

UNITED STATES

Outdoor Hospitality Report

Market Insights & Feasibility for Glamping Resorts, Campgrounds, and RV Resorts

Introduction

Welcome to the Glamping Industry Data Report

As outdoor travel and unique stays grow in popularity, this report offers key insights into the glamping sector. It's designed to help operators, investors, and stakeholders understand rate trends, revenue drivers, and other key metrics.

About Sage Outdoor Advisory

We're a leader in outdoor hospitality consulting, feasibility studies, and appraisals in North America. With over 300 completed projects and the industry's largest proprietary database of glamping businesses, we provide unmatched expertise and insights.



Accuracy and Limitations

At Sage Outdoor Advisory, we strive to provide high-quality data insights through meticulous research and validation processes. However, it is important to acknowledge the following limitations:

Estimations & Aggregations: Certain financial projections, rate averages, and market trends are derived from aggregated datasets and industry benchmarks. These should be used as general indicators rather than absolute values.

External Factors: The outdoor hospitality industry is influenced by seasonal demand, regulatory changes, and economic conditions that may impact the accuracy of projections over time.

No Financial or Legal Guarantee: This report is for informational purposes only and does not constitute financial, legal, or investment advice. Users should conduct their own due diligence and seek professional consultation before making business decisions.

Intellectual Property & Confidentiality: The contents of this report are proprietary and should not be redistributed without prior authorization from Sage Outdoor Advisory.

By reviewing this, you acknowledge these limitations and agree that Sage Outdoor Advisory is not liable for decisions made based on this report.

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About the Data

Data Sources

Our data is based on manual research and publicly available listings, focusing on glamping operations across US and Canada. We combine industry expertise with a rigorous data validation process to capture the most relevant trends in glamping.

Glamping Business - Defined

- 4 or more units on a specific property
- ≥ 50 % of units are classified as glamping
- Specific unit is classified as a glamping unit (view slide 5 for complete list)
- Not a tent, vehicle, or RV site
- No shared wall between units (e.g. lodge)

Report Methodology

The data represents a sample of high-demand glamping properties. See the *Glamping Unit Types* page for a complete breakdown. All metrics are anonymized and aggregated to offer an accurate and comprehensive view of glamping trends.

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Glamping Unit Types

A-Frame – A triangular design combining rustic and modern aesthetics, offering insulation for year-round comfort, ideal for mountain and forest settings.

Airstream – A high quality aluminum trailer offering year-round luxury and comfort for adventurous stays.

Bell Tent – A circular canvas structure with a central pole, perfect for spring to fall stays and adaptable with insulation for cooler weather.

Cabin – An enclosed, hard-sided structure offering year-round comfort, ranging from rustic off-grid styles to high-end retreats.

Canvas Tent – A durable canvas structure typically supported by a metal pole frame, providing a sturdy yet flexible shelter. Often insulated or equipped with stoves for colder climates, it's ideal for varied outdoor environments.

Dome – A geodesic design with energy efficiency and weather resilience, suitable for all seasons and eco-conscious travelers.

Safari Tent – A spacious, canvas-walled structure with robust framing, ideal for spring through fall stays and easily winterized for cooler weather.

Tiny Home – Less than 400 SF hard-sided unit, including park model cabins, offering modern amenities and high energy efficiency, suited for year-round stays and urban or remote locations.

Tipi – A conical canvas structure inspired by indigenous designs, offering excellent ventilation and a cozy, immersive nature experience, best suited for seasonal stays.

Treehouse – Elevated among trees, ideal for warmer months, though insulated versions can provide unique year-round stays.

Vintage Trailer – A retro-style hard-sided unit, suited for all seasons with proper heating/cooling, often placed in scenic locations.

Yurt – A circular structure with fabric exteriors, offering excellent airflow in summer and adaptable for winter with insulation and heating.

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Key Metrics & Definitions

Average Retail Daily Rate (ARDR)

The average nightly rate listed for accommodations at professional glamping resorts across the US and Canada, reflecting the advertised retail price before taxes and booking fees. Unlike ADR, which represents the average price paid by guests based on actual unit revenue, RDR focuses solely on the standard listed rates, providing a baseline view of pricing.

Property Type

This categorizes outdoor hospitality accommodations based on their lodging structures and unit composition. A Mixed Unit Glamping Property refers to a property that features two or more different unit types, such as a combination of yurts, safari tents, and tiny homes. When a glamping property consists of only a single unit type, it is classified specifically by that type—for example, a property with only cabins would be categorized under "Cabins". This classification helps analyze market trends, pricing structures, and the impact of unit variety on guest demand and revenue.

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Region Breakdown

Northeast Region

Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

Midwest Region

Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

Southeast Region

Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, and West Virginia.

Southwest Region

Arizona, New Mexico, Oklahoma, and Texas—states where desert landscapes, warm climates, and year-round tourism heavily influence outdoor-hospitality trends.

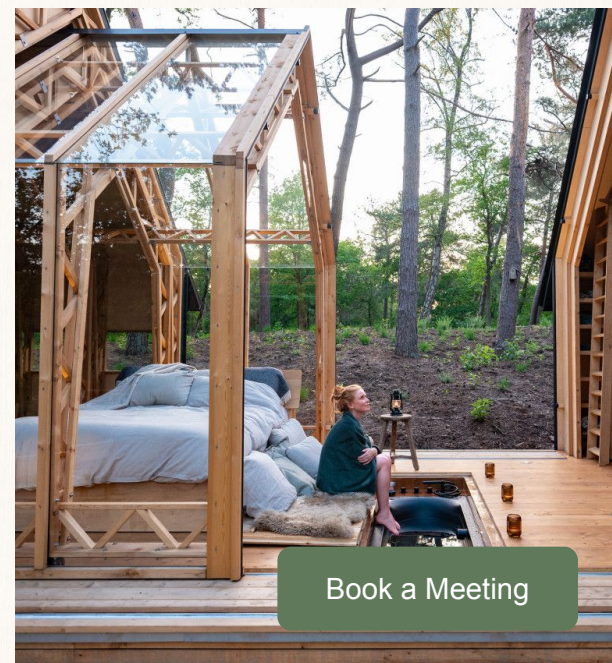
Western Region

Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, and Wyoming.

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Glamping



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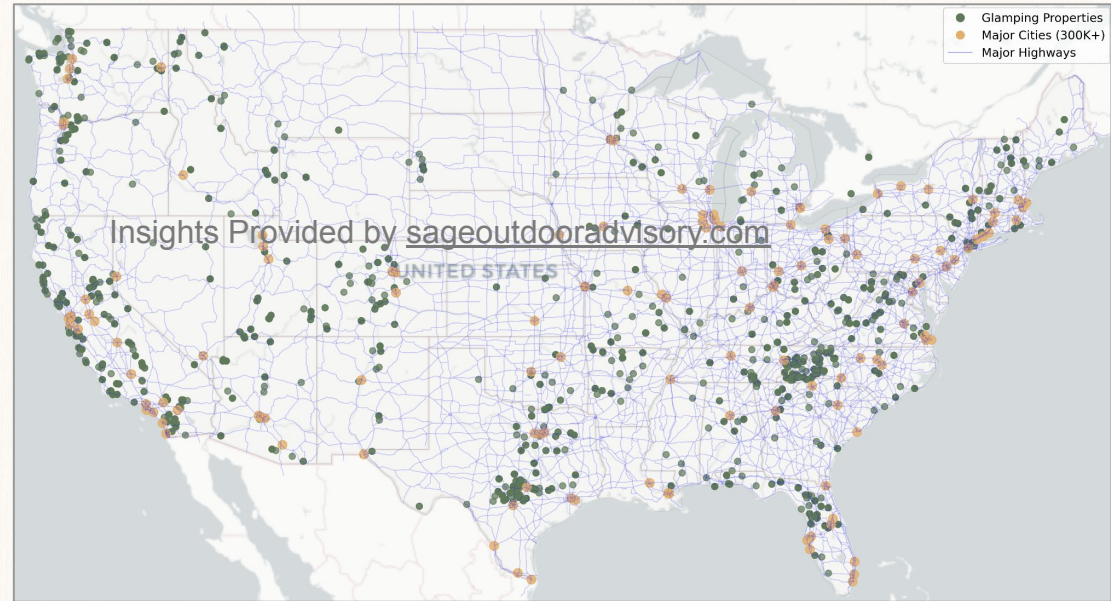
Report Overview

Specifications

- **Quarter:** Q2
- **Year:** 2025
- **Country:** USA

Contents

- Summary
- Avg. Retail Daily Rates by State
- Property Distribution by State
- Rates by Unit Type (Lite Version)
- Glamping Unit Type Ratio (Standard Version)
- Unit Capacity (Standard Version)
- Property Type Rates (Standard Version)
- Amenity Analysis (Lite Version)
- Seasonal Rates (Lite Version)
- National Parks (Standard Version)
- Transportation (Standard Version)
- Top 5 Revenue Boosting Ideas (Lite Version)
- How Do You Compare? (Lite Version)



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Number of Properties

Total Glamping Properties

745

Number of Units

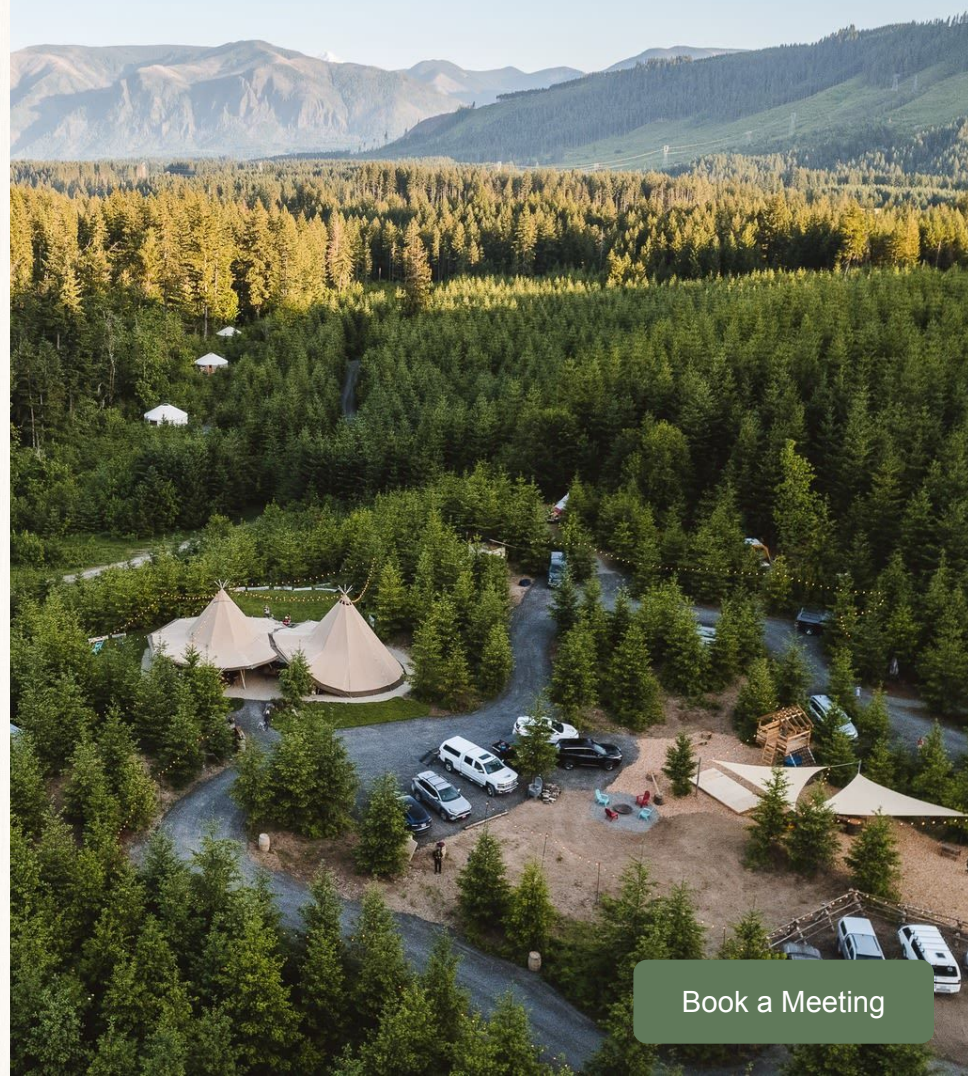
Total Glamping Units

3,409

Avg. Retail Daily Rate

Before Taxes and Booking Fees

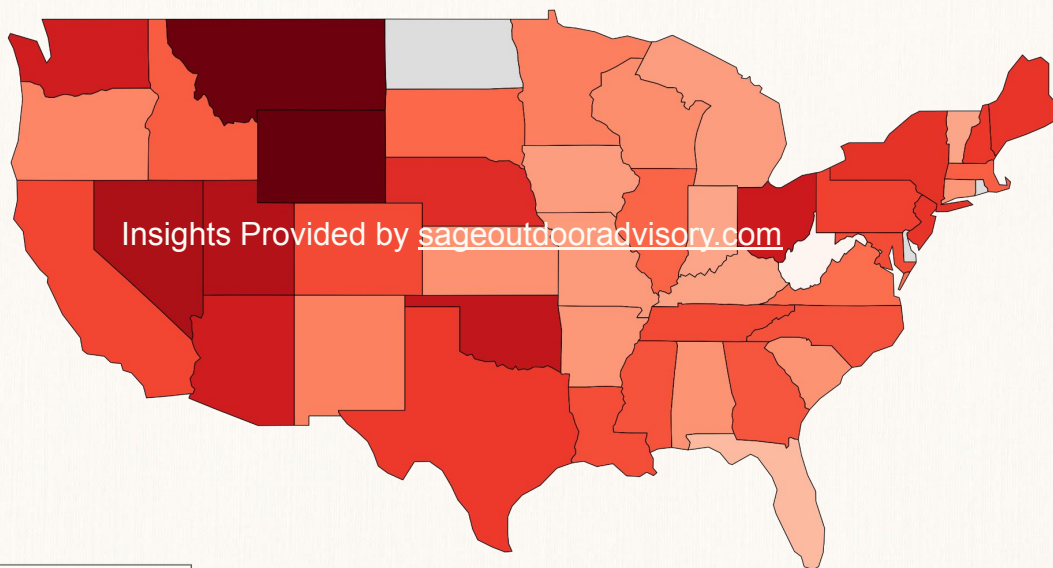
\$146



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Avg. Retail Daily Rate by State

Before Taxes and Booking Fees



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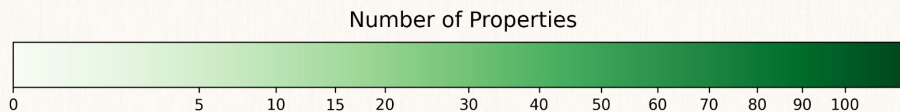
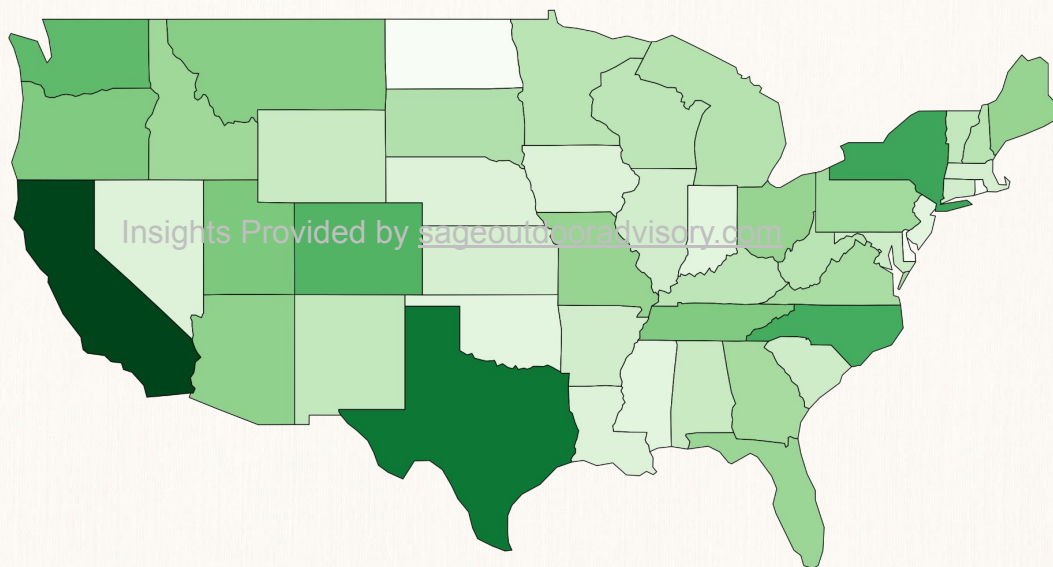
Avg. Rate (Next 12 Months)



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Property Count by State

Breakdown of Property Counts by State



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Our Services

Feasibility Study

A detailed evaluation of your project's potential, combining market research, financial modeling, and competitive analysis. Reports include trends, location insights, revenue projections, and feasibility conclusions to guide decisions and secure financing.

Revenue Projection

Financial forecasts on rates, occupancy, and revenue trends using Sage's proprietary data, providing actionable insights to optimize profitability and plan for growth.

Market Analysis

A focused review of competition, demographics, and market opportunities, helping clients identify gaps and position their projects effectively.

Valuation

An expert opinion on the market value of a resort or land, assessed in different conditions: as-is, as if entitled, or as built/complete. This valuation helps guide investment decisions, financing, and strategic planning.



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