



GLAMPING
SHOW AMERICAS




Glamping Show Americas

2025 Glamping Report

October, 2025

Background & Methodology

- Objectives:
 - Identify the current state of glamping among glamping operators and prospects.
 - Evaluate the level of potential growth and expansion across operators and suppliers.
- Method of data collection & timing
 - All surveys were completed online using the Glamping Americas contact list with n=388 surveys completed in July & August of 2025.
- Results are representative of the subset of respondents, and are intended to provide a snapshot of their views.

The background of the right side of the slide is a faded, grayscale image of a glamping tent's interior. The tent is set up on a wooden deck. Inside, there is a comfortable seating area with cushions and a coffee table. A lantern is visible in the foreground, and the tent's structure is visible in the background.

“The first thing to say about glamping is that it turns out to have more differences from camping than just two letters.”
– Business Insider

Introduction

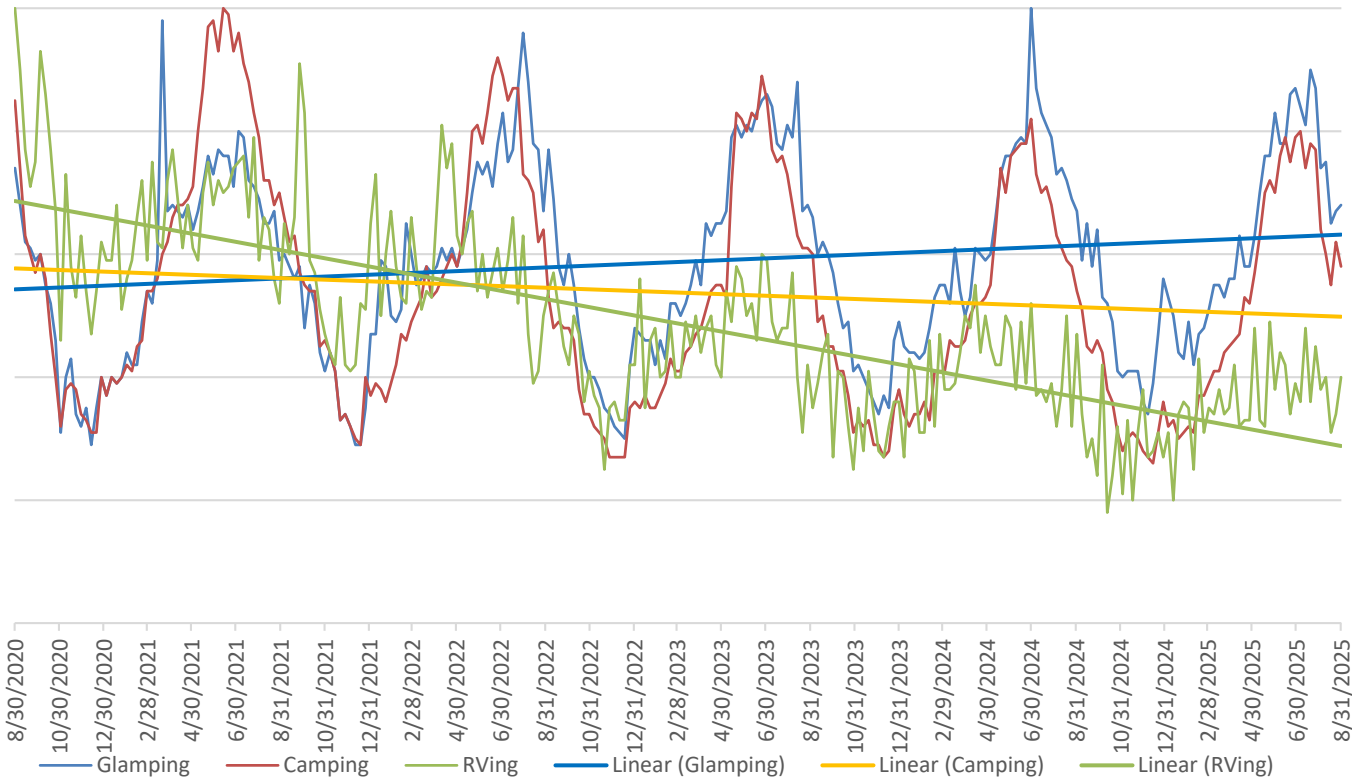
- This report is designed to capture a current snapshot of glamping's business climate among both operating parks and prospective entrants.
- Results reflect the experiences and expectations of respondents and should be read as directional insights for decision-making across development, operations, pricing, amenities, and growth.

GLAMPING
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“The experience we provide is at the intersection of resort hospitality and spectacular outdoor destinations.”

*—Matt Gaghen, Under Canvas
CEO*

Trends in Interest (2020 to 2025)



Leisure traveler interest in glamping continues to rise even as general camping and RV interest has softened since 2020.

Key Takeaways

- **Demand and price realization are up.** Operators report ADR averaging **\$251/night**, up ~21% vs. 2023 and ~11% vs. last year; **59%** expect to raise rates again. Average length of stay climbed from **2.2 to 2.7 nights**, supporting revenue growth.
- **Cost to enter has surged, but revenue has kept pace.** Since 2023, start-up costs have **more than doubled** even as gross revenue rose and operating costs were relatively stable year over year—raising the bar for capitalization while validating pricing power for well-positioned concepts.
- **Growth posture: cautious on structures, bolder on locations.** Operators are tempering near-term **structure** additions while signaling more appetite for **adding locations**, reflecting a shift toward market diversification over densification.
- **Permitting is improving unevenly.** Approval timelines have shortened across regions—fastest in the South—with the most notable improvement in the Northeast, indicating better (but still variable) path-to-opening conditions.

“Glamping, just like camping, facilitates immersive, therapeutic bouts of nature.”
--Outside Online

Key Takeaways

- **Staffing ramps ahead of 2026.** Parks average ~4 full-time staff today, and ~half of operators expect to increase headcount next year—planning for expanded service delivery and longer seasons.
- **Product mix is diversifying.** A rising share of operators maintain **both on- and off-grid** offerings; **private in-suite bathrooms** remain most common but with more **hybrid (communal + private)** mixes and fewer up-charges. **Minimum-stay** policies are split (about half require 2+ nights), and **pet fees** remain common.
- **Amenities strategy: recreation first, wellness next.** Recreation (on/off-site) is widespread; next-wave adds include **on-site wellness** and **EV charging**, while **food service (e.g., chefs)** is frequently cited as **needed** but not yet planned—signaling a guest-value opportunity with operational complexity.
- **Marketing/commerce channels are normalizing.** Use of **social media** declined from 90% (2024) to **79%** (2025), with **email and SEO** steady.
- More operators now combine **direct + OTA** bookings rather than relying on direct alone.

“Glamping basically eliminates all that (forgetting something). You just have to show up.”

— Christopher Keyes, after a glamping stay

Key Takeaways

- **Location thesis: nature-led with urban adjacency.** Many properties sit near **natural features/state parks**, and **~1/4** are close to **urban areas**, suggesting room to target both nature immersion and quick-escape segments.
- **Prospect pipeline is strong and near-term.** About **30%** say they are **~6 months** from launch; a majority plan to open within **12 months**. A **quarter** aim for **3+ locations**, with plans averaging **~20 structures** (above current operator average **~13**). **Tiny-home ADRs** are expected **>\$300**, with more **domes** in the mix.
- **Prospect business models are maturing.** More plan **add-on** concepts to existing parks, **both on- and off-grid** capabilities, **year-round** calendars, and **dual booking** (direct + third-party) with listings on Airbnb, Hipcamp, VRBO, and Glamping Hub. Financing skews more **self-funded**, but most expect **multi-source** capital stacks.
- **Barriers persist—and are converging.** **Financing** remains the top impediment for both groups; **ordinances/regulation** pressures are rising. Operators most want **financing access**, **marketing support**, and **operational consulting**—a signal that executional expertise is an emerging bottleneck as the category scales.

“We wanted to bring back the magic of connecting with nature and outdoor adventures without giving up comfort or style.”
— Salvador Lora, CEO, Kampaoh.

Current Operators

Where are the respondents located?

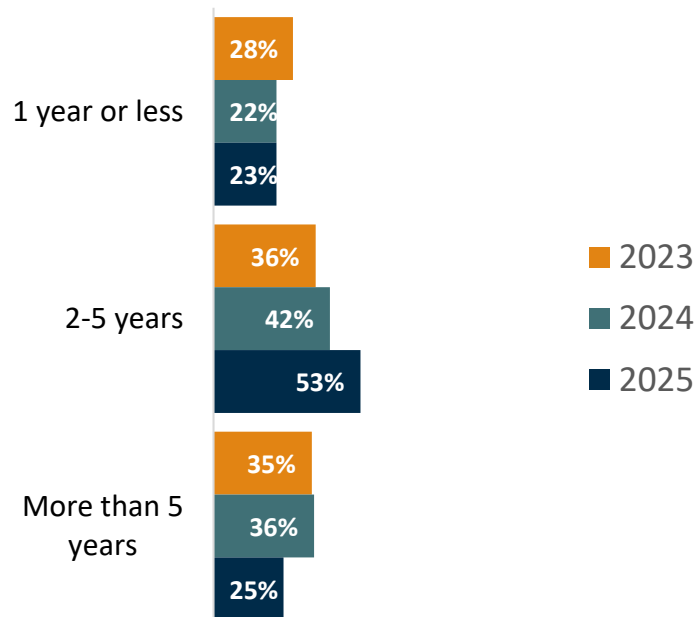
Countries	2023	2024	2025
U S	79%	80%	82%
Northeast Region	12%	14%	15%
Midwest Region	19%	30%	27%
South Region	31%	46%	48%
West Region	38%	42%	45%
Canada	8%	9%	11%
Caribbean	1%	2%	2%
Mexico	6%	4%	8%
Central America	4%	4%	4%
South America	3%	7%	8%

Most operators responding to the survey are U.S.-based, though roughly 1-in-5 are either outside the U.S. or operate in both regions.

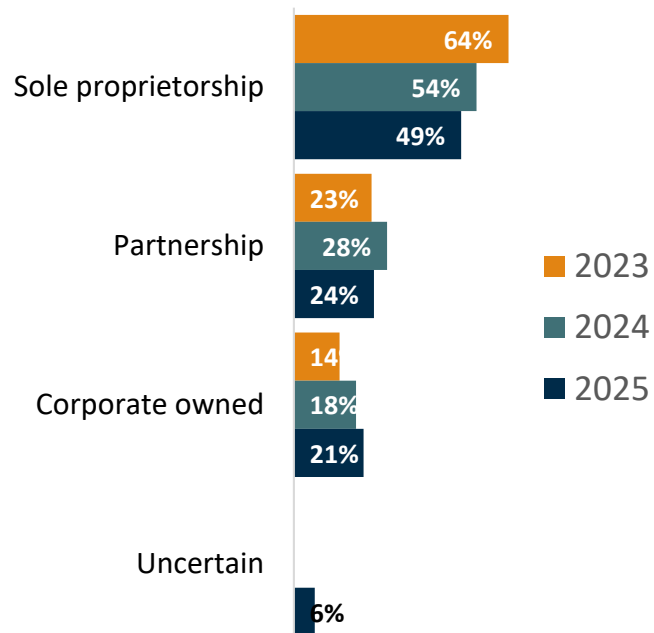
In terms of U.S. representation, the southern and western states have the highest number of operators, whereas the northeast has the fewest.

What is their tenure and ownership structure?

How many years have you been in operation, or have you been providing glamping accommodations and services?

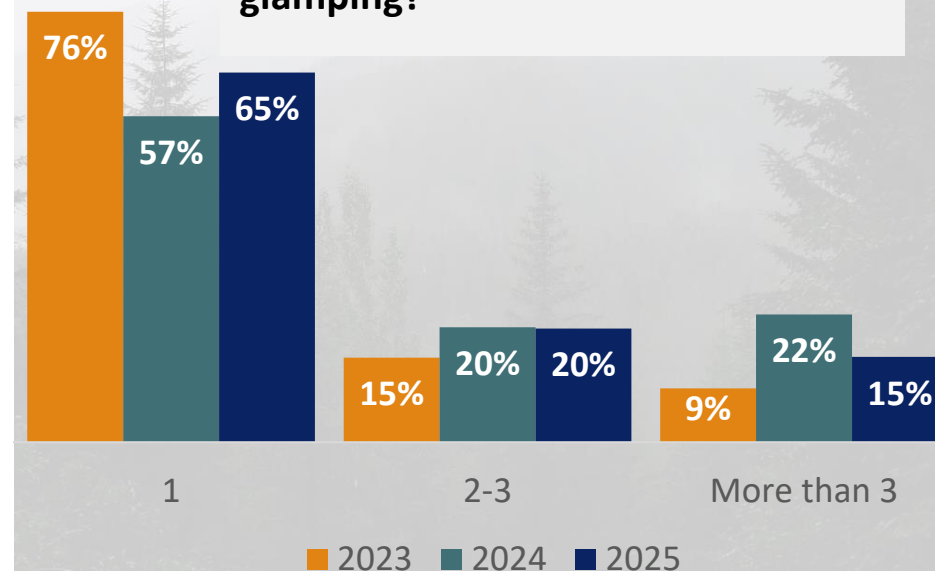


What type of ownership structure do you have?



Over time, more of the operators are in the 2-5 year band for tenure, with slightly fewer new entrants. About a third of operators have more than one location.

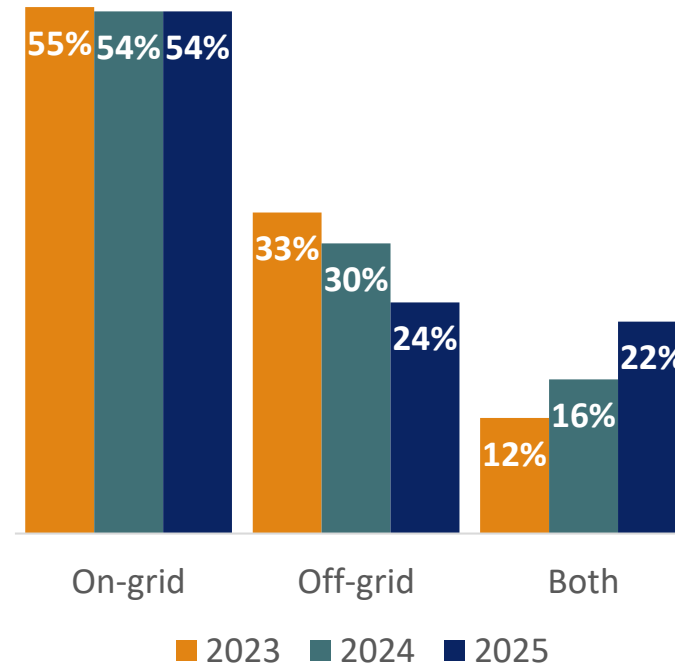
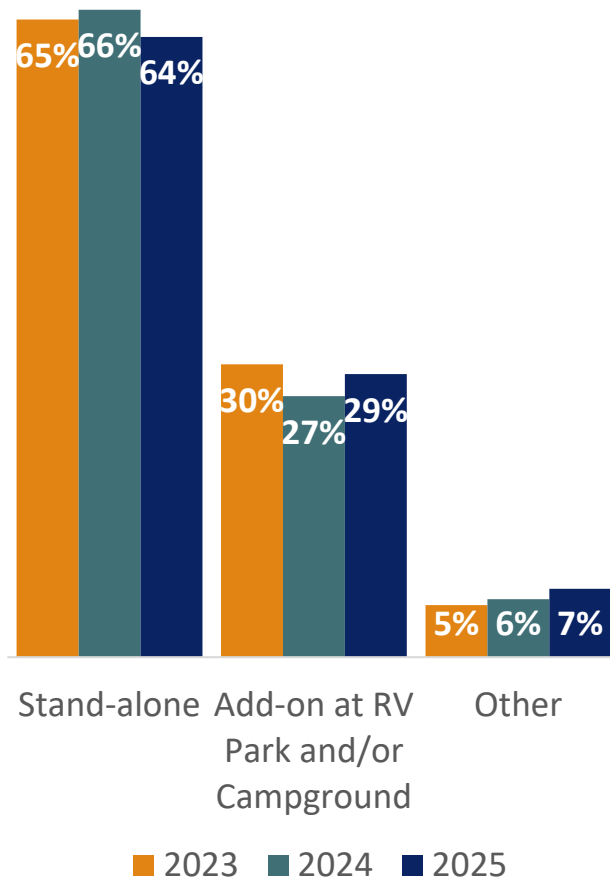
How many locations do you have for glamping?



What type of property or properties do they own or operate?

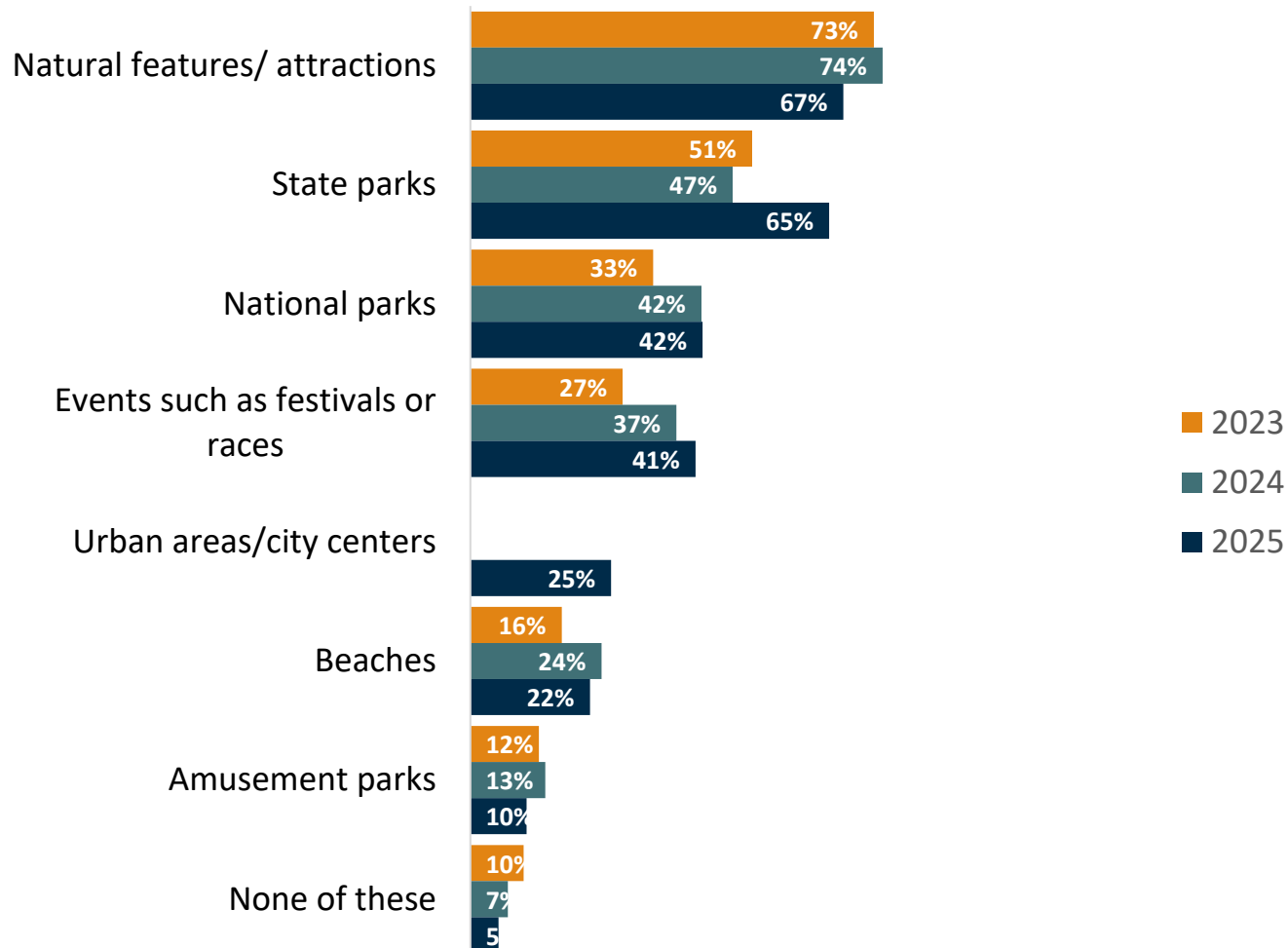
Stand-Alone vs. Add-On

On vs. Off Grid



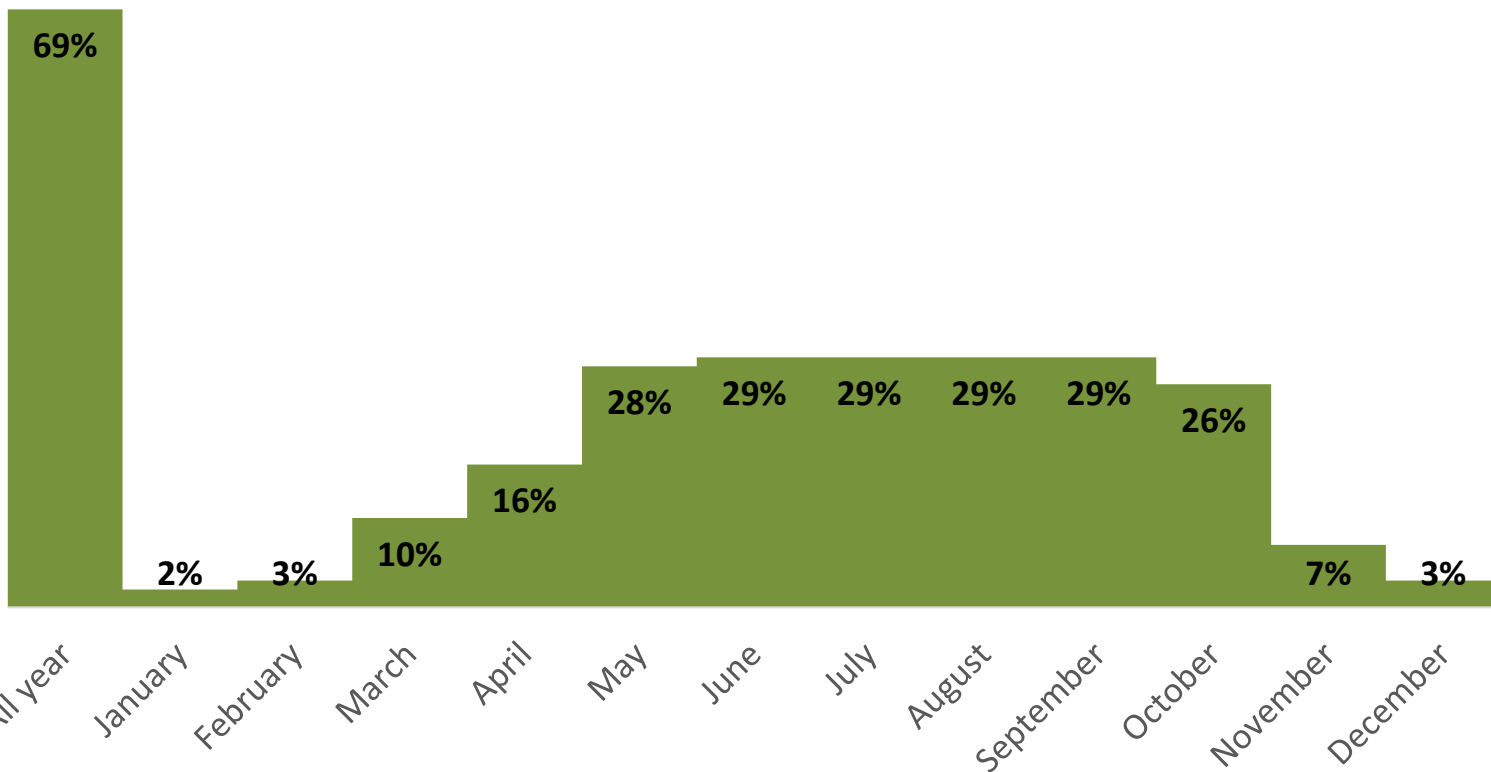
The proportion of stand-alone versus add-on parks is relatively consistent over time. It is notable that an increasing proportion of operators have both on- and off-grid properties (resulting in a shrinking proportion off-grid only properties).

What features or attractions are these parks located?



There is a nearly equal percentage of operators whose properties are near natural features and/or state parks, suggesting these locations offer multiple natural setting opportunities. One-fourth of glamping properties are in close proximity to urban areas.

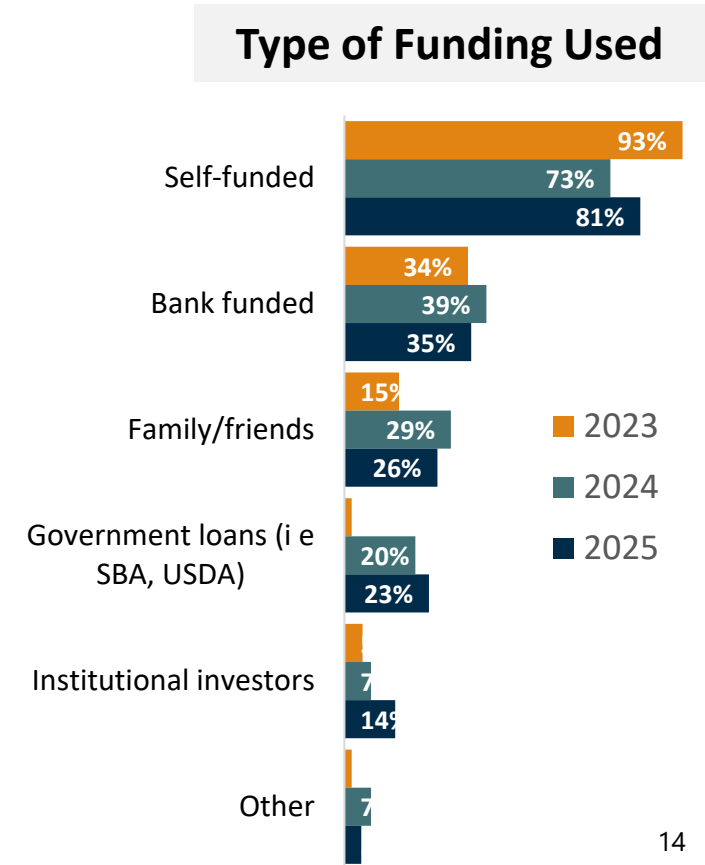
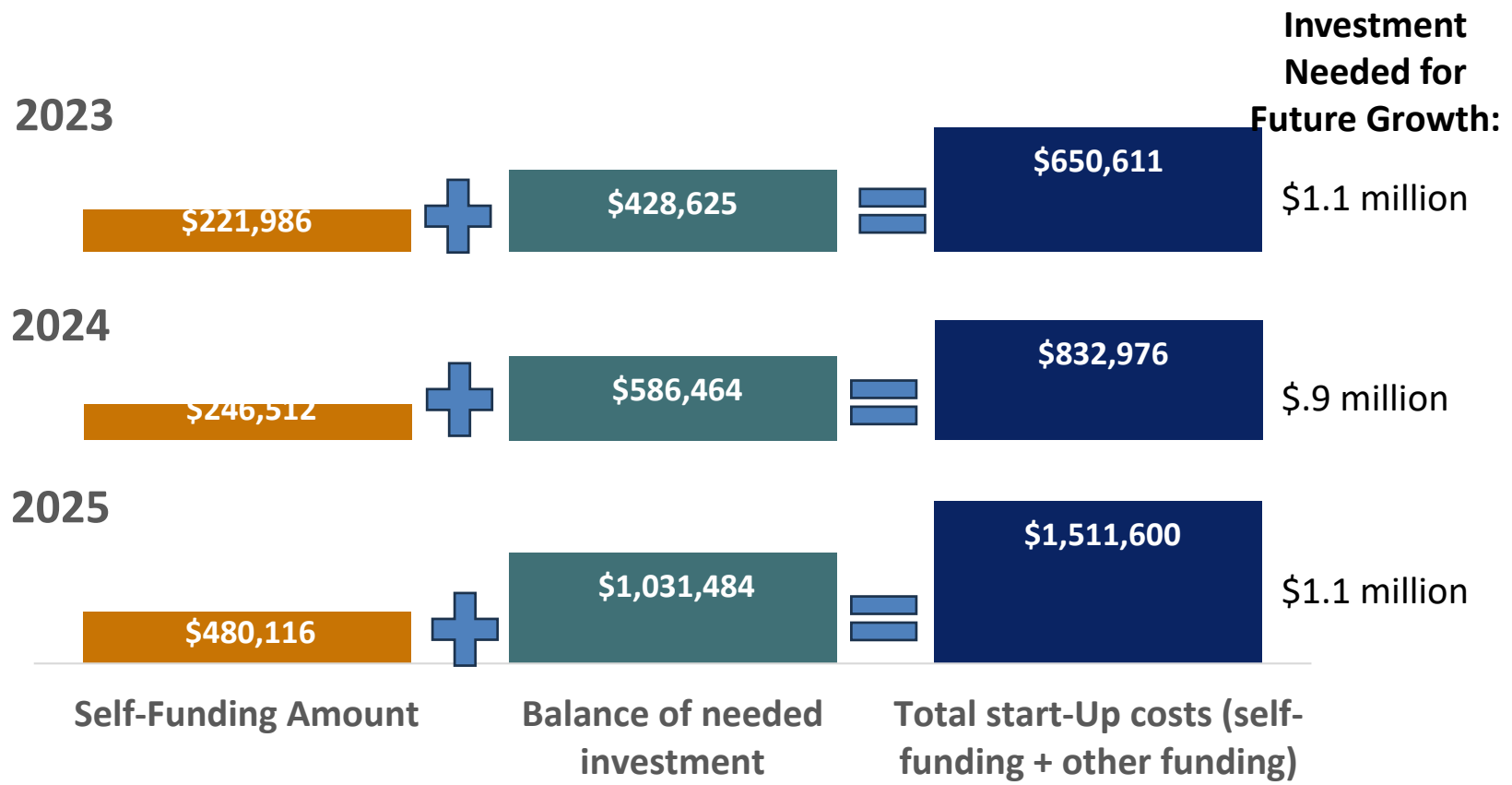
When are they open to guests?



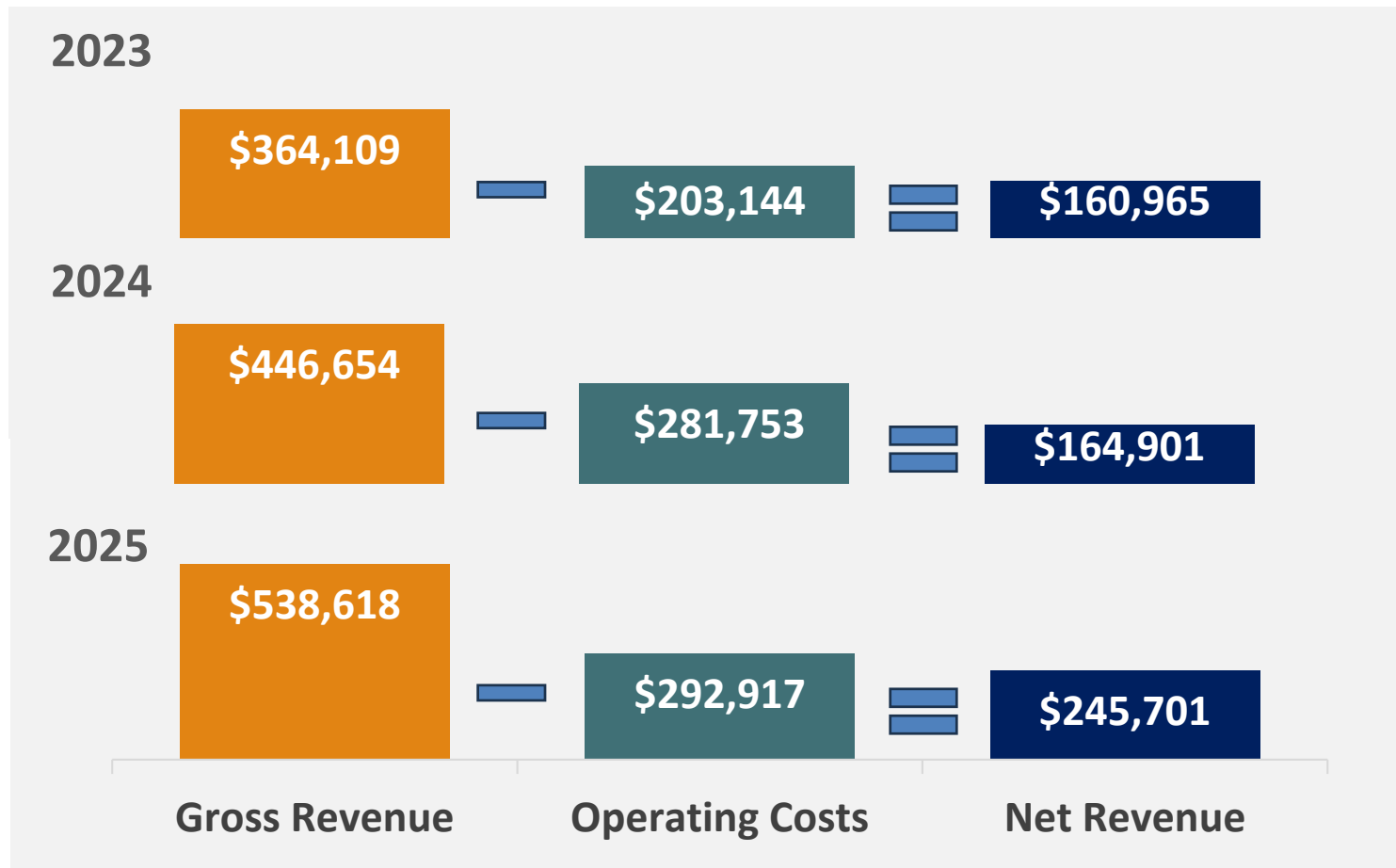
Notably, about seven out of ten operators are open all year, with the bulk open in the prime summer months.

What does it take to fund these operations?

Since 2023, start-up costs have more than doubled, even with increased self-funded contributions.

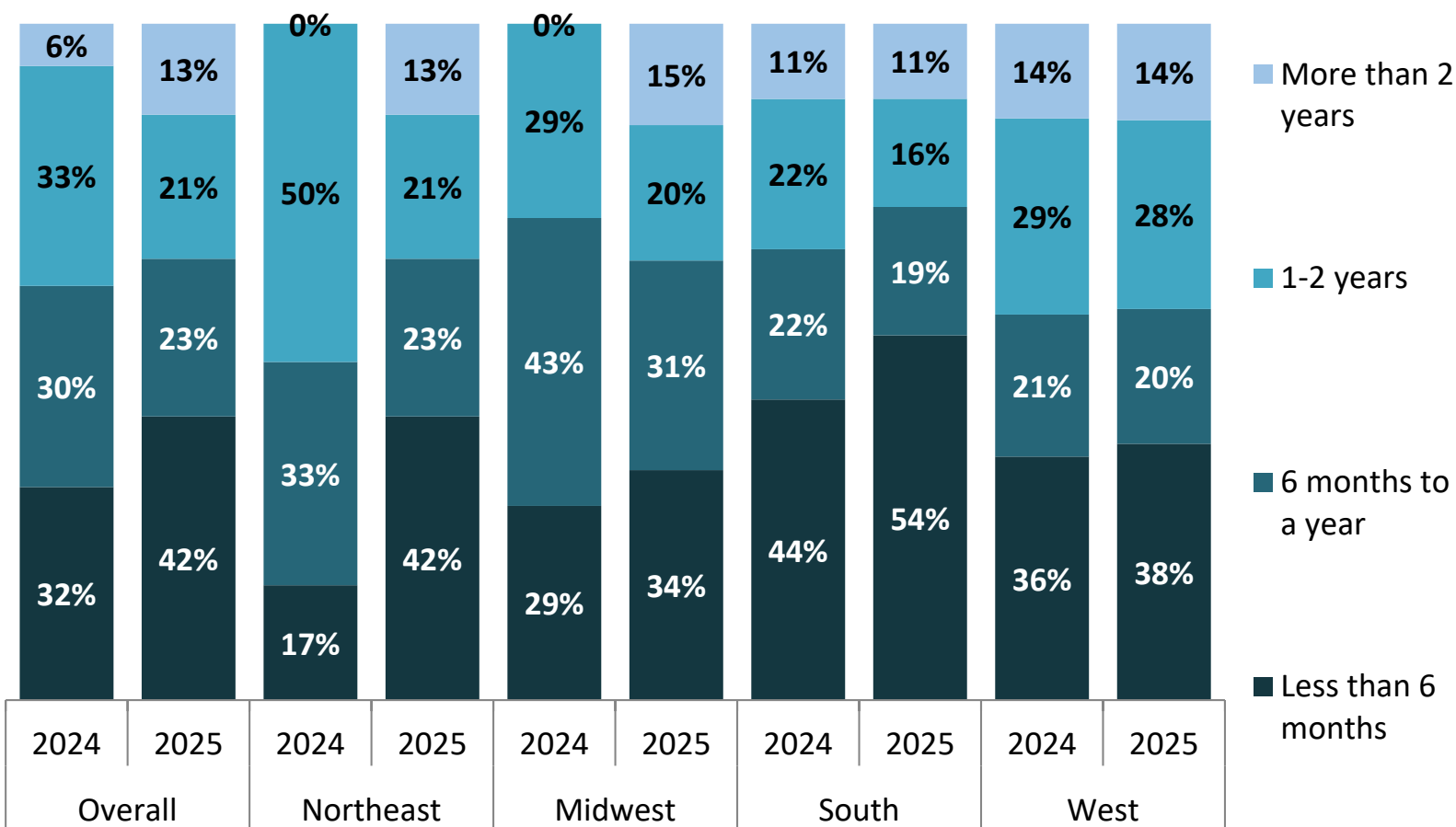


What is the overall net revenue?



To offset the initial investments, revenue continues to climb; operational costs did not see a large bump since last year, while gross revenue increased substantially.

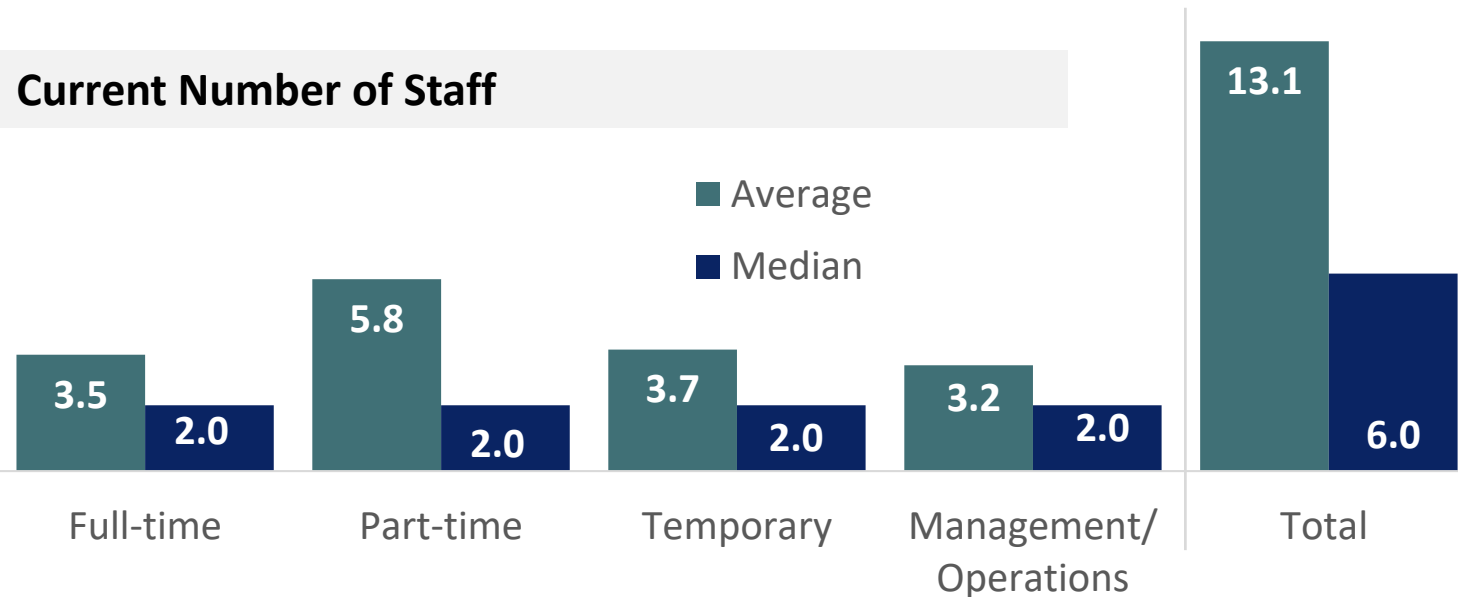
How long is permitting taking to get approved?



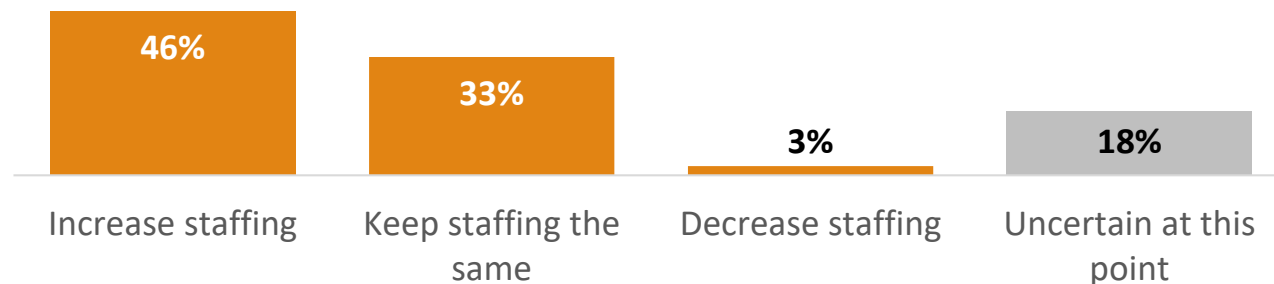
In all regions, the permitting process appears to be shortening, especially in the Northeast Region. However, the Southern Region has the overall quickest turnaround for permitting.

How does the staffing mix fall out?

Current Number of Staff



Plans for Next Year's Staff

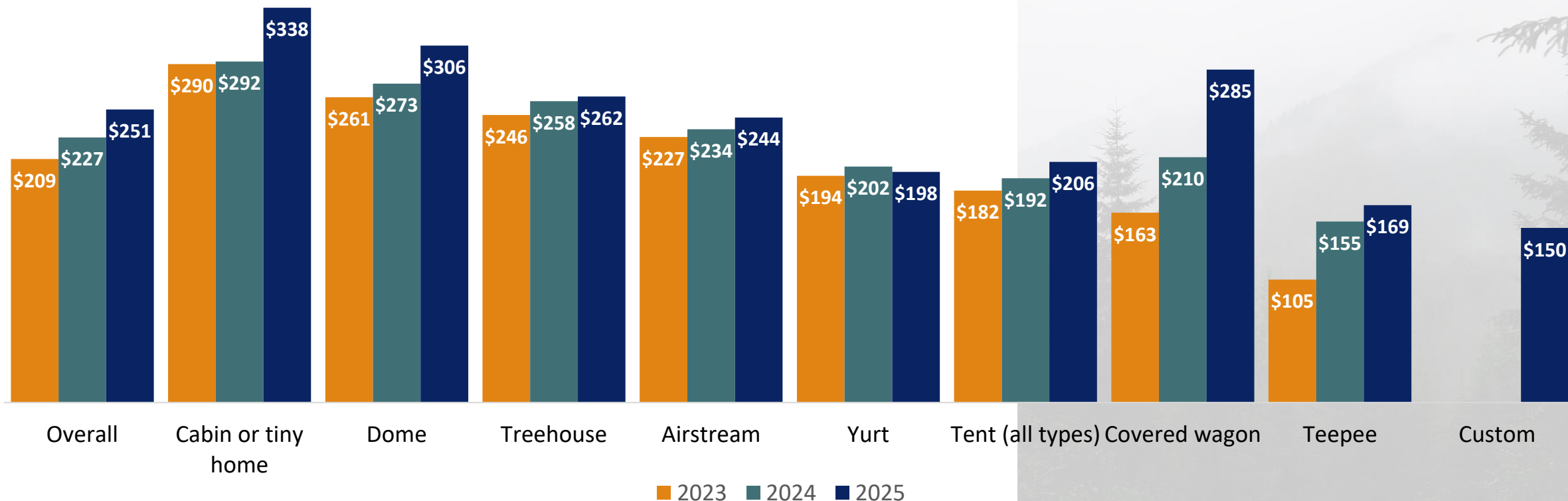


The average glamping operator who responded to the survey has almost 4 full-time staff, with the balance being part-time or temporary. Almost half of the operators indicate an increase in staff in the coming year.

How has ADR changed over the past 2 years?

Average by Unit Type

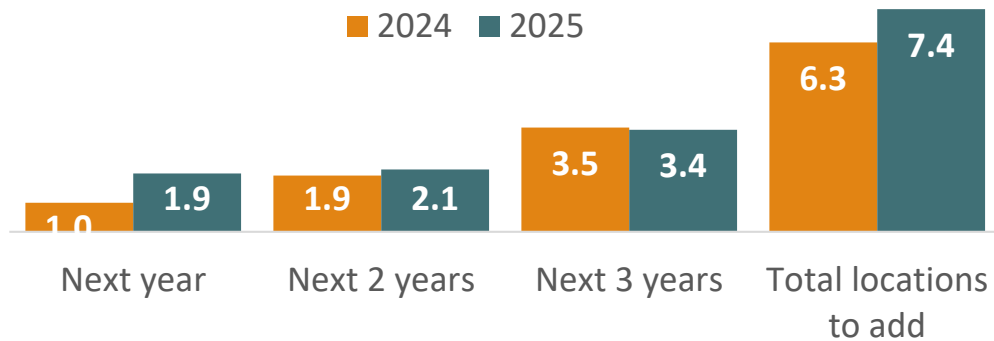
Across all operators, the ADR stands at \$251 per night, a noticeable \$42 increase since 2023 (21%) and \$24 increase over last year (11%). 59% of the operators say that they will increase rates in the next year. Increases are greatest for covered wagons, cabins/tiny homes, and domes.



What is the actual and anticipated growth in structures & locations?

Compared to last year, operators appear to be limiting their expansion in structures, while near-term additions in locations appears to have increased.

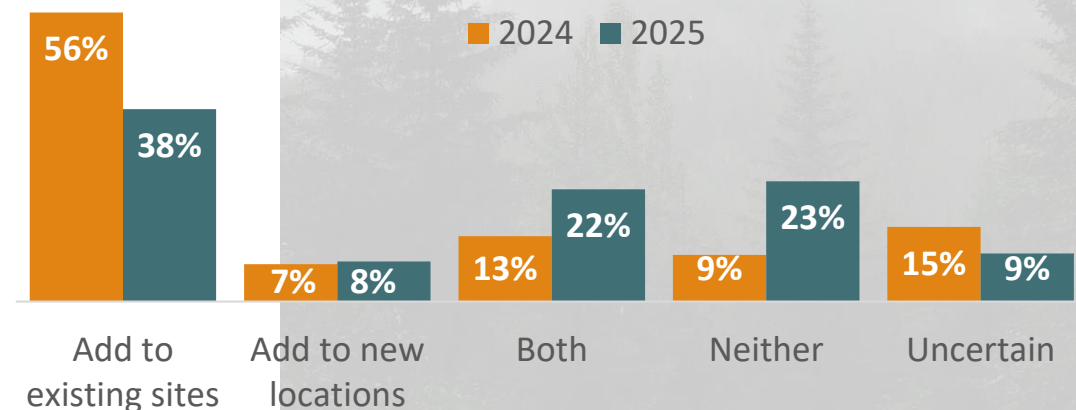
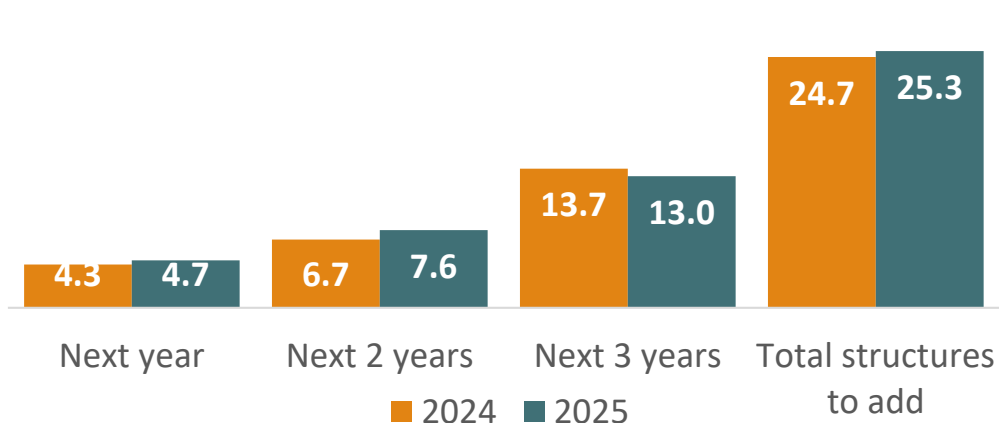
Growth in Additional Locations



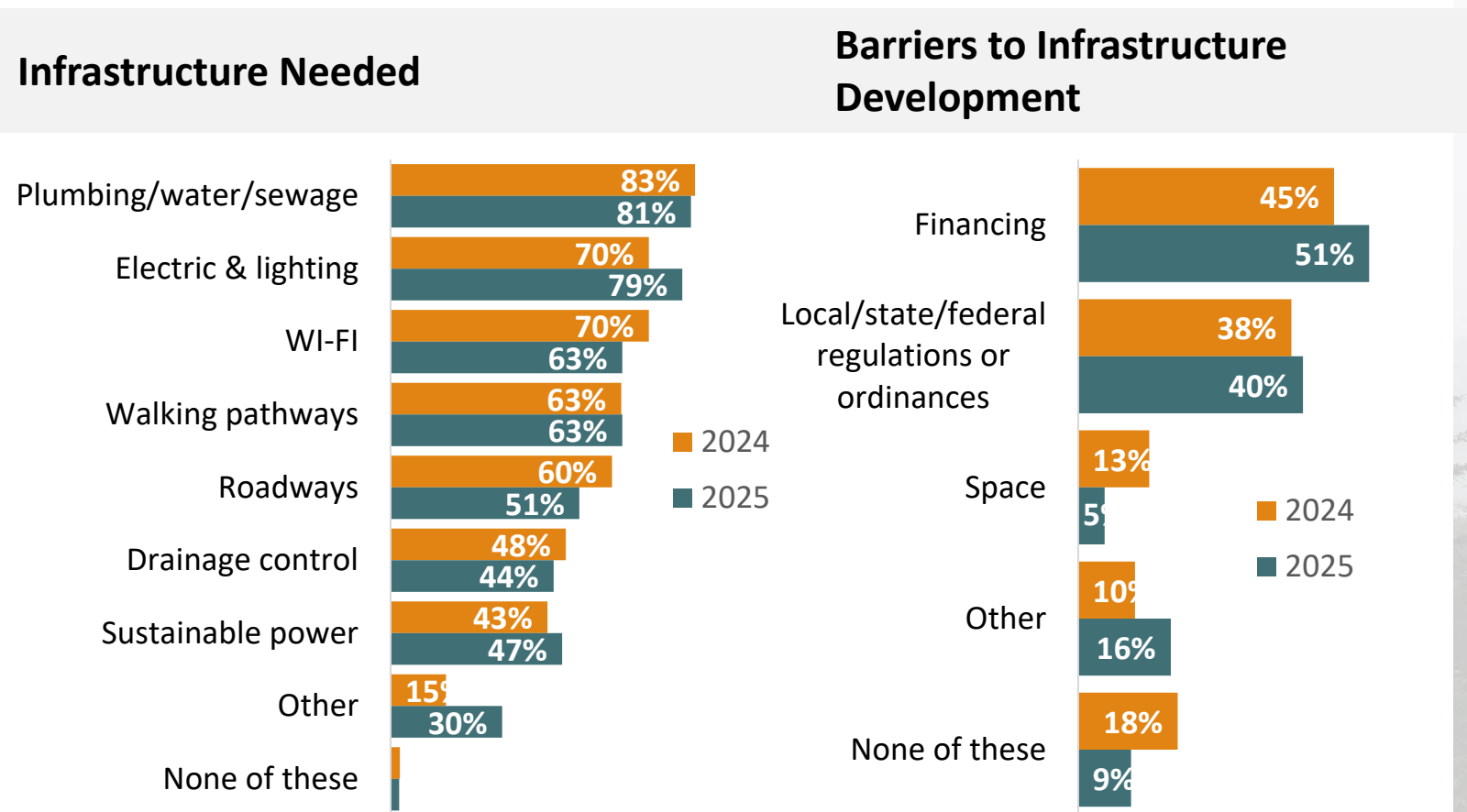
Average Number of Structures



Growth in Additional Structures



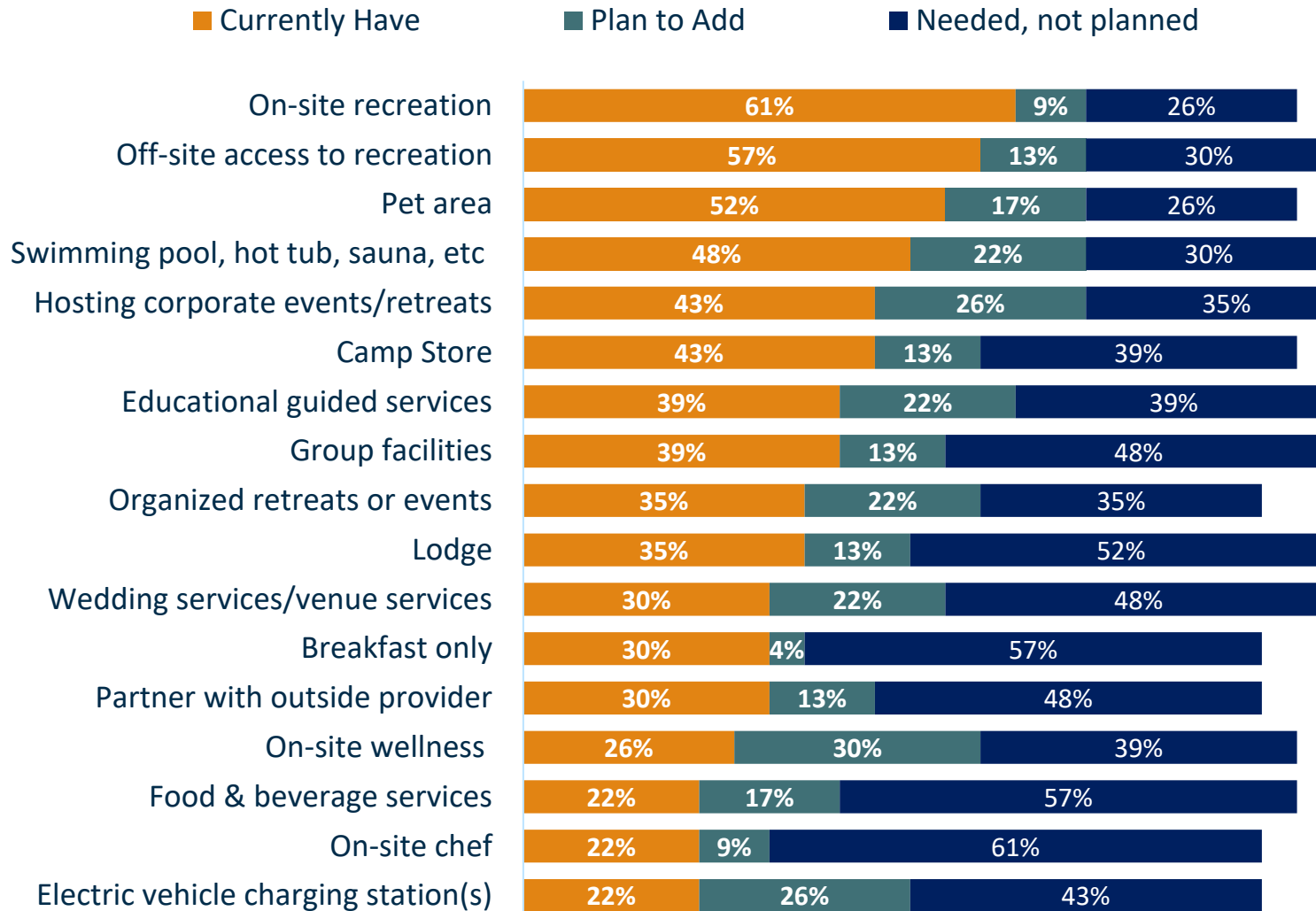
What infrastructure development and enhancement are needed and what are the barriers to development?



Similar to last year, plumbing represents the most pressing need for infrastructure development, though there is an increase in electric/lighting development.

Financing, once again, is the greatest barrier to development, with regulations and ordinances hindering 4-in-10 operators.

Which of the following services and amenities do you currently offer, plan to offer (or expand), and which are needed (but don't currently have plans for)?



Across the spectrum of services & amenities, recreation – whether on or offsite – are most common. Still half of the operators indicate having a pet area, and a similar proportion have pools and spas.

Plans to add in the coming year include adding on-site wellness and EV charging.

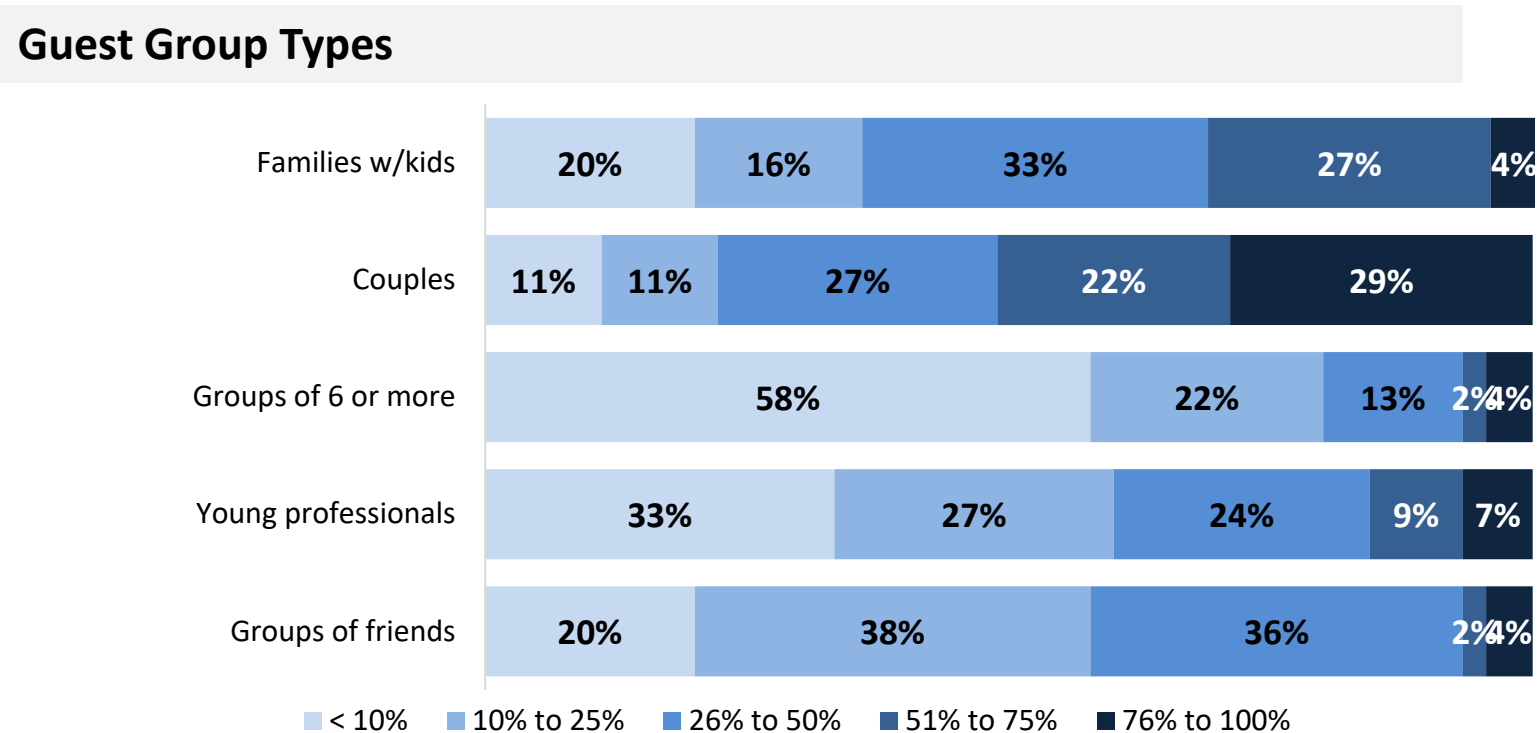
On-site chefs and other food services are most likely to be mentioned as needed, but still not planned to add.

What is the average length of stay? // What is the current mix of guests?

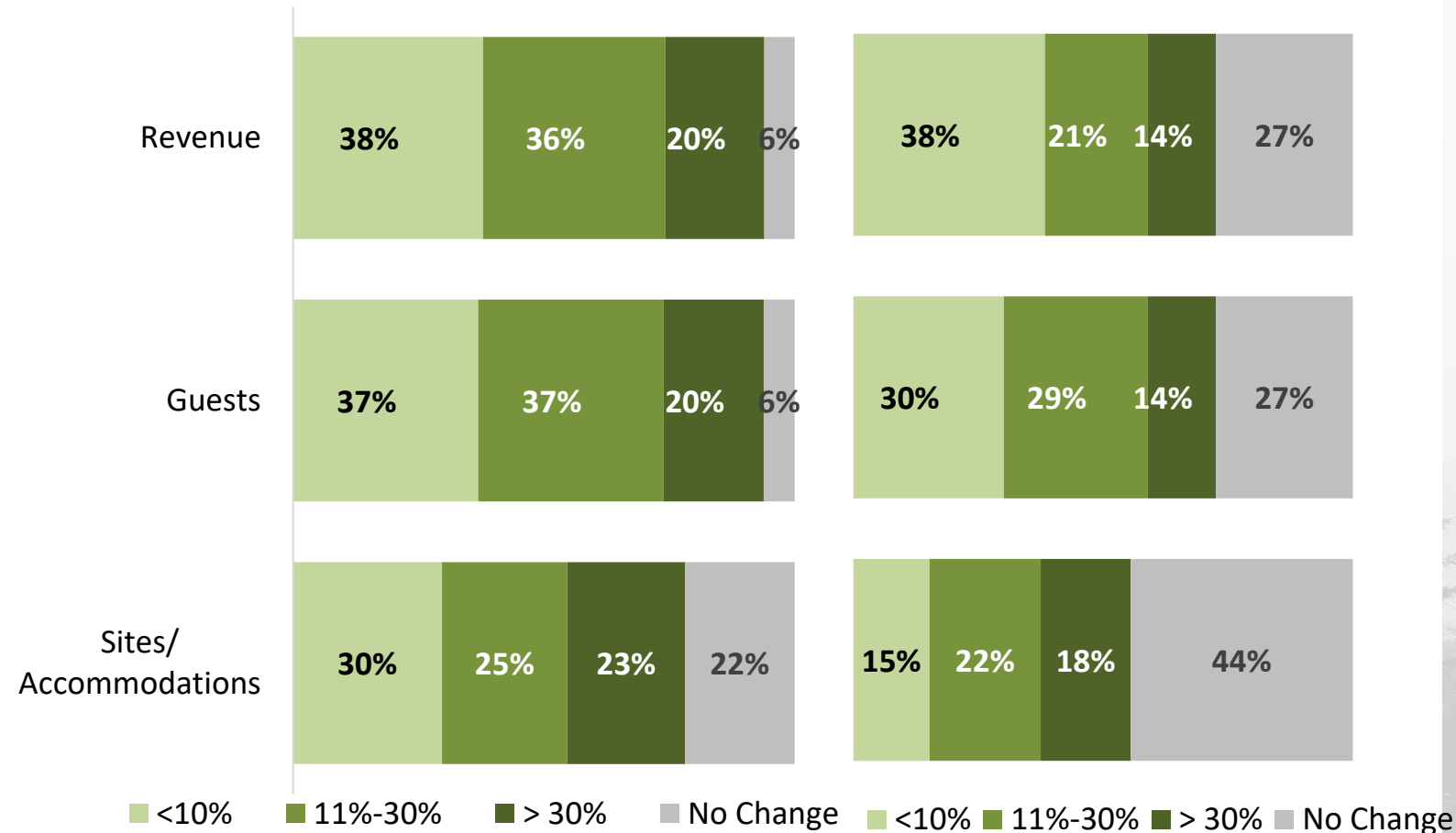
Average Length of Stay
 2024: 2.2 days
 2025: 2.7 days

Perhaps contributing at least in part to increased revenue, there is an uptick in the average length of stay from 2024 to 2025.

Couples appear to be the primary guest among operators, followed by families with kids.



What is the growth rate for the past 1-2 years?



Since last year, there appears to a slowing in the growth of these operations, with larger blocs of respondents stating that there has been no change, especially in the growth of accommodations or sites.

What are the primary barriers to future growth and the resources needed for growth & expansion?

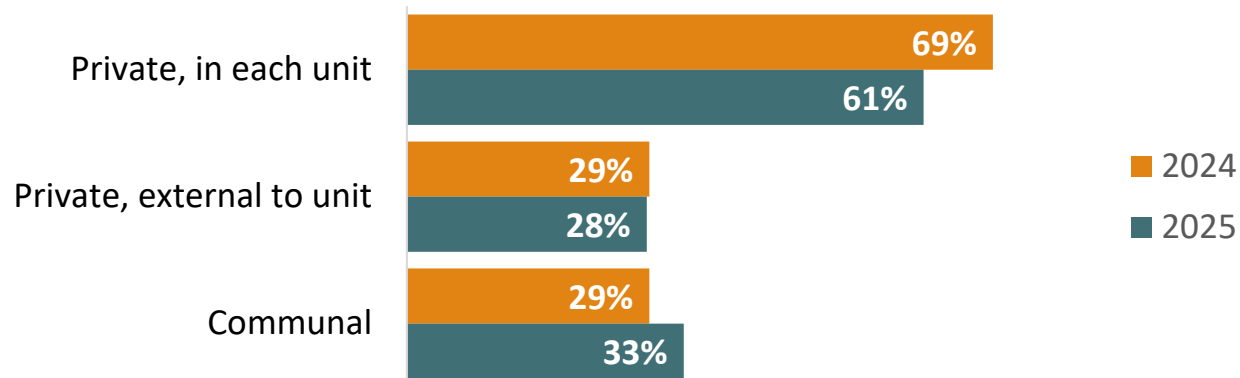


Financing continues to be the primary impediment to growth, while in 2025, the proportion mentioning ordinances and regulations has doubled over last year.

The resources need, again, include access to financing and equally important is marketing assistance. It's notable that there is a significant increase in the percentage who mention operational consulting.

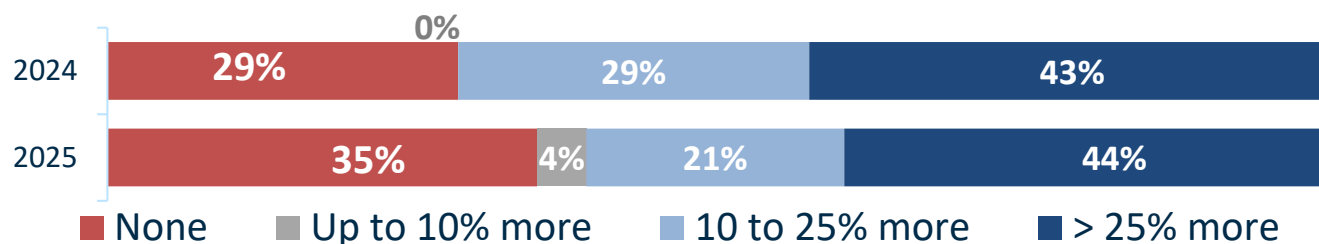
What is the current configuration of bathrooms at your property or properties? // How much extra, if any, do you charge for private in-suite bathrooms?

Location of Bathroom

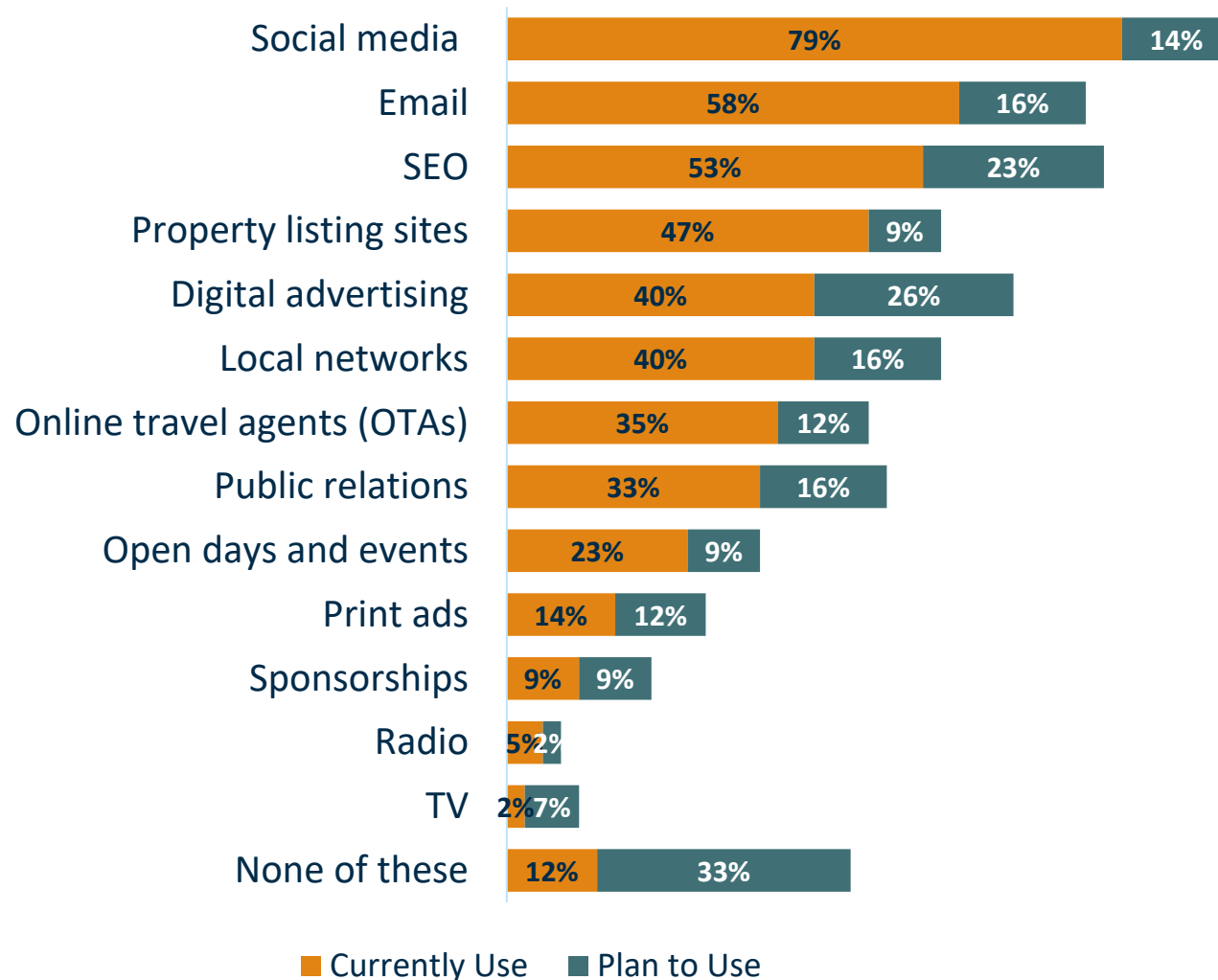


Private, in-suite bathrooms continue to be the most common bathroom configuration, though it appears that operators are including more of a mix, including communal facilities. By contrast, fewer operators are including an up-charge for in-suite bathrooms.

Extra Charge for In-suite Bathrooms



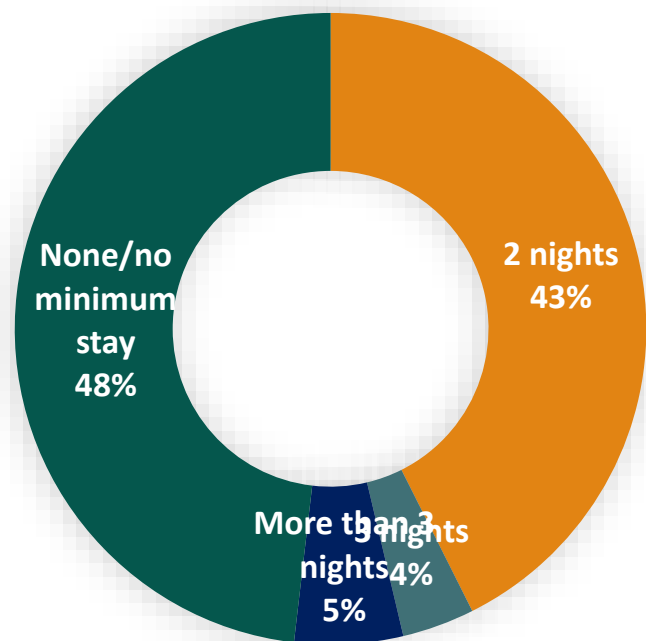
How are they marketing their businesses?



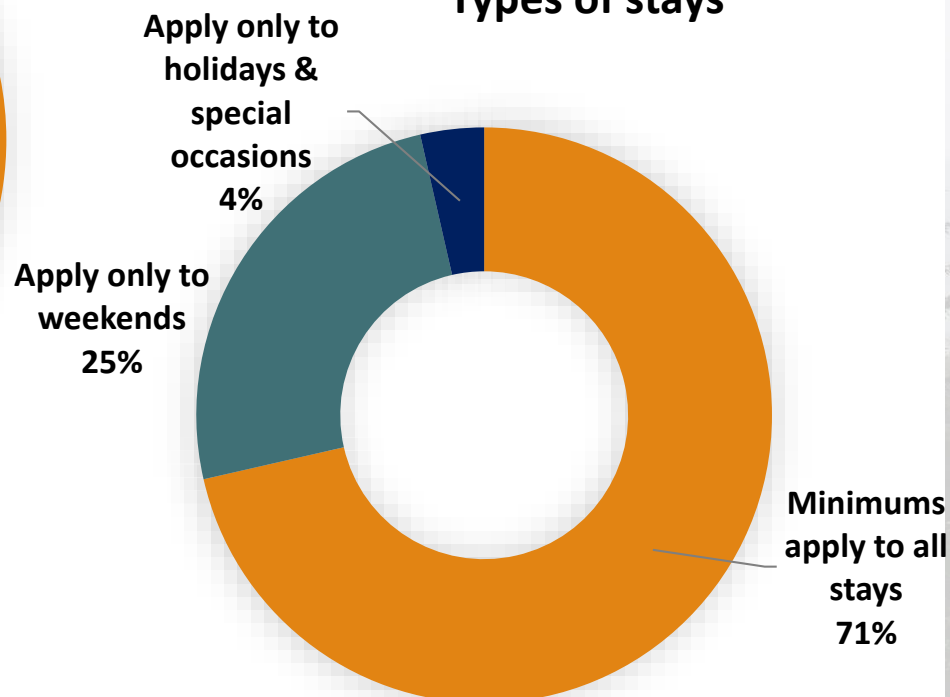
In 2024, 90% of operators said that they used social media for marketing, which has dropped to 79% currently. Email and SEO are also commonly mentioned forms of marketing. There is generally lower usage of PR, OTAs and events.

Is there a minimum stay required?

Minimum Stay Requirement



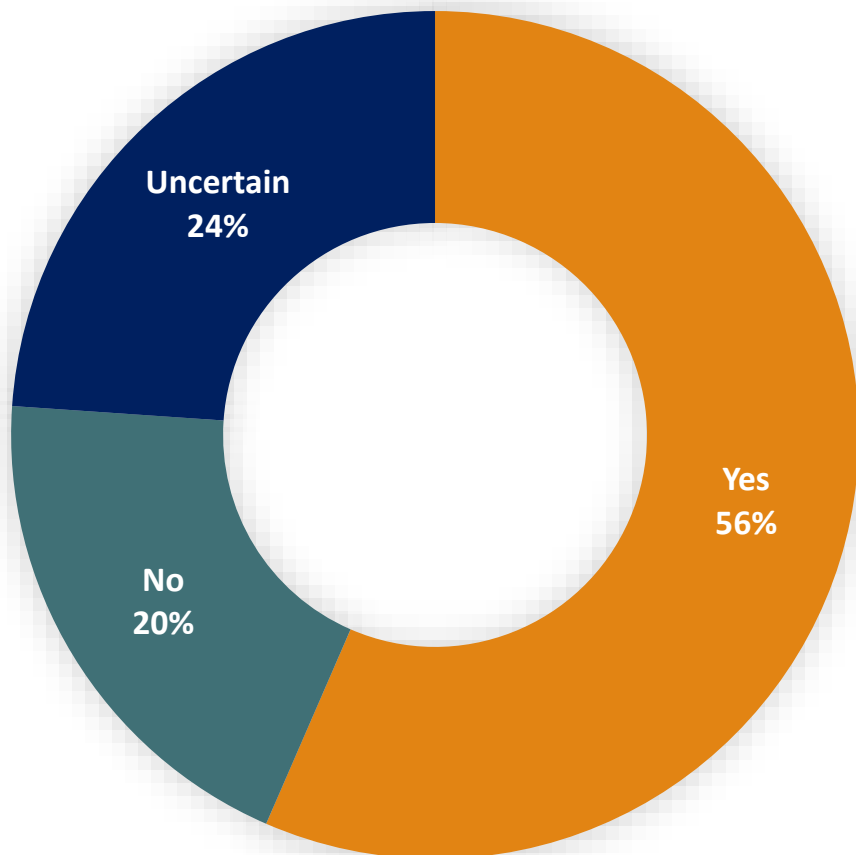
Minimum Applied to Types of stays



There is a split between those who do not have a minimum stay requirement (48%) and those who require 2 or more nights (52%).

Among those who have minimum stays, the largest proportion (71%) say that this requirement applies to all stays, while one-fourth apply the standard to weekends only.

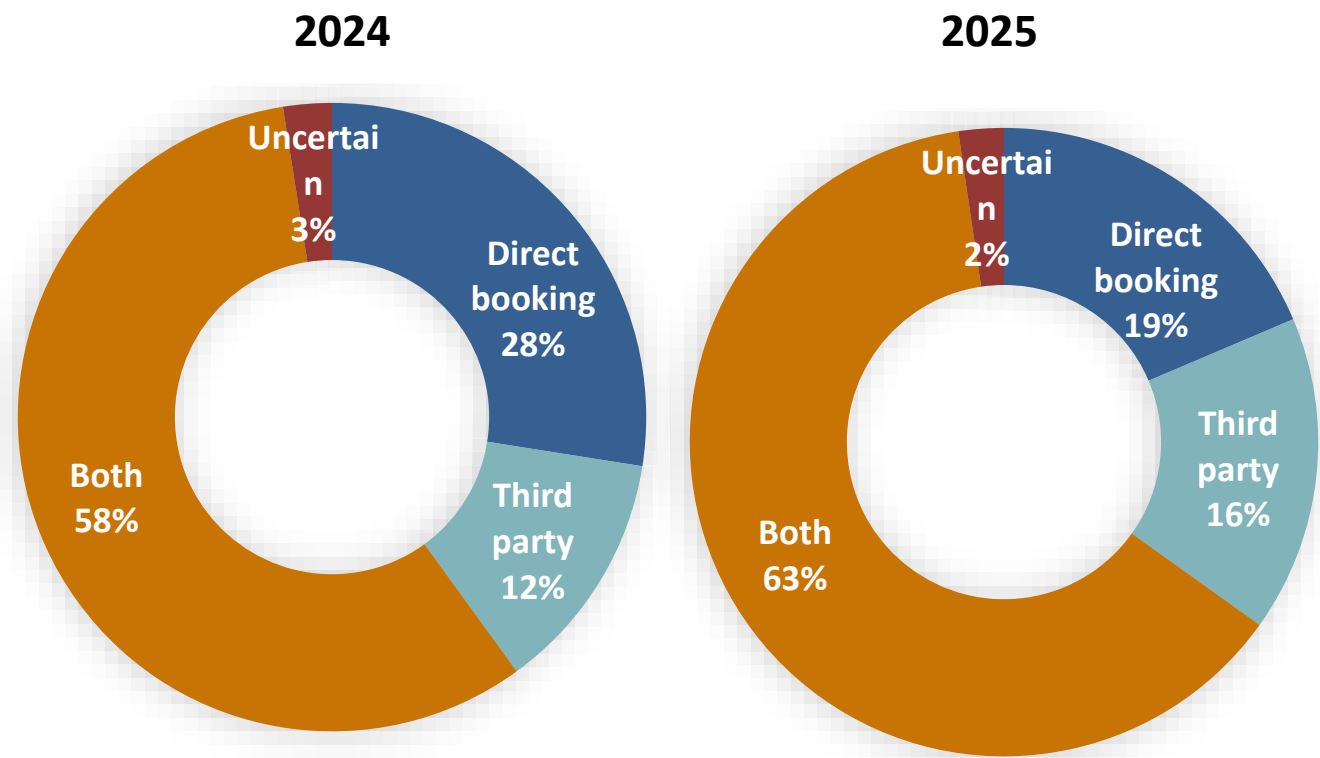
Is there an upcharge for pets?



Over half of the operators surveyed said that they include an additional fee for pets.

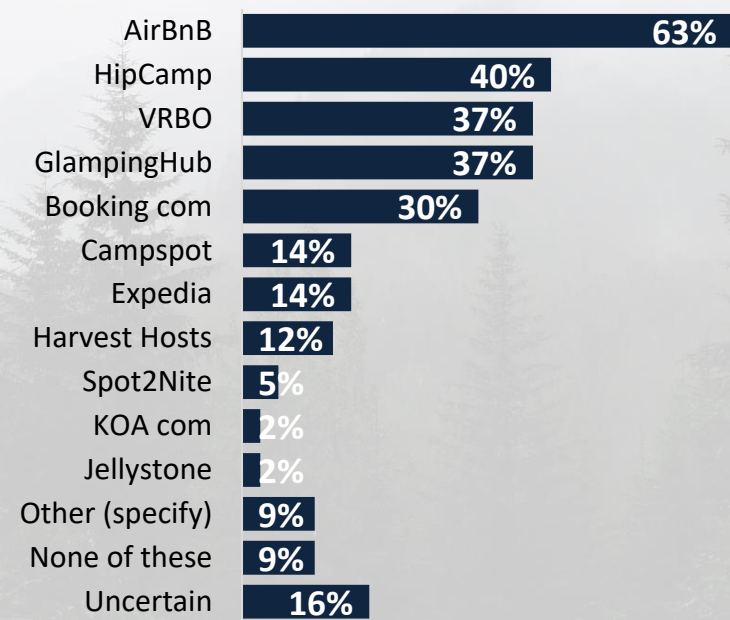
How are they booking reservations?

Booking Type Offered



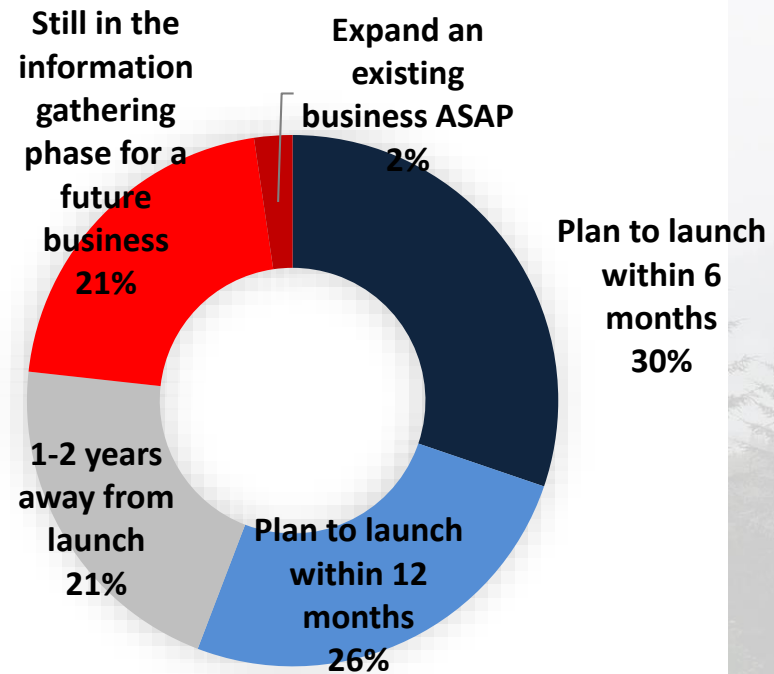
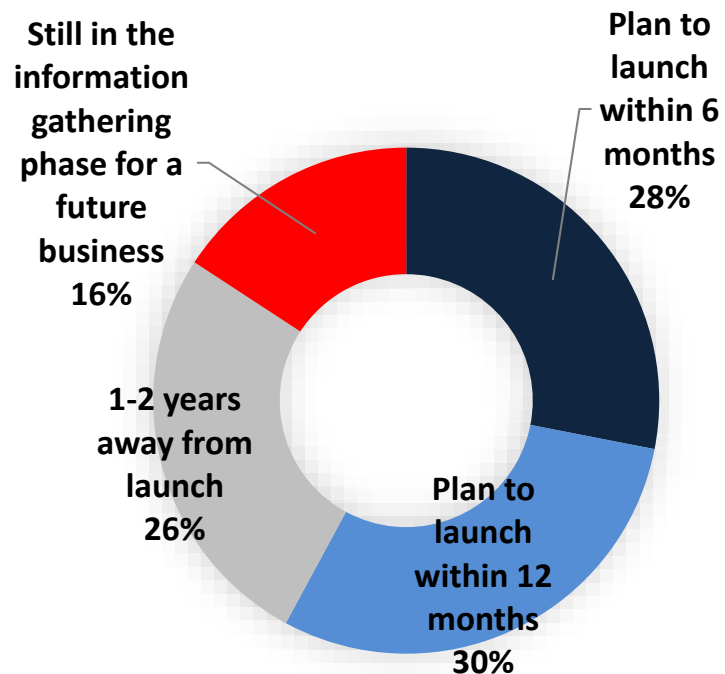
Fewer operators are using direct booking alone and instead having both options.

Listings



Prospective Operators

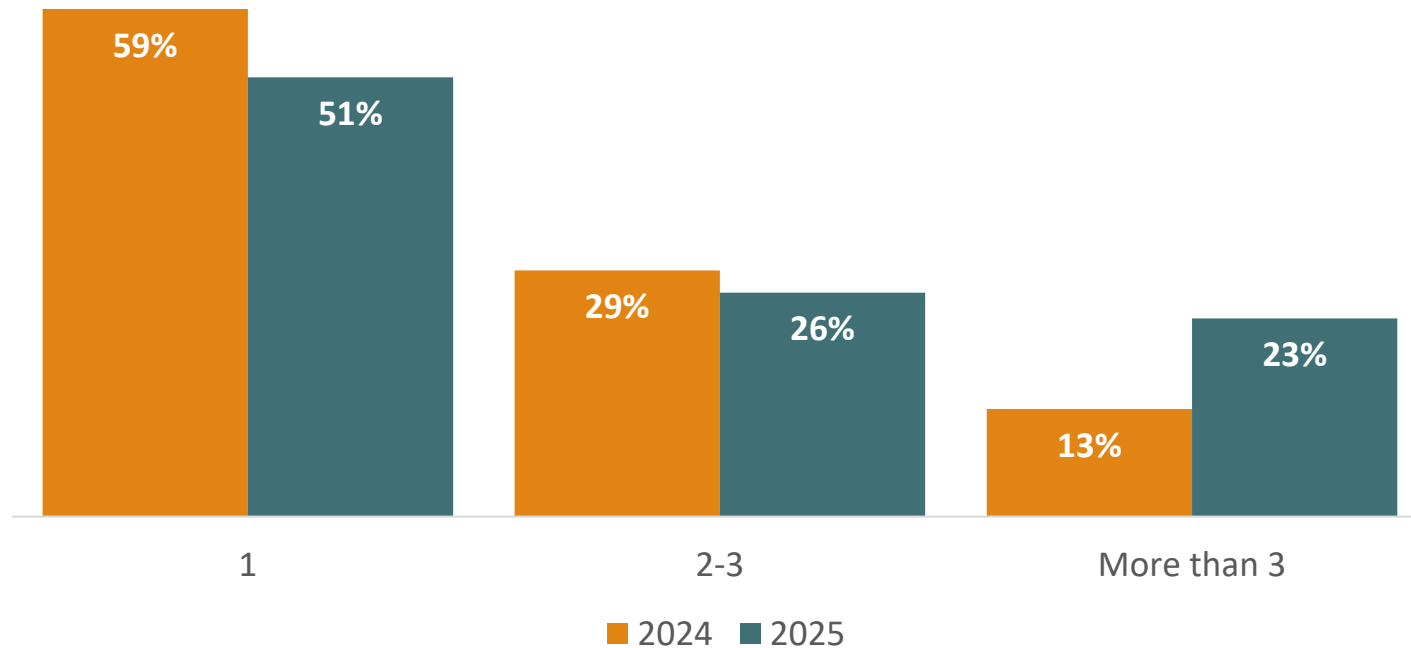
At what stage are they in the planning process?



Nearly identical to last year, 30% of prospects report being about 6 months away from launch and in total, more than half plan to open in the next year.

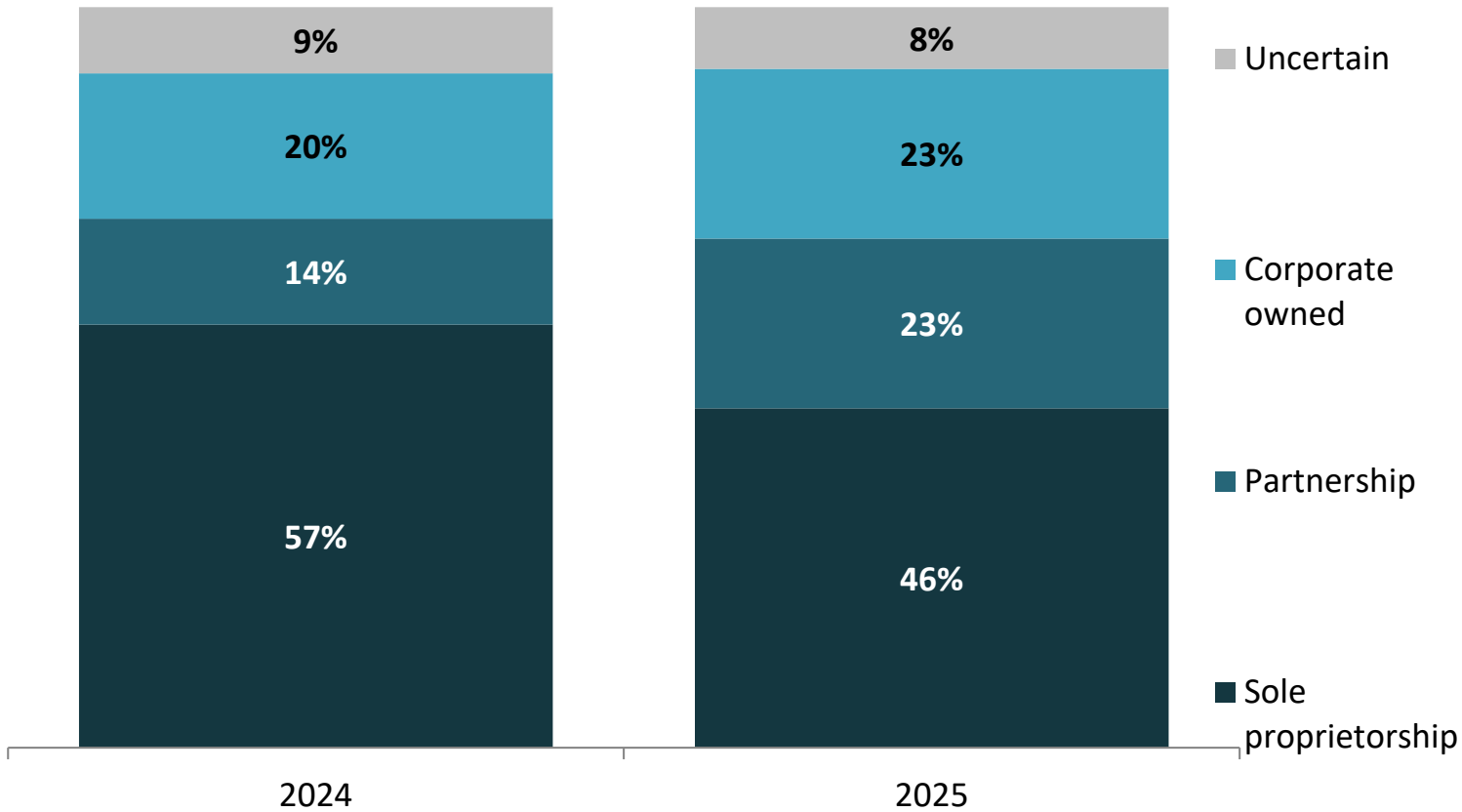
How many locations do they plan to open?

Planned Number of Locations



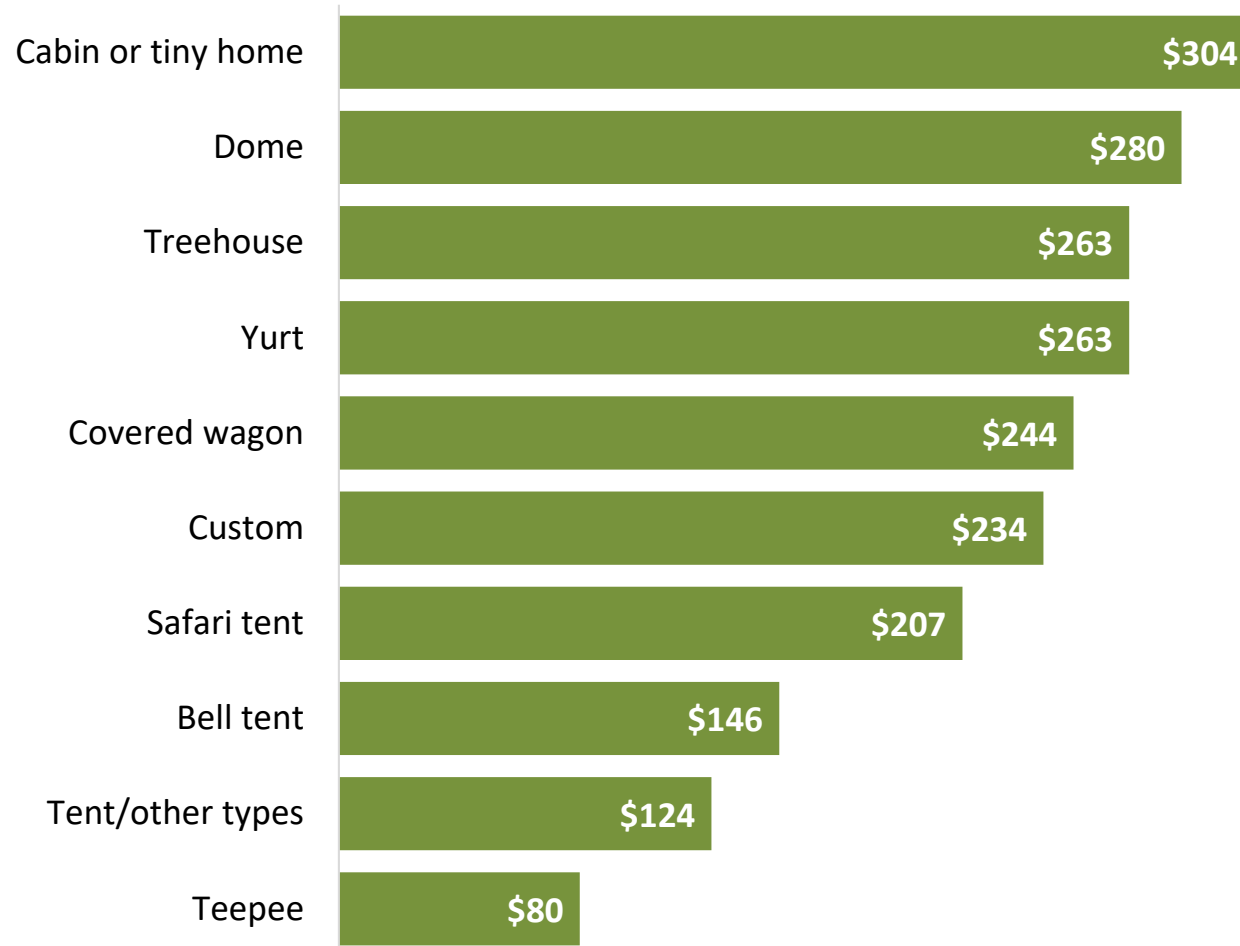
Optimism for opening multiple locations has increased over last year, with one-fourth of prospects indicating that they plan to open more than 3 locations.

What type of ownership/ownership structure will they have?



Sole proprietorship has declined since last year, with a greater proportion of partnerships and corporate owned properties.

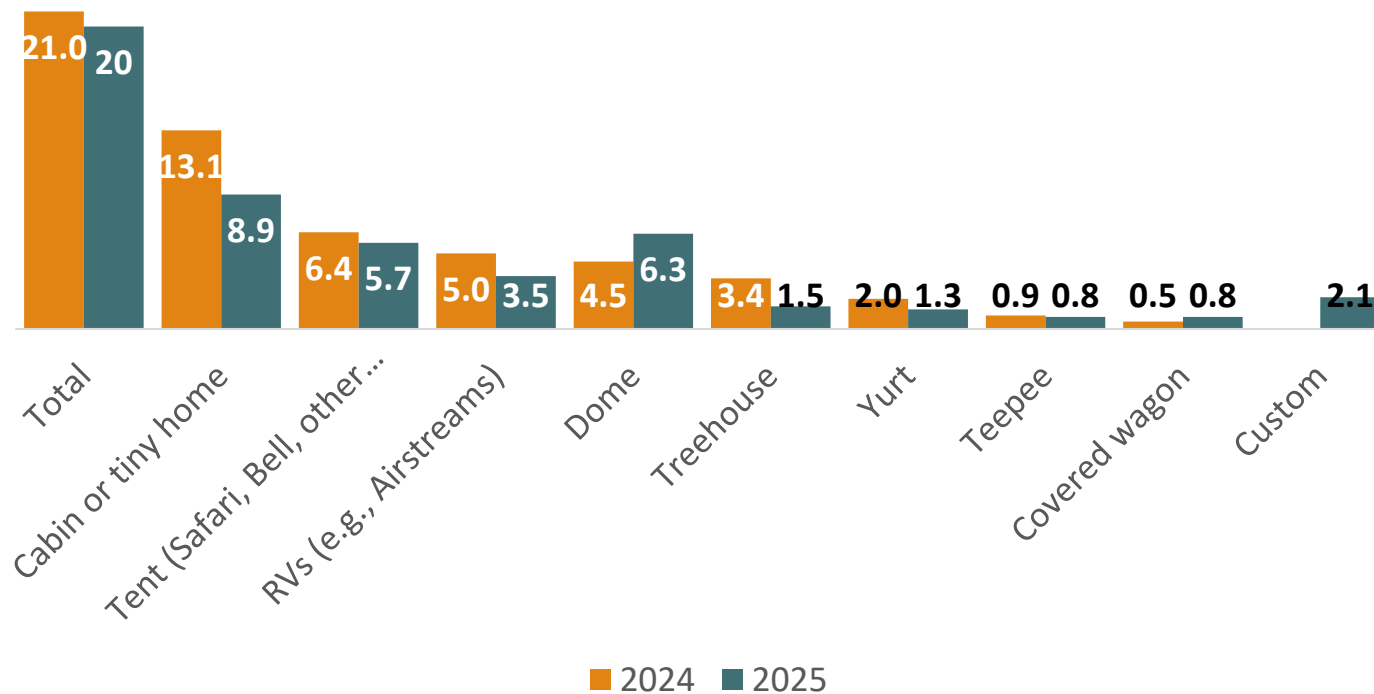
What is their planned ADR?



A snapshot of planned ADR shows that rates exceed \$300 for tiny homes, while teepees will be priced well below other types of accommodations.

How many structures of each type are they planning to include?

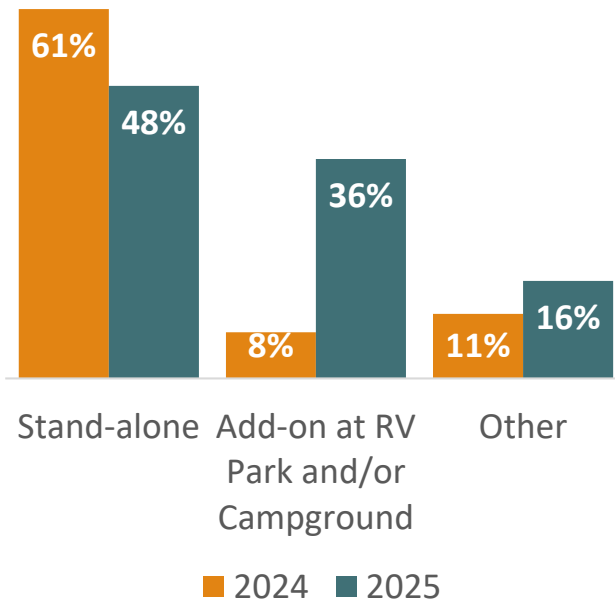
Average Number of Structures



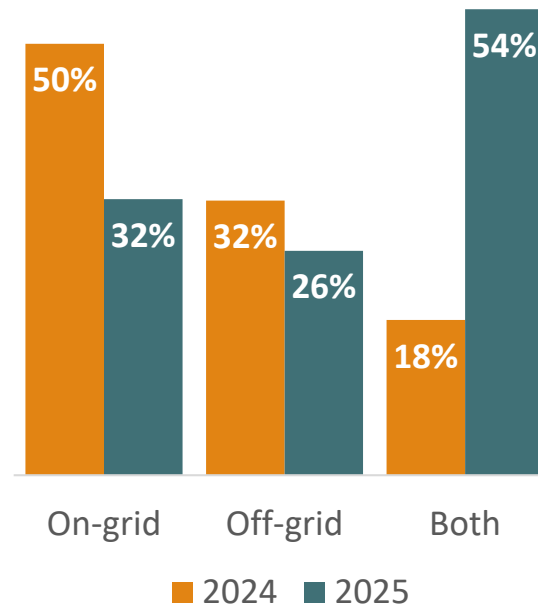
Again, similar to last year, the plans include about 20 structures (which is above the average for existing operators which stands at 13), with somewhat of a bump in plans to include domed structures and a decline in cabins/tiny homes.

What type of property or properties are they considering?

Stand-Alone vs. Add-On

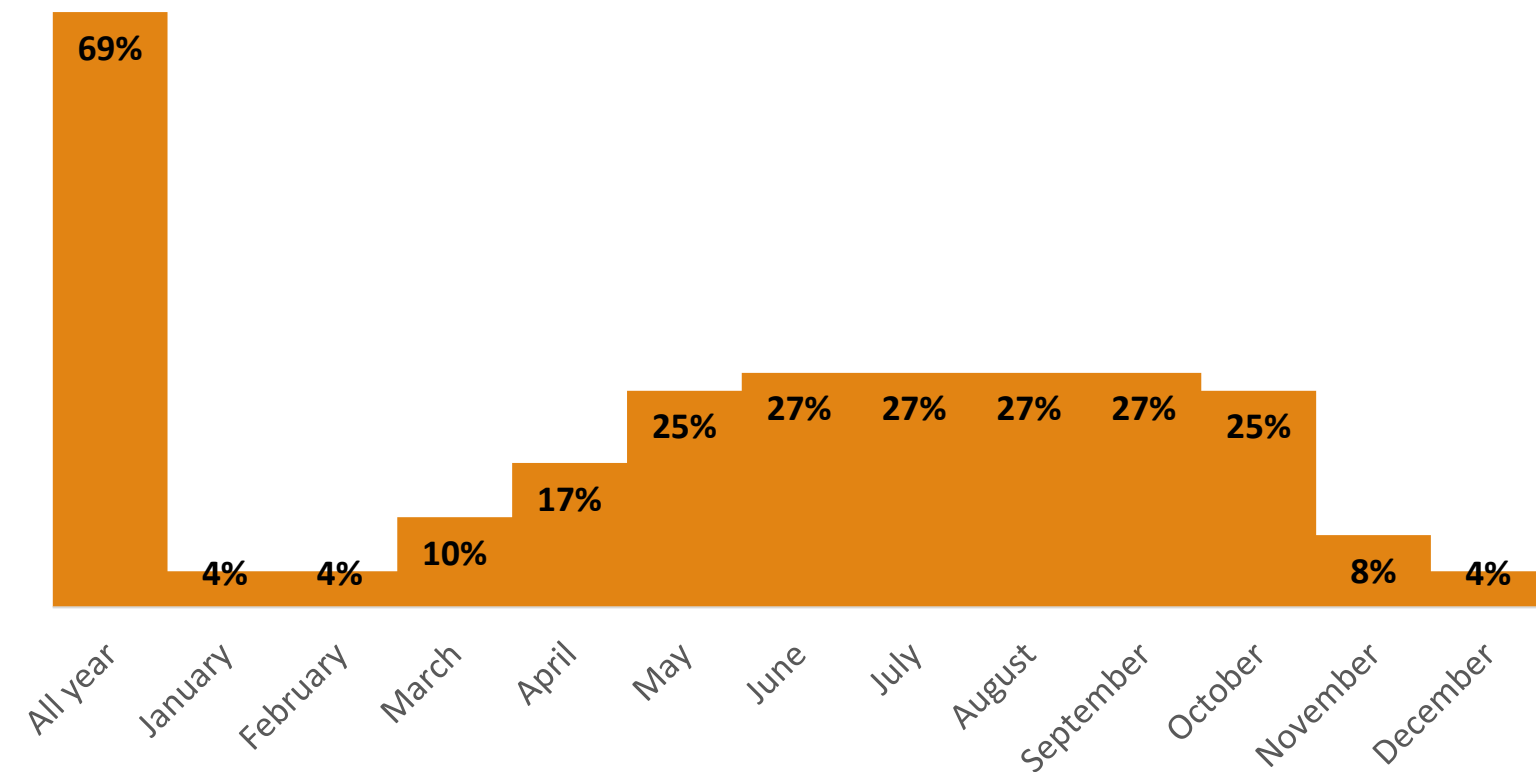


On vs. Off Grid



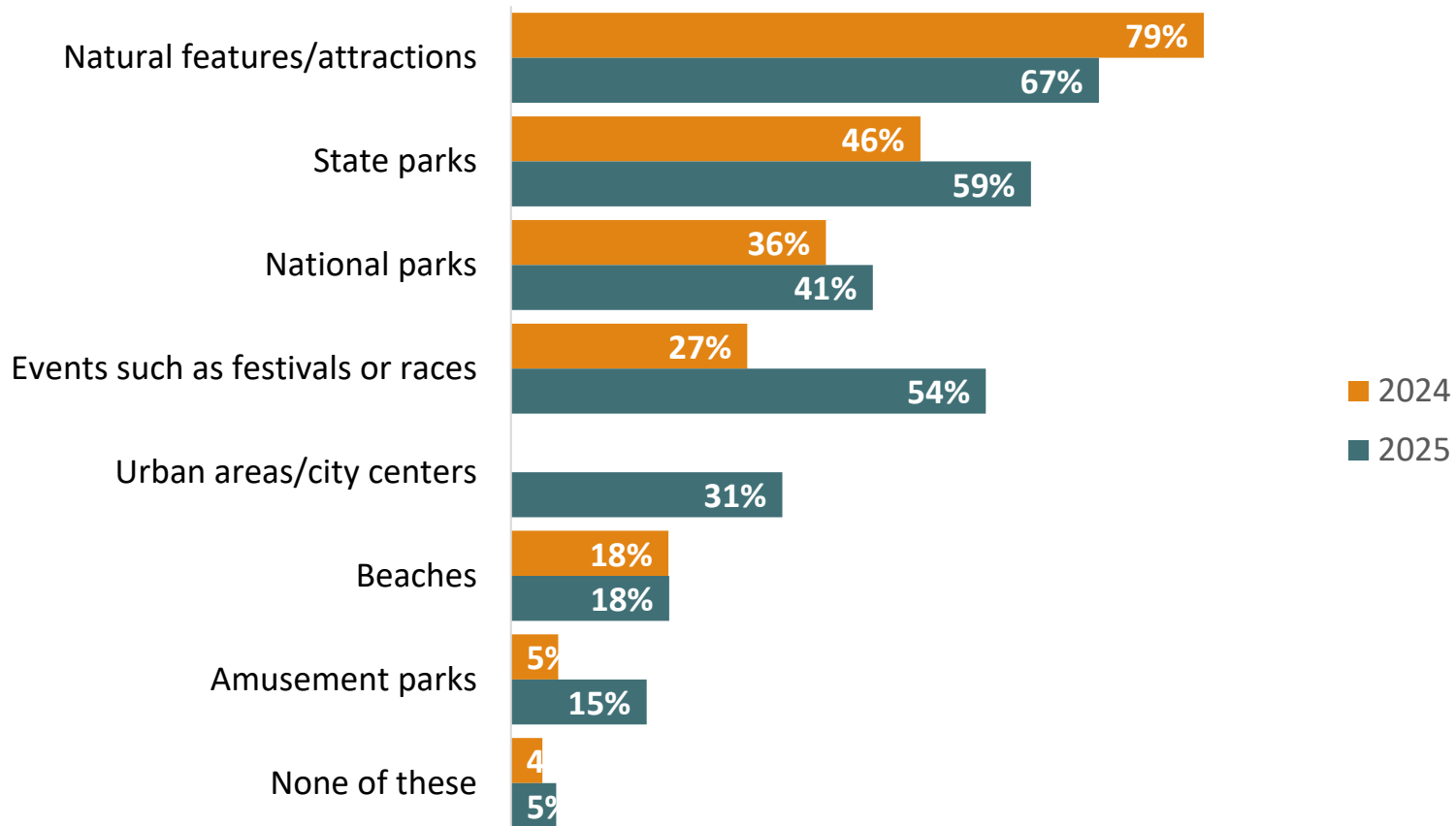
In a sharp contrast to last year, more prospective operators include those who plan to add-on to an existing park or campground. Additionally, there is a substantial bump in the percentage who are considering both on and off grid properties.

Which months to they plan to operate?



Similar to existing operators, most plan to operate all year.

Are they near any special features or locations?

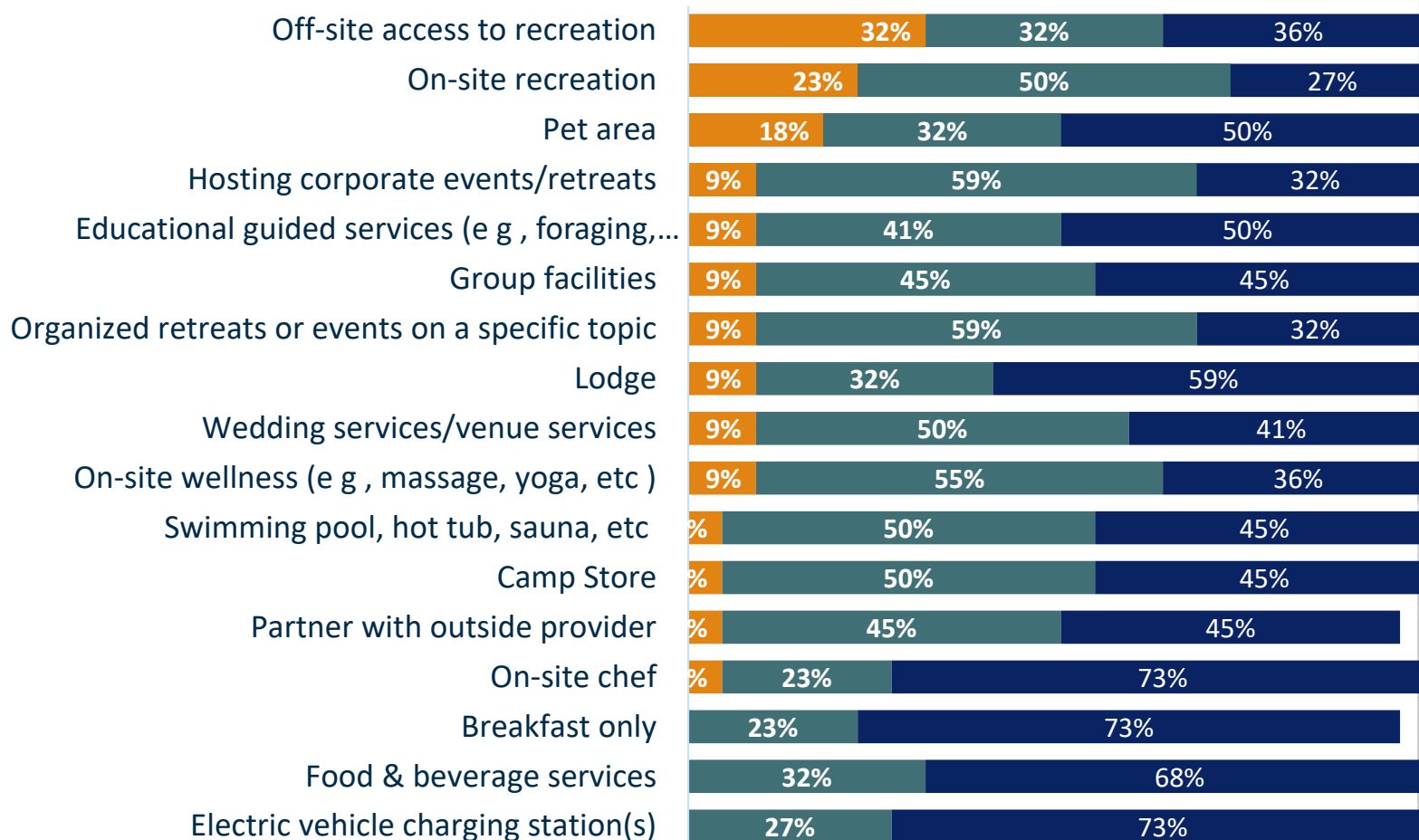


This new set of operators is twice as likely to be located near events such as festivals or races, and also near state parks.

It is worth considering that 3-in-10 are in close proximity to urban areas (note: this item was not included in 2024).

Which of the following services and amenities do you plan to offer?

■ Plan to include
 ■ Needed
 ■ Not planned

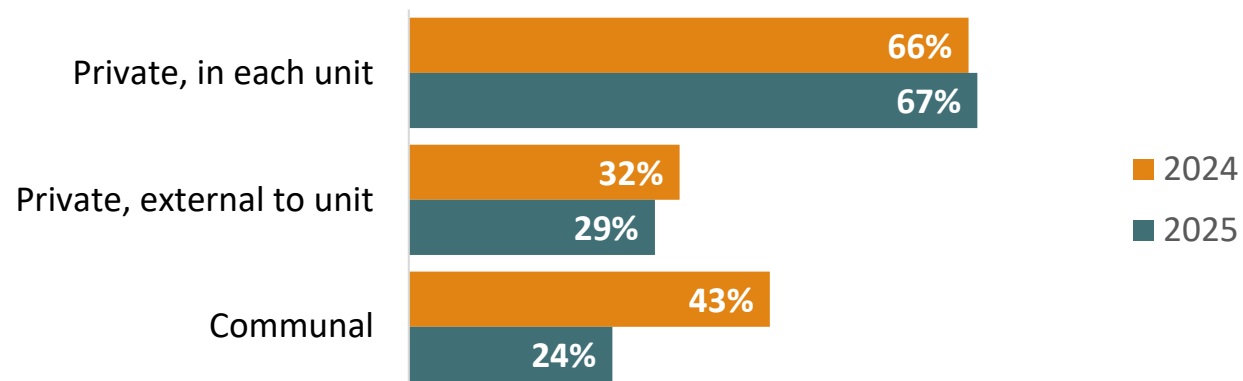


With many still in the early stages of planning, off- and on-site recreation are the most commonly included and planned amenities.

There also appears to be strong interest in consideration for hosting of events, retreats, and weddings.

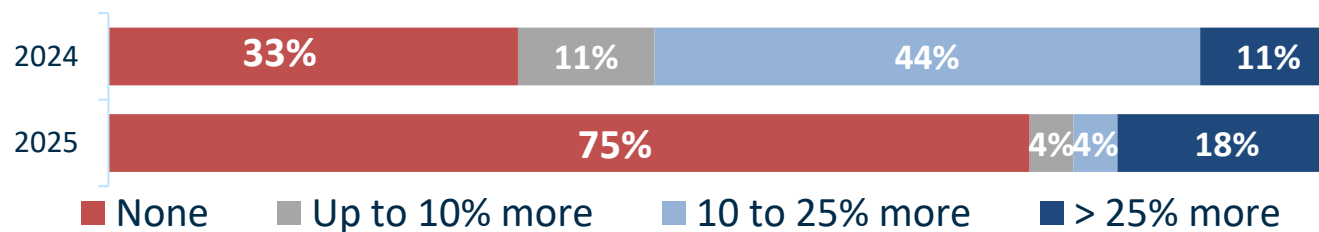
What will be the configuration of bathrooms be at the property or properties?

Location of Bathroom

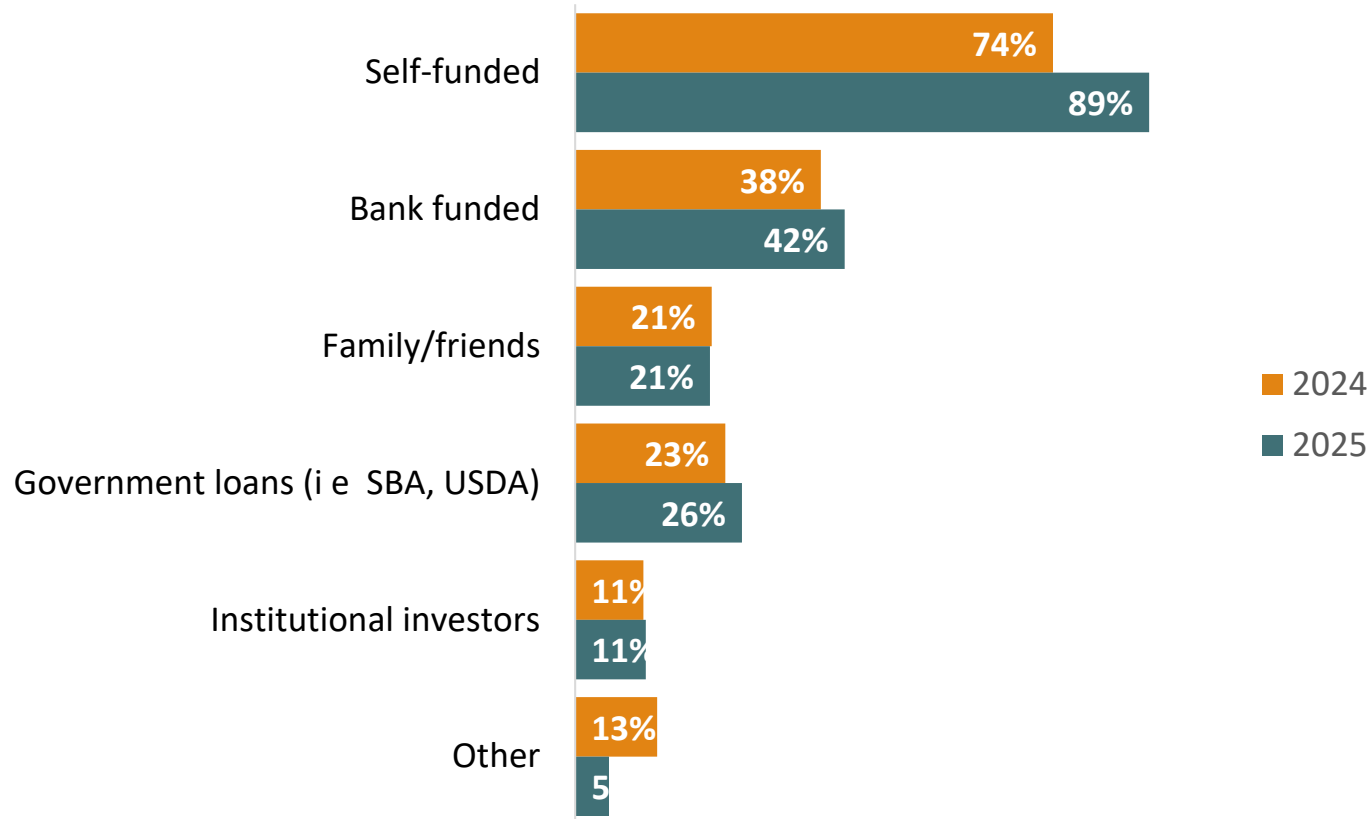


It appears that there is an increase in the consideration for including more communal bathrooms in addition to private in-suite configurations. This may be reflected in the increased proportion who say that they have no plans to upcharge for private bathrooms.

Extra Charge for In-suite Bathrooms



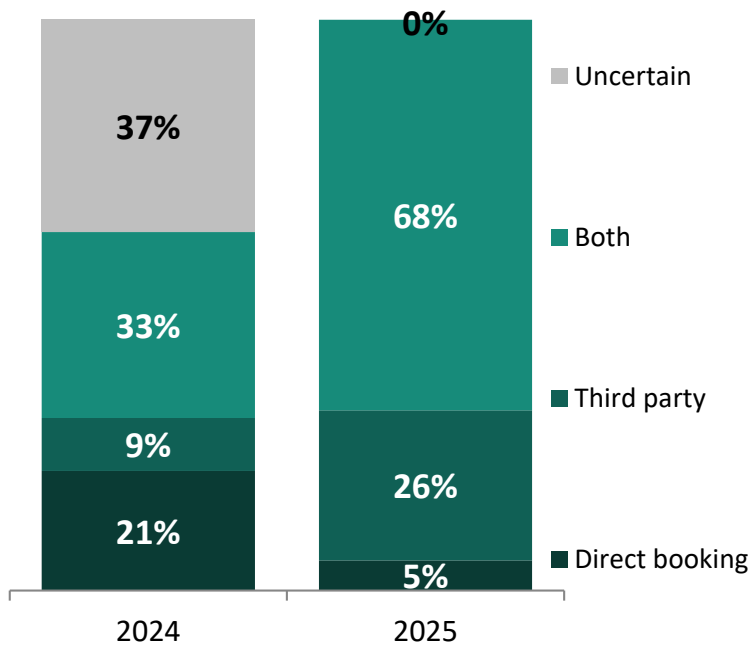
What type of financing will you use to fund your business?



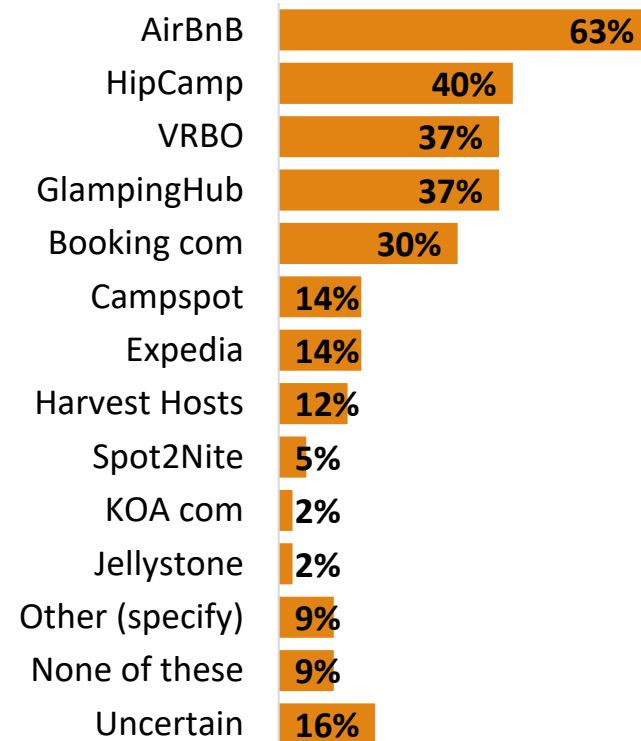
In 2025, a greater proportion of prospects plan to use self-funding for their property, though the mix of other sources remains consistent, suggesting that this set of owners is seeking funding from multiple sources.

What method do they plan to use for booking and reservations?

Planned Booking Type



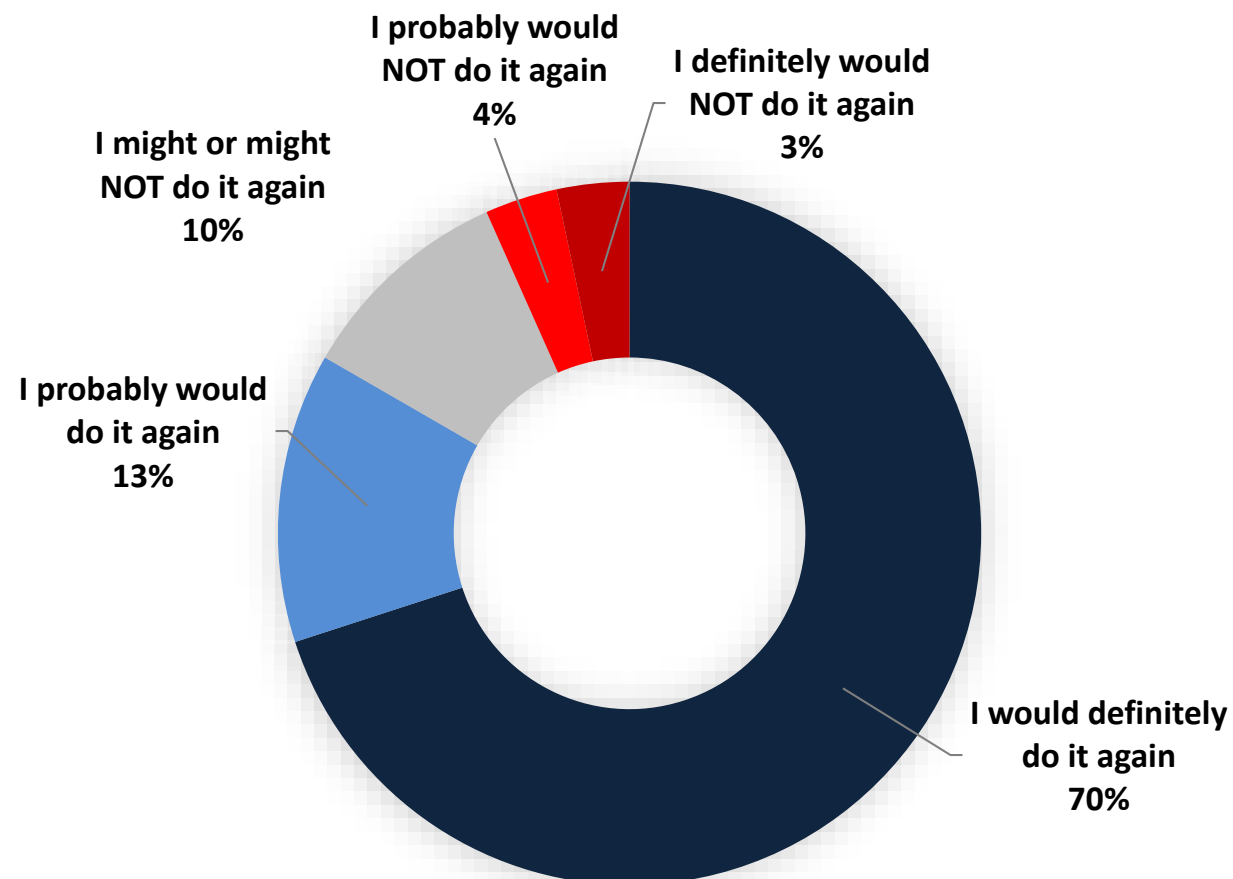
Planned Listings



Far fewer prospects plan to use direct booking as the only way to make reservations, with the proportion who plan to use both direct and third party bookings having doubled.

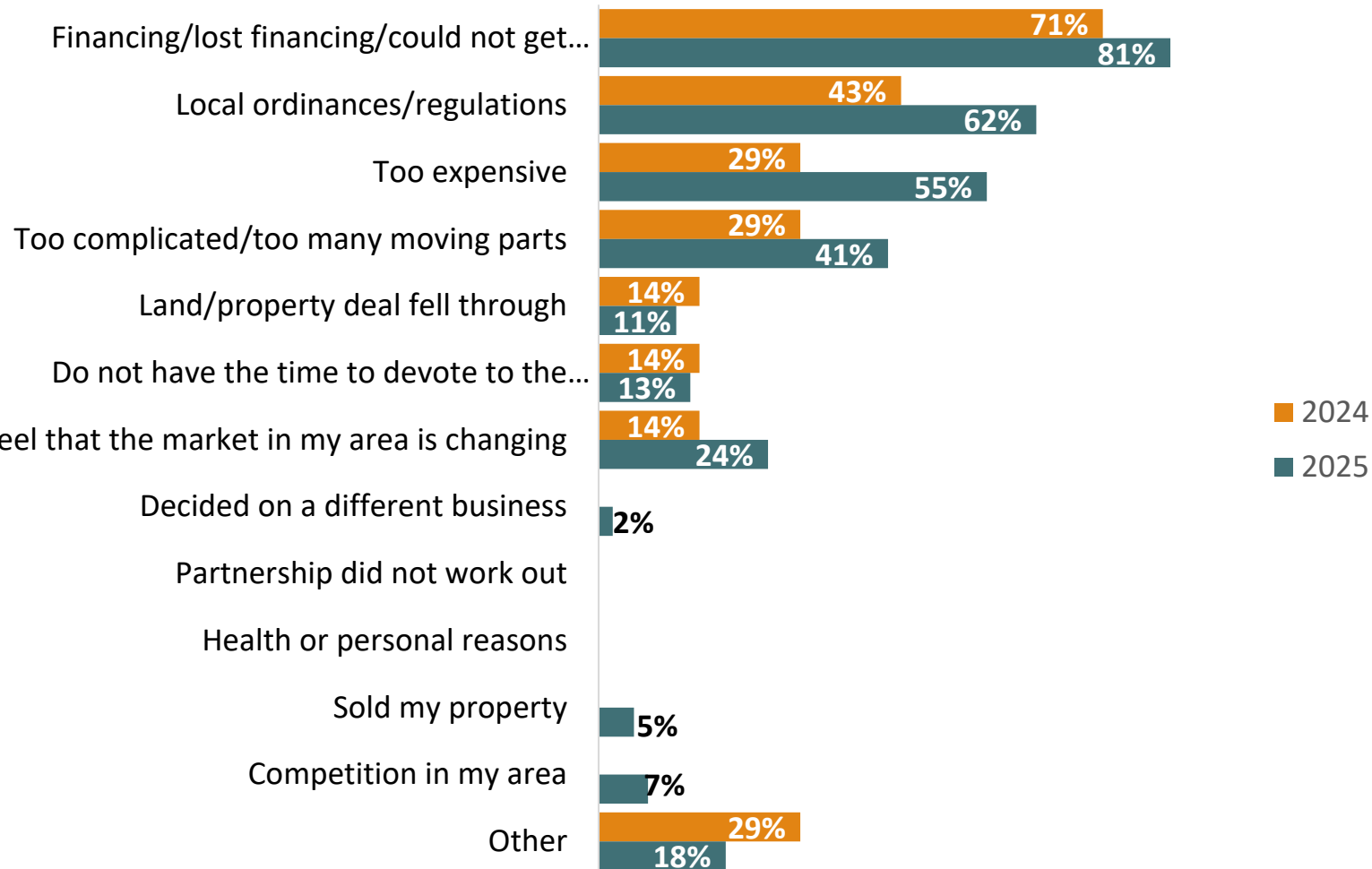
In terms of listings, the most commonly cited include AirBnB, HipCamp, VRBO, and GlampingHub.

Would they do it all over again?



And at this point in time, most of the prospects would do it all over again, with only 7% suggesting they would not; 10% appear to have some reservations.

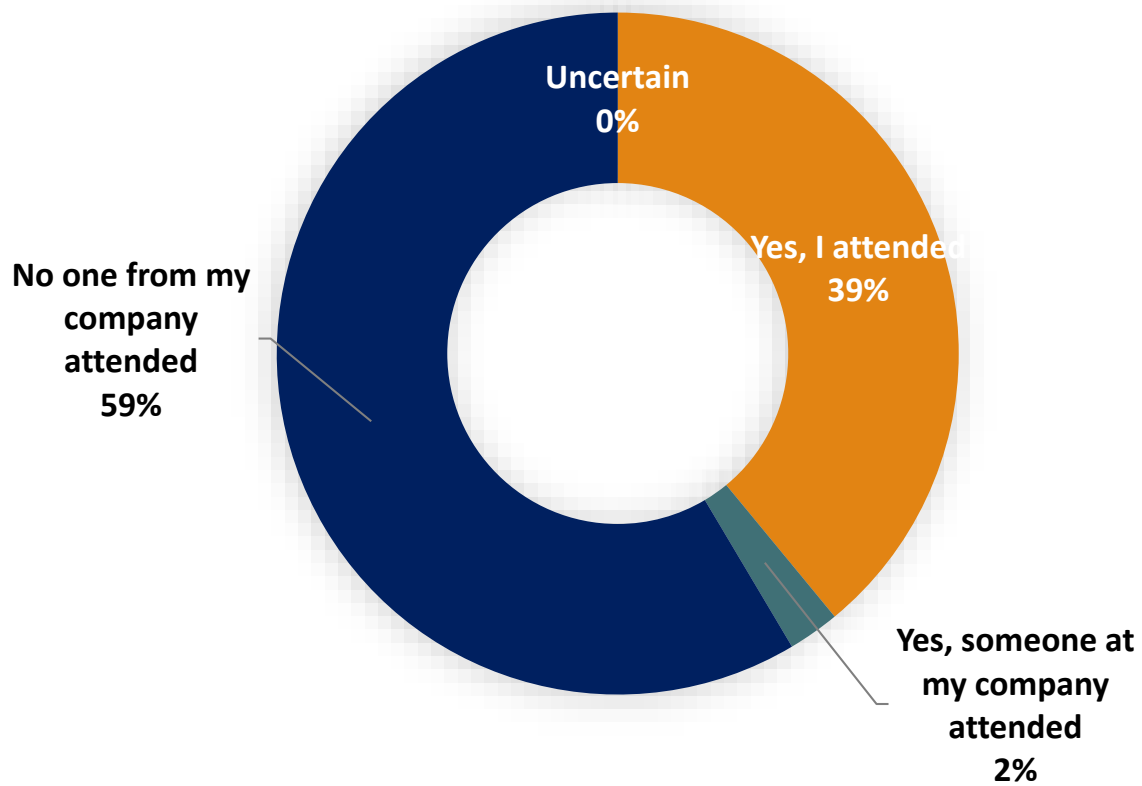
Why did they back out of moving forward?



Financing continues to be the biggest reason for prospects losing interest in opening a glamping park, though there are increases in those mentioning local ordinances, expense, and complications.

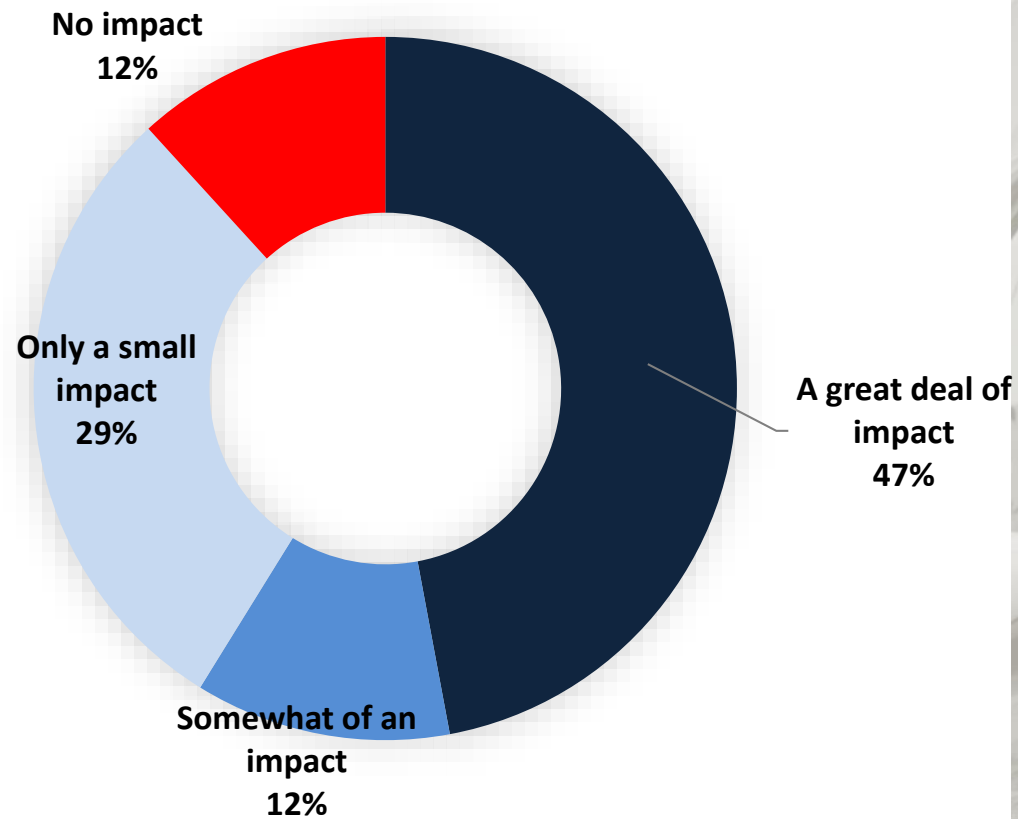
Glamping Show

Did they attend the 2024 Glamping Show Americas conference in Colorado?



Attendance at the show from last included 4-in-10 of the respondents.

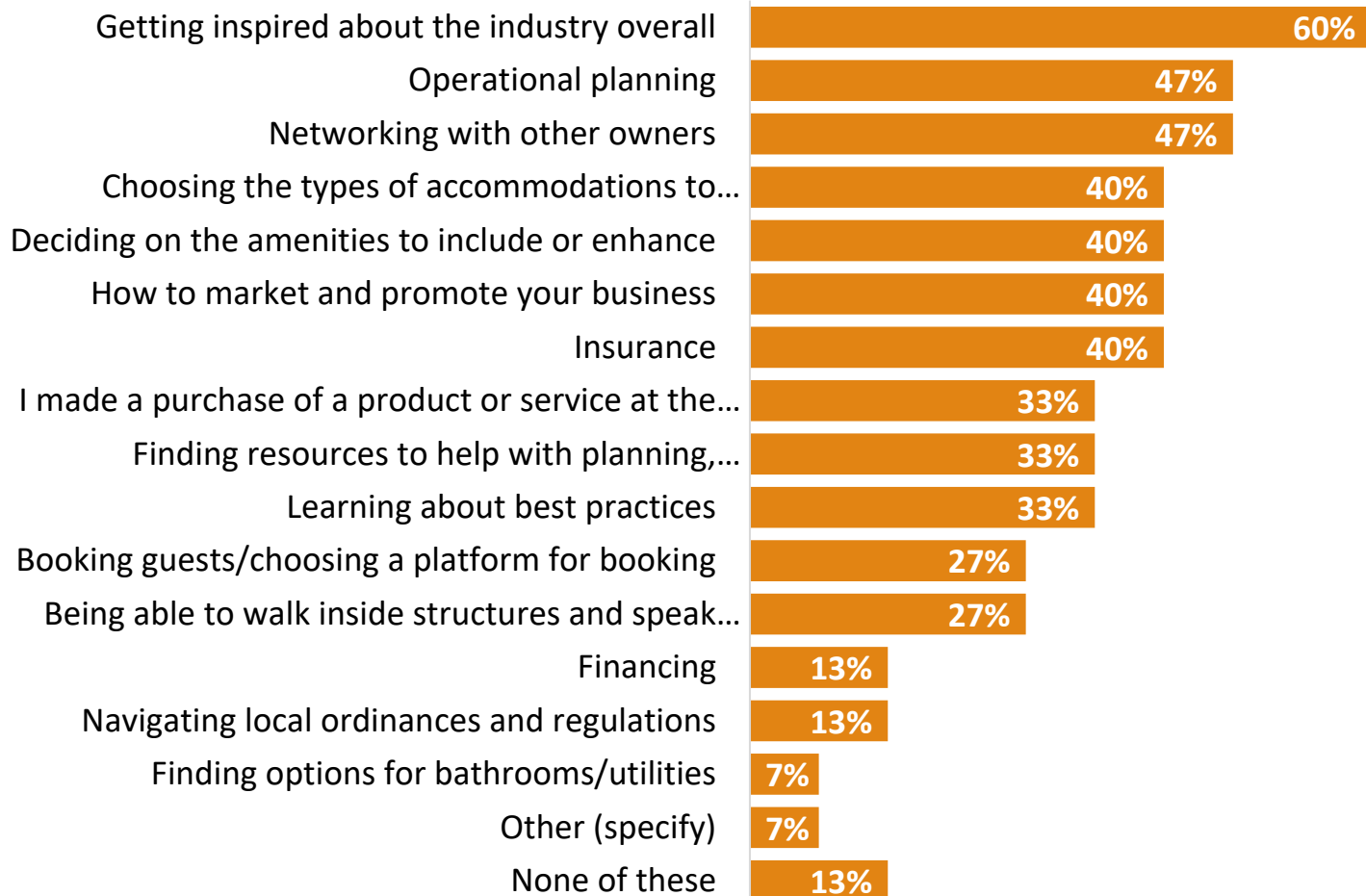
Did attending the show impact their business?



Among the attendees, close to half said that the show had a great deal of impact on their businesses.

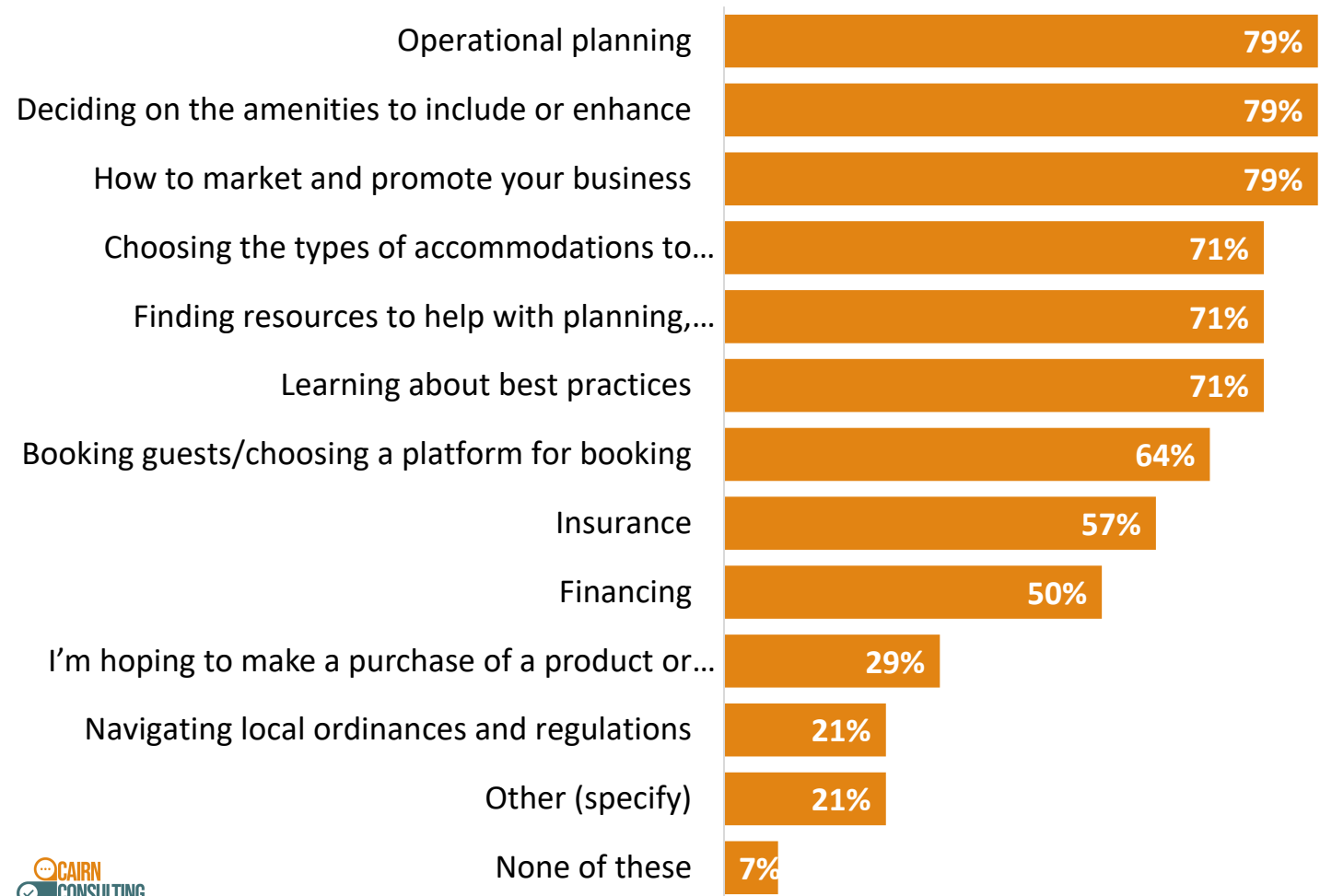
What areas of their business were impacted by attendance at the show?

GLAMPING
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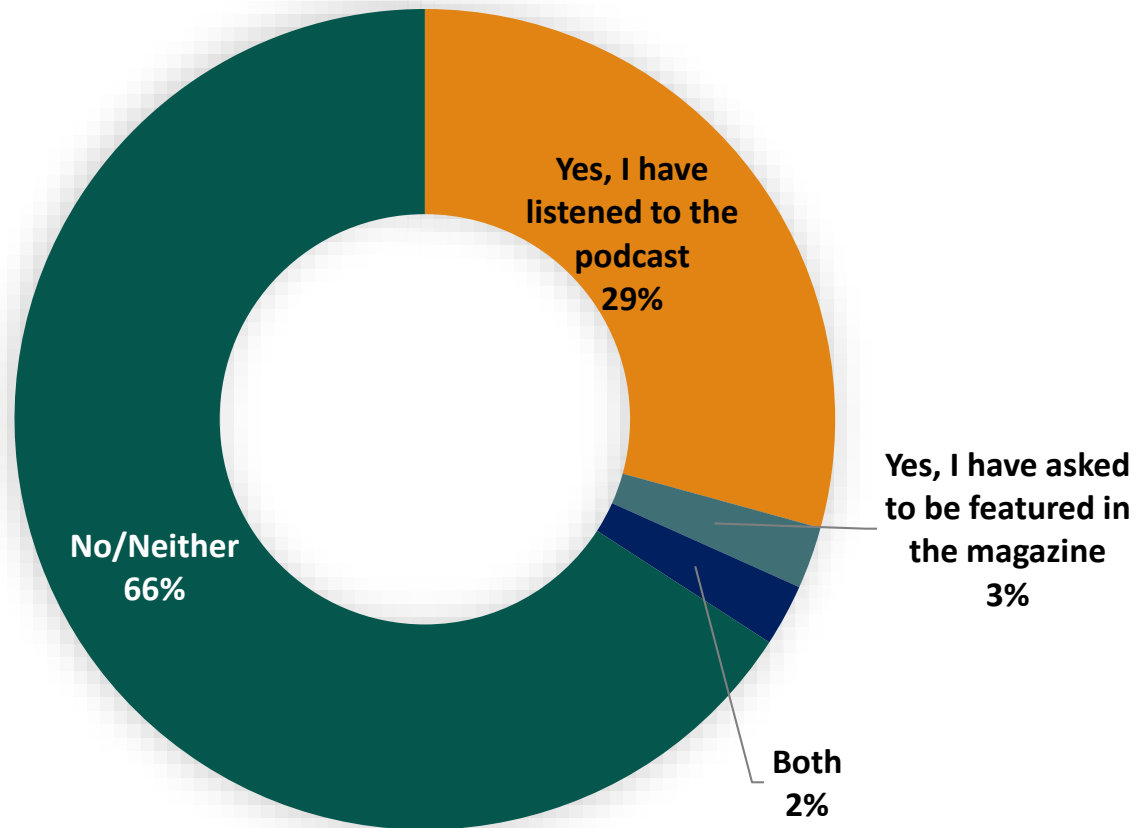
Inspiration is the greatest impact mentioned by those who attended the show.

What areas of your business are you seeking to enhance or find out more about at the 2025 show?



2025 attendees are seeking help with operations, amenities, and marketing.

Have they listened to the Glamping Americas Podcast or asked to be featured in the magazine?



Two-thirds have not had exposure to the podcast, nor asked for a magazine feature.



Contact Information

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Our organization has stayed on the forefront of the market research industry by offering our clients a full suite of research services, as well as the analytics and insights to move their organizations forward.

In particular, our work on the North American Camping Report has been nationally recognized, being cited in such notable media outlets as The New York Times, Chicago Tribune, LA Times, NBC News, Fox Business News, USA Today and CBS News. This work has been recognized by PR Week in the “Best in Analytics” category for both 2017 and 2018 and a Sabre Award for “Best Post Campaign Analysis” in 2018 and 2019.

