



# THE INSIDER PERKS OUTDOOR HOSPITALITY PRICING INDEX

MAY 2026 - ISSUE #2

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:

# \$103.58/night

## COMPOSITE BREAKDOWN



**RV**

99.3 / \$72.79

Change: -0.7 %



**LODGING**

102.1 / \$196.88

Change: +2.1 %



**TENT**

105.6 / \$58.72

Change: +5.6 %

## MARKET SEGMENTS



**PUBLIC**

100.1 / \$34.17

Change: +0.1 %



**GLAMPING**

100.2 / \$304.95

Change: +0.2 %



**INDEPENDENT**

94.0 / \$79.13

Change: -6.0 %

METRIC	VALUE	VS. APRIL
Demand Pressure Index	49.4% estimated minimum occupancy	+9.4 pts
Premium Spread (P75-P25)	\$69.00 (94.5% of median)	+6.8 pts
Weekend Multiplier	1.029 (2.9% premium)	-0.1
Private-to-Public Ratio	3.03x	+0.10
Tent-to-Glamping Ratio	0.193	+0.020

## DATA COVERAGE

More than 8.6 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 — ensuring every data point is counted once.

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## WHAT THE NUMBERS SAY: MAY 2026

The OHPI Composite rose 2.7 points to 102.7 as the outdoor hospitality market enters peak booking season. The weighted average nightly rate climbed to \$103.58, up from \$100.88 at baseline. This is the industry's first measured month-over-month increase since the index began.

The movement is not uniform across accommodation types. Tent sites led the increase at 105.6 (+5.6 from baseline) as campgrounds across the northern half of the country open for the season. Lodging rose to 102.1 as cabin and cottage inventory enters peak availability. RV —

the largest segment — actually dipped slightly to 99.3, suggesting RV site pricing has not yet responded to rising seasonal demand the way tent and lodging have.

The divergence between RV and tent pricing is the story of May. Tent camping jumped \$6 per night while RV sites barely moved. This is consistent with seasonal opening patterns — tent sites at parks that were closed for winter come online at higher summer rates, while year-round RV parks in southern states continue at their established pricing.

## DEMAND PRESSURE

The Demand Pressure Index surged from 40.0% in April to 49.4% in May — nearly half of all available site-nights across the dataset are now booked. Across 20.3 million site-nights of estimated capacity, 10.1 million are booked and 10.3 million remain available.

This 9.4-point jump in a single month signals the transition from shoulder season to peak season. At this rate, the DPI will likely exceed 55% by July — approaching the levels where individual parks begin reporting sell-outs across entire weekends.

Among sold-out site types, 87.2% were observed at zero availability at least 30 days before check-in, and 77.2% were at zero availability 60 or more days out. The median sold-out observation occurs 131 days before check-in — down from 154 days in April, indicating that the booking window is compressing as peak season approaches and remaining inventory fills.





## WITHIN-PARK RV PRICING

Among parks offering multiple RV site types, the average price range within a single park is \$50.70 — up slightly from \$50.06 in April. The median within-park range is \$28.80 (up from \$28.62). More than 1,250 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	MAY RATE	APRIL RATE	CHANGE
Waterfront	\$82.95	\$83.29	-\$0.34
Premium / Deluxe designated	\$82.88	\$81.81	+\$1.07
Pull-through	\$73.88	\$74.48	-\$0.60
50-amp service	\$71.69	\$70.13	+\$1.56
Standard (back-in, 30-amp)	\$67.70	\$68.95	-\$1.25

Standard RV sites dropped \$1.25, widening the gap between standard and premium inventory. The waterfront premium expanded from 20.8% to 22.5%. The 50-amp premium jumped from 1.7% to 5.9% — the largest attribute-level shift this month, suggesting parks with 50-amp service are

beginning to price for summer demand. Premium-designated sites nearly closed the gap with waterfront, narrowing the difference to just \$0.07.

## THE INDEPENDENT HOSTING MARKET

The OHPI tracks thousands of independent outdoor hosting properties across the United States, with coverage expanding significantly since the baseline issue.

Independent hosts average \$79.13 per night, with a median of \$55. RV sites at independent hosts

average \$57.56, tent sites \$63.29, and structures \$178.34. The OHPI-Independent index reading of 94.0 reflects significantly expanded property coverage this month rather than a decline in pricing — as the dataset grows to include more properties, the average shifts to reflect the broader market.





# THE GLAMPING MARKET

The OHPI tracks thousands of standalone glamping properties in the United States across 21 distinct accommodation types, with pricing captured from actual booking platforms rather than listing rates. The average glamping stay is \$304.95 per night, with a median of \$225. The gap

between mean and median reveals significant upward skew from luxury properties. Glamping accommodations at traditional campgrounds average \$158.59, maintaining the measurable gap between campground glamping and standalone properties.

## AVERAGE NIGHTLY RATE BY GLAMPING TYPE:

ACCOMMODATION	APRIL PRICE	MAY PRICE	CHANGE
Castle	\$554.31	\$547.09	-\$7.22
Nature Lodge	\$358.41	\$335.95	-\$22.46
Tower	\$324.98	\$334.50	+\$9.52
Boat	\$315.34	\$332.83	+\$17.49
Cave	\$345.28	\$325.38	-\$19.90
Dome	\$324.00	\$317.92	-\$6.08
Treehouse	\$310.28	\$298.54	-\$11.74
A-Frame	\$269.90	\$265.72	-\$4.18

ACCOMMODATION	APRIL PRICE	MAY PRICE	CHANGE
Safari Tent	\$225.95	\$257.95	+\$32.00
Bubble	\$100.00	\$245.33	+\$145.33

Castles command the highest per-night rate at \$547, competing directly with boutique hotels. The most notable movement this month is safari tents, which jumped 14.2% as summer demand reaches glamping markets. Boats rose 5.5% and towers gained 2.9%. Most categories saw slight price compression as coverage expanded significantly — dome properties nearly doubled from 173 to 281, and safari tent properties grew from 169 to 317. When coverage expands faster than demand, averages naturally moderate. The

categories with the fewest properties (castles, caves, towers) show the most price volatility month to month.

*Note: This issue transitions the glamping type table from listing prices to actual booking platform prices, which reflect what guests pay. Booking prices are consistently higher than listing prices due to cleaning fees, service fees, and seasonal adjustments captured at the time of booking.*





## PREMIUM SPREAD

The spread between P25 and P75 widened to \$69.00 — equal to 94.5% of the national median, up from \$64.00 (87.7%) in April. The top of the market is pulling away: P90 jumped \$8.75

while P25 barely moved. Market stratification is accelerating as peak season pricing takes hold at premium properties while budget campgrounds hold steady.

PERCENTILE	MAY	APRIL	CHANGE
P25	\$52.50	\$53.00	-\$0.50
Median	\$73.00	\$73.00	flat
P75	\$121.50	\$117.00	+\$4.50
P90	\$210.00	\$201.25	+\$8.75

## WEEKEND VS. WEEKDAY

The weekend premium stands at 2.9%, with weekend rates averaging \$105.16 versus weekday rates of \$102.17 — essentially flat from April's 3.0%.



## HOLIDAY PREMIUMS

HOLIDAY	MAY RATE	MAY PREMIUM	APRIL RATE	APRIL PREMIUM
Labor Day Weekend	\$110.34	+4.9%	\$106.70	+4.3%
Memorial Day Weekend	\$109.03	+3.7%	\$107.77	+5.4%
Spring Break (Late March)	\$106.23	+1.0%	\$102.14	-0.1%
Christmas	\$97.23	-7.5%	\$96.70	-5.5%
Thanksgiving Weekend	\$95.87	-8.8%	\$96.41	-5.7%
Veterans Day	\$94.13	-10.5%	\$88.01	-14.0%

Labor Day overtook Memorial Day as the highest-premium holiday in the May observation — \$110.34 vs \$109.03. Memorial Day's premium compressed from 5.4% to 3.7% as the holiday approached and remaining inventory shifted

from premium to available sites. Veterans Day's premium improved significantly from -14.0% to -10.5%, while Thanksgiving and Christmas moved in the opposite direction, deepening their negative premiums.

## STATE RANKINGS

### MOST EXPENSIVE

RANK	STATE	MAY AVG	APRIL AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
1	Maryland	\$175.07	\$143.63	+21.9%	\$127.71	\$274.27	\$91.71
2	New Jersey	\$142.17	\$135.01	+5.3%	\$107.48	\$231.02	\$76.80
3	California	\$136.44	\$130.52	+4.5%	\$92.15	\$247.62	\$115.44
4	New Hampshire	\$133.06	\$124.60	+6.8%	\$86.25	\$236.11	\$74.94
5	Pennsylvania	\$132.18	\$116.01	+13.9%	\$84.64	\$219.14	\$54.93
6	Florida	\$121.35	\$120.74	+0.5%	\$88.93	\$216.98	\$48.14
7	Ohio	\$116.86	\$110.67	entered top 10	\$81.82	\$223.44	\$55.86
8	Connecticut	\$116.71	\$117.15	-0.4%	\$85.82	\$214.24	\$70.48
9	Louisiana	\$115.57	\$111.92	+3.3%	\$71.45	\$210.00	\$33.39
10	Virginia	\$115.04	\$111.89	entered top 10	\$85.19	\$203.18	\$55.24

Ohio and Virginia entered the top 10, replacing Alaska (#8→#27) and New York (#9→#12).

### LEAST EXPENSIVE:

RANK	STATE	MAY AVG	APRIL AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
47	North Dakota	\$39.73	\$42.16	-5.8%	\$39.41	\$82.74	\$17.95
46	Kansas	\$59.00	\$69.91	-15.6%	\$46.70	\$136.45	\$27.42
45	Nevada	\$62.89	\$62.57	+0.5%	\$67.11	\$199.21	\$48.38
44	Nebraska	\$79.45	\$80.01	-0.7%	\$54.55	\$172.70	\$24.33
43	New Mexico	\$80.53	\$81.01	entered bottom 5	\$67.48	\$158.33	\$40.87

New Mexico replaced Arkansas in the bottom 5.

Alaska which dropped to #27 (\$91.57) as the seasonal pattern shifts.

Maryland extended its lead as the most expensive state, jumping from \$143.63 to \$175.07 — a 21.9% increase as the mid-Atlantic enters peak season.

The gap between the most expensive state and the least expanded to \$135.34, up from \$101.47 — a 4.4x difference, up from 3.4x.

Ohio entered the top 10 at #7 (\$116.86), replacing



The seasonal pattern is sharpening. Eastern and southeastern states are heating as summer approaches. Alaska's 21% drop reflects the end of early-season pricing as supply expands for the short Alaska summer. Kansas and the plains states are cooling from spring break peaks.

## MARKET DIRECTION

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

STATE	APRIL AVG	MAY AVG	CHANGE
Maryland	\$144.92	\$175.07	+20.8%
Pennsylvania	\$114.51	\$132.18	+15.4%
North Carolina	\$99.33	\$108.34	+9.1%
Indiana	\$94.42	\$100.97	+6.9%
South Carolina	\$105.78	\$112.06	+5.9%

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

STATE	APRIL AVG	MAY AVG	CHANGE
Alaska	\$116.07	\$91.57	-21.1%
Kansas	\$70.18	\$59.00	-15.9%
Michigan	\$94.61	\$89.38	-5.5%
North Dakota	\$42.02	\$39.73	-5.5%
Missouri	\$89.06	\$86.78	-2.6%





## THE YEAR AHEAD

The forward pricing curve as observed in May 2026:

MONTH	APRIL OBSERVATION	MAY OBSERVATION	CHANGE
May 2026	\$100.17	\$100.94	+\$0.77
June	\$102.36	\$104.86	+\$2.50
<b>July</b>	\$107.45	\$110.09	+\$2.64
August	\$104.64	\$107.47	+\$2.83
September	\$102.45	\$105.05	+\$2.60
October	\$99.33	\$101.73	+\$2.40
November	\$95.21	\$96.85	+\$1.64
December	\$94.69	\$97.04	+\$2.35
January 2027	\$100.76	\$105.35	+\$4.59
February	\$100.99	\$105.82	+\$4.83
March	\$103.21	\$107.07	+\$3.86

**Every forward month shifted upward since the April observation.** The market is repricing the entire year higher, not just summer. July remains the national peak at \$110.09 — up \$2.64 from where July was priced in April. The winter months (January-March) showed the largest shifts at \$3.86-\$4.83, suggesting that warm-weather and snowbird markets are strengthening their winter pricing.

This is the forward curve working as designed. The \$2.64 shift in July's pricing between the April and May observations is real demand pressure — isolated from seasonality because we're comparing the same future month across two different observation points.

## AFFORDABILITY

### MARKET SEGMENTS BY PRICE

SEGMENT	MAY RATE	APRIL RATE	CHANGE	VS. TENT
Public campgrounds	\$34.17	\$34.47	-\$0.30	0.58x
Tent camping (private)	\$58.72	\$52.72	+\$6.00	1.00x
RV sites	\$72.79	\$73.47	-\$0.68	1.24x
Independent hosts	\$79.13	\$84.17	-\$5.04	1.35x
Campground lodging	\$196.88	\$193.14	+\$3.74	3.35x
Standalone glamping	\$304.95	\$304.37	+\$0.58	5.19x

Tent camping rose faster than any other segment this month — up \$6 per night — compressing the tent-to-lodging ratio from 0.273 to 0.298 and the tent-to-glamping ratio from 0.173 to 0.193. The outdoor hospitality value floor is rising as

peak season opens. Meanwhile, independent hosts dropped \$5.04, reflecting expanded coverage pulling the average toward lower-priced properties rather than an actual decline in pricing at existing hosts.



# 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. All pricing reflects published rates on consumer-facing booking platforms.

## DEDUPLICATION

Each property, site type, and check-in date combination is deduplicated to the most recent price observation within each observation period, ensuring every data point is counted once. Properties appearing on multiple platforms are attributed to their primary booking system and removed from aggregator sources to prevent double-counting.

## 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. This prevents dataset composition changes from affecting the index. The baseline (April 2026) is set to 100.0.

## SUB-INDICES

OHPI-RV, OHPI-Lodging, and OHPI-Tent track pricing within each accommodation category at traditional campgrounds. OHPI-Public tracks federal campground pricing separately. OHPI-Glamping tracks standalone glamping properties. OHPI-Independent tracks peer-to-peer outdoor hosting. All sub-indices use date-specific booking platform pricing.

## 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 but remain in overall composite calculations where applicable.

## OUTLIER EXCLUSION

Prices above \$1,000/night are excluded from composite index calculations. Glamping properties above \$2,000/night and categories classified as vacation rentals (large houses, villas, private islands) are excluded from the glamping index.

## STATE RANKINGS

Only US properties are included. States require a minimum number of properties for inclusion in state-level rankings. State-level coverage is expanding monthly as additional properties are discovered and indexed.

## OCCUPANCY ESTIMATION

The Demand Pressure Index uses a conservative baseline methodology. For each park and site type, total capacity is estimated as the highest availability count ever observed (capped at 600). Current occupancy is derived by comparing current availability against this baseline. This approach produces a floor estimate — actual PMS-reported occupancy would be higher.

## LIMITATIONS

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

## FULL METHODOLOGY

The complete OHPI methodology document, including detailed descriptions of all proprietary metrics, index construction, and data processing procedures, is available at [insiderperks.com/ohpi/methodology](https://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](https://insiderperks.com/ohpi).

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