Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective

Prepared for:
Tourism Business Development, Research and Investment Branch
Alberta Tourism, Parks and Recreation
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Acknowledgements

This study was commissioned by the Tourism Business Development, Research and Investment Branch of Alberta Tourism, Parks and Recreation (ATPR). The advisory team for the study included representatives from ATPR, the Alberta Hotel and Lodging Association and the Recreational Vehicle Dealers Association of Alberta. The authors would also like to acknowledge the panel of industry experts who provided valuable input to the study.
Executive Summary

In order to assess if Alberta campgrounds are adequate in numbers, condition and diversity, a detailed look at recreational vehicle (RV) campers and campgrounds was conducted by The Praxis Group™ in February and March of 2009. The study included a review of print and web literature, expert interviews and a public telephone survey of those who camp with RVs who reside in British Columbia, Alberta and Saskatchewan. Using these primary and secondary sources, the study provides an assessment of the status of the travel industry in light of the economic changes, the current campground situation in Alberta in terms of the supply side (manufacturers and RV campground operations) and the demand side (how Alberta rates in the eyes of its campers), highlights significant trends impacting RV campground operation and development, and identifies best practices in campground operations.

Camping is one of the most popular leisure activities in which Albertans are involved. **Over 40% of Albertans take part in overnight camping as a leisure activity and over three quarters of camping is done using a recreational vehicle.** Alberta has one of the highest rates of RV ownership in North America, with 18% of households owning an RV.

In 2007, more than $380 million dollars was spent in the province on camping trip expenditures alone. Approximately $700 million dollars is spent on RV purchases in Alberta each year, representing about one third of all RV sales in Canada. Over 20,000 new RV units are sold each year in Alberta, adding to the more than 800,000 RV units on the road nationally. Canadian retail RV sales in 2008 grew by 11.8% and early indications in 2009 are showing continuation of strong sales. The future for the RV camping industry, even in the current economic downturn is one of optimism. There is also a high desire for current RV owners to upgrade to a larger model in the future.

The trend in camping activity in Alberta since 2005 is on the rise, following a downward trend in camping since the late 1990’s. Forecasts suggest participation in RV camping will be stronger than ever over the coming years given the affordability of camping and the heavy existing investment in recreational vehicle ownership.

Over 40,000 campsites throughout the province provide campers with a wide range of opportunities; lakes and rivers for fishing, swimming and other water sports; wilderness for such activities as hiking, backpacking, horseback riding, X-country skiing, quadding; and, the existence world class tourist attractions.

In spite of the popularity of the activity and its importance to Albertans and the tourism industry as a whole, the supply-side picture is less than ideal. Many of the province’s campgrounds have deteriorated in quality through a lack of re-investment. Campsites developed several decades ago have not kept pace with the changing needs of today’s RV campers. The perceived value for money has declined with charges for firewood and showers along with increased camping fees with limited corresponding investment in facility upgrades. RV campers are seeking service buildings with showers and flush toilets, power and water hookups and sani-stations. They are also looking for well maintained campgrounds that offer privacy and sites large enough for their RV camper.
On the surface there appears to be a large supply of campsites in Alberta; however, the number of sites designed to meet current and future RV camping requirements is not sufficient.

Over half the province’s campground supply does not offer power hookups and over two-thirds do not offer water hookups. The largest provider of serviced sites is privately owned campgrounds. Over 60% of powered sites and 72% of sites with water hookups are provided by private owners. National parks and provincial parks are significantly under-represented in terms of provision of serviced sites.

Just over half of the province’s campgrounds offer shower facilities, flush toilets and sani-stations. In terms of these services, the provincial parks lag well behind federal, municipal and private parks.

The survey of industry experts indicated the lack of availability of suitable sites coupled with a less than adequate reservation system and higher camping fees is forcing campers to leave the province, and is not attracting campers from outside of the province to the extent that could be the case. The survey findings show one third of Albertan’s camping nights are spent outside of Alberta, mostly in British Columbia and Saskatchewan.

One of the benefits of investing in the upgrade of the province’s campgrounds will be to relieve some of the pressure on the areas that currently experience demand well in excess of supply. Areas like Kananaskis Country are perceived as ‘impossible to get into’. Many campers are frustrated with the inability to obtain what they perceive to be the ‘prime camping sites’ as these are secured through advanced bookings as early as March for the entire summer season. Campers thereby reach the conclusion that the province has an inadequate supply of campsites (noted in two recent province-wide surveys). In reality the supply of campsites is not the issue; rather it is the insufficient supply of campsites that have the services and amenities to meet today’s camping needs. Improvements to information and marketing will also work to relieve the current concentration of demand.

To sustain and even grow the province’s RV camping industry, investment is essential. Without investment in the province’s campgrounds, the risk of losing campers to neighboring provinces and states increases. British Columbia and Saskatchewan have embarked on strategies to align their campground supply with the current types and levels of demand.
1.0 Study Background and Purpose

1.1 Background
Camping is a very popular leisure activity to Albertans; over 40% of Albertans take part in overnight camping as a leisure activity. The Alberta Recreation Survey (2005) indicated that Albertans rated camping as their third most favorite leisure or recreation activity, after walking and golf.

RV camping is by far the most popular method of camping. Over three quarters of camping is done with some form of RV. The recreational vehicle market includes a wide array of products targeting nearly every demographic group. The motorhome segment includes Class A, Class B, and Class C motorhomes, as well as conversion vans and busses. The travel trailer and camper segment principally includes conventional and fifth wheel travel trailers, truck campers, and tent trailers.

In order to assess if Alberta campgrounds are adequate in numbers, condition and diversity, a detailed look at recreational vehicle (RV) campers and campgrounds was conducted by the Praxis Group™ in February and March of 2009. The study included a review of print and web literature, expert interviews and a public telephone survey of those who camp with RVs who reside in British Columbia, Alberta and Saskatchewan. Using these primary and secondary sources, the study provides an assessment of the status of the travel industry in light of the economic changes, the current campground situation in Alberta in terms of the supply side (manufacturers and RV campground operations) and the demand side (how Alberta campgrounds rate in the eyes of its campers), highlights significant trends impacting RV campground operation and development, and identifies any best practices in campground operations.

The goal of the review is to focus on all types of campground operations; private, municipal, provincial and federal campgrounds and parks.

1 (Alberta Community Development, 2005); p. 2

2 (Alberta Community Development, 2005); p. 10
1.2 Methods

1.2.1 Literature Review
As there lacks a single, consistent source of campground information in Canada, the literature review was compiled from a variety of sources, some of which are industry-specific but from other countries. Much of the data is taken from US sources such as Woodall’s and Trailer Life as they are the established authorities on RV camping and campgrounds. Due to the recent economic change in the North American markets, any literature that is older than six years was not considered. The current financial situation has barely begun to be reflected in tourism statistics.

The first stage of the literature review began with an update of the Alberta Recreational Vehicle Campground Study 2001 bibliography. Newer versions of the key reports were researched and located. Woodalls.com, RVIA.org and GoRving.ca websites provided current ‘news’ announcements pertaining to the RV industry. An extensive search of electronic databases at EbscoHost was conducted. The databases covered were: Academic Search Elite, Canadian Reference Centre, MasterFILE Premier, Primary Search, Regional Business News, Business Source Complete, Business Source Elite, Regional Business News, Psychology and Behavioral Sciences Collection and SocINDEX with Full Text.

A blog, ‘RV Industry News’ (www.rvinews.com) was followed for the entire period of this study as well as retrospectively. Web searches using Google were conducted throughout the entire research process to locate any additional documents or news pieces pertaining to the RV camper and campground industry. Statistical information was updated using CANSIM tables available through E-Stat.

1.2.2 Expert Interviews
Interviews were conducted with knowledgeable representatives from government, manufacturing, private and public campground operations to obtain additional insight into the current and future state of RV camping in Alberta. Open-ended questions were asked pertaining to a number of key themes; strengths, weaknesses and opportunities in relation to the Alberta camping industry, identification of trends in relation to equipment and consumer preferences, the impact of the current economic conditions on the industry and potential models for success in the future. Experts were identified through contacts within the RV Dealers Association, the Alberta Hotel and Lodging Association (AHLA), Alberta Tourism, Parks and Recreation (ATPR) and web searches. The interviews were conducted over the telephone by a senior consultant. Answers were recorded in an on-line form. A link to the on-line form was then sent to the participant along with a password allowing them to review their responses to validate the information and to add anything that may have been missed. Twenty interviews were completed, ranging in length from twenty minutes to an hour and a half (Appendix B).

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3 (Western Management Consultants, 2001)
1.2.3 Public Survey of RV Campers
A random sample telephone survey was conducted in Alberta, British Columbia and Saskatchewan between February 27th and March 13th. The survey commenced with a screener to determine if the household owns or has rented a recreational vehicle for camping. The survey asked questions about equipment used, best and worst features of campgrounds, the amount of camping done and where, services and amenities sought, improvements needed to campgrounds and the impact of the current economic conditions on future camping. The survey took an average of 17 minutes to complete. The sample size for Alberta was 389, while British Columbia and Saskatchewan combined were 389 (evenly split). A proportionate sample was used across the three provinces. Data were weighted to the respective populations. A response rate of 30% was obtained among the RV camping population. Results are reliable within +/-5%, 19 times out of 20 for the Alberta sample and BC/Saskatchewan sample. When examining all three provinces the results are reliable within +/-3.5%, 19 times out of 20.

1.2.4 Campground Inventory
The majority of the data used to create the supply-side perspective was from the Alberta Hotel and Lodging Association’s 2009 Alberta Campground Guide. Specific information concerning campsite amenities (power and water) were gathered from a combination of sources including Woodall’s Canada Campground Guide (2009 edition), Campscout.com and the ATPR campground database. For the small number of campgrounds that did not have site-specific information on power and water an average appropriate for that campground type was assigned.
2.0 Alberta’s Campgrounds
There are more than 600 campgrounds offering more than 40,000 campsites in Alberta. All campgrounds included in the current study met the Minimum Standard for Approved Campgrounds as defined by the Alberta Hotel and Lodging Association (Appendix A). As there are many unserviced campgrounds in Alberta used extensively by RVs their inclusion in the supply analysis is essential.

Table 1 provides the breakdown of campgrounds and campsites according to the type of operator.

<table>
<thead>
<tr>
<th>Operating Agency</th>
<th># of Campgrounds</th>
<th># of Campsites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Clubs and Associations</td>
<td>39</td>
<td>2769</td>
</tr>
<tr>
<td>Municipal and County</td>
<td>176</td>
<td>6958</td>
</tr>
<tr>
<td>Parks Canada</td>
<td>27</td>
<td>4507</td>
</tr>
<tr>
<td>Privately Owned</td>
<td>153</td>
<td>12867</td>
</tr>
<tr>
<td>Provincial Parks</td>
<td>208</td>
<td>13953</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>603</strong></td>
<td><strong>41054</strong></td>
</tr>
</tbody>
</table>

A key strength of Alberta’s campgrounds is the wide range of landscapes, and scenery offered throughout the entire province. Mountains, rivers, lakes, prairies and even badlands are available for campers to enjoy.

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5 The 2001 Alberta Recreational Vehicle Campground Study only included serviced campgrounds (n=359), therefore direct comparisons to the earlier report in terms of the supply analysis are not possible. Only including serviced campgrounds underestimates supply and does not reflect how camping is carried out.
Government parks (federal, provincial and municipal) administer almost two-thirds of the province’s supply of campsites (Figure 1).

Figure 1 Campground Administration (% of campsites)

Over half the province’s campground supply does not offer power hookups at the site and over two-thirds do not offer water at the site. The largest provider of serviced sites is privately owned campgrounds. Over 60% of powered sites and 72% of sites with water hookups are provided by private owners.

National parks and provincial parks in relation to the number of sites offered are significantly under-represented in terms of provision of serviced sites (power and water).

Table 2 Campsite Amenities: Power and Water (campsites)

<table>
<thead>
<tr>
<th>Amenity</th>
<th>Total Campsites with power or water</th>
<th>Local Club and Association Campsites</th>
<th>Municipal and County Campsites</th>
<th>Parks Canada Campsites</th>
<th>Privately Owned Campsites</th>
<th>Provincial Parks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power</td>
<td>18,317</td>
<td>876</td>
<td>3,491</td>
<td>10,744</td>
<td>2,508</td>
<td></td>
</tr>
<tr>
<td>Water</td>
<td>12,939</td>
<td>709</td>
<td>2,013</td>
<td>9,620</td>
<td>276</td>
<td></td>
</tr>
</tbody>
</table>

*expressed as % of total campsites in Alberta
Figure 2 Campsites with Power

- Privately Owned: 26%
- Parks Canada: 2%
- Provincial Parks: 6%
- Municipal and County: 9%
- Local Clubs and Associations: 2%
- No Power: 55%

Figure 3 Campsites with Water

- Privately Owned: 23%
- Parks Canada: 1%
- Provincial Parks: 1%
- Municipal and County: 5%
- Local Clubs and Associations: 2%
- No Water: 68%
More than half of the province’s campgrounds offer sani-stations, showers, flush toilets and fire pits.

Table 3 Campground Amenities: General

<table>
<thead>
<tr>
<th>Amenity</th>
<th># of Campgrounds Offering Amenity</th>
<th>% of Campgrounds Offering Amenity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire Pits</td>
<td>528</td>
<td>88%</td>
</tr>
<tr>
<td>Flush Toilets</td>
<td>340</td>
<td>56%</td>
</tr>
<tr>
<td>Showers</td>
<td>339</td>
<td>56%</td>
</tr>
<tr>
<td>Sani-Station</td>
<td>328</td>
<td>54%</td>
</tr>
<tr>
<td>Reservations Accepted</td>
<td>292</td>
<td>48%</td>
</tr>
<tr>
<td>Caretaker</td>
<td>265</td>
<td>44%</td>
</tr>
<tr>
<td>Pull-Thru sites available</td>
<td>191</td>
<td>32%</td>
</tr>
<tr>
<td>Gate</td>
<td>157</td>
<td>26%</td>
</tr>
<tr>
<td>Laundry</td>
<td>134</td>
<td>22%</td>
</tr>
<tr>
<td>Concession/Snack Bar</td>
<td>84</td>
<td>14%</td>
</tr>
</tbody>
</table>

Figure 4 provides a comparison of the percentage of campgrounds by operating entity offering the key amenities RV campers look for. Provincial parks offer the lowest level of service in terms of flush toilets (22%), showers (21%) and sani-stations (30%). By Contrast, the private sector offers the highest level of amenities.

Figure 4 Amenities by Operator (campgrounds)
### Table 4 Power Amperage Breakdown (Campgrounds)

<table>
<thead>
<tr>
<th>Power Sites</th>
<th># of Campgrounds</th>
<th>% of Campgrounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 amp sites available</td>
<td>240</td>
<td>40%</td>
</tr>
<tr>
<td>30 amp sites available</td>
<td>266</td>
<td>44%</td>
</tr>
<tr>
<td>50 amp sites available</td>
<td>39</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Table 5 Power Amperage Breakdown by Operator (Campgrounds)

<table>
<thead>
<tr>
<th>Power Sites</th>
<th>Total Campgrounds</th>
<th>Parks Canada</th>
<th>Privately Owned</th>
<th>Provincial Parks</th>
<th>Local Clubs, Associations, Municipalities, and Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 amp sites available</td>
<td>240 (40%)</td>
<td>5 (19%)</td>
<td>106 (69%)</td>
<td>10 (5%)</td>
<td>119 (55%)</td>
</tr>
<tr>
<td>30 amp sites available</td>
<td>266 (44%)</td>
<td>5 (19%)</td>
<td>134 (88%)</td>
<td>7 (3%)</td>
<td>120 (56%)</td>
</tr>
<tr>
<td>50 amp sites available</td>
<td>39 (7%)</td>
<td>0</td>
<td>33 (22%)</td>
<td>0</td>
<td>6 (3%)</td>
</tr>
</tbody>
</table>

Note: Some campgrounds offer more than one level of amperage and are therefore double-counted.
The recreational vehicle camper survey undertaken as part of this study revealed that having a campfire is an essential part of the experience for the majority of campers (59% indicated it is essential and 31% preferred in their choice of campground). \(^6\)

Two thirds of campgrounds in Alberta charge for firewood. Alberta provincial parks now charge for firewood on a per bundle basis (sold by concession or as a surcharge $6.00 to $8.00). National parks charge for a daily fire permit ($8.80/day). Private park firewood charges vary.

![Campfires are an essential or preferred requirement by 90% of RV campers in their choice of a campground](image)

Figure 5 Firewood in Alberta’s Campgrounds*

*This information is based on data from 473 (78%) of the campgrounds as the remaining campgrounds did not report this information.

\(^6\) (The Praxis Group, March, 2009); p. 16
The majority of Alberta’s campgrounds provide access to playgrounds (60%). Access to water-based activities such as fishing (56%), canoeing (43%), boating (30%) and swimming (26%) is offered at many of the provinces’ campgrounds. Water access is a key decision point for many RV campers (39% indicated it is ‘essential’ and 50% ‘preferred’ in their choice of campground).  

Table 6 Recreational Activities Offered

<table>
<thead>
<tr>
<th>Recreational Activities</th>
<th># of Campgrounds</th>
<th>% of Campgrounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playgrounds</td>
<td>364</td>
<td>60.4%</td>
</tr>
<tr>
<td>Fishing</td>
<td>336</td>
<td>55.7%</td>
</tr>
<tr>
<td>Day Use Area</td>
<td>302</td>
<td>50.1%</td>
</tr>
<tr>
<td>Canoeing</td>
<td>258</td>
<td>42.8%</td>
</tr>
<tr>
<td>Horseshoe Pits</td>
<td>228</td>
<td>37.8%</td>
</tr>
<tr>
<td>Boat Launch</td>
<td>183</td>
<td>30.3%</td>
</tr>
<tr>
<td>Hiking Trail</td>
<td>176</td>
<td>29.2%</td>
</tr>
<tr>
<td>Swim Area</td>
<td>156</td>
<td>25.9%</td>
</tr>
<tr>
<td>Beach</td>
<td>132</td>
<td>21.9%</td>
</tr>
<tr>
<td>Fish Stand</td>
<td>119</td>
<td>19.7%</td>
</tr>
<tr>
<td>Pier</td>
<td>99</td>
<td>16.4%</td>
</tr>
<tr>
<td>Baseball Diamond</td>
<td>80</td>
<td>13.3%</td>
</tr>
<tr>
<td>Bike Trails</td>
<td>69</td>
<td>11.4%</td>
</tr>
<tr>
<td>Cross-country Skiing</td>
<td>68</td>
<td>11.3%</td>
</tr>
<tr>
<td>Interpretive Trails</td>
<td>49</td>
<td>8.1%</td>
</tr>
<tr>
<td>Golf Course</td>
<td>42</td>
<td>7.0%</td>
</tr>
<tr>
<td>Motor Boats</td>
<td>37</td>
<td>6.1%</td>
</tr>
<tr>
<td>Mini-golf</td>
<td>28</td>
<td>4.6%</td>
</tr>
<tr>
<td>Boat Rental</td>
<td>27</td>
<td>4.5%</td>
</tr>
<tr>
<td>Equestrian Trails</td>
<td>25</td>
<td>4.1%</td>
</tr>
<tr>
<td>Indoor Area</td>
<td>21</td>
<td>3.5%</td>
</tr>
<tr>
<td>Outdoor Pool</td>
<td>12</td>
<td>2.0%</td>
</tr>
<tr>
<td>Tennis</td>
<td>7</td>
<td>1.2%</td>
</tr>
<tr>
<td>Indoor Pool</td>
<td>4</td>
<td>0.7%</td>
</tr>
<tr>
<td>Hot Tub</td>
<td>2</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

7 (The Praxis Group, 2008); p. 16
Table 7 Campground Fees

<table>
<thead>
<tr>
<th>Site Type</th>
<th>N</th>
<th>Total Alberta</th>
<th>N</th>
<th>Local Clubs and Associations</th>
<th>N</th>
<th>Municipal and County</th>
<th>N</th>
<th>Parks Canada</th>
<th>N</th>
<th>Privately Owned</th>
<th>N</th>
<th>Provincial Parks</th>
</tr>
</thead>
<tbody>
<tr>
<td>No services</td>
<td>460</td>
<td>$17.40</td>
<td>28</td>
<td>$16.11</td>
<td>131</td>
<td>$14.82</td>
<td>20</td>
<td>$22.20</td>
<td>79</td>
<td>$20.95</td>
<td>202</td>
<td>$17.40</td>
</tr>
<tr>
<td>Power</td>
<td>198</td>
<td>$22.62</td>
<td>20</td>
<td>$21.20</td>
<td>76</td>
<td>$19.49</td>
<td>4</td>
<td>$33.00</td>
<td>48</td>
<td>$25.25</td>
<td>50</td>
<td>$24.60</td>
</tr>
<tr>
<td>Power/Water</td>
<td>142</td>
<td>$25.95</td>
<td>14</td>
<td>$21.93</td>
<td>41</td>
<td>$21.12</td>
<td>0</td>
<td>-</td>
<td>76</td>
<td>$28.80</td>
<td>11</td>
<td>$29.36</td>
</tr>
<tr>
<td>Power/Water/Sewer</td>
<td>179</td>
<td>$29.62</td>
<td>20</td>
<td>$28.40</td>
<td>49</td>
<td>$24.18</td>
<td>3</td>
<td>$39.00</td>
<td>105</td>
<td>$32.14</td>
<td>2</td>
<td>$28.50</td>
</tr>
<tr>
<td>Tenting</td>
<td>135</td>
<td>$17.07</td>
<td>16</td>
<td>$14.62</td>
<td>43</td>
<td>$12.70</td>
<td>5</td>
<td>$19.80</td>
<td>58</td>
<td>$20.60</td>
<td>13</td>
<td>$17.69</td>
</tr>
</tbody>
</table>

*N=number of campgrounds

National park camping fees do not include the park entry fee. National park entry fees range from $4.90/day for youth, $9.60/day for an adult to $19.60/day for a family (discounts apply to annual permits). This makes national parks the most expensive place to camp in Alberta.

RV campers surveyed in 2009 noted that value for money is declining in Alberta’s campgrounds with increased fees, charging for firewood and showers with no commensurate increase in the quality and provision of services and facilities. Similar results were obtained in ATPR’s campground satisfaction surveys. The most recent report (2008) showed value for camping fee, cleanliness of washrooms, condition of facilities and availability of firewood as the lowest ranked of all attributes measured, with value for money lowest overall. Issues with the reservation system, firewood and condition of facilities generated the greatest number of negative comments (32.7% of all comments).

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8 (The Praxis Group, March, 2009); p. 10

9 (Alberta Tourism, Parks and Recreation, 2008); p. 3
2.1 Campground Characteristics by Tourist Destination Region

Figure 6 demonstrates the extent to which campsites are distributed in all regions of the province. The characteristics of each tourism destination region are vastly different.

Figure 6 Campsites by Tourist Destination Region

The Central Region has the greatest number of campgrounds (220) and campsites (13,275). Campgrounds in the Central and Northern Regions provide the greatest number of water-based opportunities in the province. The Canadian Rockies region has 93 campgrounds offering 8,888 sites. See Table 8.
Table 8 Campgrounds and Campsites by Tourism Region

<table>
<thead>
<tr>
<th>Tourist Destination Region</th>
<th># of Campgrounds</th>
<th># of Campsites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Alberta</td>
<td>90</td>
<td>5,389</td>
</tr>
<tr>
<td>Central Alberta</td>
<td>220</td>
<td>13,275</td>
</tr>
<tr>
<td>Edmonton and Area</td>
<td>31</td>
<td>3,834</td>
</tr>
<tr>
<td>Alberta Rockies</td>
<td>93</td>
<td>8,888</td>
</tr>
<tr>
<td>Calgary and Area</td>
<td>32</td>
<td>2,595</td>
</tr>
<tr>
<td>Southern Alberta</td>
<td>137</td>
<td>7,073</td>
</tr>
</tbody>
</table>

The mountain parks provide the lowest levels of power and water services to their campsites.

Figure 8 Campsites with Power and Water Hookups by Tourism Destination Region

[Bar chart showing the percentage of campsites with power and water hookups by region.]
2.2 Assessment of Camping Supply

Interviews conducted with operators, dealers, manufacturers, government officials and other industry experts support the quantitative findings. The key strengths identified are the proximity to a wide variety of camping opportunities, a safe environment for camping, and relax or recreate in some of the most spectacular outdoor areas in North America.\(^\text{10}\)

There was consensus among those surveyed that the current supply of campgrounds lacks quality (sites are run down – especially in provincial parks) and there is a serious shortage of campsites that cater to the current and future needs of the recreational vehicle camping market. Sites are too small for today’s camping units and they do not offer the services needed.\(^\text{11}\)

It is believed that the lack of availability of suitable sites coupled with a less than adequate reservation system and higher camping fees is forcing campers to leave the province, and is not attracting campers from outside of the province. It should be noted that ATPR is developing a new centralized campground reservation system in for provincial parks commencing in 2009.

\(^{10}\) (The Praxis Group, February, 2009)

\(^{11}\) (The Praxis Group, February, 2009)
3.0 Profile of Alberta RV Campers

3.1 Camping Equipment Used
More than 70% of camping in the province’s government parks is done in recreational vehicles. Provincial parks report slightly higher levels of RV use (76%)\(^{12}\) compared with Banff and Jasper National Parks (69%).\(^{13} \)\(^{14}\) The percentage of RV use in private and other parks is not reported in any published sources, however it is presumed to be higher than provincial and national parks as there is a much higher percentage of serviced sites offered.

Figure 9 Camping Equipment used in Provincial and National Parks

The higher percentage of motorhome use in national parks can be attributed to the considerable fly-drive camping market in the mountain parks renting motorhomes. Over 30% of campers in Banff and Jasper are from overseas (32% Banff and 31% Jasper). This compares with less than 2% for Alberta’s provincial parks. Over 90% of Alberta provincial park campers are from in-province.

\(^{12}\) (Alberta Tourism, Parks and Recreation., 2005); p. 17

\(^{13}\) (Banff National Park, December, 2008); p. 11

\(^{14}\) (Jasper National Park, December, 2008); p. 11
RV ownership is more common in western Canada (19%) than eastern Canada (11%). Figure 10 illustrates that 18% of Alberta households own an RV.¹⁵

**Figure 10 Recreational Vehicle Ownership in Canada**

![Graph showing RV ownership by province in Canada.](image)

The recreational vehicle camper survey undertaken as part of this study showed that in the three provinces surveyed, travel trailers are the most popular form of recreational vehicle, followed by fifth wheels. This is consistent with the type of equipment used in Alberta’s provincial parks (Figure 9).

In Alberta tent trailers are the third most popular form of RV in use. Individuals camping in tent trailers are more likely to travel outside of the province in comparison to those camping in trailers and fifth wheels.¹⁶

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¹⁵ (MRP Market Research Professionals, 2006); p.11

¹⁶ (The Praxis Group, March, 2009); p. 5
3.2 Camping Destinations

In 2008, half of Alberta RV owners did all of their camping in Alberta. Nine percent of Alberta RV owners camped entirely outside of Alberta in 2008. One quarter of British Columbia RV owners and 18% of Saskatchewan RV owners did at least some of their camping in Alberta in 2008. Given the substantial ownership of RV’s in the two provinces immediately adjacent to Alberta, a large potential market exists that is largely untapped.

The majority of Alberta residents who own tent trailers (60%) and motorhomes (66%) did at least some of their camping outside of Alberta. The majority of travel trailer (56%) and fifth wheel (60%) owners did all of their camping in Alberta.

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17 (The Praxis Group, March, 2009); p. 5

18 Ibid, p. 9
3.3 Demographic Profiles of Recreational Vehicle Campers
Demographic profiles for users of the various RV types indicate that travel trailer and tent trailer campers are younger families, while fifth wheel and motorhome campers are older with smaller families\textsuperscript{19}.

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\textsuperscript{19} (The Praxis Group, March, 2009); p. 7
3.4 Camping Patterns

Figure 15 shows the average number of nights spent camping in 2008 by owners of each type of recreational vehicle. Fifth wheel and motorhome owners spend considerably more time camping than all other RV types, especially among British Columbia owners. This may be related to the average age of RV owners in British Columbia being higher than the other two provinces and more time available associated with retirement (BC mean age = 54, AB mean age = 49, SK mean age = 50).

Figure 15 Average Camping Nights in 2008 by RV Type and Province

20 (The Praxis Group, March, 2009); p. 7
3.5 Services and Amenities Sought by RV Campers

Figure 16 shows the priorities for services and amenities among RV campers in Alberta. Respondents were asked to rate each item as ‘not required’, ‘preferred’ or ‘essential’ in selecting a place to camp. The figure shows only the ‘preferred’ and ‘essential’ attributes ranked in order of most essential to least essential. Four items were rated as preferred or essential by more than 80% of Alberta RV campers; fire pits, private well treed sites, being near a lake or river and ability to reserve in advance. The top five items were the same for British Columbia and Saskatchewan RV campers, although the order changed slightly in both cases.21

[Diagram showing priority ratings for services and amenities among Alberta RV campers]

21 (The Praxis Group, March, 2009); p. 14
Table 9 illustrates the attributes **considered essential by each RV camper type**. Items shaded in green represent 50% or more respondents considering the item essential. Items shaded in red represent 25% to 49% of RV campers in the respective category.\(^22\)

The opportunity to have a fire is the top requirement for the majority of RV campers. The majority of tent trailer campers also consider being near a lake and having shower facilities essential features of a campground. While 30 amp electrical hookups are an essential requirement for 40% of fifth wheel campers, it is less critical to other RV types. Sewer hookups and 50 amp electrical hookups are also considered less essential than other features.

**Table 9 Essential Attributes in Choosing a Campground by Equipment Type**

<table>
<thead>
<tr>
<th>Essential</th>
<th>fifth wheel</th>
<th>travel trailer</th>
<th>motor home</th>
<th>tent trailer</th>
<th>truck camper</th>
<th>camper van</th>
</tr>
</thead>
<tbody>
<tr>
<td>fire pits</td>
<td>55%</td>
<td>64%</td>
<td>40%</td>
<td>72%</td>
<td>67%</td>
<td>45%</td>
</tr>
<tr>
<td>private site, well treed</td>
<td>36%</td>
<td>49%</td>
<td>27%</td>
<td>50%</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>sani-station available</td>
<td>48%</td>
<td>46%</td>
<td>41%</td>
<td>23%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>near lake or river</td>
<td>40%</td>
<td>44%</td>
<td>23%</td>
<td>51%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>ability to reserve in advance</td>
<td>34%</td>
<td>39%</td>
<td>27%</td>
<td>47%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>cost of site</td>
<td>30%</td>
<td>34%</td>
<td>31%</td>
<td>25%</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>water to your site</td>
<td>32%</td>
<td>33%</td>
<td>22%</td>
<td>26%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>shower facilities</td>
<td>29%</td>
<td>31%</td>
<td>26%</td>
<td>53%</td>
<td>12%</td>
<td>36%</td>
</tr>
<tr>
<td>nearby hiking/walking trails</td>
<td>15%</td>
<td>27%</td>
<td>19%</td>
<td>47%</td>
<td>29%</td>
<td>40%</td>
</tr>
<tr>
<td>flush toilets</td>
<td>21%</td>
<td>25%</td>
<td>22%</td>
<td>44%</td>
<td>4%</td>
<td>26%</td>
</tr>
<tr>
<td>30 amp electrical hookup</td>
<td>40%</td>
<td>25%</td>
<td>21%</td>
<td>18%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>sewer hookup at your site</td>
<td>23%</td>
<td>21%</td>
<td>18%</td>
<td>13%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>pull through site</td>
<td>20%</td>
<td>18%</td>
<td>21%</td>
<td>18%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>tourism attractions in area</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>laundry facilities</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>15%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>seasonal RV site rental</td>
<td>16%</td>
<td>9%</td>
<td>2%</td>
<td>7%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>50 amp electrical hookup</td>
<td>16%</td>
<td>6%</td>
<td>12%</td>
<td>6%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>concession</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>nearby golf course</td>
<td>6%</td>
<td>5%</td>
<td>11%</td>
<td>7%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>interpretive programs</td>
<td>1%</td>
<td>5%</td>
<td>6%</td>
<td>15%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>swimming pool</td>
<td>8%</td>
<td>5%</td>
<td>2%</td>
<td>11%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>owning my RV campsite</td>
<td>10%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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\(^{22}\) (The Praxis Group, March, 2009); p. 15
Table 10 shows which attributes are considered **preferred or essential** (categories combined) by RV campers.

Lower priority was consistently given across all RV types for having 50 amp electrical hookups, seasonal RV site rental, a nearby golf course, a swimming pool, a concession and owning an RV campsite.

---

**Table 10 Essential or Preferred Attributes in Choosing a Campground by Equipment Type**

<table>
<thead>
<tr>
<th>Preferred or Essential</th>
<th>fifth wheel</th>
<th>travel trailer</th>
<th>motor home</th>
<th>tent trailer</th>
<th>truck camper</th>
<th>camper van</th>
</tr>
</thead>
<tbody>
<tr>
<td>fire pits</td>
<td>90%</td>
<td>91%</td>
<td>81%</td>
<td>93%</td>
<td>91%</td>
<td>84%</td>
</tr>
<tr>
<td>private site, well treed</td>
<td>86%</td>
<td>92%</td>
<td>81%</td>
<td>92%</td>
<td>85%</td>
<td>100%</td>
</tr>
<tr>
<td>near lake or river</td>
<td>85%</td>
<td>90%</td>
<td>84%</td>
<td>94%</td>
<td>92%</td>
<td>100%</td>
</tr>
<tr>
<td>cost of site</td>
<td>82%</td>
<td>81%</td>
<td>85%</td>
<td>80%</td>
<td>71%</td>
<td>91%</td>
</tr>
<tr>
<td>sani-station available</td>
<td>81%</td>
<td>82%</td>
<td>86%</td>
<td>42%</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>water to your site</td>
<td>76%</td>
<td>75%</td>
<td>76%</td>
<td>61%</td>
<td>54%</td>
<td>67%</td>
</tr>
<tr>
<td>ability to reserve in advance</td>
<td>74%</td>
<td>80%</td>
<td>78%</td>
<td>85%</td>
<td>52%</td>
<td>85%</td>
</tr>
<tr>
<td>nearby hiking/walking trails</td>
<td>71%</td>
<td>76%</td>
<td>81%</td>
<td>92%</td>
<td>76%</td>
<td>86%</td>
</tr>
<tr>
<td>shower facilities</td>
<td>71%</td>
<td>76%</td>
<td>73%</td>
<td>94%</td>
<td>62%</td>
<td>90%</td>
</tr>
<tr>
<td>30 amp electrical hookup</td>
<td>69%</td>
<td>66%</td>
<td>66%</td>
<td>51%</td>
<td>48%</td>
<td>58%</td>
</tr>
<tr>
<td>sewer hookup at your site</td>
<td>66%</td>
<td>60%</td>
<td>68%</td>
<td>33%</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>flush toilets</td>
<td>64%</td>
<td>66%</td>
<td>59%</td>
<td>86%</td>
<td>55%</td>
<td>90%</td>
</tr>
<tr>
<td>tourism attractions in area</td>
<td>62%</td>
<td>69%</td>
<td>67%</td>
<td>73%</td>
<td>47%</td>
<td>69%</td>
</tr>
<tr>
<td>pull through site</td>
<td>56%</td>
<td>57%</td>
<td>57%</td>
<td>56%</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>interpretive programs</td>
<td>39%</td>
<td>41%</td>
<td>49%</td>
<td>62%</td>
<td>20%</td>
<td>79%</td>
</tr>
<tr>
<td>laundry facilities</td>
<td>43%</td>
<td>39%</td>
<td>46%</td>
<td>41%</td>
<td>24%</td>
<td>36%</td>
</tr>
<tr>
<td>50 amp electrical hookup</td>
<td>40%</td>
<td>33%</td>
<td>40%</td>
<td>28%</td>
<td>12%</td>
<td>34%</td>
</tr>
<tr>
<td>seasonal RV site rental</td>
<td>36%</td>
<td>34%</td>
<td>34%</td>
<td>36%</td>
<td>12%</td>
<td>23%</td>
</tr>
<tr>
<td>nearby golf course</td>
<td>36%</td>
<td>21%</td>
<td>38%</td>
<td>27%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>swimming pool</td>
<td>33%</td>
<td>38%</td>
<td>26%</td>
<td>44%</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>concession</td>
<td>30%</td>
<td>30%</td>
<td>35%</td>
<td>43%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>owning my RV campsite</td>
<td>25%</td>
<td>20%</td>
<td>21%</td>
<td>21%</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

---

23 (The Praxis Group, March, 2009); p. 16
Table 11 shows the mean scores for the importance of 16 attributes related to the camping experience. The high mean scores for the top three items suggest RV campers are looking for an opportunity for **relaxation in a safe, secure and uncrowded setting**. Being together with friends and family is an important feature of camping for travel trailer campers and tent trailer campers. This is consistent with earlier results presented in relation to the demographic profile of these RV campers (having a higher percentage of families with children). Being in a wilderness setting is very important to those camping with tent trailers, truck campers and camper vans.

Camping close to home, learning new skills and attending fairs/exhibitions and special events are the least important features. It should be noted being close to home was not described in absolute terms in this question.²⁴

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Camping close to home, learning new skills and attending fairs/exhibitions and special events are the least important features. It should be noted being close to home was not described in absolute terms in this question.²⁴

### Table 11 Experience Sought by RV Campers (AB, BC, SK)

<table>
<thead>
<tr>
<th>Mean Scores - Scale from 1 (not at all important to 5 very important)</th>
<th>fifth wheel</th>
<th>travel trailer</th>
<th>motor home</th>
<th>tent trailer</th>
<th>truck camper</th>
<th>camper van</th>
<th>overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>A safe, secure setting</td>
<td>4.44</td>
<td>4.55</td>
<td>4.39</td>
<td>4.51</td>
<td>3.82</td>
<td>4.41</td>
<td>4.42</td>
</tr>
<tr>
<td>Relaxation</td>
<td>4.22</td>
<td>4.33</td>
<td>4.21</td>
<td>4.40</td>
<td>4.29</td>
<td>4.15</td>
<td>4.28</td>
</tr>
<tr>
<td>Uncrowded</td>
<td>4.05</td>
<td>4.05</td>
<td>4.08</td>
<td>4.12</td>
<td>4.25</td>
<td>4.40</td>
<td>4.10</td>
</tr>
<tr>
<td>To be together with family/friends</td>
<td>3.92</td>
<td>4.16</td>
<td>3.99</td>
<td>4.52</td>
<td>3.62</td>
<td>3.29</td>
<td>4.03</td>
</tr>
<tr>
<td>Wilderness/natural setting</td>
<td>3.80</td>
<td>3.94</td>
<td>3.80</td>
<td>4.24</td>
<td>4.44</td>
<td>4.37</td>
<td>4.00</td>
</tr>
<tr>
<td>Solitude and quiet</td>
<td>3.77</td>
<td>3.96</td>
<td>3.98</td>
<td>3.92</td>
<td>4.18</td>
<td>4.36</td>
<td>3.96</td>
</tr>
<tr>
<td>Opportunity to explore nature</td>
<td>3.80</td>
<td>3.98</td>
<td>3.79</td>
<td>4.19</td>
<td>3.98</td>
<td>4.19</td>
<td>3.95</td>
</tr>
<tr>
<td>Opportunities for outdoor recreation</td>
<td>3.80</td>
<td>3.99</td>
<td>3.63</td>
<td>4.10</td>
<td>3.87</td>
<td>3.98</td>
<td>3.90</td>
</tr>
<tr>
<td>Adventure</td>
<td>3.20</td>
<td>3.35</td>
<td>3.06</td>
<td>3.74</td>
<td>3.17</td>
<td>3.70</td>
<td>3.33</td>
</tr>
<tr>
<td>Exercise</td>
<td>3.01</td>
<td>3.28</td>
<td>3.10</td>
<td>3.37</td>
<td>3.07</td>
<td>3.44</td>
<td>3.20</td>
</tr>
<tr>
<td>Learning about nature</td>
<td>3.05</td>
<td>3.10</td>
<td>3.11</td>
<td>3.52</td>
<td>2.98</td>
<td>3.27</td>
<td>3.15</td>
</tr>
<tr>
<td>To be with and meet other people</td>
<td>3.19</td>
<td>3.21</td>
<td>3.31</td>
<td>3.04</td>
<td>2.79</td>
<td>2.63</td>
<td>3.12</td>
</tr>
<tr>
<td>Exploring cultural and historical attractions</td>
<td>3.11</td>
<td>3.12</td>
<td>2.99</td>
<td>3.21</td>
<td>3.06</td>
<td>2.96</td>
<td>3.10</td>
</tr>
<tr>
<td>Close to home</td>
<td>2.71</td>
<td>2.85</td>
<td>2.76</td>
<td>2.70</td>
<td>2.55</td>
<td>2.27</td>
<td>2.72</td>
</tr>
<tr>
<td>Learning new skills</td>
<td>2.64</td>
<td>2.64</td>
<td>2.44</td>
<td>3.05</td>
<td>2.57</td>
<td>2.29</td>
<td>2.64</td>
</tr>
<tr>
<td>Attending fairs/exhibitions and special events</td>
<td>2.32</td>
<td>2.35</td>
<td>2.44</td>
<td>2.29</td>
<td>2.03</td>
<td>2.16</td>
<td>2.31</td>
</tr>
</tbody>
</table>

²⁴ (The Praxis Group, March, 2009); p. 17
3.6 Best and Worst Features of Campgrounds

RV campers were asked to describe the features of the best RV parks they had been to recently. The responses were recorded verbatim and then categorized for analysis purposes. Two features emerged above all others that separated the best parks from others; well treed, private sites and being near a lake for swimming and/or fishing. Clean and well maintained buildings were also identified as features that differentiated the top campgrounds from the rest (for 9% of RV campers).  

Figure 17 What make some campgrounds better than others?

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25 (The Praxis Group, March, 2009); p. 18
The opposite perspective was also gathered from RV campers who were asked to describe the characteristics of the worst campgrounds they have been to recently. Perhaps not surprisingly the features that created the best campgrounds when done well, also resulted in the worst campgrounds when not done well. **Sites being crowded, poor privacy and being too close together were major reasons for campers disliking certain campgrounds.** Poor cleanliness and maintenance and excessive amounts of noise and partying were also reasons that campers cited as significant detractors from a positive camping experience.\(^{26}\)

**Figure 18 What makes some campgrounds worse than others?**

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\(^{26}\) (The Praxis Group, March, 2009); p.19
3.7 Preference for Campground by Operator Type

Most RV campers do not have a preference for private, public or not for profit and municipal campgrounds. For many RV campers their choice of campground depends on the services offered, not the organization in charge of operation. British Columbia RV campers had a slightly higher preference for provincial park campgrounds than Alberta or Saskatchewan campers.\(^{27}\)

<table>
<thead>
<tr>
<th>Preference for Operator by Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within provincial park or rec area</td>
</tr>
<tr>
<td>Private campground</td>
</tr>
<tr>
<td>National park</td>
</tr>
<tr>
<td>Non profit or municipal</td>
</tr>
<tr>
<td>No pref depends on services offered</td>
</tr>
</tbody>
</table>

There was no significant difference by length of recreational vehicle which suggests the issues of campsite size are applicable to all operators

\(^{27}\) (The Praxis Group, March, 2009); p.20
Provincial park campgrounds appeal to a slightly higher percentage of tent trailers and truck campers than other RV types. Fifth wheel owners had the highest proportion of use of private campgrounds. As with the breakdown by province, the most prevalent response was that the choice of operator was not an issue, rather it was dependent on the services offered.

**Figure 20 Preference for Operator by RV Type**

3.8 Campground Occupancy

Information on the number of campsites and campgrounds in Alberta is available from published sources, such as Woodall’s, the Alberta Campground Guide and the Alberta Hotel and Lodging Association database. However, current occupancy data are only available for national parks.

The most recent published occupancy data for provincial parks is from 1990, and there are no published sources for private parks.

Banff National Park’s campgrounds show a wide range of occupancy throughout the season. Campgrounds such as Lake Louise Trailer Court, Tunnel Mountain Trailer Court and Two Jack Lakeside show peak season occupancy levels in excess of 90%. Overall seasonal occupancy levels range from a low of 21.8% at Two Jack Lake, to 84.9% at Two Jack Lakeside. Occupancy statistics were not available for other national parks in Alberta.
Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective

Table 12 Banff National Park Campground Occupancy (2007)

<table>
<thead>
<tr>
<th>Occupancy Rate</th>
<th>Lake Louise Trailer</th>
<th>Tunnel Mountain Trailer Court</th>
<th>Two Jack Lake</th>
<th>Two Jack Lakeside</th>
<th>Tunnel Mountain Village I</th>
<th>Tunnel Mountain Village II</th>
<th>Johnston Canyon</th>
<th>Castle Mountain</th>
</tr>
</thead>
<tbody>
<tr>
<td>May</td>
<td>22.1%</td>
<td>25.5%</td>
<td>6.2%</td>
<td>51.4%</td>
<td>13.7%</td>
<td>23.9%</td>
<td>N/A</td>
<td>18.6%</td>
</tr>
<tr>
<td>June</td>
<td>78.5%</td>
<td>58.6%</td>
<td>14.6%</td>
<td>77.9%</td>
<td>24.8%</td>
<td>44.4%</td>
<td>33.6%</td>
<td>32.3%</td>
</tr>
<tr>
<td>July</td>
<td>96.5%</td>
<td>91.3%</td>
<td>30.6%</td>
<td>99.0%</td>
<td>63.1%</td>
<td>82.3%</td>
<td>76.5%</td>
<td>62.5%</td>
</tr>
<tr>
<td>August</td>
<td>96.3%</td>
<td>83.5%</td>
<td>26.7%</td>
<td>97.2%</td>
<td>56.2%</td>
<td>72.7%</td>
<td>73.4%</td>
<td>49.9%</td>
</tr>
<tr>
<td>September</td>
<td>77.5%</td>
<td>45.8%</td>
<td>24.8%</td>
<td>77.0%</td>
<td>15.8%</td>
<td>46.2%</td>
<td>31.7%</td>
<td>45.0%</td>
</tr>
<tr>
<td>October</td>
<td>58.0%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Total</td>
<td>62.9%</td>
<td>61.8%</td>
<td>21.8%</td>
<td>84.9%</td>
<td>35.3%</td>
<td>54.0%</td>
<td>56.8%</td>
<td>44.5%</td>
</tr>
</tbody>
</table>

A gross estimate of occupancy for provincial parks can be determined by dividing the overall number of occupied sites by the number of sites available. Based on the most recent campground attendance data available (2004), the overall provincial park campground occupancy rate for July was 41% and August 32%. However, the limitation of an aggregate occupancy calculation is that it does not display the high weekend loading on facilities and is based on ‘design’ capacity, not actual campsites open (site closures occur throughout the season for various management reasons).\(^28\)

The most recent data on peak season occupancy is from 1990 which showed weekend campsite occupancy in the peak season was double that of weekday use. There is no reason to believe this ratio has changed. Also, most of the camping in provincial parks is done in the summer months (2004 data).

Although occupancy data are not available for parks within Kananaskis Country, survey respondents and experts interviewed reported the main campgrounds in this region to be at capacity the entire summer season. Mount Kidd at the time of preparing this report (March, 2009) was already 98% booked for the summer.\(^29\) Thirty percent of Alberta’s campers stay in Kananaskis Country. In 2004, this represented 418,402 site nights of occupancy.\(^30\)

Figure 21 illustrates that two-thirds of camping occurs in July and August in provincial park campgrounds and 83% of camping occurs in June, July and August.

\(^{28}\) (Alberta Community Development, 2005); p. 7

\(^{29}\) (The Praxis Group, February, 2009)

\(^{30}\) (Alberta Tourism, Parks and Recreation, 2005)
3.9 Assessment of Camping Demand

Over three-quarters of the camping done in Alberta is with some form of recreational vehicle. Interviews conducted with industry experts suggest the provinces’ campground supply is seriously out-of-date. Campgrounds, especially those within provincial and national parks were developed decades ago for a market that used much smaller camping equipment. The main issues identified by industry experts were:

- A market that requires larger sites to support the size of their recreational vehicles
- An increased need for power and water hookups, showers and flush toilets (more conveniences)
- Demand for campsites in preferred destinations in Alberta exceeding supply during the peak season is forcing campers to go to other provinces.

From a consumer perspective, the priority for all RV campers is for larger, more private sites. While power and water hookups are preferred by RV campers, these services are not considered essential by the majority. In fact there is a higher priority for centralized services, such as sani-stations, showers, and flush toilets. Presumably this relates to most RV’s coming equipped with generators and a water supply. Tent trailer users have the highest requirement for showers and flush toilets with less of a need for power at the site.

The issue of demand exceeding capacity is difficult to assess without adequate occupancy data; however, it is evident from the recreational vehicle camper survey conducted as part of this study that capacity issues do exist. The perception exists that Alberta does not have enough campsites. In reality, there are enough campsites to meet demand, just not enough offering the services and amenities needed by today’s camping market.
4.0 Assessment of Competition

Among Alberta RV owners, two thirds of their camping nights were spent within Alberta in 2008. British Columbia accounts for the single largest loss of Alberta’s resident camping market, followed by Saskatchewan and the United States.\(^{31}\)

Figure 22 Where Alberta RV Owners Camp (camper nights)

Figures 23 and 24 illustrate where British Columbia and Saskatchewan RV owners camped in 2008. Sixteen percent of BC RV owners’ camper nights were spent in Alberta while 12% were spent in the USA. Eight percent of Saskatchewan RV owners’ camper nights spent in Alberta. Over 80% of camper nights by Saskatchewan RV owners were spent within their home province.\(^{32}\)

\(^{31}\) (The Praxis Group, March, 2009); p. 12

\(^{32}\) (The Praxis Group, March, 2009); p. 13
Figure 23 Where British Columbia RV Owners Camp (camper nights)

- nights in other parts of Canada: 6%
- nights in USA: 13%
- nights in Alberta: 17%
- nights in BC: 62%

Figure 24 Where Saskatchewan RV Owners Camp (camper nights)

- nights in other parts of Canada: 2%
- nights in USA: 2%
- nights in Alberta: 8%
- nights in BC: 4%
- nights in Saskatchewan: 84%
4.1 Camping in Saskatchewan

Saskatchewan's provincial park system consists of 34 provincial parks, (4 wilderness, 10 recreation, 11 natural environment and 9 historic parks), plus an additional 137 recreation sites, 8 historic sites and 23 protected areas. Campsite rates range from $17 for non-electrical sites, $22 for electrical sites and $26 for full service sites.\(^{33}\)

As of 2009, Saskatchewan Parks are offering a 30-consecutive-night shoulder season rate during the spring and fall seasons.

**Saskatchewan’s strategy for 2009-2010:**\(^{34}\)

- Currently the reservation window is open for all Reserve-a-Site parks
- Saskatchewan is beginning a four-year, $20 million program to upgrade the park.\(^{35}\) This is part of a fiscal support plan to provide 13.5 times more support for Saskatchewan's Regional Parks in comparison to 2007-08 levels.\(^{36}\)
- Beginning in 2009, free provincial park entry will be granted Monday through Thursday, to all park users from the Monday of the May-long weekend until June 24. A permit is required if you visit a park on Friday through Sunday.
- Saskatchewan will be adding approximately 200 to 300 additional electrified campsites in 2009-10 so that they may reach the Government's goal of 1,000 electrified campsites by 2011 (Government Goal, 2009)
- Systematic replacement of facilities in older parks is planned to improve visitor amenities (Government Goal, 2009)
- Saskatchewan intends to implement a market-based fee adjustment. This is predominantly for seasonal camping and nightly electrified sites, and revenue is to be directed to the enhancement of customer service, resource conservation and facility upgrades (Government Goal, 2009)

\(^{33}\) (Government of Saskatchewan, 2009)  
\(^{34}\) (Government of Saskatchewan, 2009)  
\(^{35}\) (Government of Saskatchewan, 2008)  
\(^{36}\) (Government Goal, 2009)
A partnership with the private sector is being considered to identify, improve, and facilitate business opportunities for existing and new commercial lessees that will both meet the needs of the general public and protect the park environment (Government Goal, 2009).

Saskatchewan intends to launch an investigation into suitable candidates for new parks, including a new wilderness area specifically for extreme camping (Government Goal, 2009).

4.2 Camping in British Columbia

What BC has to offer: *

- 500 private, inspected campgrounds in which the majority of sites offer full service, including power (30-50 amp), water, sanitation and cable (20-50 per night)
- 340 BC Provincial Park campgrounds with 11,075 sites, open 263 days a year
- Approximately 1,200 recreation sites on Crown land. Rural, rustic sites most of which are built for tent camping. Many are further from major roads and have no power. ($0 - $15 per night)
- 24 municipal campgrounds with 983 campsites ($15-$23 per night)
- Unknown number of campgrounds run by First Nations. ($27-$45 per night)
- 6 National parks in BC with over 800 campsites. All national parks in BC, (except Revelstoke and Gwaii Haanas) feature camping facilities with sewage disposal, fireplaces and firewood. ($18.80-$36.65 per night)
- BC Hydro has 7 campgrounds located near dams and power stations. They are free but do not offer hook-ups
- Many overnight parks also offer opportunities for people to stay longer either through seasonal rentals, month-to-month rentals, or purchasing/leasing lots. Lodgings such as cabins, cottages, motels, lodges, and manufactured home-pad rentals are also commonly offered

* Information from Camping & RV in BC website (Camping and RVing BC Coalition, 2009)
BC’s strategy for 2009-2010:

Recently 15 recommendations were made in a report commissioned by BC’s Minister of Tourism, Sport and the Arts. These recommendations are listed here.

- Develop a work plan for collaborating with other agencies to address data gaps regarding RVing
- Examine options for making Crown land a more viable and available opportunity for RVing
- Complete a pilot project to examine suitable Crown land for RV campground development
- Examine the cost and benefits of amending the Agri-Tourism Accommodation policy to increase the allowable sleeping units, to increase available serviced RV sites by co-mingling agricultural and RVing activities and also create an inventory of campsites
- Distribute report to municipalities
- Boondocking is to be dealt with by municipalities
- Work to assist First Nations in developing campgrounds
- Examine opportunities to alter campsites in high demand to better accommodate newer RV models, create price flexibility to reflect market demands, develop overflow parking lots to accommodate RVs
- Examine opportunities at front-country Recreation sites which may better suit managed full-serviced campgrounds, and consider design changes that could be made to recreation sites that would better accommodate RVs
- Engage small business BC to investigate solutions for RV park operators and developers to better access financing
- Identify opportunities to collaborate on issues of common interest (marketing, information provision, and electronic reservation system)
- Examine government sewage regulation and consider changes to make them less prohibitive to RV park development
- All RV parks should be required to be part of Tourism BC’s Approved Accommodation program or Camping Select
- Examine RV accessible signs on provincial highways
- Editorial update of Campground Operators Manual

This report predicts high demand for RVing in near future (due to baby boomers) and lists the main problem with BC’s supply as its insufficient capacity in high demand areas during peak periods. This problem has become more troublesome in recent years as the number of sites have decreased due to a shift to seasonal rentals or condo development.

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5.0 Trends Affecting Alberta’s RV Camping Industry

5.1 Current Outlook for Travel
The financial state of today’s markets is only just beginning to show its influence on the tourism industry. At the time of writing this report, statistics are just beginning to emerge that indicate travelers are considering tourism a luxury and are cutting costs. However, the tourism outlook seems to vary, depending on who is reporting. It also varies according to the segment of the tourism industry. Certainly camping, being a lower cost form of leisure will react differently to the current economic conditions than high cost vacations involving air travel and hotel accommodation.

The Hotel Association of Canada (HAC) conducted a 2009 Canadian Travel Intentions survey that indicated 74% of Canadians intend to travel in the next year despite the economic market. The survey also found that while travelers continued to travel during the last four months of 2008, they chose cheaper accommodation options, shortened their stays and stayed closer to home (more staying within province than before). Fifty-four percent answered that they would travel the same amount in 2009 that they did in 2008. PKF Consulting produced a recent accommodation outlook for 2009 in which it had revised its projected accommodation figures for 2009. In Western Canada, the original projected occupancy rate for both 2008 and 2009 was 68% and the revised forecast/projections were changed to 66% and 64% respectively. While this is a decrease, it is not a severe one. The overall message was that 2009 was going to be a tough year in the tourism industry for fixed roof accommodation operators, but this may not be the case for the camping sector. Regardless, the Conference Board of Canada predicts a return to profit growth in the tourism industry by 2010, primarily because of the Winter Olympic Games.

Alberta specific
Albertans tend to travel for leisure within the province more often than outside the province. A 2004 Leisure Travel Intentions Study found that 77% of trips planned by Albertans were to Alberta destinations. The number one destination was the Rocky Mountains and the least popular destination was Alberta North. 40% of all Albertan travelers intended to visit British Columbia at least once in the upcoming future; British Columbia was the top destination outside of Alberta. Alberta traveler

38 (Hotel Association of Canada, 2009)
39 (Hotel Association of Canada, 2009); p.13
40 (PKF Consulting, 2009); p.17
41 (Conference Board of Canada, 2008); p.3
42 (Advanis, Inc., 2004); p.6
43 (Advanis, Inc., 2004); p.6
statistics show that the number of person trips to Alberta was on the rise in 2006, with an increase in visits by 4.3% over the previous year. However, this number seemed to be boosted entirely by local Albertans as they visited within their province more than other Canadians, Americans or international tourists who visited Alberta. While Alberta fared better than the country as a whole, the number of overnight international direct entries to the province decreased over 2008 by 0.8% (nationally the numbers dropped by 4.8%) and a similar situation can be seen in US overnight direct entry numbers (decreased in Alberta by 2.5% and nationally by 2.3%). Similarly, occupancy rates and park attendance levels were down from 2007.

**Albertans travel within the province**

Albertans who travel within the province and those that travel outside of the province differ demographically. In 2007, 94% of visitors to Alberta’s provincial parks and protected areas were from Alberta (2% from British Columbia, 4% from elsewhere). 45% of these campers were labeled Comfort Seekers, looking for familiar locations, relaxation and strengthening family bonds. 42% were known as Real Relaxers who camp for peace, relaxation and who prefer to do nothing. Only 13% were Accomplishers who came to visit unknown destinations/places and to try new experiences.

**Albertans travel outside the province**

According to the Travel Activities and Motivation Survey (TAMS), 83% of Albertans traveled outside of the province and 90% of that travel was for pleasure. 8.1% of those who took a pleasure trip outside of Alberta traveled by RV. Out-of-province travelers were more likely to travel by RV than those staying within the province. Those traveling outside the province possessed the following characteristics:

- Married
- Less likely to have young children at home
- Possessing post-secondary education
- Affluent

Out-of-province travelers preferred cultural activities, learning vacations and visited museums, historical sites, galleries and attended live arts performances. This group of travelers was more involved in casino gambling, tasting events (food, wine etc.) and attended professional sporting events. The out-of-province travelers were more physically active, especially warm-weather activities (golf) but also

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44 (Alberta Tourism, Parks and Recreation, 2008); p.2
45 (Alberta Tourism, Parks and Recreation, 2009); p1, 3 & 4
46 (Alberta Tourism, Parks and Recreation, 2008)
47 (Lang Research, Inc., 2008); p.11
downhill skiing, exercising and jogging. The Internet was the planning tool of choice for out-of-province travelers (nearly 70%).

**Travelers from other origins**

Trips by other Canadians to Alberta totaled 3.2 million in 2008. The US and international travel markets have changed significantly in the past year; US vacation intentions are at an all-time low and international travel from countries such as France, Germany, Mexico, China and Australia showed a slight increase in demand. Travelers from the UK, Japan and South Korea showed a more significantly decreased demand.

5.2 Impact of Current Economic Conditions on the RV market

Most experts feel camping will be stronger than ever as the Alberta population will continue to recreate closer to home. Early indications from trade shows and dealer sales indicate that in Alberta there is still considerable demand for new RVs. However, if the current economic conditions worsen or last longer than several years, the trend may be towards lighter, smaller towable units. The other factor that supports the continuation of a strong camping market in Alberta is the large percentage of the population who own RVs in Alberta, and western Canada.

“People will continue to camp, perhaps in greater numbers than ever before, as the alternatives are far more costly. RV’s and camping gear last for many years - the economic situation will reduce the number of new RV's on the road - not the number of existing models.”

Go RVing recently revamped its latest marketing campaign to promote “Go Affordably. Go RVing” which they hope will set the tone for 2009. The recent 2008 Vacation Cost Comparison study by the Recreational Vehicle Industry Association (RVIA) supports RVing as the cheapest family vacation option.

An unknown economic factor was the change in the price of fuel. 2007 and 2008 were ideal tests for this condition as gas prices across the continent soared but travel was not affected as anticipated. A variety of sources, including an article in the Toronto Star reported that the price of gas did not affect RV travel as had been predicted for 2008 and rising airfares and cottage rentals continued to help consumer chose RV travel or camping over other accommodation options. In addition, RVIA’s survey revealed that RV owners intended to use their RVs for travel at either the same amount (20%) or an increased

48 ibid., p.1
49 (Canadian Tourism Commission, 2009)P.3-4
50 (The Praxis Group, February, 2009)
52 (Wright, 2008)
amount (76%) from previous years. Those that did admit to changing their travel plans as a result of the increase in the cost of fuel said they would still travel but stay closer to home and stay longer in one place.

In the survey undertaken in support of this study, RV owners in Saskatchewan, Alberta and British Columbia were asked how the current economic conditions will affect their participation in camping. The majority indicated there would be no affect.

Figure 25 Will Current Economic Conditions Affect RV Camping?

In the same survey, those who indicated there may be an impact on their camping, most indicated it depends on the price of gas. If the price of gas increases they will camp closer to home and camp less. There were also those who indicated they will camp more because camping is a lower cost travel option than other forms of vacation.

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53 (Gray, 2009)

54 (The Praxis Group, March, 2009); p.22
5.3 Trend in RV Sales

Another indication that the RV market will react favorably to the current economic situation is the success of RV shows and conventions held early in 2009. The numbers that have been reported after RV shows in Hamilton, Calgary, and Halifax, have all shown strong sales and interest.\(^{55,56}\) Woody’s RV, in Calgary, attributed the robust market to the fact that RV prices are currently at an eight year low.\(^{57}\) Statistics Canada reported comparative numbers for November 2007 and November 2008 that indicated an increase of 6.1% for used and recreational motor vehicle and parts dealers (seasonally adjusted).\(^{58}\)

Wholesale shipments of RVs in Canada exceeded 65,450 units in 2008. Retail sales grew 11.8% in 2008. Statistics for Canada comparing 2008 sales (up to and including December 2008) with 2007 sales show declines have occurred in Class A motorhomes of 20.1%. However, travel trailers and tent trailers have seen increases of 15.9% and 13.9% respectively. Fifth wheels have seen an increase of 8% over the same

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\(^{55}\) (Brown, 2009)  
\(^{56}\) (Zerlin, 2009)  
\(^{57}\) (Remington, 2009)  
\(^{58}\) (Statistics Canada, 2009)
period. Slight decreases were experienced in the sale of park models (-2.6%) and Class C motorhomes (-2.3%).

In the long term, conditions are predicted as strong based on a primary demand for RVs that was solid (delay in purchasing now might mean future sales potential), encouraging numbers and sales at early RV shows and conventions and RV credit remaining at the top of the credit worthy scale.

Alberta continues to be one of the strongest provinces in RV sales averaging more than 20,000 units being sold each year, and approximately one-third of the total sales nationally. As noted previously, 18% of Albertans own an RV. The recreational vehicle camper survey conducted as part of this study, showed that one third of Albertans have purchased their RV within the past two years.

Figure 27 Number of Years Owned Current RV

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59 (Merkowsky, 2009)

60 (Broom, New U-Mich Study: RV Ownership Reaches All-Time High, 2005)

61 (Merkowsky, 2009)

62 (The Praxis Group, March, 2009); p.6
In spite of the current economic outlook, almost one quarter of RV owners surveyed indicated they plan to purchase a new RV in the near future. Almost 80% indicated they would be buying a larger unit (Figure 24).

Figure 28 Anticipate Purchasing an RV in the Near Future

Dr. Richard Curtain, a research economist at the University of Michigan, is an authority on RV forecasts and predictions. His RV consumer study in 2004 found that RV ownership had risen 15% in the previous four years and that a newly emerging market (the 35-54 year old) had replaced the retiree market as the main purchaser of RVs. Recently, Dr. Curtain revised his predictions that RV sales would continue to increase at a similar rate based on the changing state of the US economy. His most recent prediction is that the industry’s problems will bottom out in the first quarter of 2009 and begin to see growth in the second quarter. However, Curtain is also reported saying that RV shipments in 2009 will be worse than the numbers reported in 2008.

63 (Broom, New U-Mich Study: RV Ownership Reaches All-Time High, 2005)
64 (Meenan, 2008)
65 (Lange, 2009)
5.4 Trends in Camping Within Alberta
The main challenge is arriving at a specific demand forecast for RV camping is the lack of historical occupancy data. While government campground operations report nights of occupancy, information is not consistently reported that separates RV camping from other forms of camping. While it is probable that private operations retain their own occupancy statistics, there is no single repository for occupancy data making it impossible to identify the trend across all private campground operations, or how they contribute to the overall trend.

The best source of information on camping demand is from Statistics Canada’s International Travel Survey, Canadian Travel Survey and Travel Survey of Residents of Canada. Together these surveys provide a complete picture of camping participation in Alberta. Figure 29 shows person nights of camping in Alberta from within the province as well as out of province (for all types of camping).

Since 2005 camping in Alberta has shown an increase, following a trend of decline in previous years. The increase is consistent with recent increases experienced in RV sales, as discussed earlier. Unfortunately data cannot be broken down by type of campground operation. Note the graph shows all types of camping, including back country and front country camping.

Figure 29 Camping Trends in Alberta (camper nights)

66 (Statistics Canada, 2000 - 2004)
67 (Statistics Canada, 2000 - 2004)
68 (Statistics Canada, 2006-2007)
The Alberta Tourism Operator Survey Report attributed a variety of reasons to successfully reaching its anticipated 10% increase in business during the summer months of 2008. These reasons include:

- An increase in the long-stay customer, attributed to the high fuel prices and the unwillingness of RVers to make multiple destination trips.
- Diversified target groups such as weddings and reunions to make up for the slow-down in the oil and gas industry
- A noticeable increase in travelers from New Zealand, Germany and the UK. (Advertising through Travel Alberta seems to have impacted some European markets)

One online RV campground reservation website indicated that bookings in the first month of 2009 were 41% ahead of the 2008 levels. Gocampingamerica.com reported that individual RV parks and campgrounds were experiencing a strong ‘snowbird’ season for the start of the new year.

Indications from a wide variety of sources suggest that RV camping in Alberta will be as strong as ever, and that RV sales will continue to stay strong provided the economic conditions do not get considerably worse than they are today.

5.5 Trends and Innovations in RV Camping

The current economic conditions are generally acknowledged to be a short term adjustment to the economy. Therefore it is also important to consider what the camping industry may look like as it emerges from the current recession.

**RV manufacturers respond**

Recently, RV campers have been asking for two types of RVs. The first is the smaller travel trailer or ultra-light that can be towed by a 4-cylinder vehicle often with full bathroom facilities. There is a growing selection of aerodynamic, ultra-light models that meet this requirement. The other frequently-requested style is the larger destination trailer and/or park model that may serve as a weekend home for a fraction of the cost.

RV manufacturers are working to keep up with these demands. There is also showing to be an increase in demand for fuel-efficient units by campers who want to limit their carbon footprint. Weight, smaller engines, better aerodynamics and increased non-powered engine cooling are some of the directions

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69 (Leger Marketing, 2008)

70 (Bibler, Campgrounds Enter 2009 on Positive Note, 2009)

that companies are headed. A new annual conference was started to introduce new green practices and green models for vehicles, including RVs. Alternate power options, such as solar panels and portable RV wind generators, are available for RVs. Both of these add-ons allow campers the freedom to stay wherever they want, without the limitations or cost of campground services but also help reduce the environmental impact of the RV. A possible future green trend might be to offer bio-diesel conversion kits for RVs, similar to those available for automobiles.

An RV campground in New Jersey, Driftwood RV, is adding improvements to one of its two RV campgrounds to allow for more park-model type destination trailer RVs. According to this operator, the middle has dropped out of the market and people want the RVs at the ends – the small travel trailers and the big park models. Park model trailers are very different than their ancestor, the trailer/mobile home. These days they are considered RVs but look like small homes built in different architectural styles. These mini-homes are fully furnished with dormer windows, French doors, bay windows, hardwood floors, lofts and wood cabinetry and offer a 400 square foot vacation home for a fraction of the cost of a cottage or cabin.

**RV campground operators respond to demands**

RV campgrounds in North America have changed dramatically in the past three decades. Gone are the days of RVing being similar to tent camping but with a vehicle. The trend for RV campers is to expect their RV camping experience to be as comfortable as a stay in fixed roof accommodation but with all their own things. RVers who are into destination camping bring with them all the amenities of home and expect their destination location to offer services to support these amenities and more. RV campgrounds should be considering the expectations of today’s RV crowd. Some of these include:

- Adequate services for the larger rigs (30 to 50 amp hookups, adequate water, drainage and sanitation)
- Communication services (phone, television/cable, Internet)
- Clean, updated bathroom and shower facilities that are well-maintained
- Well-designed lots, level, spacious with shade and good road access

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72 Damon Motor Coach introduced its Avanti line of Class A motorhomes, the first to get nearly 15 miles per gallon as a response to consumer demand for more fuel-efficient RVs. Damon Motor Coach. 14.5+ MPG Avanti Class A Diesel to Debut at Shows, August 15, 2008.14.5+ MPG Avanti Class A Diesel to Debut at Shows


75 (Murphy, 2007); p.B4

Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective

- Access to activities such as swimming, fishing, hunting
- Community-oriented services such as meeting halls, swimming pools, sports fields and programs
- Services and activities that appeal to the newly emerging RV market, the young family
- Facilities that allow parks to attract other types of visitors (conventions, groups, weddings, reunions, hobbyists)

Effective campground design should address many of the needs or demands of the RV camper. Some basics that are found in the literature include:

- A clear purpose of the campground – is it a destination facility or simply an overnight stopping ground. Services and amenities at each type will differ, depending on the nature of the campground
- Effective campground layout, with straight road access and space for RVs to park or turn around safely
- Sizeable pads that are level
- Shade, trees and privacy
- Easy access to amenities and recreational areas
- Safety in terms of access, lighting, facilities that are maintained
- Adequate parking
- Clear, visible signage

Another huge trend in camper demands focuses on Internet/WiFi availability, both at their destination of choice but also as a source of RV campground information and trip planning. Statistics Canada issued a report in 2006 that cited an Ipsos-Reid survey of online users for travel purposes. Eighty-seven percent of respondents said that they will use the Internet to research an upcoming trip and 55% indicated they would use it for booking travel directly online. According to TAMS, RV campers are destination

77 The Trailer Life Directory updated its rating system in 2004 for the first time in 10 years to reflect the changing face of the RV campground. They added credit for Internet/WiFi service, credit for the ability to house larger rigs and noted that the average age of the RV buyer had dropped from 51 years to 49 between 2001 and 2003. This is credited towards more families buying RVs (Business Wire. Campground and RV Park Campground Directory reflects the changing traveler and times, Dec 2, 2004.


80 (Gold Coast City Council); p.1-3

81 (Utovac & Stafford, 2006); p.4
Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective

Campers and use the Internet as their number one tool.\textsuperscript{82} What used to be more of a younger camper requirement has been adopted by the baby boomers whom may have more time on their hands to surf for their next stop or for the days outing. More than 2/3 of KOA’s Canadian campgrounds provide free WiFi access. \textsuperscript{83} WiFiRV, a high-speed Internet provider to RV parks, lists free WiFi as the number one amenity that campers want. “Since founding WiFiRV, John Borg II has seen the benefits of WiFi amenities in RV parks, resorts, and campgrounds. Properties consistently report increased occupancies and loyalty.” \textsuperscript{84} This is not just limited to private campgrounds. As of 2006, 49 locations in California State Parks offered WiFi access. \textsuperscript{85}

A trend that has caught on quickly and become another ‘must-have’ for campgrounds is an online reservation system. In 2007, AGI launched an online reservation system for 75 campgrounds that was accessible through the Woodalls or Trailer Life websites. This central booking option provides campers with the chance to make their travel reservations any time of the day. The vice president of AGI is quoted saying that 60% of online travel reservations are made after business hours; a campground without an online system would miss out on this business. \textsuperscript{86} Another source indicated that park operators prefer the online reservation system due to cost savings in employee time. \textsuperscript{87}

RV storage options and on-site cabins/yurts/rental RVs that allow visitors to drive their fuel-efficient vehicle to the destination are two future trends to consider. A scaled pricing system at RV parks that reflects the different sizes of vehicle is another idea that is presented in the literature. Reasons to consider these trends include higher fuel prices (as seen in 2007 and 2008), a general shift away from gas-guzzling vehicles to more fuel-efficient units and the changing face of the RV market as more families buy RVs and have different requirements. Finally, some RV parks are considering limiting the number of spaces available to house the big rig RVs, partially as a reaction to the shift in RV size preference but also because the bigger RVs require so much more in terms of size, power and access that some operators are opting for a mixed RV facility that reflects the current buying trends. \textsuperscript{88}


\textsuperscript{83} (Sullivan, 2007)


\textsuperscript{85} (Nowlin, 2006)

\textsuperscript{86} (Crider, AGI Launches Online Reservation Service, 2007)


\textsuperscript{88} (Gonser, 2009); p.2-3
A creative storage solution has been identified as a potential new market. With the parking and storage restrictions determined by either city bylaws or small properties, a gap in service has been identified around the problems of storing one’s RV while not using it. A firm in California combined the idea of RV storage and an RV campground by proposing to build one that offered a fully enclosed garage on each site. Units have sold out before construction of the park had even been completed.  

A 2008 economic survey by the National Association of RV Parks and Campgrounds (ARVC) indicated that RV campgrounds that upgrade their facilities are faring better than those that do not. New ownership often preceded the improvements. Other highlights of the survey detailed amenities and services that are being offered at more and more campgrounds, such as:

- Discounts to club members (AAA, Good Sam Club, etc.)
- Optional cabin rentals
- Camp stores
- 50 amp service (37% of parks surveyed) and 30 amp service (37% of parks surveyed)
- High speed Internet access, often free
- Green park practices, ranging from xeriscaping (landscaping to minimize water use) to energy and water conservation programs and recycling
- Online promotion (95% of parks have own website)
- Strong park management (63% of campground are managed directly by the owners, 26% use professional park managers)

Another trend that may be gathering strength is the park model option. Recreational park models were gaining in popularity as they offered an affordable vacation option that was similar to a second home but (in the United States) considered to be a recreational vehicle and not subject to similar taxation. Park models allow people to vacation in country club type establishments and locations for a fraction of the cost. In 2006, 10100 units were shipped within the US; the industry has since experienced a drop in sales of nearly 30%. An interesting point is that shipments to Canada have continued to rise since 2001, hitting 1258 units in 2007, although have fallen by 2.6% in 2008. This trend is opposite to the situation in the US where the number of units sold began to drop in 2006 and continued in 2007.

A new enterprise that started in the UK is creating gentle waves and is possibly headed for the US in the future. It combines a working farm with a small, top-end campsite. While these are not specific to RVs and currently focus on permanent tents, this is a successful venture that might work with RVers also. A

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89 (Gerber, 2009)

90 (Crider, AGI Launches Online Reservation Service, 2007)

91 (Murphy, 2007)

92 (RPTIA, 2008)
UK entrepreneur approached farmers in the UK with the concept of turning part of their land into a campground, offering an eco-friendly break with educational appeal for nature lovers, families and retirees. Guests stay in luxury tents with toilets, wooden floors and wood-burning stoves. The potential for income is attractive to farmers and an annual income with average occupancy in the five units could generate up to $35,000 USD.93

A pilot venture by Airstream and Kampgrounds of America (KOA) has placed 25 luxury Airstream trailers at campgrounds in three locations in the US for rental purposes. The idea behind this is to allow campers to experience the high-end luxury of the Airstream trailer without the cost of purchasing one. It is also an exploration into alternatives to a hotel stay.94

As Internet mainstays such as Facebook, Twitter, Youtube.com and blogs take a firmer hold in today’s society, RV campground owners are wondering how these social tools can be used to benefit their industry. At the Minnesota Resort and Campground Association 2008 Fall Conference, one idea involved sending text messages to interested campers when camping sites became available. Other ideas included blogs for guest entries and amateur videos mounted on Youtube.com of the campground and individual sites.95

Another innovative business trend that is found in the literature combines timesharing with RV parks. These operations are generally luxury parks that allow members to stay for 1-2 weeks at a time, as often as they desire, and offer different locations to their members.96 Some offer pads as the timeshare option, others offer the site with the RV, to avoid the large capital investment of purchasing a destination-style RV.97 As with other industry timeshares, the resale opportunities make this a popular and viable option.

Many RV club memberships operate on a timeshare-like basis, offering flexible use but guaranteed annual space for a trailer, optional space for additional units or tents and parks that feature commonly requested amenities.98

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93 (Davies, 2006); p. 14.
94 (Garcia, 2009)
95 (Bibler, Minnesota Owners Ponder E-Marketing, 2008)
96 (Drechsler, 2008); p.54
98 (Peterson & McCoy II, 2006); p27.
RV-friendly signs are featured on highway signs in many parts of the United States and have recently been seen ‘popping up’ in California. The road signs feature a motorhome friendly logo that points to facilities that cater to RVs (gas, food, lodgings, business).  

The change in RV unit size and the diversification of the RV market (more younger adults, families) has led to the concept of ‘zoned’ parks. RVers are many different breeds and some want to park next to a neighbour, to sit in front of the RV and watch television and visit with their new community. Others prefer more space, more shade, more trees and there are those that want to be out in the middle of wilderness. Customer satisfaction is important and is best achieved if retirees or adult couples are not parked right next to a family of young, active children.

**Alberta campgrounds response to trends**

Alberta’s campgrounds in general have not kept pace with the changes in equipment and consumer preferences. Campgrounds developed within provincial and national parks in particular were designed for much smaller camping equipment (trailers, tents and tent trailers) and have difficulty accommodating the size of units used by many campers today. The trend towards increased demand for amenities (showers, flush toilets) and services (30 amp electric hookups, water) has not been matched by changes in the province’s supply. The limited availability of sites with services and amenities that match demand has resulted in campers travelling to neighboring provinces.

A survey of Albertans was conducted in 2008 to assess the priorities for provincial parks. Two-thirds of respondents indicated the need for increased enforcement of rules, especially in relation to noise. Over half of respondents indicated the need to invest in the current infrastructure. Survey respondents said that providing shower facilities or improving existing shower facilities (cleaner, more hot water, lower cost) was the most important improvement. Adding more serviced sites, particularly power sites, and was a necessary improvement noted by campers as well as enhancing existing washroom facilities. The focus should be on improving and updating what exists through improvements to infrastructure and increasing maintenance of the current asset.

RV campers surveyed as part of this study indicated a strong desire in the future to rent or purchase a seasonal property. Almost one quarter of respondents indicated they will be considering a seasonal campsite in the future. Arguably, British Columbia is well on its way in providing this type of opportunity to the market of RV campers.

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99 (PR Web, 2009)

100 (The Praxis Group, March, 2009); p.9

101 (The Praxis Group, 2008)

102 (The Praxis Group, March, 2009); p.23
5.5 Economic Impact

Figure 30 illustrates trip expenditures by Albertans and out of province travelers camping in Alberta. Trip expenditures are estimated at over $350 million in 2007.\(^{103}\)\(^{104}\)\(^{105}\) This includes all forms of camping including back country and front country.

*Figure 30 Camping Trip Expenditures in Alberta*

Trip expenditure data only show part of the picture. The RVDA of Canada estimates that in 2005 retail sales totaled approximately $2.35 billion. As noted earlier, Alberta accounts for about 30% of national RV sales.

There are over 800,000 RVs on the road in Canada.\(^{106}\)

\(^{103}\) (Statistics Canada, 2000 - 2004)
\(^{104}\) (Statistics Canada, 2000 - 2004)
\(^{105}\) (Statistics Canada, 2006-2007)
\(^{106}\) (RVDA of Canada, 2009)
6.0 Alberta’s RV Campground Industry – Strengths, Weaknesses, Opportunities and Threats

6.1 Strengths of Alberta’s Campground Product

High level of RV ownership among Alberta households
Alberta residents have among the highest rates of RV ownership in North America. Indications from early sales, RV shows and the recreational vehicle camper survey undertaken as part of this study suggest this trend will continue.

Wide variety of landscapes for recreation, leisure and discovery; lakes, rivers, mountains, prairies and badlands
For the vast majority of campers, activities (other than camping itself) are an important aspect of the camping vacation. Lakes and rivers are preferred by 89% of all RV campers, hiking and walking trails are sought by 79% of RV campers and tourist attractions by 70% of RV campers.

International recognition of mountain parks draws visitors from around the world
National parks within Alberta draw a significant number of fly-drive campers from around the world. Over 30% of camping done within Banff and Jasper is from overseas.

Close proximity of large urban markets to wide array of campground options
Alberta’s population is concentrated in two major urban centres, both of which are in close proximity to significant portions of the province’s campground supply. Over 16,000 campsites are within several hours driving time of Edmonton and over 18,000 campsites within several hours of driving time to Calgary.

Abundant supply of campsites
Alberta has more than 41,000 campsites throughout the province. Even though demand is concentrated is several key nodes (a notable weakness), there remains considerable supply.

6.2 Weaknesses in Alberta’s Camping Industry

Campsites are too small for today’s RV; sites have not kept pace with changing market demand towards larger units
There is strong agreement from industry experts and consumers alike that Alberta’s campsites have not kept pace with changes in the market. The most significant change is in relation to the size of RV camping units. RV campers rated as their top priority the need for privacy and uncrowded sites.
Not enough serviced sites, especially in high demand areas
Industry experts identified the gap in the current supply in relation to demand for serviced sites, in particular power and water. This is most notable in the province’s premiere tourism destinations in the mountain parks where only 19% of sites have power hookups and 11% have water hookups. From the perspective of RV campers, serviced sites are preferred, but are less essential than privacy and having a larger site. Services sites near water for boating, swimming and fishing are in particular short supply.

Poor distribution of demand in relation to supply
Survey respondents and industry experts reported the highest levels of frustration with getting into campgrounds in Kananaskis Country. While the province has a large supply of campsites, the concentration of demand in a few key areas creates the perception that the province needs more campsites (more than half the experts interviewed indicated more campsites are needed). While the key destinations are busting at the seams, many parks are almost vacant during the week. There are many factors that contribute to this, including, poor and insufficient infrastructure, low awareness, and travel distance.

Short season makes investment in upgrading facilities difficult to sell to financial institutions
Private operators indicated the short camping season presents one of the biggest challenges to financing increased investment in infrastructure. (Private operators include those contracted to operate certain provincial campgrounds)

Many RV units are not designed for Alberta winters, limiting the options for four season usage
Moving to a three season or four season operation was suggested as an opportunity by many experts. However, most RV equipment is not designed for Alberta’s winters.

Many incomplete web and hard copy information sources, but no one place where a camper can find everything they need to plan their trip
Approximately 70% of campers in western Canada rely on printed sources or word of mouth for their camping information. Only 5% indicated they used the provincial government website. The low use of the web is in stark contrast to what the literature suggests is the current trend in planning camping vacations. There are two likely reasons for this. Few campgrounds have Internet access in Alberta (hence precluding the convenience of planning the next stop while enroute) and the proliferation of websites containing only partial information about the province’s camping supply.

6.3 Opportunities for Alberta’s Camping Industry

Upgrading facilities will keep Alberta campers in Alberta and attract out of province campers
There is consensus among industry experts surveyed that the current supply of campsites in the province is seriously out of date. Length of stay will increase, and more campgrounds will be utilized around the province if an investment is made in providing showers, flush toilets, sani-stations and power and water hookups. Creating a better product, including larger sites offering more privacy will
help to differentiate Alberta from other jurisdictions in Canada. Experts noted the issue of aging campsites and supply not matching demand is a problem that is not unique to Alberta, and characterizes much of the industry in Canada.

**The growth trend in RV camping**

Even in a time of economic down turn, the camping industry is on the rise. Sales are increasing in fifth wheel, tent trailer and trailer RVs in Canada. Western Canadians have considerable investment in RV camping equipment with among the highest ownership rates in the country. The vast majority of camping is done with RVs, while the majority of campsites are not designed for this type of equipment. Over the past twenty years the trend has been towards significantly larger camping units, yet supply has remained largely unchanged.

**Seasonal campgrounds provide new potential in Alberta**

Most experts agreed a largely untapped opportunity exists in establishing resort-style campgrounds. Almost 25% of Alberta’s RV campers indicated they will be looking to own or rent a seasonal site in the future. The escalation in fuel costs will contribute to this change in method of camping. The development of park model camping units will also support the growth of this opportunity. British Columbia is well on its way with regard to establishing developments where time share, rental or owned sites are being developed. While most experts supported the concept of seasonal RV parks there were also notable challenges, not the least of which is the Alberta climate. Restrictive government regulations with respect to the environment, difficulty in obtaining approvals from municipalities and obtaining capital for development were noted as obstacles to overcome for this to be successful.

**Information through a single website could position Alberta as an industry leader**

Industry experts interviewed as part of this study suggested the need for a single web source to provide prospective campers with information about the province’s many camping opportunities. This might even include virtual tours, pictures, maps and other trip planning information. Currently the web is under-utilized in camping trip planning as a main source of information. The addition of Internet access is another feature that campground operators need to address, especially for long haul travelers who rely extensively on the web for planning their routes. Alberta provincial parks is developing a new centralized campground reservation system, although it is limited to selected provincial parks at this point in time.

**Marketing the affordability of camping with the vast array of opportunities**

At least in the short term, marketing efforts should focus on the affordability of camping and doing so closer to home. RV Campers surveyed indicated that camping is becoming less affordable with higher fees for firewood, showers and campsites. It is felt that value for money is declining in Alberta’s campgrounds as costs are going up, but facilities are not being upgraded and maintained. Survey participants were asked what would encourage them to camp more frequently in Alberta. For Alberta residents the main factors that would encourage higher use are lower camping fees, better availability of campsites, better maintenance of campgrounds and free fire wood (Figure 25). For campers from British Columbia and Saskatchewan, most respondents indicated they are happy with where they are
currently camping, Alberta is too far or they are not aware of what is offered (Figure 26). Therefore the easier market to attract is the one that lives within the province. With half of Alberta’s campers leaving the province, a significant opportunity exists to increase camping by providing Albertans the reason to stay in-province.

**Keeping Albertans in Alberta**

In the recreational vehicle camper survey conducted as part of this study, RV campers were asked what would encourage them to camp more often in Alberta. The top items mentioned were lowering the cost of camping and better availability of campsites. As discussed earlier, about one third of Alberta RV owners’ camper nights are spent outside the province.107

**Figure 31 What would encourage you to camp more often in Alberta? Alberta campers**

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**Bringing campers from neighboring provinces**

The vast majority of Saskatchewan campers tend to stay in their home province (over 80%). The main reason for not camping in Alberta is that they already have what they need in their home province, therefore do not feel the cost of travel is warranted. There was a similar response from BC campers. Beyond this, the main reasons for not camping in Alberta included not knowing what is available, poor quality campgrounds, perceived higher cost, and the need for more lakes.108

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107 (The Praxis Group, March, 2009); p.10

108 (The Praxis Group, March, 2009); p.11
The main opportunity is to show campers in neighboring provinces that the Alberta camping product is unique and of high quality.

Figure 32 What would encourage you to camp more often in Alberta? BC and SK campers

<table>
<thead>
<tr>
<th>Reason</th>
<th>BC</th>
<th>SK</th>
</tr>
</thead>
<tbody>
<tr>
<td>nothing, prefer camping close to home</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>do not know what there is</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>develop nicer campgrounds</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>better/more lakes</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>lower camping fees</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>better maintenance</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>control noise/drunkiness</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>better availability of campsites</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>free firewood</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>on-line reservation system</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>add more serviced sites</td>
<td>0%</td>
<td>5%</td>
</tr>
</tbody>
</table>

6.4 Threats to Alberta’s Camping Industry

**Neighboring provinces and states upgrade their camping supply**
For Alberta campground operators to ignore the need to change and adapt places them at risk of falling further behind and losing market share to neighboring jurisdictions, especially if the adjacent provinces and states upgrade their offer. Value for money is perceived to be declining in relation to camping in Alberta. Campers indicated maintenance standards have fallen off, the choice sites are not available, sites are too small, too crowded and do not offer the level of service needed; all this at a higher cost.

**The purchase of recreational property and time shares out of province**
BC in particular is developing resort campgrounds (e.g. time share) in tourism destination regions within the province. BC has a climate advantage over Alberta creating a more viable 3 or 4 season offer.

**Other jurisdictions targeting Alberta campers**
Alberta has among the highest rates of RV ownership in North America. The economy remains relatively strong, even in these difficult economic times. It is also recognized that Alberta’s camping products is
not meeting contemporary needs. These factors create a prime opportunity to target Albertans to travel to BC and Saskatchewan to fulfill their camping needs. Improved promotion and marketing, such as BC’s “Super Camping”, are being used to increase awareness of their offer.

**Difficulty in obtaining financial backing for investment in upgrading facilities**
The current economic climate will make obtaining needed investment capital more difficult to obtain. This applies to all sectors, public and private.

**Manufacturers out of sync with operators**
RV manufactures have been driving the market towards big rigs with heavy service requirements (e.g. 50 amps). Operators noted that the move to 50 amp sites has proven to be a poor investment in terms of ROI (return on investment). Also, providing sites for rigs in excess of 40 feet means taking smaller sites and combining them into single larger sites, again with a questionable return on investment given the camping fee increases cannot make up for the lost revenue.
7.0 Conclusions and Recommendations

Camping is one of the most popular leisure activities in which Albertans are involved. Over 40% of Albertans take part in overnight camping as a leisure activity and over three quarters of camping is done using a recreational vehicle.

In 2007, more than $380 million dollars was spent in the province on camping trip expenditures alone. An estimated $700 million is spent on RV purchases in Alberta each year. Alberta has one of the highest rates of RV ownership in North America, with 18% of households owning an RV. Nationally there are over 800,000 RVs on the road.

Forecasts suggest participation in RV camping will be stronger than ever over the coming years given the affordability of camping and the heavy existing investment in recreational vehicle ownership. The trend in camping activity in Alberta since 2005 is on the rise, following a declining trend in camping since the late 1990’s.

The future for the RV camping industry, even in the current economic downturn is one of optimism. There is also a high desire for current RV owners to upgrade to a larger model in the future. Retail RV sales in 2008 grew by 11.8% and early indications in 2009 are showing a continuation of strong sales.

Over 40,000 campsites throughout the province provide campers with a wide range of opportunities; lakes and rivers for fishing, swimming and other water sports; wilderness for hiking, backpacking, horseback riding, X country skiing, quadding to name just a few, and world class tourist attractions.

In spite of the popularity of the activity and its importance to Albertans and the tourism industry as a whole, the supply-side picture is far less than ideal. Many of the province’s campgrounds have deteriorated in quality through a lack of re-investment. Campsites developed several decades ago have not kept pace with the changing needs of today’s RV campers. The perceived value for money has declined with charges for firewood and showers along with increased camping fees with no corresponding investment in facility upgrades. RV campers are seeking service buildings with showers and flush toilets, power and water hookups and sani-stations. They are also looking for well maintained campgrounds that offer privacy and sites large enough for their RV camper.

Over half the province’s campground supply does not offer power hookups at the campsite and over two-thirds do not offer water hookups. The largest provider of serviced sites is privately owned campgrounds. Over 60% of powered sites and 72% of sites with water hookups are provided by private owners. National parks and provincial parks in relation to the number of sites offered are significantly under-represented in terms of provision of serviced sites (power and water).

To be competitive and to meet the needs of increasing demand for RV camping, Alberta operators in all sectors must increase the supply of campsites capable of supporting RV use. To attract campers from other provinces and keep Albertans in their home province, an increase in sites with an orientation to
beach and water activity is also key, as is keeping costs down (firewood, fees) and providing sites with a high level of privacy.

Just over half of the province’s campgrounds offer shower facilities, flush toilets and sani-stations. In terms of these services, the provincial parks lag well behind federal, municipal and private parks.

To sustain and even grow the province’s RV camping industry, investment is essential. Without investment in the province’s campgrounds, the risk of losing an increasing number of campers to neighboring provinces and states increases.

The following recommendations are based on the findings of the current study. In fact there are very few recommendations emerging from this study because so much of what the study has demonstrated revolves around a single issue – the need to bring the provinces’ campground supply up to date. Without this investment, the opportunities for market growth or even market retention are limited.

**RECOMMENDATION**

Increasing the supply of campsites that can support the continued growth in RV camping is the top priority for Alberta’s camping industry. This includes larger sites offering more privacy, provision of centralized showers and flush toilets (especially in provincial parks), provision of more serviced sites (especially 30 amp electrical hookups and water) and improved maintenance. Access to water-based activities is also seen as important to meeting the needs of the camping market.

**RECOMMENDATION**

Investigate the economic feasibility of seasonal campground operations in Alberta. Lengthening the season may make campground operations more viable, allowing for increased investment in infrastructure.

**RECOMMENDATION**

Increase cooperation between government and private sector in terms of sharing information and technology. This could include a province-wide reservation system, a comprehensive web site that provides campers with virtual tours, pictures, information on amenities and things to do.

**RECOMMENDATION**

Increase the level of in-province promotion to make Albertans aware of some of the camping opportunities that exist around the province. In doing so, divert excess demand away from the overcrowded destinations. Getting Albertans to ‘try’ another park should be the emphasis. There are over 600 parks in Alberta, yet the concentration of use falls within only a few parks.
Appendix A Minimum Standards for ALHA Campgrounds

MINIMUM STANDARDS FOR APPROVED CAMPGROUNDS

These minimum standards apply to all campgrounds. Additional standards will apply to your facility based on the classification of the campground. Although the requirements in each classification vary, the minimum requirements for all types of facilities do not, nor do the standards for cleanliness and maintenance. This forms the basic standard for your inspection.

1. AVAILABILITY
   a. At least 25% of its sites must be available to overnight campers from June to September inclusive.

2. COURTESY
   a. Courtesy is a minimum requirement in the Approved Campground Program. It is an important aspect of cleanliness, safety and state of repair. Management and staff shall present a good appearance to the guest, operate an ethical business-like basis and provide courteous attention to guest service. Rude, indifferent or discourteous service is unacceptable and can cause for losing the approved Campground status. Failure to respond appropriately to guest complaints may also result in loss of Approved Campground status.
   b. Registration area must be separated from living quarters where applicable.

3. BUILDINGS
   a. All buildings shall present a well maintained exterior appearance in keeping with their nature and location.
   b. All stairs and landings shall be free of defects, and handrails shall be maintained in a safe and sound condition.

4. PRIVIES/TOILETS
   a. At minimum, all campgrounds will have one privy for each sex, clearly identified, for every 20 or part thereof, kids or units served. All privies shall be well constructed with toe spaces and handrails, properly fitted down, with made latches, ventilated with fly-proof screens on all ventilation openings; area subject to ailing berries and trees should be impermeable to water, and subject to the approval of the local Board of Health.
   b. Adequate quantity of toilet tissues in suitable dispensers shall be provided and maintained for each privy.
   c. Privy door contents shall be treated to control odors, flies and volume of water.

5. MAINTENANCE
   a. Every campground operator shall provide maintenance to keep premises and its equipment in good repair and appearance and in a clean, orderly and sanitary condition.
   b. Grounds, landscaping, grass and foliage shall be well kept and regularly maintained to present a neat and tidy appearance in keeping with their nature and location.
   c. All refuse shall be stored in durable, rust-resistant, non-absorbent, watertight and rodent-proof containers that are covered with close-fitting lids and provided with suitable handles. Containers shall be free from sharp edges and should be kept clean and in good repair.
   d. Garbage disposal areas, walkways and parking areas shall be maintained and free from litter and other debris.
   e. Signs and advertising on the property shall be well maintained, legible and accurate.

6. WATER
   a. The water supply system within any campground shall comply to the requirements of the Provincial Board of Health and Regulations pertaining Plumbing and Drainage made under the Plumbing and Drainage Act.
   b. At a Minimum, portable water shall be provided at a station designed especially for drinking, cooking, dishwashing and other domestic purposes and campfire control. Suitable drainage facilities shall be incorporated so as to prevent pools of spilled water from accumulating at or near the water station.

7. AMENITIES
   a. Table with benches must be provided for each 1200 square feet.
   b. Drinking fountains (unless fires are restricted)
   c. Firewood or like supplies (unless fires are restricted)
   d. Electrical services shall meet all applicable provisions of the Electrical Protection Act and the Regulations thereof.

IT IS RECOMMENDED to have a defined cancellation policy in place.

OTHER REQUIREMENTS

Approval is also conditional upon facility complying with regulations under the Health Act, Alberta Building Code and other existing provincial government regulations related to the construction.

APPROVED

Means the establishment has met Alberta’s Minimum Standards for a campground and qualifies for a listing in the following year’s Alberta Campground Guide. This also certifies them to exhibit an Approved Campground Decal, until, for cause, the privilege is revoked.

PROVISIONAL APPROVAL

Means the establishment has been accepted on the basis that deficiencies found will be corrected within a time specified by the Quality Assurance Advisor. The establishment is listed as it has been approved. Evidence of failure to comply with the recommended improvements will be cause for revoking the establishment.

NOT APPROVED

Means the establishment has failed to meet the Minimum Standards as indicated above. It is not entitled to a listing in the Alberta Campground Guide or to exhibit an Approved Campground Decal. If a listing has been previously granted, the privilege is revoked. Owners/operators of an establishment “Not Approved” as an Approved Campground may appeal the ruling. A written appeal must be submitted to the Manager, Quality Assurance within thirty (30) days of the inspection. The ALHA reserves the right to either accept the Quality Assurance recommendation or to grant the establishment a re-inspection.
## Appendix B Expert Interviews

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Type</th>
<th>Position</th>
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<tbody>
<tr>
<td>Joss Penny</td>
<td>British Columbia Lodging and Campgrounds Association</td>
<td>Association</td>
<td>Executive Director</td>
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<tr>
<td>Jean MacDonald</td>
<td>Ol’ MacDonald’s Resort</td>
<td>Operator</td>
<td>Owner</td>
</tr>
<tr>
<td>Adam Ledwon</td>
<td>Alberta Hotel and Lodging Association</td>
<td>Association</td>
<td>Director, Campgrounds</td>
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<tr>
<td>Darva MacBeth</td>
<td>Woody’s RV World</td>
<td>Dealer/Association</td>
<td>President, RVDA</td>
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<tr>
<td>Kyle Redmond</td>
<td>Bucars RV Centre</td>
<td>Dealer/Association</td>
<td>Director, RVDA</td>
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<td>Rod Glass</td>
<td>Fleetwood Canada Limited</td>
<td>Manufacturer</td>
<td>district sales manager (ab/bc)</td>
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<tr>
<td>Dan Merkowsky</td>
<td>Recreational Vehicle Dealers Association (Alberta)</td>
<td>Association</td>
<td>Executive Vice President</td>
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<td>Archie Landals</td>
<td>ATPR</td>
<td>Government</td>
<td>Director, Parks Resource Management Coordination Branch</td>
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<td>Kyle Clifford</td>
<td>APTR</td>
<td>Government</td>
<td>Executive Director, Field Operations</td>
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<td>Melanie Taylor</td>
<td>RV Lifestyle Magazine</td>
<td>Publishing</td>
<td>National Publication</td>
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<tr>
<td>Chris Ekloff</td>
<td>Lions Club - Bow Rivers Edge Campground</td>
<td>Operator/Not-For-Profit</td>
<td>Manager</td>
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<td>George Goddard</td>
<td>Holiday Trails - membership park</td>
<td>Operator</td>
<td>General Manager</td>
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<tr>
<td>Doreen Willner</td>
<td>Alldrive Canada</td>
<td>Industry-RV Rental Company</td>
<td>President</td>
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<td>Ross Hodgins</td>
<td>RV City</td>
<td>Dealer</td>
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<td>Keith Hanks</td>
<td>Affordable RV</td>
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<tr>
<td>Bill Burnett</td>
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<td>Dealer</td>
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<td>Marty Vellner</td>
<td>Vellner Leisure Products</td>
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<td>Dean Smyl</td>
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<tr>
<td>Dale Woytiuk</td>
<td>Gulfstream US</td>
<td>Manufacturer</td>
<td>Western Canadian Sales Rep</td>
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<tr>
<td>Siegfried Schwartz</td>
<td>Mount Kidd RV Campground</td>
<td>Provincial Campground</td>
<td>Operator</td>
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Bibliography


Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective


