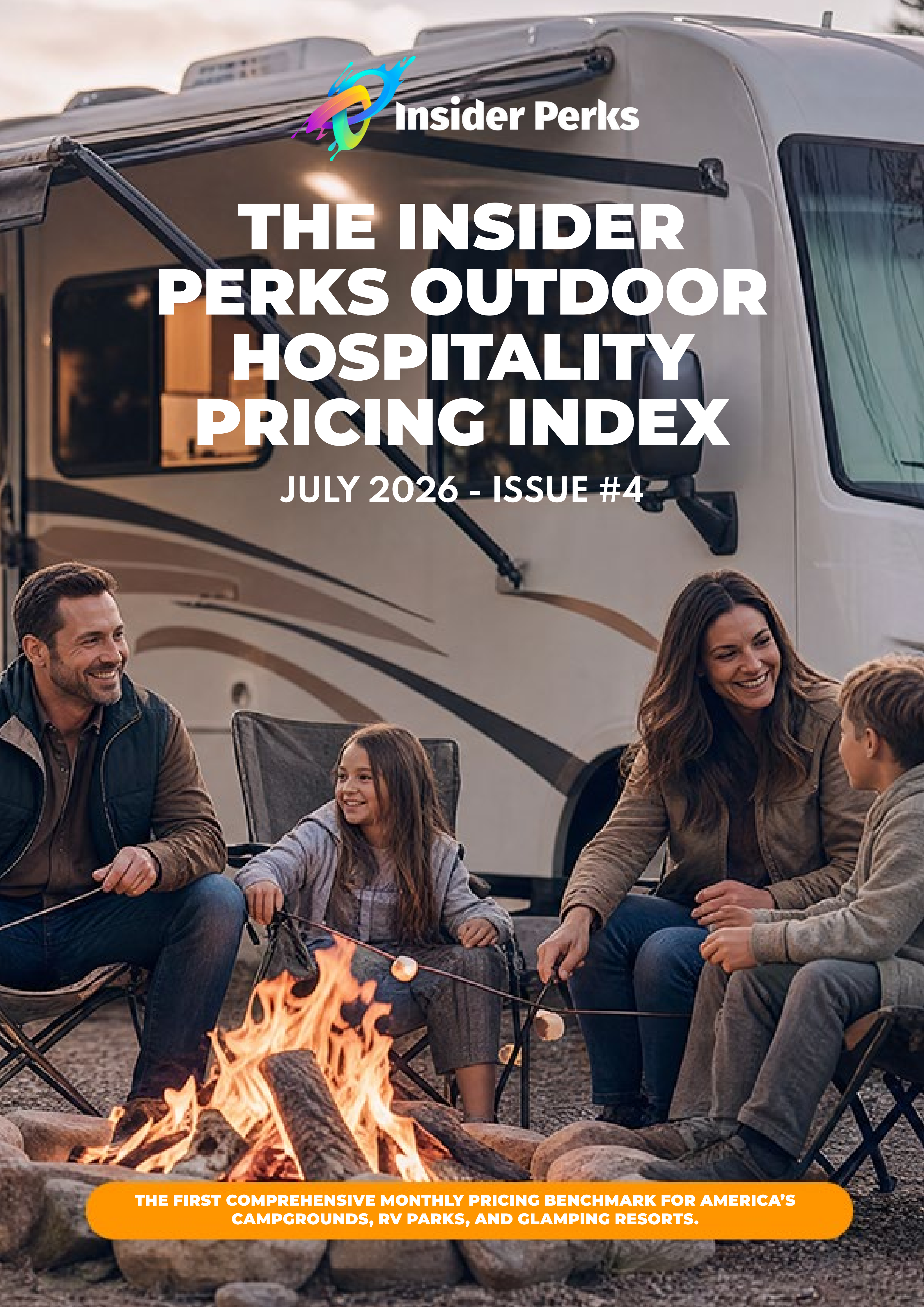
Insider Perks

# THE INSIDER PERKS OUTDOOR HOSPITALITY PRICING INDEX

JULY 2026 - ISSUE #4



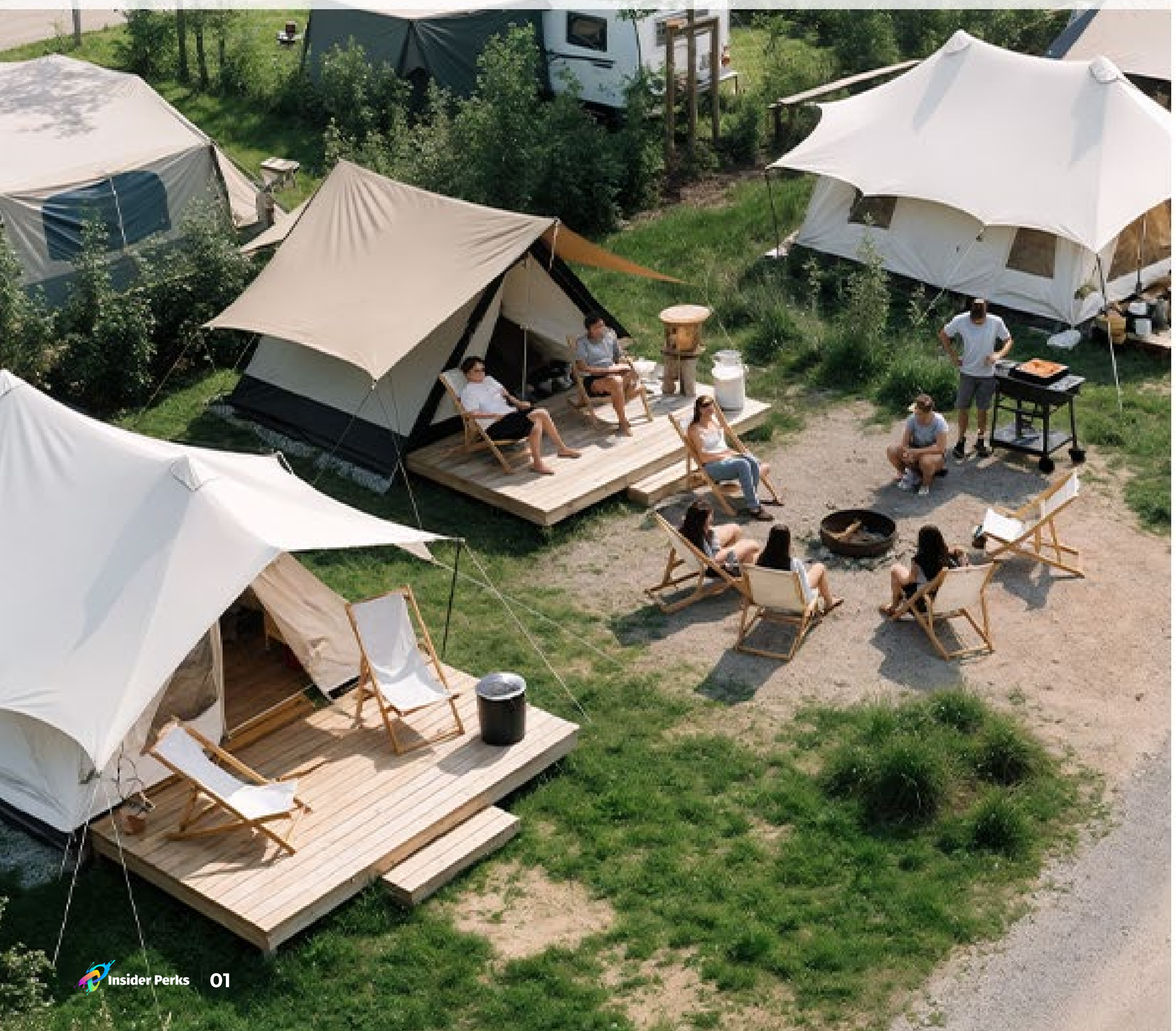
**THE FIRST COMPREHENSIVE MONTHLY PRICING BENCHMARK FOR AMERICA'S CAMPGROUNDS, RV PARKS, AND GLAMPING RESORTS.**

# 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 102.7 means prices have risen 2.7% 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:**

**102.7**

(+2.7 FROM BASELINE)

**Weighted Average:**

**$103.60/night**

## COMPOSITE BREAKDOWN

| RV | LODGING | TENT |
|---|---|---|
| 99.0 / $72.56 | 102.5 / $197.70 | 106.0 / $58.92 |
| Change: -0.9 % | Change: -0.5 % | Change: - |

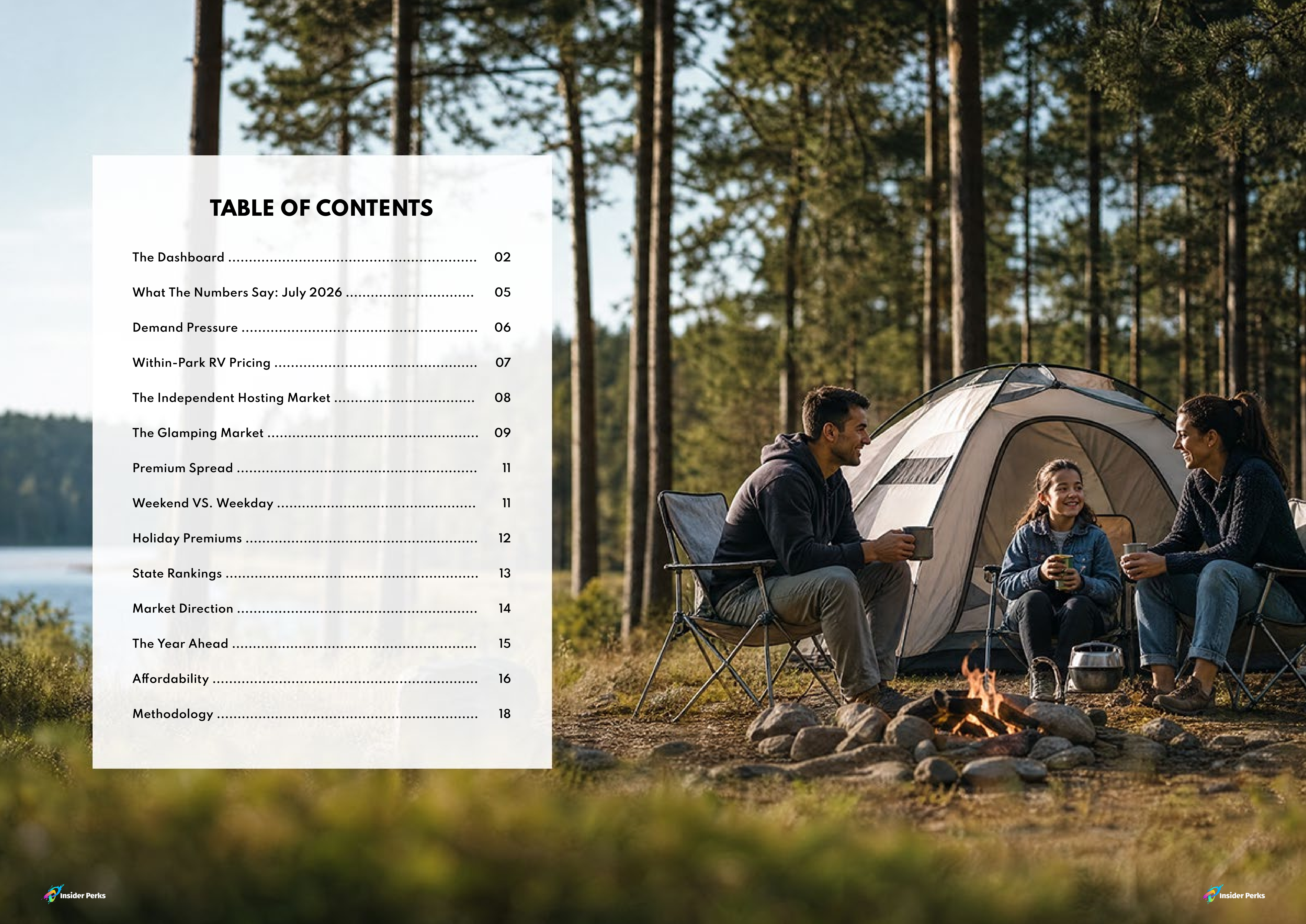
## MARKET SEGMENTS

| PUBLIC | GLAMPING | INDEPENDENT |
|---|---|---|
| 100.0 / $34.12 | 97.5 / $296.70 | 93.3 / $78.50 |
| Change: - | Change: -0.4 % | Change: -0.1 % |

| METRIC | VALUE | VS. JUNE |
|---|---|---|
| Demand Pressure Index | 52.2% estimated minimum occupancy | +1.8 pts |
| Premium Spread (P75–P25) | $69.59 (95.8% of median) | +1.0 pts |
| Weekend Multiplier | 1.025 (2.5% premium) | -0.1 |
| Private-to-Public Ratio | 3.04x | -0.01 |
| Tent-to-Glamping Ratio | 0.199 | +0.001 |

## 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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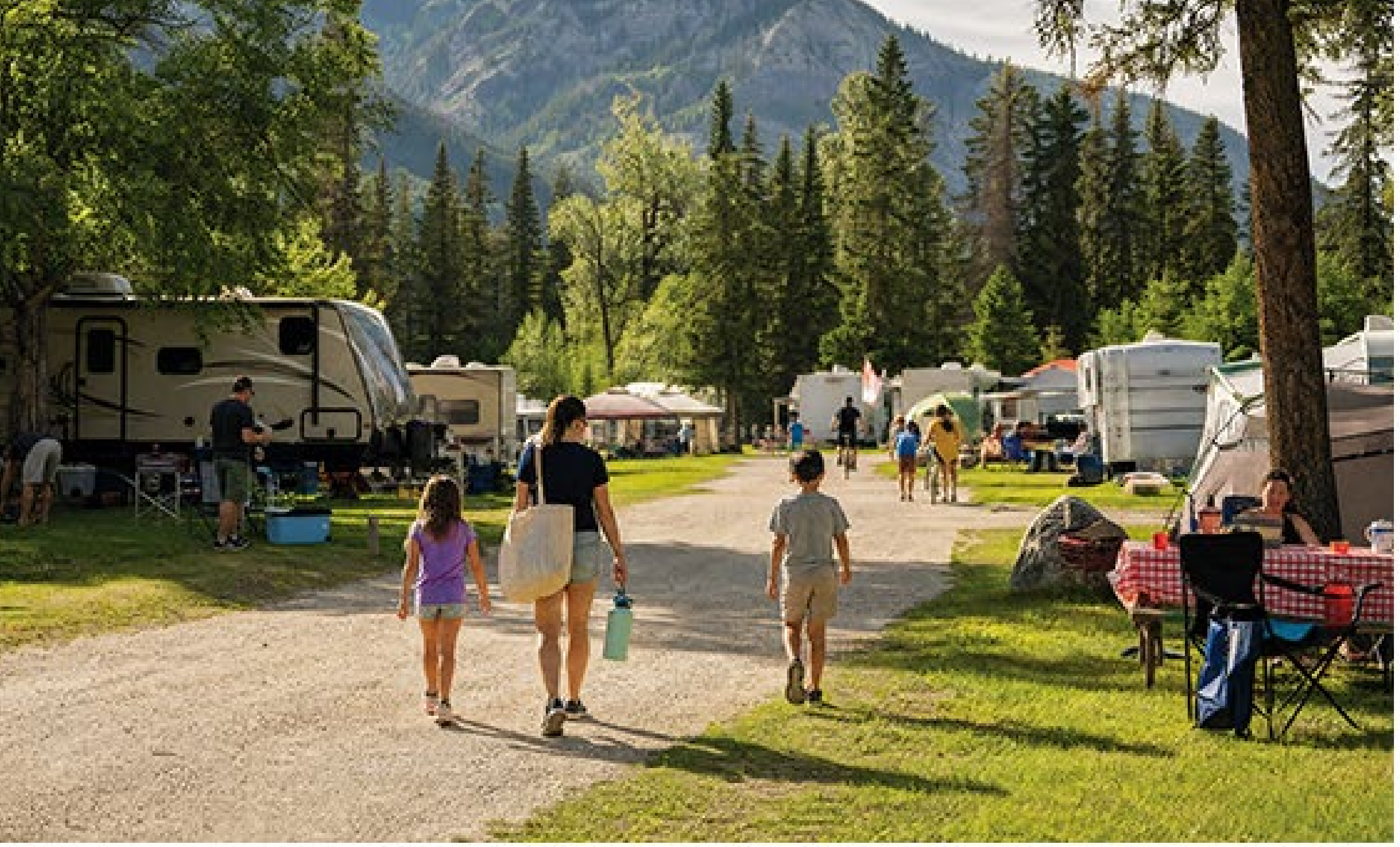


# WHAT THE NUMBERS SAY: JULY 2026

The OHPI Composite eased to 102.7 in July, down 0.4 points from June — the first month-over-month decline since the index began. The weighted average nightly rate settled at $103.60. After May's surge and June's plateau, July marks the moment summer pricing began to roll over.

The decline is gentle and broad. RV slipped to 99.0, lodging to 102.5, and glamping eased fractionally. Only tent and public campgrounds held flat. No segment fell sharply — this is the market stepping back from its peak, not retreating from it.

The more striking signal is that demand kept climbing even as prices eased. The Demand Pressure Index rose again to 52.2%, and the booking window compressed sharply to a 112-day median — down 15 days from June and 42 days from April. Campgrounds are more heavily booked than ever and filling faster, yet average rates ticked down. This is the hallmark of a market at its seasonal peak: inventory is scarce, but the highest-rate summer weekends have largely sold, leaving a mix that pulls the average gently downward.



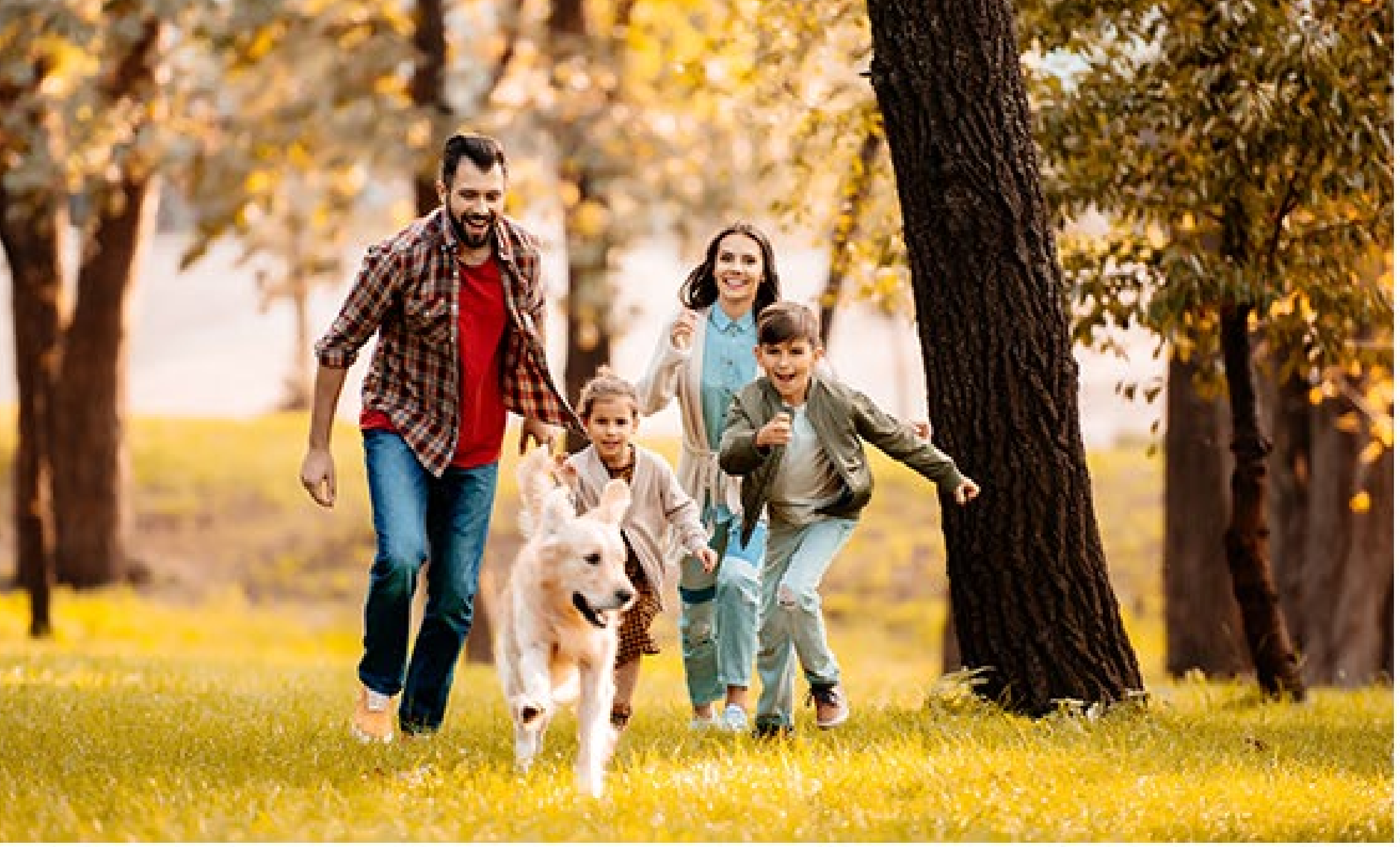
# DEMAND PRESSURE

The Demand Pressure Index rose to 52.2% in July, up from 50.4% in June — its highest reading yet. Across 16.3 million site-nights of estimated capacity, 8.5 million are booked and 7.8 million remain available.

The booking window compressed sharply. The median sold-out observation now occurs 112 days before check-in, down from 127 in June and 154 in April — a 42-day compression across the season.

Among sold-out site types, 86.3% were at zero availability at least 30 days out, and 70.5% were sold 60 or more days ahead.

The compressing booking window alongside easing rates is the signature of peak season fully arrived: the scarce remaining inventory books quickly, but the premium summer weekends that drove rates up have already sold through.



# WITHIN-PARK RV PRICING

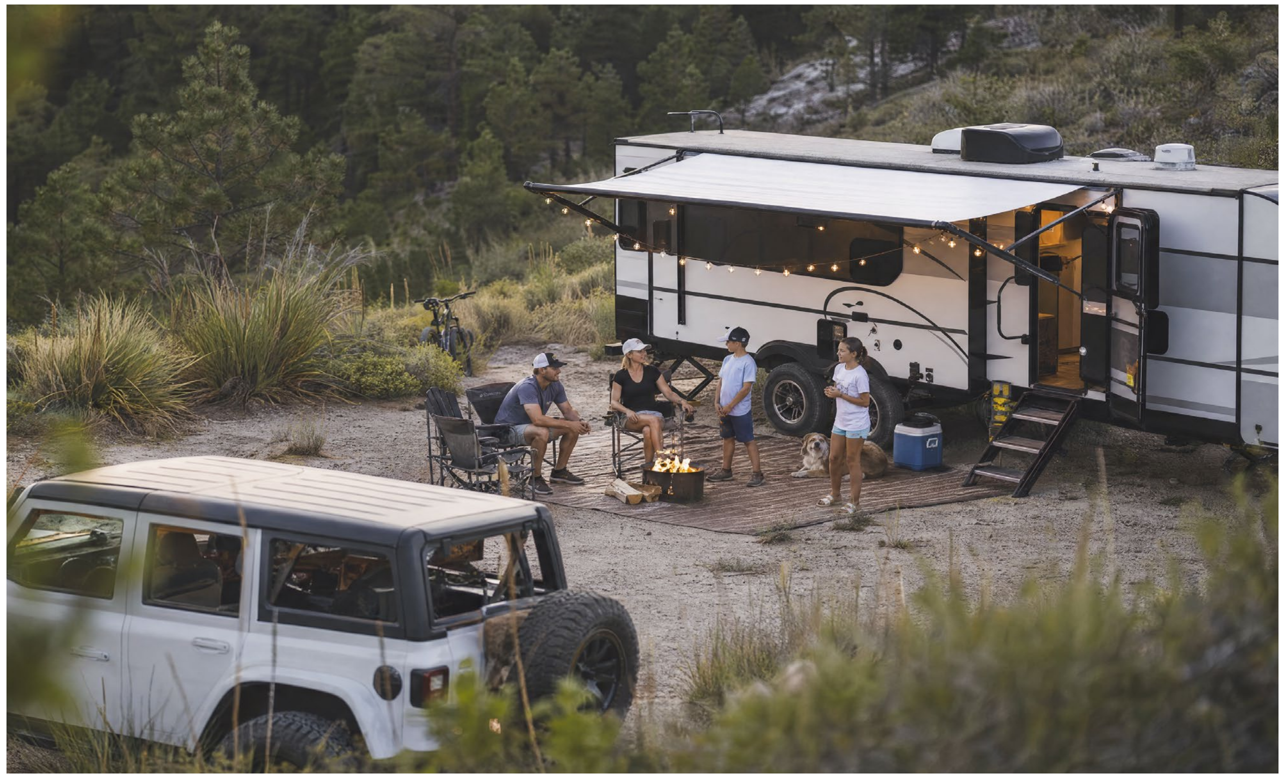
Among parks offering multiple RV site types, the average price range within a single park is $50.26 — holding near June's $50.70. The median within-park range is $28.67. More than 1,230 parks maintain a spread of $40 or more between their lowest and highest RV rate.

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

| SITE ATTRIBUTE | JULY RATE | JUNE RATE | CHANGE | PREMIUM OVER STANDARD |
|---|---|---|---|---|
| Premium / Deluxe Designated | $84.05 | $82.63 | +$1.42 | +24.5% |
| Waterfront | $82.31 | $83.96 | -$1.65 | +21.9% |
| Pull-through | $73.07 | $74.04 | -$0.97 | +8.3% |
| 50-amp Service | $72.95 | $71.93 | +$1.02 | +8.1% |
| Standard (back-in, 30-amp) | $67.50 | $68.25 | -$0.75 | — |

Premium-designated sites overtook waterfront for the top spot this month, at $84.05 vs. $82.31 — the first time branded premium inventory has led the table. While waterfront pricing softened with the broad market, parks that actively name and market premium sites held and extended their pricing. With standard sites easing to $67.50, the premium-designated advantage widened to 24.5% — the largest premium gap recorded. The lesson compounds each month: operators who segment and brand their inventory capture more, even as the overall market cools.

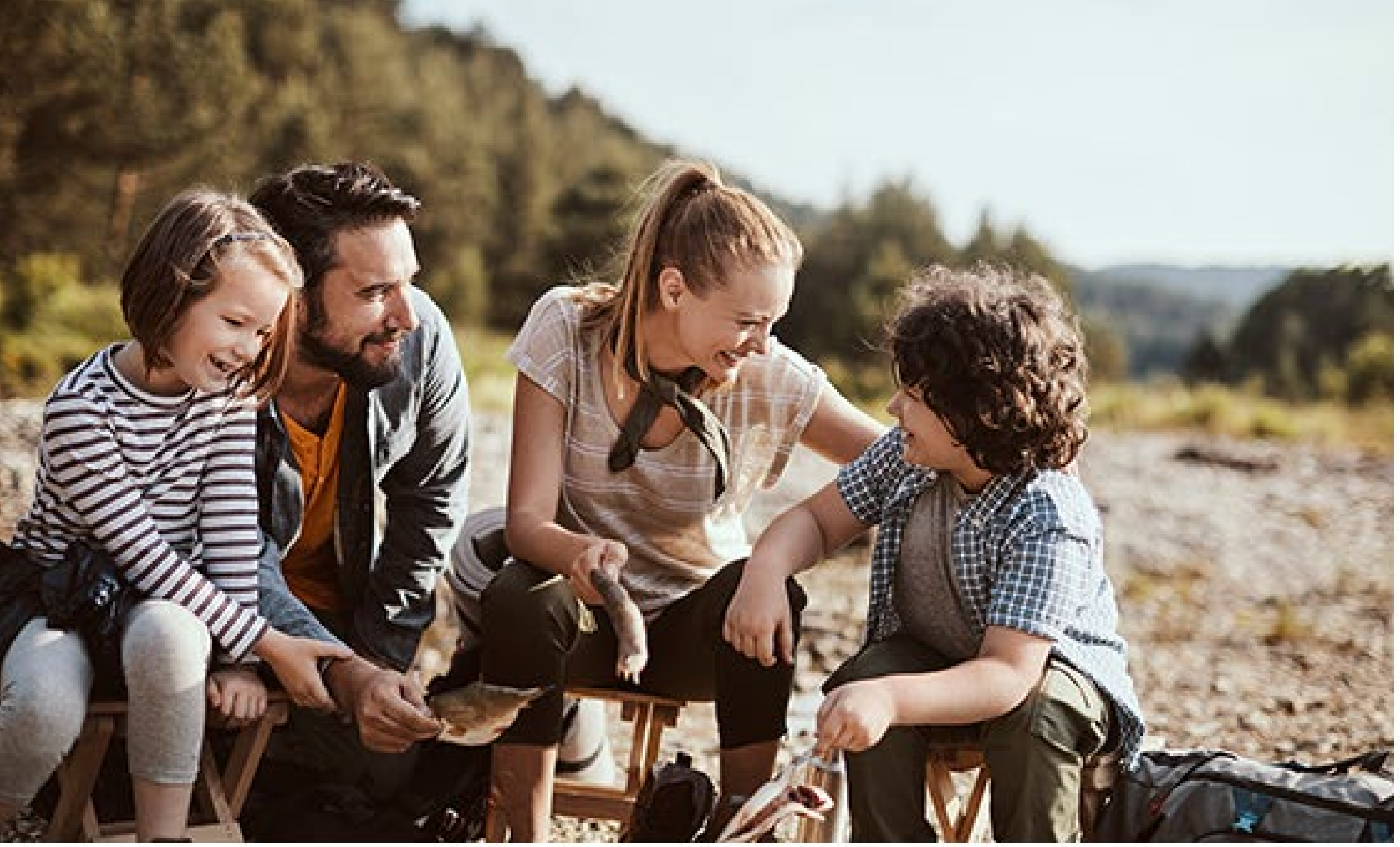
The RV split shows premium sites at $73.73 and standard at $70.78 — a spread of $2.95 (4.2%), widening from June's $2.47 (3.4%) as branded inventory holds firmer than standard.



# 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 third consecutive month — independent pricing remains flat and stable. The average ($78.50) is essentially unchanged from June. RV sites at independent hosts average $57.28, tent sites $62.74, and structures $175.58.



# 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.

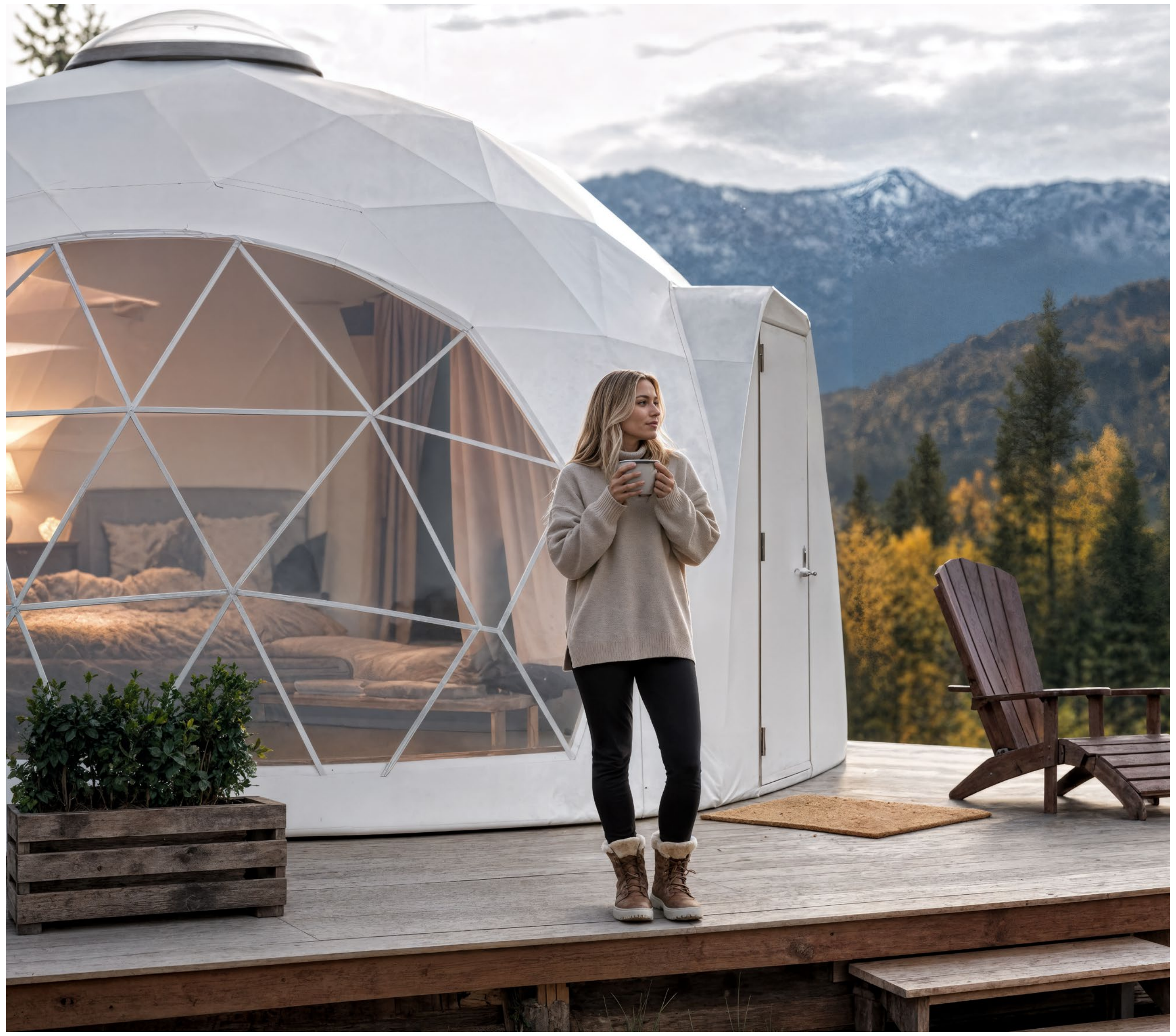
The median glamping rate was $221, essentially flat from June ($220) and the April baseline ($226.67) — glamping pricing is stable. The average ($296.70) eased slightly. Glamping accommodations at traditional campgrounds average $157.62.

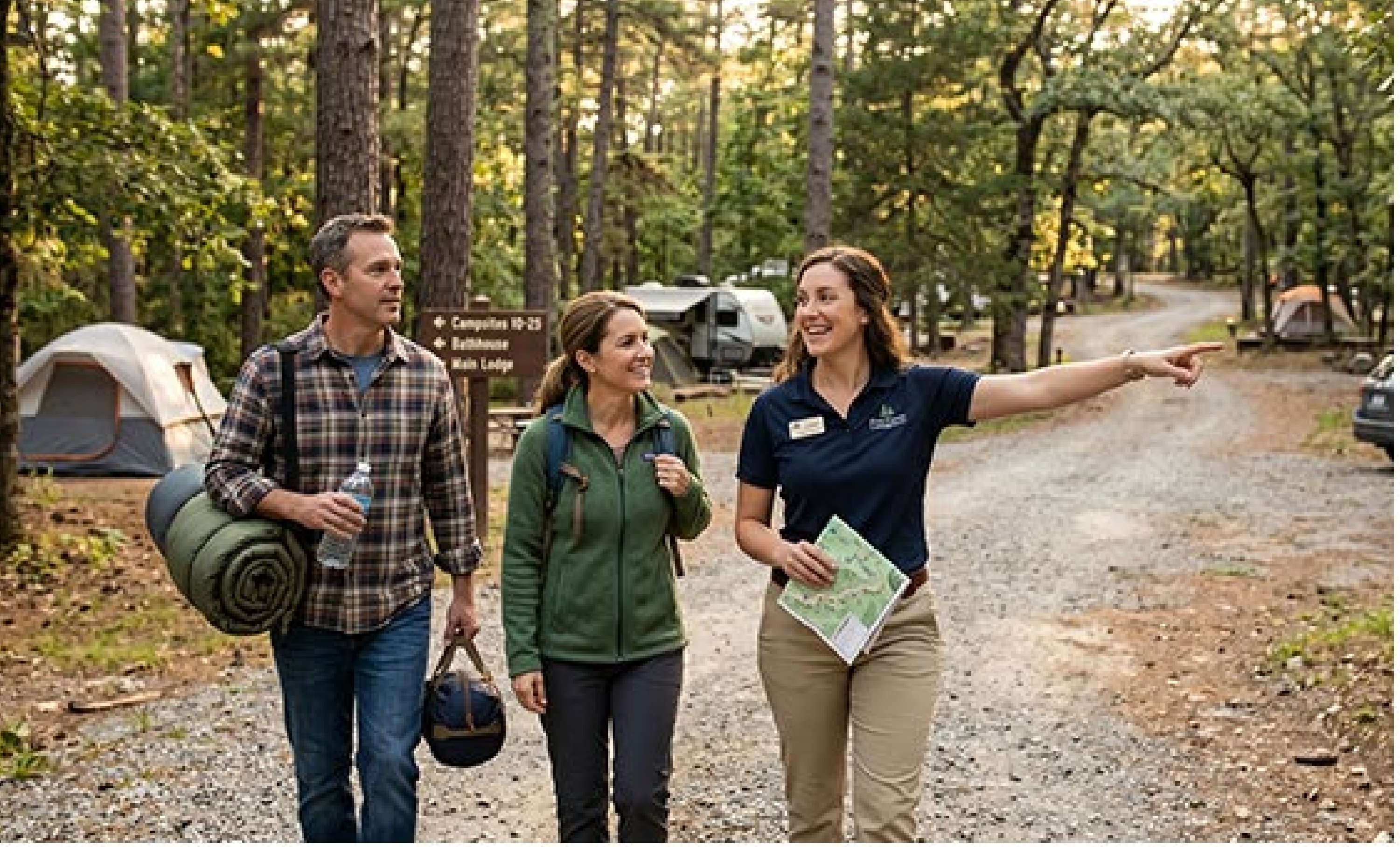
### AVERAGE AND MEDIAN NIGHTLY RATE BY GLAMPING TYPE:

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

| ACCOMMODATION | JULY AVG | JUNE AVG | CHANGE | JULY MEDIAN |
|---|---|---|---|---|
| Dome | $320.97 | $326.77 | -$5.80 | $288.48 |
| Treehouse | $299.19 | $311.93 | -$12.74 | $245.00 |
| A-Frame | $265.28 | $269.09 | -$3.81 | $180.00 |
| Safari Tent | $231.22 | $220.28 | +$10.94 | $165.00 |
| Bell Tent | $217.06 | $215.10 | +$1.96 | $150.00 |
| Caravan | $212.87 | $211.43 | +$1.44 | $163.00 |
| Yurt | $208.03 | $210.78 | -$2.75 | $175.00 |
| Tiny House | $196.52 | $199.05 | -$2.53 | $170.00 |
| Airstream | $181.94 | $192.33 | -$10.39 | $175.00 |

Domes remain the premium glamping category at $320.97 average ($288 median). The median column continues to tell the clearer story: across every category the typical rate runs well below the average — A-frames average $265 but the typical A-frame is $180, evidence of a luxury tail pulling the mean upward. Most categories eased modestly in July, consistent with the broad market, while safari tents rose as warm-weather demand held.





# PREMIUM SPREAD

The spread between P25 and P75 widened to $69.59 — 95.8% of the national median, up from 94.8% in June. As the broad market eased, budget pricing (P25) fell faster than premium pricing (P90 held nearly flat), stretching the gap. Stratification continues to widen even as overall rates decline: the premium end of the market is the most resilient to the seasonal downturn.

| PERCENTILE | JULY | JUNE | CHANGE |
|---|---|---|---|
| P25 | $52.20 | $52.75 | -$0.55 |
| Median | $72.62 | $73.00 | -$0.38 |
| P75 | $121.79 | $121.98 | -$0.19 |
| P90 | $210.10 | $210.16 | -$0.06 |

# WEEKEND VS. WEEKDAY

The weekend premium held at 2.5%, with weekend rates averaging $105.05 versus weekday rates of $102.51 — nearly flat from June's 2.6%. With occupancy at its seasonal high across all days, the weekend-weekday gap remains compressed.

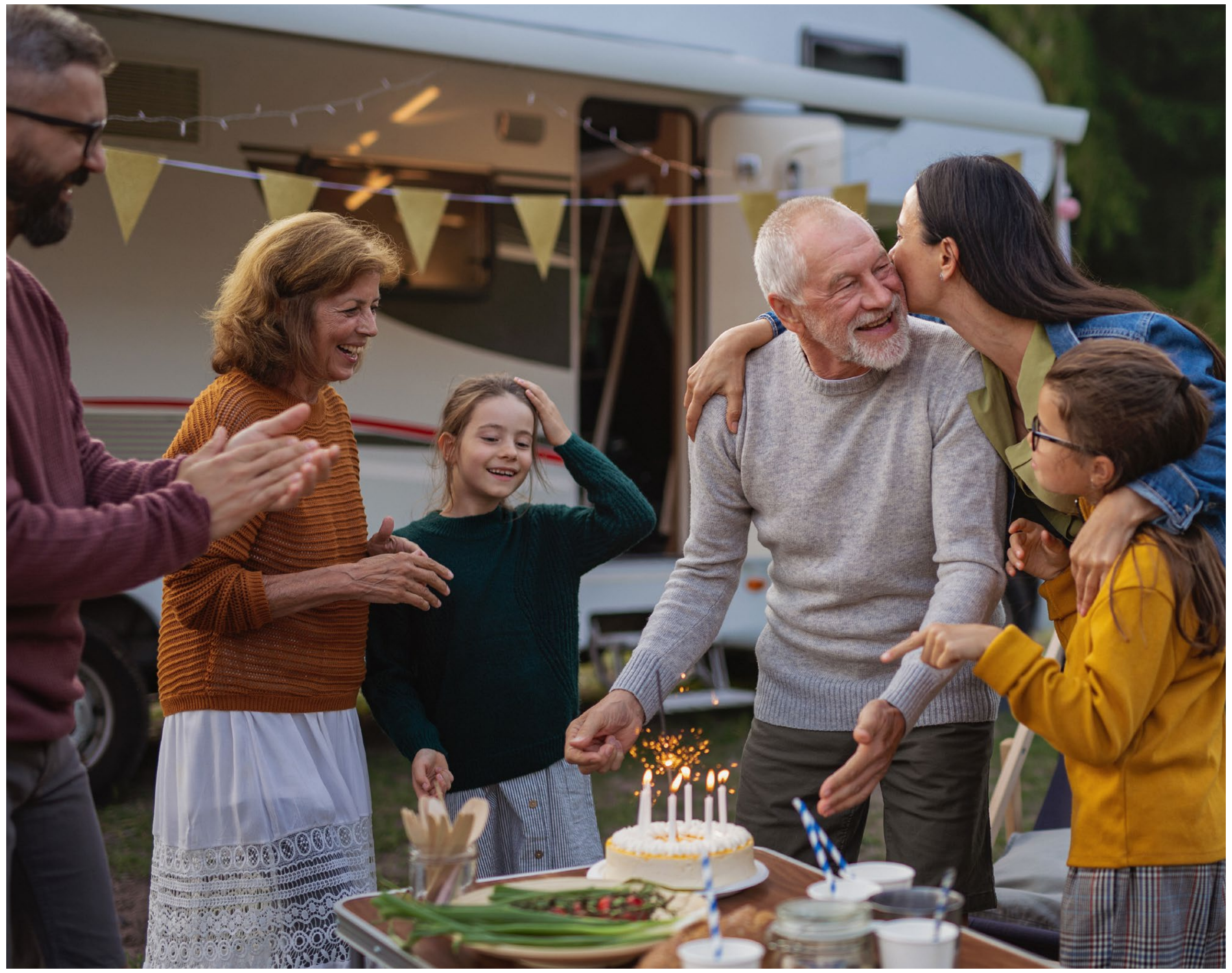


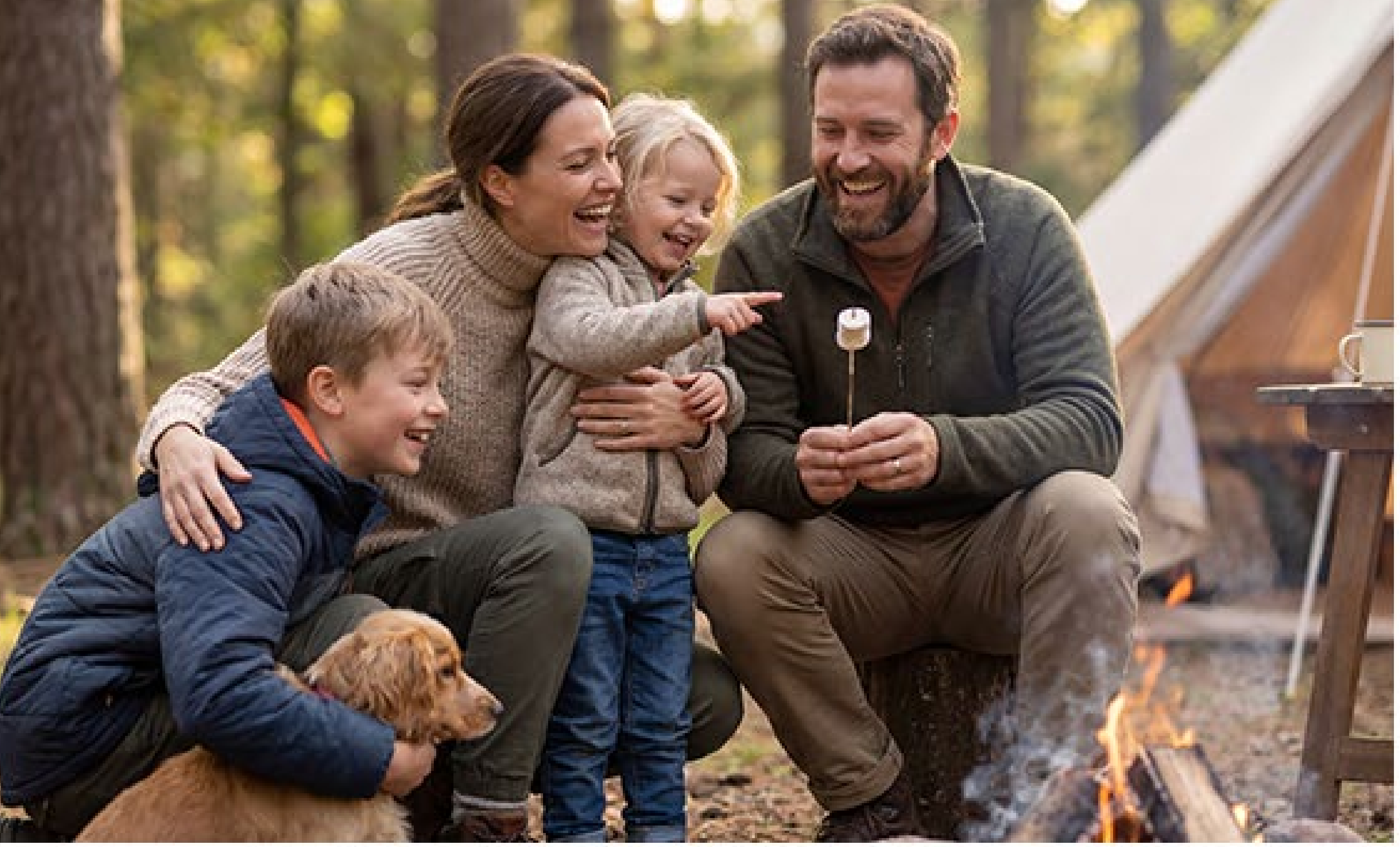
# HOLIDAY PREMIUMS

With Independence Day now past, Labor Day leads the holiday calendar as the last major summer weekend ahead.

| HOLIDAY | JULY RATE | JULY PREMIUM | JUNE RATE | JUNE PREMIUM |
|---|---|---|---|---|
| Labor Day Weekend | $109.01 | +3.8% | $110.19 | +4.5% |
| Spring Break (Late) | $105.24 | +0.2% | $106.14 | +0.6% |
| Christmas | $97.54 | -7.2% | $97.35 | -7.7% |
| Thanksgiving Weekend | $95.90 | -8.7% | $96.21 | -8.8% |
| Veterans Day | $94.24 | -10.3% | $94.43 | -10.5% |

Labor Day holds the top premium at 3.8%, easing slightly from June as the holiday approaches and the surrounding weekend baseline settles. The fall and winter holidays remain at consistent discounts, as they have all season.





# STATE RANKINGS

### MOST EXPENSIVE

| RANK | STATE | JUNE AVG | JULY AVG | CHANGE | RV AVG | LODGING AVG | TENT AVG |
|---|---|---|---|---|---|---|---|
| 1 | Maryland | $179.33 | $182.37 | +1.7% | $130.83 | $286.25 | $96.34 |
| 2 | New Hampshire | $149.53 | $152.32 | +1.9% | $91.46 | $273.71 | $77.42 |
| 3 | New Jersey | $144.65 | $148.02 | +2.3% | $114.82 | $260.86 | $75.25 |
| 4 | California | $135.72 | $136.47 | +0.6% | $91.33 | $251.49 | $116.09 |
| 5 | Pennsylvania | $133.29 | $133.92 | +0.5% | $84.57 | $221.13 | $55.38 |
| 6 | Florida | $122.73 | $122.45 | -0.2% | $89.73 | $219.13 | $47.82 |
| 7 | Ohio | $120.17 | $120.17 | flat | $81.52 | $233.77 | $54.89 |
| 8 | Connecticut | $116.67 | $119.26 | +2.2% | $89.84 | $211.24 | $68.04 |
| 9 | Massachusetts | — | $115.03 | entered top 10 | $85.89 | $242.54 | $52.80 |
| 10 | New York | $113.54 | $114.03 | +0.4% | $76.39 | $201.46 | $56.94 |

Maryland extended its lead for a fourth straight month at $182.37. The top of the table held remarkably steady — the same states, similar order — even as the national average declined, showing the premium markets are the last to cool. Massachusetts and New York both entered the top 10, displacing Louisiana and Virginia, which slipped to #11 and #12.



### LEAST EXPENSIVE:

| RANK | STATE | JUNE AVG | JULY AVG | CHANGE | RV AVG | LODGING AVG | TENT AVG |
|---|---|---|---|---|---|---|---|
| 47 | North Dakota | $40.82 | $40.59 | -0.6% | $40.69 | $81.98 | $18.27 |
| 46 | Nevada | $62.86 | $61.78 | -1.7% | $66.39 | $201.56 | $48.07 |
| 45 | Kansas | $63.95 | $63.48 | -0.7% | $46.12 | $148.95 | $27.63 |
| 44 | Arizona | $80.28 | $79.62 | -0.8% | $66.01 | $197.71 | $36.52 |
| 43 | Wyoming | $82.58 | $80.31 | -2.7% | $64.55 | $165.12 | $34.50 |

The gap between the most and least expensive state was $141.78 — Maryland at $182.37 versus North Dakota at $40.59, a 4.5x difference, the widest of the year.

# MARKET DIRECTION

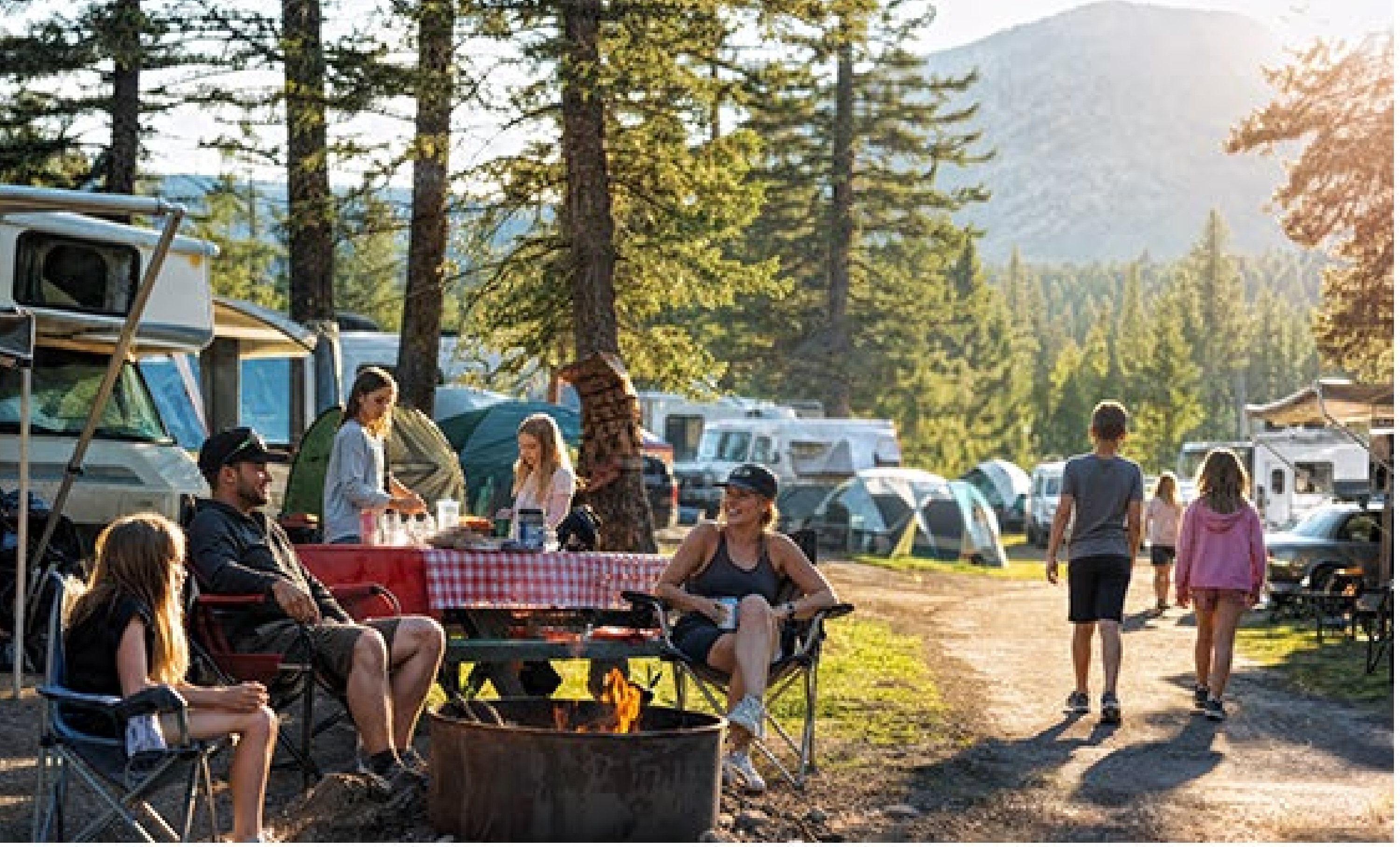
### HEATING MARKETS (PRICES RISING MONTH-OVER-MONTH):

| STATE | JUNE AVG | JULY AVG | CHANGE |
|---|---|---|---|
| Iowa | $93.81 | $98.11 | +4.6% |
| New Jersey | $144.65 | $148.02 | +2.3% |
| Connecticut | $116.67 | $119.26 | +2.2% |

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

| STATE | JUNE AVG | JULY AVG | CHANGE |
|---|---|---|---|
| Alaska | $88.92 | $84.89 | -4.5% |
| Tennessee | $99.13 | $94.65 | -4.5% |
| South Dakota | $88.25 | $85.19 | -3.5% |
| Oklahoma | $90.44 | $87.91 | -2.8% |
| Wyoming | $82.58 | $80.31 | -2.7% |

The balance tipped this month. Where June had only two cooling states, July has five, and just three states with heating momentum strong enough to note. This is the first clear sign of the seasonal turn: the broad summer firming has ended, and more markets are now declining than rising. The remaining heat is concentrated in the Northeast, where the short summer season peaks latest.



# THE YEAR AHEAD

The forward pricing curve as observed in July 2026:

| MONTH | JULY OBSERVATION | JUNE OBSERVATION | SHIFT |
|---|---|---|---|
| July 2026 | $110.34 | $109.75 | +$0.59 |
| August | $106.96 | $107.29 | -$0.33 |
| September | $104.54 | $104.93 | -$0.39 |
| October | $101.27 | $101.56 | -$0.29 |
| November | $96.87 | $97.00 | -$0.13 |
| December | $97.22 | $97.28 | -$0.06 |
| January 2027 | $104.85 | $105.47 | -$0.62 |
| February | $105.45 | $106.35 | -$0.90 |
| March | $108.19 | $108.11 | +$0.08 |



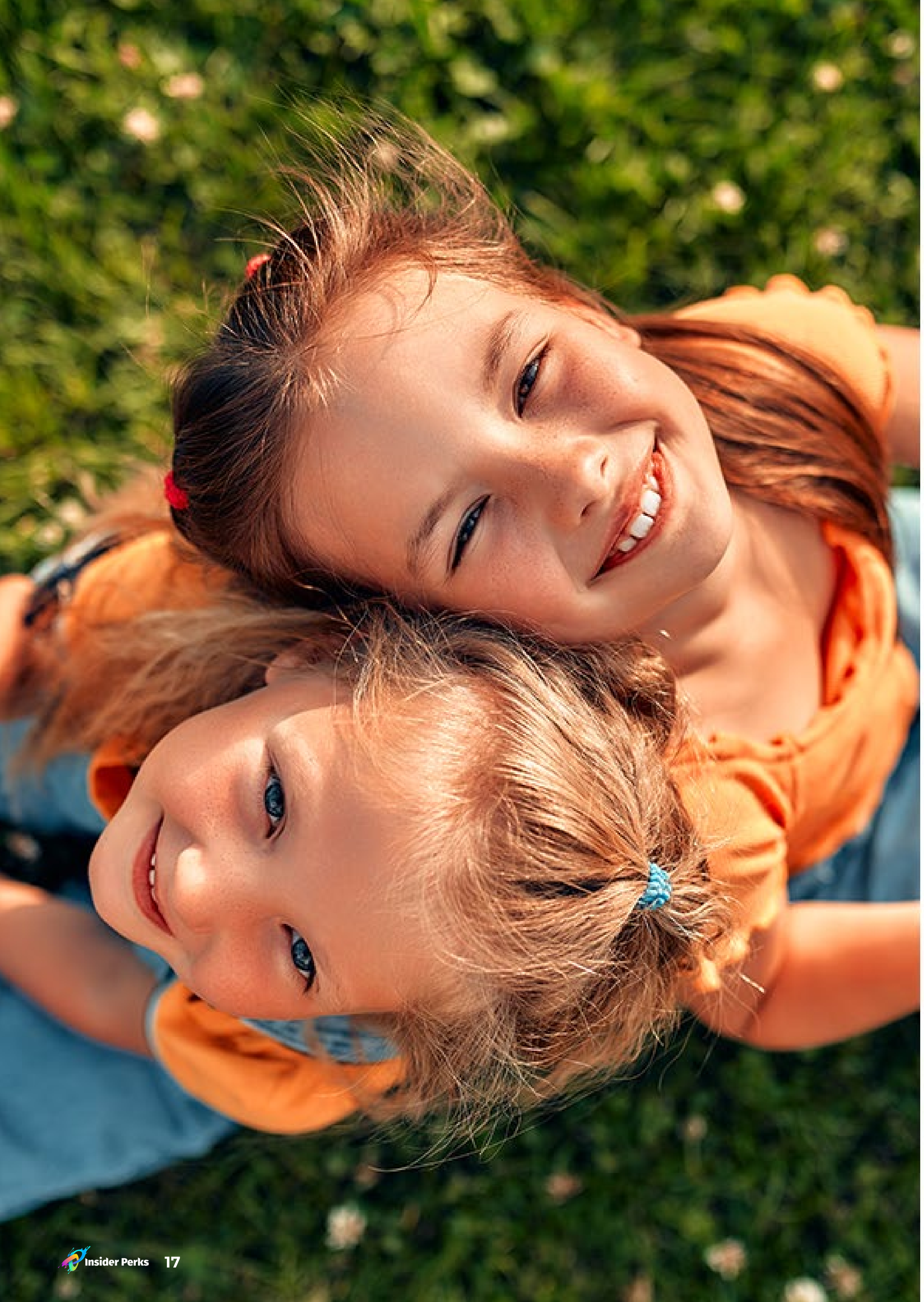
The forward curve now descends cleanly from July's peak — the shape of a market past its summit. July settled at $110.34, but every month from August onward steps down through November, confirming the rollover the June curve first signaled.

Notably, the winter-strengthening trend that ran through May and June reversed slightly this month: January and February 2027 came in $0.62-$0.90 below where they were observed in June. After months of building, snowbird-season pricing paused. Only March 2027 held its ground. This suggests the winter markets may have found their near-term ceiling as well, though the coming months will show whether this is a pause or a turn.

# AFFORDABILITY

| SEGMENT | JULY RATE | JUNE RATE | CHANGE | VS. TENT |
|---|---|---|---|---|
| Public campgrounds | $34.12 | $34.12 | flat | 0.58x |
| Tent camping (private) | $58.92 | $58.91 | +$0.01 | 1.00x |
| RV sites | $72.56 | $73.20 | -$0.64 | 1.23x |
| Independent hosts (median) | $55.00 | $55.00 | flat | 0.93x |
| Campground lodging | $197.70 | $198.66 | -$0.96 | 3.36x |
| Standalone glamping (median) | $221.00 | $220.00 | +$1.00 | 3.75x |

Pricing across segments was stable to slightly softer in July. RV and lodging eased modestly while tent and public held flat. Using median values for the high-turnover segments, both independent hosting and glamping were essentially unchanged — consistent with a market gently past its peak rather than one in decline.





# 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.

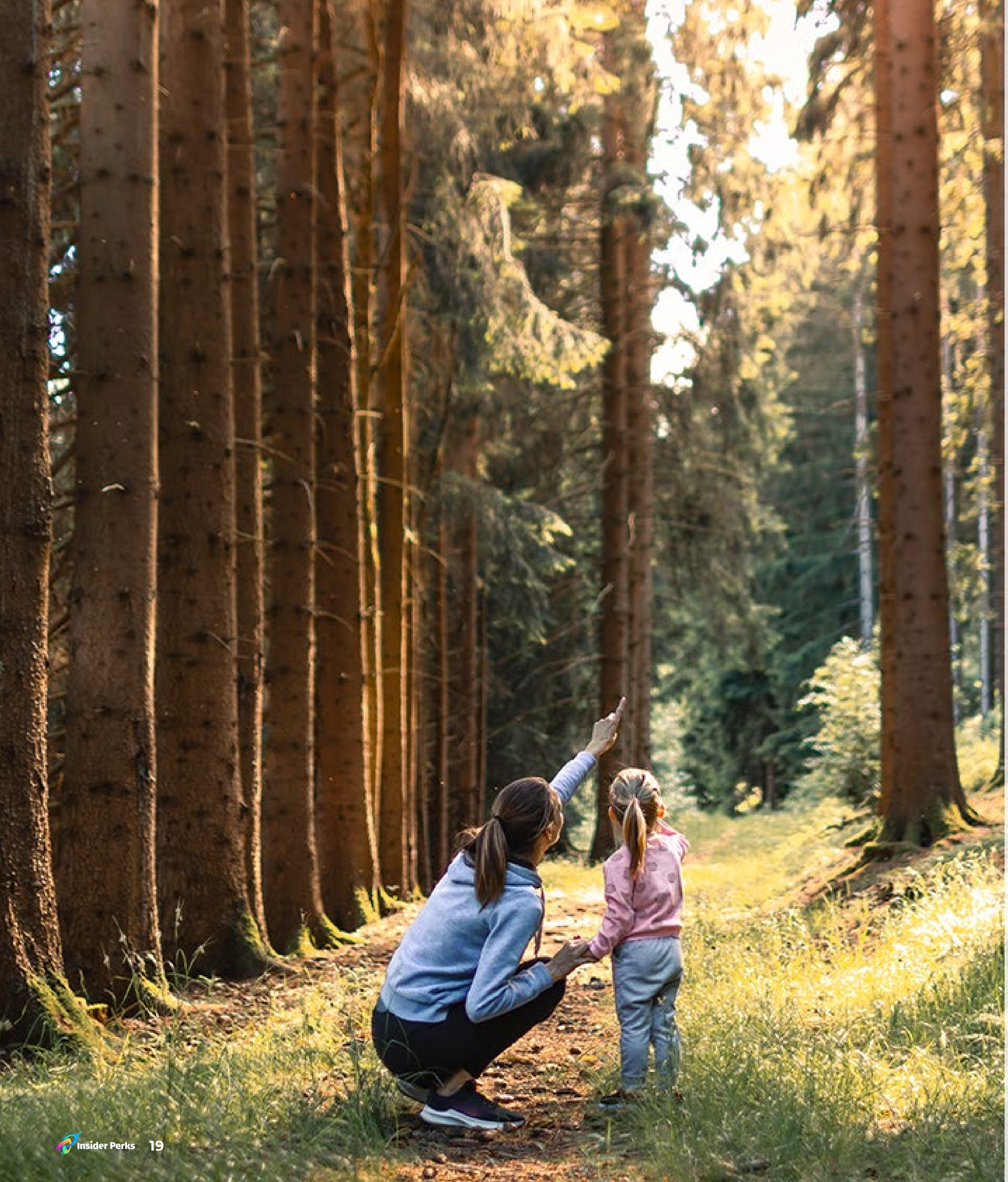
## OCCUPANCY ESTIMATION:

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.

## CONTACT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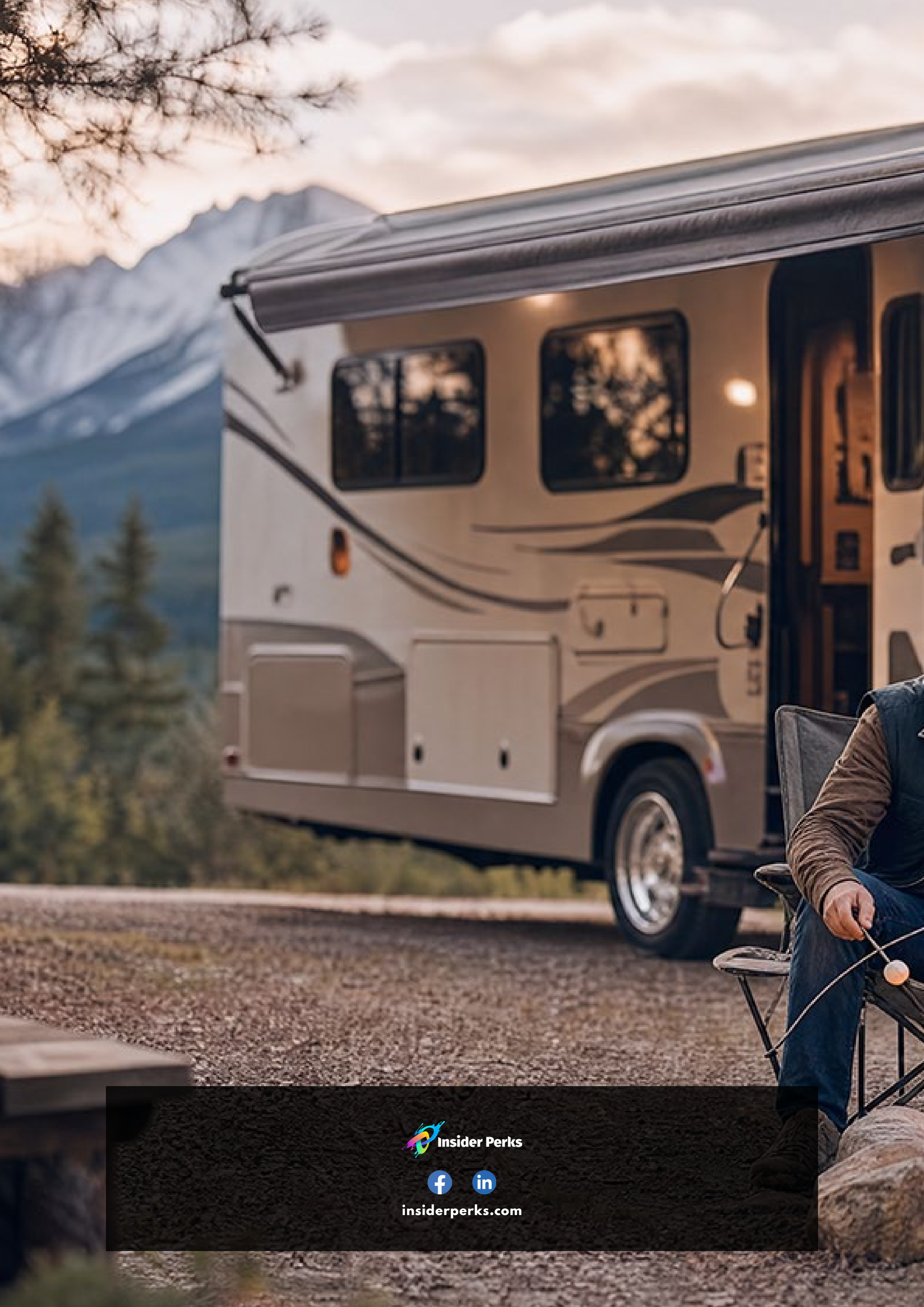

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