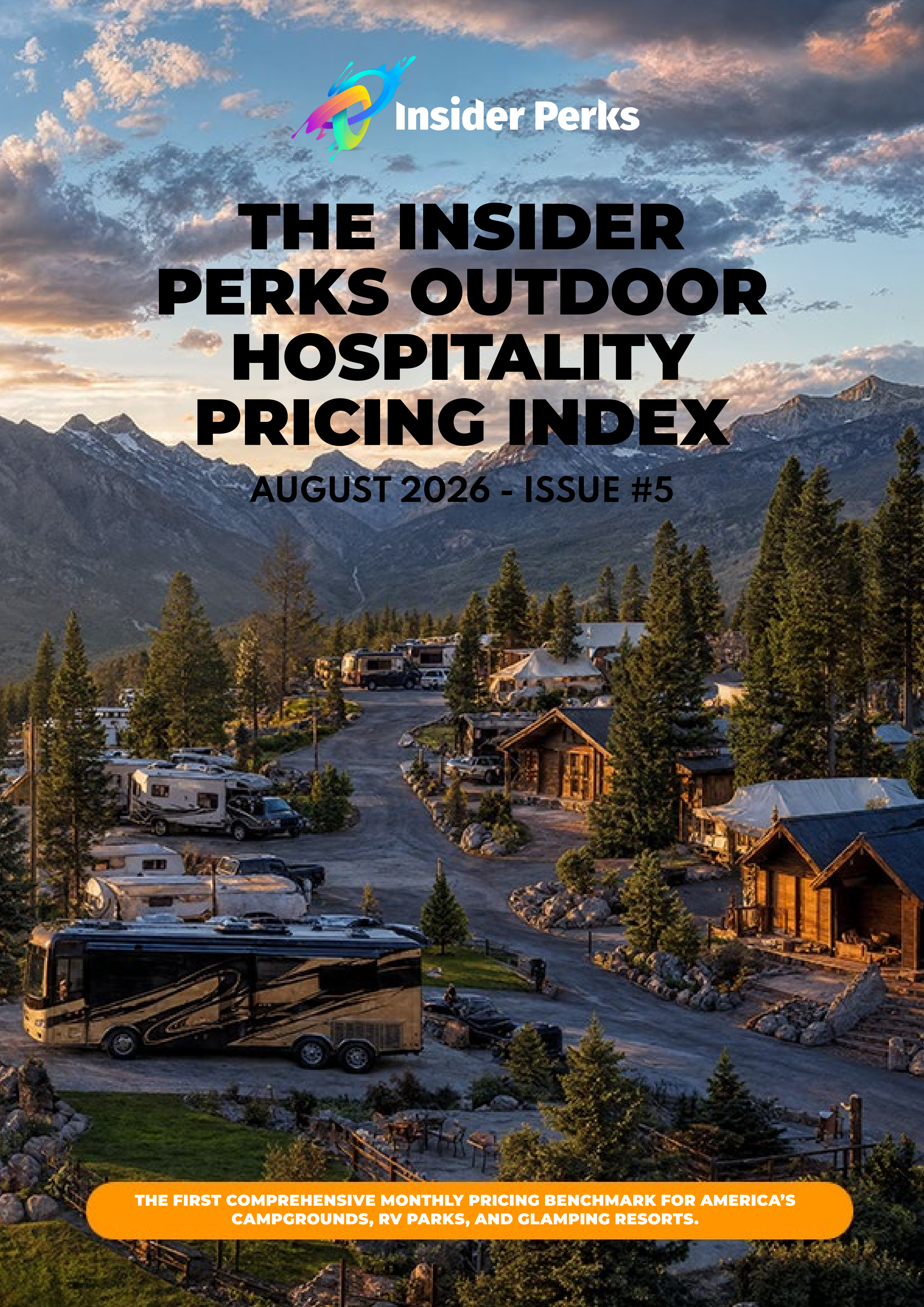

THE FIRST COMPREHENSIVE MONTHLY PRICING BENCHMARK FOR AMERICA'S CAMPGROUNDS, RV PARKS, AND GLAMPING RESORTS.

ABOUT THIS INDEX

The Outdoor Hospitality Pricing Index (OHPI) is a monthly measure of what it costs to stay at America's private campgrounds, RV parks, glamping resorts, independent outdoor hosts, and public campgrounds. It is produced by Insider Perks using proprietary pricing data collected from more than 23,000 properties across multiple booking platforms, reservation systems, federal recreation databases, glamping marketplaces, and peer-to-peer outdoor hosting platforms.

The OHPI baseline was established at 100.0 using April 2026 data. A reading of 102.5 means prices have risen 2.5% from baseline levels.

No equivalent benchmark exists in outdoor hospitality. Hotels have STR. Real estate has Case-Shiller. Campgrounds have the OHPI.

THE DASHBOARD

OHPI Composite:

102.5

(+2.5 FROM BASELINE)

Weighted Average:

$102.72/night

COMPOSITE BREAKDOWN

RV	LODGING	TENT
99.0 / $71.66	102.9 / $197.11	105.5 / $56.90
Change: -	Change: +0.4 %	Change: -0.5%

MARKET SEGMENTS

PUBLIC	GLAMPING	INDEPENDENT
99.9 / $34.09	99.3 / $302.30	93.5 / $78.70
Change: -0.1%	Change: +1.8 %	Change: +0.2 %

METRIC	VALUE	VS. JULY
Demand Pressure Index	53.4% estimated minimum occupancy	+1.2 pts
Premium Spread (P75–P25)	$68.00 (94.4% of median)	-1.4 pts
Weekend Multiplier	1.019 (1.9% premium)	-0.6
Private-to-Public Ratio	3.01x	-0.03
Tent-to-Glamping Ratio	0.188	-0.011

DATA COVERAGE

More than 8 million deduplicated pricing observations from private campgrounds and RV parks, federal campgrounds, standalone glamping properties, and independent outdoor hosting properties across the United States. Each observation represents the most recent price for a unique property, site type, and date combination.

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WHAT THE NUMBERS SAY: AUGUST 2026

The OHPI Composite held at 102.5 in August, down 0.2 points from July — essentially unchanged. The weighted average nightly rate settled at $102.72. After May's surge and a gentle easing through June and July, August is the month the market flattened out rather than continuing to fall.

The segments moved in different directions, and they largely cancelled. Campground lodging rose 0.4 points to 102.9, its strongest reading since the index launched, as cabin and cottage inventory held rates into late summer. RV was flat at 99.0. Tent camping gave back 0.5 points to 105.5 — the largest decline of the traditional segments, and the seasonal mirror of May, when tent sites led the market up as northern campgrounds opened.

Standalone glamping and independent hosting both rose — glamping to 99.3 and independent to 93.5, the first monthly gain for either since the index began. Both draw from guests booking experience-led stays that are less tied to the traditional summer camping calendar.

What makes August notable is not the pricing, which barely moved, but everything around it. The Demand Pressure Index reached 53.4%, another high. The booking window compressed to a 97-day median — down 15 days from July and 57 days from April. Campgrounds are fuller than at any point since the index began and guests are booking closer to arrival than ever, yet operators are neither pushing rates higher nor cutting them. The market absorbed peak-season pressure and held its price.

DEMAND PRESSURE

The Demand Pressure Index rose to 53.4% in August, up from 52.2% in July — its highest reading yet. Across 14.5 million site-nights of estimated capacity, 7.7 million are booked and 6.7 million remain available.

The booking window continued its steady compression. The median sold-out observation now occurs 97 days before check-in, down from 112 in July, 127 in June, and 154 in April — a 57-day compression across the season. Among sold-out site types, 80.9% were at zero availability at least 30 days out, and 68.5% were sold 60 or more days ahead.

Both of those percentages fell from July, which is the first meaningful softening in how far ahead inventory disappears. Occupancy is at its high and the booking window is at its tightest, but the very-far-ahead sell-outs that characterized spring have begun to ease — an early signal that the market is transitioning out of peak season.

WITHIN-PARK RV PRICING

Among parks offering multiple RV site types, the average price range within a single park narrowed to $48.13, down from $50.26 in July. The median within-park range is $28.00. Nearly 1,200 parks maintain a spread of $40 or more between their lowest and highest RV rate, down from more than 1,230 in July.

The differentiation continues to be driven by site attributes, not hookup type:

SITE ATTRIBUTE	AUGUST RATE	JULY RATE	CHANGE	PREMIUM OVER STANDARD
Premium / Deluxe designated	$83.06	$84.05	-$0.99	+24.5%
Waterfront	$81.11	$82.31	-$1.20	+21.6%
50-amp service	$72.85	$72.95	-$0.10	+9.2%
Pull-through	$72.02	$73.07	-$1.05	+8.0%
Standard (back-in, 30-amp)	$66.69	$67.50	-$0.81	—

Every attribute tier eased in August, but not evenly. 50-amp service overtook pull-through for the first time, holding almost perfectly flat at $72.85 while pull-through gave back $1.05. Premium-designated sites retained the top position and held their 24.5% advantage over standard — identical to July even as the whole table moved down, because premium and standard eased in near-lockstep.

The pattern that has held all season held again: the tiers parks actively name and market are the slowest to give ground. Waterfront, the one attribute a park cannot create through marketing, fell the most in dollar terms.

The RV split shows premium sites at $72.75 and standard at $70.04 — a spread of $2.71 (3.9%), narrowing from July's $2.95 (4.2%).

THE INDEPENDENT HOSTING MARKET

The OHPI tracks thousands of independent outdoor hosting properties across the United States. We report both the average and median nightly rate for independent hosts, because this segment sees higher month-to-month property turnover than professionally managed campgrounds — properties go on and off market frequently, which moves the average more than it reflects actual price change. The median is the more stable measure of what a typical independent stay costs.

The median independent rate held at $55 for the fourth consecutive month — this segment has not moved on the measure that matters since the index began. The average edged up to $78.70, lifting the index to 93.5. RV sites at independent hosts average $57.35, tent sites $63.46, and structures $175.38.

Independent hosting was one of three segments to gain in August. Notably, tent sites at independent hosts ($63.46) now price above tent sites at traditional campgrounds ($56.90) — a reversal from earlier in the season, and a sign that guests booking private land are holding their rates as the conventional camping market cools.

THE GLAMPING MARKET

The OHPI tracks thousands of standalone glamping properties across more than a dozen accommodation types, with pricing captured from actual booking platforms. We report both the average and median nightly rate for glamping, because the standalone glamping market sees significant month-to-month property turnover — high-value properties move in and out of the dataset, swinging the average more than underlying prices change. The median tracks the typical glamping stay.

The median glamping rate rose to $225, up from $221 in July and back to within $2 of the April baseline ($226.67). The average climbed to $302.30, lifting the index to 99.3 — glamping's first monthly gain and its strongest reading since May. Glamping accommodations at traditional campgrounds average $160.02.

Glamping's gain is one of the clearer signals in an otherwise flat month. It rose on both average and median — the two measures agreeing, which means this is genuine price movement rather than a shift in which properties were tracked.

AVERAGE AND MEDIAN NIGHTLY RATE BY GLAMPING TYPE:

Includes only accommodation types with 50 or more tracked properties, ensuring each figure reflects a meaningful sample rather than a handful of listings.

ACCOMMODATION	AUGUST AVG	JULY AVG	CHANGE	AUGUST MEDIAN
Dome	$327.91	$320.97	+$6.94	$295.29
Treehouse	$301.51	$299.19	+$2.32	$245.00
A-Frame	$264.34	$265.28	-$0.94	$195.00
Safari Tent	$235.95	$231.22	+$4.73	$167.00
Bell Tent	$221.24	$217.06	+$4.18	$150.00
Yurt	$215.21	$208.03	+$7.18	$180.00
Caravan	$206.77	$212.87	-$6.10	$159.00
Tiny House	$206.33	$196.52	+$9.81	$185.00
Airstream	$180.79	$181.94	-$1.15	$171.00

Six of nine categories rose. Tiny houses gained the most at $9.81, followed by yurts at $7.18 — and yurts moved ahead of caravans in the rankings. Domes remain the premium category at $327.91 average ($295 median). The gap between average and median persists across every type, confirming that a tail of high-end listings pulls the means upward: A-frames average $264 while the typical A-frame books at $195.

PREMIUM SPREAD

The spread between P25 and P75 narrowed to $68.00 — 94.4% of the national median, down from 95.8% in July. This is the first month stratification has compressed since the index began.

The mechanism reversed from July. Where budget pricing fell fastest last month and stretched the gap, in August the premium end gave back the most: P75 and P90 each fell more than $1.75 while P25 moved only 20 cents. The top of the market, which resisted the first month of the downturn, participated in the second.

PERCENTILE	AUGUST	JULY	CHANGE
P25	$52.00	$52.20	-$0.20
Median	$72.00	$72.62	-$0.62
P75	$120.00	$121.79	-$1.79
P90	$208.25	$210.10	-$1.85

WEEKEND VS. WEEKDAY

The weekend premium narrowed to 1.9%, with weekend rates averaging $103.92 versus weekday rates of $101.95 — down from 2.5% in July and the lowest reading the index has recorded. As the season winds down and weekend demand normalizes, the premium operators can charge for a Friday or Saturday night has compressed to under two percent.

HOLIDAY PREMIUMS

Labor Day is the last major summer holiday, and it is the only holiday on the calendar carrying a meaningful premium.

HOLIDAY	AUGUST RATE	AUGUST PREMIUM	JULY RATE	JULY PREMIUM
Labor Day Weekend	$108.98	+4.9%	$109.01	+3.8%
Spring Break (Late)	$104.61	+0.7%	$105.24	+0.2%
Christmas	$97.41	-6.3%	$97.54	-7.2%
Thanksgiving Weekend	$96.55	-7.1%	$95.90	-8.7%
Veterans Day	$94.47	-9.1%	$94.24	-10.3%

Labor Day's premium widened to 4.9% from 3.8%, even though its absolute rate barely moved. The premium grew because the ordinary weekend it is measured against fell — as regular weekends cooled, the holiday's relative advantage expanded.

The same effect lifted every holiday in the table: all five improved their premium versus July while their dollar rates stayed nearly flat. Christmas, Thanksgiving, and Veterans Day remain at steep discounts, but less steep than a month ago.

STATE RANKINGS

MOST EXPENSIVE

RANK	STATE	JULY AVG	AUGUST AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
1	Maryland	$182.37	$177.40	-2.7%	$125.12	$279.13	$93.36
2	New Hampshire	$152.32	$153.32	+0.7%	$91.24	$277.00	$78.43
3	New Jersey	$148.02	$138.15	-6.7%	$106.81	$240.99	$73.85
4	California	$136.47	$134.32	-1.6%	$89.99	$247.42	$109.20
5	Pennsylvania	$133.92	$133.73	-0.1%	$84.04	$218.56	$53.50
6	Florida	$122.45	$124.45	+1.6%	$90.65	$222.71	$47.77
7	Ohio	$120.17	$120.27	+0.1%	$81.68	$230.68	$53.36
8	Massachusetts	$115.03	$119.32	+3.7%	$89.54	$242.12	$54.35
9	Connecticut	$119.26	$115.99	-2.7%	$88.20	$203.01	$63.37
10	New York	$114.03	$114.01	flat	$74.75	$197.56	$55.70

The top 10 held the same ten states for a second straight month, but the order shifted. Massachusetts climbed from ninth to eighth on a 3.7% gain — the largest increase in the group — while Connecticut fell to ninth. New Hampshire was the only other state in the top five to rise, edging up 0.7% as New England's late summer held. Maryland lost nearly $5 but retained the top spot for a fifth consecutive month.

New Jersey's 6.7% drop was the steepest decline anywhere in the top 10 and the largest single-state move in the country this month.

LEAST EXPENSIVE:

RANK	STATE	JULY AVG	AUGUST AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
47	North Dakota	$40.59	$40.54	-0.1%	$40.62	$81.52	$18.34
46	Nevada	$61.78	$61.57	-0.3%	$66.19	$194.10	$47.83
45	Kansas	$63.48	$62.73	-1.2%	$45.17	$148.54	$25.65
44	New Mexico	$82.08	$77.45	-5.6%	$68.92	$161.20	$42.20
43	Wyoming	$80.31	$78.44	-2.3%	$63.04	$158.64	$35.57

New Mexico entered the bottom five on a 5.6% decline, displacing Arizona. The three cheapest states barely moved — North Dakota, Nevada, and Kansas were already at seasonal floors and had little room to fall.

The gap between the most and least expensive state narrowed to $136.86 — Maryland at $177.40 versus North Dakota at $40.54, a 4.4x difference, down from July's $141.78.

MARKET DIRECTION

HEATING MARKETS (PRICES RISING MONTH-OVER-MONTH):

STATE	JULY AVG	AUGUST AVG	CHANGE
Massachusetts	$115.03	$119.32	+3.7%
Alaska	$84.89	$87.40	+3.0%
Arkansas	$83.24	$85.18	+2.3%

COOLING MARKETS (PRICES FALLING MONTH-OVER-MONTH):

STATE	JULY AVG	AUGUST AVG	CHANGE
New Jersey	$148.02	$138.15	-6.7%
New Mexico	$82.08	$77.45	-5.6%
Iowa	$98.11	$92.81	-5.4%
Nebraska	$81.94	$78.70	-4.0%
Wisconsin	$110.74	$106.54	-3.8%

The cooling markets are declining faster than they were a month ago. In July the steepest drop was 4.5%; in August three states fell more than 5%. The heating list, meanwhile, has thinned to three states and their gains are modest.

Alaska's reappearance among the heating markets is the seasonal oddity worth noting: it cooled sharply in June and July as its brief summer supply expanded, and has now firmed again as that inventory clears. New England remains the last region with genuine upward momentum, consistent with a camping season that peaks latest in the Northeast.

THE YEAR AHEAD

The forward pricing curve as observed in August 2026:

MONTH	AUGUST OBSERVATION	JULY OBSERVATION	SHIFT
August 2026	$109.08	$106.96	+$2.12
September	$104.47	$104.54	-$0.07
October	$101.39	$101.27	+$0.12
November	$96.93	$96.87	+$0.06
December	$97.38	$97.22	+$0.16
January 2027	$104.11	$104.85	-$0.74
February	$104.66	$105.45	-$0.79
March	$107.25	$108.19	-$0.94

The curve splits three ways this month. August itself repriced sharply upward, gaining $2.12 from where it was observed in July — the largest near-month shift the index has recorded. This is the near-month effect: as a month arrives, the discounted inventory sells first and what remains prices higher.

The autumn months — September through December — were essentially unchanged, moving by pennies in either direction. Fall pricing has settled and is no longer being revised.

The winter months continued to weaken. January, February, and March 2027 each came in lower than their July observation, extending the reversal that began last month. The snowbird-season strengthening that characterized May and June is now two months into a decline, with March 2027 down $0.94 and falling faster than it did in July. What looked like a pause a month ago now reads as a turn.

AFFORDABILITY

SEGMENT	AUGUST RATE	JULY RATE	CHANGE	VS. TENT
Public campgrounds	$34.09	$34.12	-$0.03	0.60x
Tent camping (private)	$56.90	$58.92	-$2.02	1.00x
RV sites	$71.66	$72.56	-$0.90	1.26x
Independent hosts (median)	$55.00	$55.00	flat	0.97x
Campground lodging	$197.11	$197.70	-$0.59	3.46x
Standalone glamping (median)	$225.00	$221.00	+$4.00	3.95x

Tent camping fell further than any other segment, and because tent is the reference point, every ratio in the table widened. RV now costs 1.26x a tent site, lodging 3.46x, and glamping 3.95x — each a step up from July.

The independent hosting median, unchanged at $55, has moved from 0.93x to 0.97x a tent site without changing price at all. Private-land camping is closing on conventional tent camping purely because the conventional market is falling toward it.

METHODOLOGY

DATA SOURCES

Pricing data is collected from multiple booking platforms, property management systems, federal recreation databases, glamping marketplaces, and peer-to-peer outdoor hosting platforms. Each source is scraped for real-time availability and pricing across multiple date windows per month including weekends, weekdays, and holidays.

DEDUPLICATION

Each property, site type, and check-in date combination is deduplicated to the most recent price observation within each observation period.

COMPOSITE INDEX CALCULATION

The OHPI Composite is a category-weighted average of private campground pricing. Prices are averaged within each accommodation category (RV, lodging, tent), then weighted by each category's share of total inventory. The baseline (April 2026) is set to 100.0.

AVERAGE AND MEDIAN REPORTING:

For most segments, the index reflects the category-weighted average. For standalone glamping and independent hosting — segments with higher month-to-month property turnover — both the average and median nightly rate are reported. The median is more resistant to changes in dataset composition and better reflects the typical stay, while the average captures the full market including high-value properties that move in and out of coverage.

SUB-INDICES:

OHPI-RV, OHPI-Lodging, and OHPI-Tent track pricing within each accommodation category at traditional campgrounds. OHPI-Public tracks federal campgrounds. OHPI-Glamping tracks standalone glamping. OHPI-Independent tracks peer-to-peer hosting.

CATEGORY CLASSIFICATION:

Accommodation types are normalized to RV, lodging, tent, and other. Approximately 4.6% of observations are classified as "other" and excluded from category-specific sub-indices.

OUTLIER EXCLUSION:

Prices above $1,000/night are excluded from composite calculations. Glamping above $2,000/night and vacation-rental categories are excluded from the glamping index.

OCCUPANCY ESTIMATION:

The Demand Pressure Index uses a conservative baseline methodology — total capacity is estimated as the highest availability count ever observed per site type (capped at 600). This produces a floor estimate; actual occupancy would be higher.

LIMITATIONS:

The index reflects published booking platform prices and may not capture direct-booking discounts, membership rates, or unpublished adjustments. Coverage varies by region and is expanding continuously.

Full Methodology: Available at insiderperks.com/ohpi/methodology.

ABOUT INSIDER PERKS

Insider Perks is an outdoor hospitality intelligence company focused exclusively on campgrounds, RV resorts, and glamping destinations since 2009. The company combines AI guest service, market intelligence, automation, AI-ready websites, and growth marketing into one connected system. Insider Perks serves more than 500 properties across North America and operates Modern Campground, the industry's largest news publication, and produces MC Fireside Chats, outdoor hospitality's longest-running podcast.

The OHPI is published monthly by Insider Perks and is available at insiderperks.com/ohpi.

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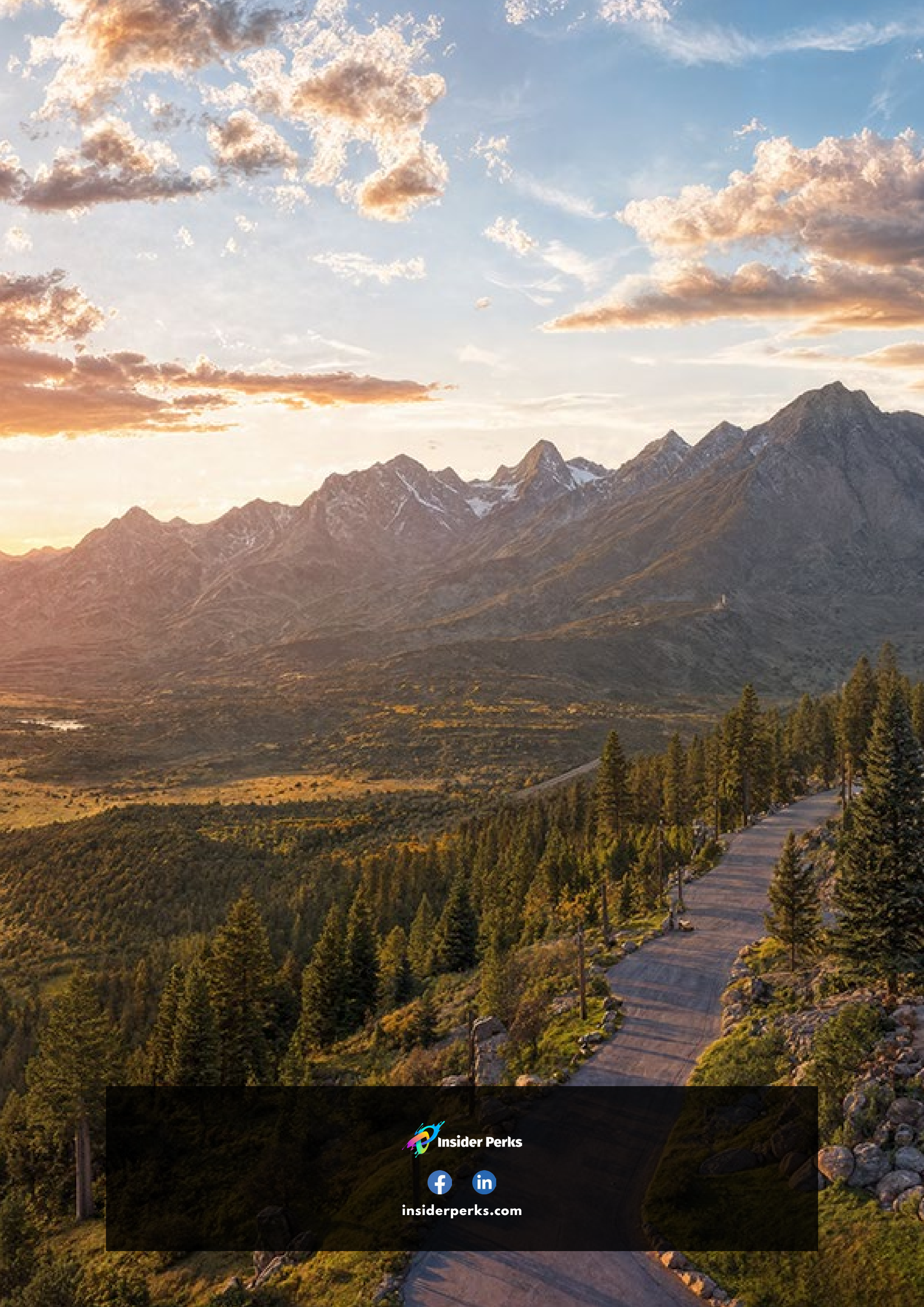
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