



Insider Perks

THE INSIDER PERKS OUTDOOR HOSPITALITY PRICING INDEX

SEPTEMBER 2026 - ISSUE # 6

**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 102.0 means prices have risen 2.0% from baseline levels.

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



THE DASHBOARD



METRIC	VALUE	VS. AUGUST
Demand Pressure Index	56.0% estimated minimum occupancy	+2.6 pts
Premium Spread (P75–P25)	\$67.95 (95.5% of median)	+1.1 pts
Weekend Multiplier	1.017 (1.7% premium)	-0.2
Private-to-Public Ratio	3.00x	-0.01
Tent-to-Glamping Ratio	0.197	+0.009

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: SEPTEMBER 2026

The OHPI Composite eased to 102.0 in September, down 0.5 points from August — the third consecutive monthly decline, with every index on the dashboard lower. The weighted average nightly rate settled at \$102.22.

In the traditional campground segments the decline was broad but shallow. Tent camping led, down 1.0 point to 104.5 as northern campgrounds moved into their shoulder season. RV eased 0.5 points to 98.5. Lodging barely moved, slipping 0.1 point to 102.8 and holding close to its high. Federal campgrounds dipped 0.2 point to 99.7.

Standalone glamping was the exception in scale. The glamping index fell 5.4 points to 93.9, its lowest reading since launch, and the median glamping stay dropped from \$225 to \$209.

Both measures fell together and every tracked glamping type declined — a genuine reset in glamping rates after August’s gain, not a change in which properties were tracked. Independent hosting slipped 0.8 point to 92.7 while its median held at \$55 for a fifth straight month.

Demand kept building even as prices eased. The Demand Pressure Index rose to 56.0%, another high, and the booking window compressed to an 87-day median. Campgrounds are fuller and guests are booking closer to arrival than at any point since April — and for the third month running, operators are answering with small reductions rather than increases.

DEMAND PRESSURE

The Demand Pressure Index rose to 56.0% in September, up from 53.4% in August — its highest reading yet. Across 12.2 million site-nights of estimated capacity, 6.8 million are booked and 5.4 million remain available.

The booking window compressed again. The median sold-out observation now occurs 87 days before check-in, down from 97 in August and 154 in April — a 67-day compression since the index began. Among sold-out site types, 82.8% were

at zero availability at least 30 days out, up from 80.9% in August, while the share sold 60 or more days ahead fell again, to 64.7% from 68.5%.

That combination — more inventory selling out a month ahead, less of it selling out two months ahead — is the booking window closing in from the far end. Guests are still filling campgrounds. They are committing later to do it.





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 fifth consecutive month — the most stable figure in the index. The average eased to \$78.04, taking the index to 92.7. RV sites at independent hosts average \$56.79, tent sites \$63.13, and structures \$172.24.

Tent sites at independent hosts continue to price above tent sites at traditional campgrounds (\$56.36), and the gap is now \$6.77.



WITHIN-PARK RV PRICING

Among parks offering multiple RV site types, the average price range within a single park eased to \$47.76, from \$48.13 in August. The median within-park range is \$28.68. A total of 1,165 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	SEPTEMBER RATE	AUGUST RATE	CHANGE	PREMIUM OVER STANDARD
Premium / Deluxe designated	\$82.99	\$83.06	-\$0.07	+24.8%
Waterfront	\$80.61	\$81.11	-\$0.50	+21.2%
50-amp service	\$71.76	\$72.85	-\$1.09	+7.9%
Pull-through	\$71.41	\$72.02	-\$0.61	+7.4%
Standard (back-in, 30-amp)	\$66.52	\$66.69	-\$0.17	—

Every attribute tier eased for a second month, but the premium tiers held best. Premium-designated sites were essentially flat, down seven cents, and their advantage over standard sites widened to 24.8%. 50-amp service gave back the most at

\$1.09 but stays ahead of pull-through.

The pattern of the last three months holds: the attributes parks name and market are the last to give ground.



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 fell to \$209, down from \$225 in August — the lowest median the index has recorded. The average fell to \$285.97, taking the index to 93.9, also its lowest reading since launch. Glamping accommodations at traditional campgrounds average \$159.45, essentially unchanged from August.

In August glamping rose against a falling market. In September it fell harder than any other segment, and the move was one-directional: both measures dropped, and all eight qualifying accommodation types declined. That agreement is what separates a real price movement from a change in which properties were tracked. The standalone glamping market, which held its summer rates longest, is now repricing for autumn — and faster than anyone else.

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	SEPTEMBER AVG	AUGUST AVG	CHANGE	SEPTEMBER MEDIAN
Dome	\$311.97	\$327.91	-\$15.94	\$290.05
Treehouse	\$278.89	\$301.51	-\$22.62	\$225.00
A-Frame	\$262.28	\$264.34	-\$2.06	\$179.00
Safari Tent	\$231.08	\$235.95	-\$4.87	\$165.00
Bell Tent	\$217.41	\$221.24	-\$3.83	\$135.00
Caravan	\$205.57	\$206.77	-\$1.20	\$151.00
Yurt	\$193.40	\$215.21	-\$21.81	\$173.48
Tiny House	\$188.54	\$206.33	-\$17.79	\$161.34

All eight categories fell. Treehouses dropped the most at \$22.62, followed by yurts at \$21.81 and tiny houses at \$17.79. Domes fell \$15.94, while A-frames, caravans, bell tents and safari tents moved by less than \$5. Caravans, which

barely moved, returned to a position above yurts. Domes remain the premium category at \$311.97 average (\$290 median). Airstreams fell below the 50-property threshold this month and are not reported.





PREMIUM SPREAD

The spread between P25 and P75 held at \$67.95 in dollar terms, five cents narrower than August, but widened to 95.5% of the national median from 94.4%. Every percentile eased, and the median fell further than either edge of the middle range, so an unchanged dollar spread now represents a larger share of a typical rate. P90 gave back the most at \$1.01.

PERCENTILE	SEPTEMBER	AUGUST	CHANGE
P25	\$51.50	\$52.00	-\$0.50
Median	\$71.15	\$72.00	-\$0.85
P75	\$119.45	\$120.00	-\$0.55
P90	\$207.24	\$208.25	-\$1.01

WEEKEND VS. WEEKDAY

The weekend premium narrowed to 1.7%, with weekend rates averaging \$103.37 versus weekday rates of \$101.68 — down from 1.9% in August. With summer over, the premium an operator can charge for a Friday or Saturday night has almost disappeared.

HOLIDAY PREMIUMS

With Labor Day past, no holiday on the forward calendar carries a premium.

HOLIDAY	SEPTEMBER RATE	SEPTEMBER PREMIUM	AUGUST RATE	AUGUST PREMIUM
Spring Break (Late)	\$103.00	-0.4%	\$104.61	+0.7%
Christmas	\$97.70	-5.5%	\$97.41	-6.3%
Thanksgiving Weekend	\$96.38	-6.8%	\$96.55	-7.1%
Veterans Day	\$94.54	-8.5%	\$94.47	-9.1%

Spring Break (Late) slipped from a small premium to a small discount as its rate fell \$1.61, in step with the broader softening of spring 2027 pricing. The three late-year holidays remain at steep

discounts but narrowed them: their rates held roughly flat while the ordinary weekend they are measured against eased.





STATE RANKINGS

MOST EXPENSIVE

RANK	STATE	AUGUST AVG	SEPTEMBER AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
1	Maryland	\$177.40	\$174.99	-1.4%	\$120.07	\$269.77	\$92.73
2	New Hampshire	\$153.32	\$154.96	+1.1%	\$90.13	\$279.77	\$78.47
3	New Jersey	\$138.15	\$143.22	+3.7%	\$104.13	\$254.38	\$73.92
4	Pennsylvania	\$133.73	\$133.85	+0.1%	\$83.39	\$221.60	\$50.97
5	California	\$134.32	\$133.53	-0.6%	\$89.56	\$245.27	\$106.15
6	Florida	\$124.45	\$125.27	+0.7%	\$93.40	\$226.02	\$47.08
7	Ohio	\$120.27	\$120.21	-0.1%	\$80.08	\$226.94	\$53.42
8	Massachusetts	\$119.32	\$118.23	-0.9%	\$81.48	\$222.18	\$45.90
9	Louisiana	\$112.62	\$114.76	+1.9%	\$68.96	\$200.05	\$31.15
10	Connecticut	\$115.99	\$114.73	-1.1%	\$87.11	\$194.37	\$64.13

Maryland held the top spot for a sixth consecutive month despite easing 1.4%. New Jersey gained 3.7% — the largest increase in the country — recovering part of August’s steep decline. Pennsylvania edged past California into fourth as California eased 0.6%. Louisiana entered the top 10 at ninth on a 1.9% gain, and New York, tenth in August and essentially unchanged, slipped to eleventh.

LEAST EXPENSIVE:

RANK	STATE	AUGUST AVG	SEPTEMBER AVG	CHANGE	RV AVG	LODGING AVG	TENT AVG
47	North Dakota	\$40.54	\$41.03	+1.2%	\$41.90	\$76.54	\$19.68
46	Nevada	\$61.57	\$60.69	-1.4%	\$65.90	\$178.50	\$50.36
45	Kansas	\$62.73	\$62.89	+0.3%	\$44.89	\$150.00	\$25.77
44	New Mexico	\$77.45	\$77.47	flat	\$68.05	\$143.00	\$42.05
43	Wyoming	\$78.44	\$77.60	-1.1%	\$60.45	\$146.74	\$34.79

The five least expensive states are the same five as in August, in the same order, and North Dakota remains the least expensive at \$41.03. Arizona fell 2.9% and now sits twelve cents above Wyoming, just outside the bottom five.

The gap between the most and least expensive state narrowed to \$133.96 — Maryland at \$174.99 versus North Dakota at \$41.03, a 4.3x difference, down from August’s \$136.86.





THE YEAR AHEAD

The forward pricing curve as observed in September 2026:

MONTH	SEPTEMBER OBSERVATION	AUGUST OBSERVATION	SHIFT
September 2026	\$104.82	\$104.47	+\$0.35
October	\$100.99	\$101.39	-\$0.40
November	\$96.94	\$96.93	+\$0.01
December	\$97.45	\$97.38	+\$0.07
January 2027	\$103.09	\$104.11	-\$1.02
February	\$103.51	\$104.66	-\$1.15
March	\$105.83	\$107.25	-\$1.42

The near months held. September firmed slightly as it arrived, October eased, and November and December were unchanged to within a few cents.

revision, with March down \$1.42 against \$0.94 a month ago. Snowbird-season pricing that strengthened through spring is now being marked down faster each month.

The winter decline accelerated. January, February, and March 2027 each fell by more than a dollar — the third consecutive month of downward

MARKET DIRECTION

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

STATE	AUGUST AVG	SEPTEMBER AVG	CHANGE
New Jersey	\$138.15	\$143.22	+3.7%
Idaho	\$94.33	\$97.42	+3.3%

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

STATE	AUGUST AVG	SEPTEMBER AVG	CHANGE
Washington	\$82.05	\$79.19	-3.5%
Arizona	\$80.07	\$77.72	-2.9%
Kentucky	\$86.80	\$84.27	-2.9%

Only five states moved by more than 2% in either direction in September. State-level movement stayed limited even as every national sub-index declined.

New Jersey recovered part of August’s 6.7% decline, and Idaho was the only other state

to rise by more than 2%. On the cooling side, Washington, Arizona, and Kentucky each fell by roughly 3%. Arizona is a winter-destination market, and its decline lines up with the continued markdown of winter 2027 pricing in the forward curve.



AFFORDABILITY

SEGMENT	SEPTEMBER RATE	AUGUST RATE	CHANGE	VS. TENT
Public campgrounds	\$34.03	\$34.09	-\$0.06	0.60x
Tent camping (private)	\$56.36	\$56.90	-\$0.54	1.00x
RV sites	\$71.32	\$71.66	-\$0.34	1.27x
Independent hosts (median)	\$55.00	\$55.00	flat	0.98x
Campground lodging	\$196.92	\$197.11	-\$0.19	3.49x
Standalone glamping (median)	\$209.00	\$225.00	-\$16.00	3.71x

Tent camping again fell further than any other traditional segment, so the ratios built on it widened: RV now costs 1.27x a tent site and campground lodging 3.49x. Standalone glamping moved the other way — its median fell \$16, pulling the glamping premium down to 3.71x a tent site from 3.95x.

The independent hosting median, unchanged at \$55, now sits at 0.98x a tent site — \$1.36 below conventional tent camping.

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.

MONTH-OVER-MONTH MEASUREMENT:

Each month's change is measured on check-in dates observed in both the current and the prior month, and applied to the prior month's published figures. This keeps month-over-month movement a reflection of pricing rather than of how far ahead the booking calendar happens to be observed. State-level changes are measured property by property, so that one property's shift in observed inventory cannot move its state's figure. Published figures from prior issues are not revised.

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

Founded in 2009, Insider Perks is a technology and marketing company dedicated exclusively to the outdoor hospitality industry. The company helps campgrounds, RV parks, and glamping resorts grow revenue, delight guests, and reclaim operational hours through practical applications of artificial intelligence and automation. Insider Perks has served over 500 properties across North America. Its CampVantage platform provides AI-powered guest service agents, automated marketing, competitive intelligence, booking engine analytics, and performance reporting in a single dashboard. Learn more at <https://insiderperks.com>.

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

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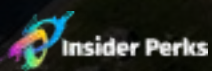
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