Foundations for Revitalizing Alberta’s Camping Experience through Comfort
“The” Question

Which 10 parks have the greatest potential for successful comfort camping investment?

• What Parks?
• Not, where in each park?
Presentation Outline

• Camping in Alberta
• What is Comfort Camping
• Comfort Camping Supply in Alberta
• Identifying Comfort Camping Market Segments
• Gaps in the Alberta Market
• A tool to help prioritize investment opportunities
Camping in Alberta
Alberta Recreation Survey: Participation in Land-based Activities

1. Day Hiking
   - 50% participation

2. Camping
   - 37% participation
     - (1.739 million)
Alberta Recreation Survey: Favourite Activities

Favourite Activities

- Walking: 23%
- Camping: 17%
- Hiking: 15%
- Reading: 10%
- Golf: 9%
- Bicycling: 7%

Percentage of population listing in top three favourite activities
Alberta Recreation Survey: Interest in Future Participation

Potentially **2.2 million** Albertan’s interested in comfort camping (48% of population)
Changing Trends in the Camping Industry

Camping by Generation

- Millenials
- GenX
- Baby Boomers
- Mature

Census | Camping
What is Comfort Camping?
A Global Phenomenon

The world's best bubble hotels

Glamping sites that let you experience nature in the lap of luxury

From luxury yurts to tricked-out tree houses, here are 10 of the best glamping experiences in the US

Luxury camping - or 'glamping' - takes off in Wales

10 U.K. Campsites for Rough Sleeping, Caravaning and Glamping
Defining Comfort Camping

GLAMPING
GLAMOUR CAMPING
EASY CAMPING
CONVENIENT CAMPING
READY-TO-CAMP
Principles based Approach...

to Differentiating Comfort Camping from Traditional Camping & other Fixed Roof Experiences

*images retrieved from: nytimes.com, inhabit.com, awoljunkee.com*
Comfort Camping should...

...Provide an enhanced level of comfort for visitors
Comfort Camping should...

...Make the experience easy & convenient for visitors (remove the need for all the gear)
Comfort Camping should...

...Be unique and responsive to target market expectations
Comfort Camping should...

...Embrace and connect visitors to the surrounding environment.

*image retrieved from: doc.govt.nz
Comfort Camping should...

...Minimize impacts to the local environment & cultural resources
Comfort Camping should...

...provide positive benefits to local communities.

*Image retrieved from: pc.ga.ca*
Comfort Camping should...

...Be of an appropriate scale and permanency

*Image retrieved from: thebackcountryhutcompany.com
Defining the Comfort Camping Experience
Comfort Camping Level of Service Spectrum

Critical to:

• Consistency in level of service
• Fair fees
• Brand management
• Visitor satisfaction
## Comfort Camping Level of Service Spectrum: Elements

<table>
<thead>
<tr>
<th>Target Markets</th>
<th>Accommodation Structure</th>
<th>Indoor Amenities</th>
<th>Outdoor Amenities</th>
<th>Services</th>
</tr>
</thead>
</table>
| • Market Segments | • Accommodation Type  
  • Architectural Character  
  • Universal Design  
  • Sleeping Spaces / Privacy  
  • Flooring  
  • Common Area | • Bed Type  
  • Linens  
  • Furnishing  
  • Potable Water  
  • Hot water  
  • Power  
  • Air conditioning  
  • Lighting  
  • Heating  
  • Showers / Bathing  
  • Toilets  
  • Toiletries  
  • Cooking Facilities  
  • Cooking equipment  
  • Wifi / TV / Satellite / Cable | • Outdoor furnishings  
  • Firepit  
  • BBQ  
  • Spa / Wellness / fitness  
  • Hot tub / sauna | • Housekeeping  
  • Waste collection  
  • Firewood |
**Comfort Camping Experience Spectrum**

<table>
<thead>
<tr>
<th>Type 1: Basic Level of Service</th>
<th>Type 2: Basic Level of Service with Additional Amenities</th>
<th>Type 3: Mid-range Level of Service</th>
<th>Type 4: Exceptional Level of Service</th>
<th>Type 5: Luxury</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Pre-fabricated design</td>
<td>• Pre-fabricated design</td>
<td>• Pre-fabricated with materials customized to site</td>
<td>• Architect/custom designed</td>
<td>• Architect/custom designed</td>
</tr>
<tr>
<td>• No mattress with basic sleeping structure</td>
<td>• Sleeping structure with mattress</td>
<td>• Mid-level mattress, linens provided</td>
<td>• Larger bed with deluxe mattress, linens provided</td>
<td>• King bed with deluxe mattress, linens provided</td>
</tr>
<tr>
<td>• Common basic toilet</td>
<td>• Centralized basic toilet</td>
<td>• Common centralized toilet (flush)</td>
<td>• Individually designated toilets</td>
<td>• En-suite washrooms</td>
</tr>
<tr>
<td>• No heating</td>
<td>• Basic heating (e.g. wood stove)</td>
<td>• Heating in each unit</td>
<td>• Heating in each unit</td>
<td>• Heating in each unit</td>
</tr>
</tbody>
</table>
Alberta’s Natural Regions

Alberta Natural Subregions Map

Boreal Forest Natural Region
- Athabasca Plain
- Boreal Subarctic
- Central Mixedwood
- Dry Mixedwood
- Lower Boreal Highlands
- Northern Mixedwood
- Peace Athabasca Delta
- Upper Boreal Highlands

Rocky Mountain Natural Region
- Alpine
- Montane
- Sub-Alpine

Foothills Natural Region
- Lower Foothills
- Upper Foothills

Canadian Shield Natural Region
- Kazan Upland

Parkland Natural Region
- Central Parkland
- Foothills Parkland
- Peace River Parkland

Grassland Natural Region
- Dry Mixedgrass
- Foothills Fescue
- Mixedgrass
- Northern Fescue
Recreation Setting

<table>
<thead>
<tr>
<th>Backcountry</th>
<th>Mid-country</th>
<th>Front-country</th>
<th>Developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting I</td>
<td>Setting II</td>
<td>Setting IV</td>
<td>Setting VI</td>
</tr>
</tbody>
</table>

RECREATION & TOURISM OPPORTUNITY SPECTRUM
Public Sector vs Private Sector Areas of Focus
Comfort Camping Supply Analysis
Park Sites & Overnight Use

- 470 parks and protected area sites (at time of study)
- Approx 4% of the province
- 8 different legislative classes of park or protected area
- 8.7 million visits (2016)
  - 6.8 million day use visits
  - 1.9 million overnight visits
- 279 sites are Provincial Parks or Provincial Recreation Area Classification
- 194 sites provide for overnight use
- 16 sites provide comfort camping
  - 9 sites have public sector opportunities
  - 7 sites have private sector opportunities
Comfort Camping Supply in Alberta

- 16 sites (total)
- ~ 383-399 beds (total)

- Public sector (9 sites / 196 beds)

- Private sector (7 sites / approx. 187-203 beds)
Existing Public Sector Supply

Public Sector:

- 60% of inventory are Yurts or Canvass Wall Tents
- Cabins

Limited diversity!
Comfort Camping Supply: Public Sector

Public Sector Comfort Camping Opportunities by Year

- Number of Sites
- Number of Beds

Years: 2011 to 2017
Numbers: 0 to 350
## Comfort Camping Supply Strength

<table>
<thead>
<tr>
<th>Comfort Camping Experience Type</th>
<th>Public Sector</th>
<th>Private Sector</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type 1</td>
<td>18</td>
<td>0</td>
<td>90</td>
</tr>
<tr>
<td>Type 2</td>
<td>176</td>
<td>103</td>
<td>231</td>
</tr>
<tr>
<td>Type 3</td>
<td>120</td>
<td>45</td>
<td>165</td>
</tr>
<tr>
<td>Type 4</td>
<td>10</td>
<td>31</td>
<td>41</td>
</tr>
<tr>
<td>Type 5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Supply Strength**
- High
- Moderate
- Low

# Number of beds in each type

### Recreation Setting (public & private)

<table>
<thead>
<tr>
<th>Supply Strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
</tr>
<tr>
<td>Moderate</td>
</tr>
<tr>
<td>Low</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comfort Camping Experience Type</th>
<th>Frontcountry</th>
<th>Midcountry</th>
<th>Backcountry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type 1</td>
<td>18</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Type 2</td>
<td>279</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Type 3</td>
<td>157</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Type 4</td>
<td>15</td>
<td>0</td>
<td>28</td>
</tr>
<tr>
<td>Type 5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

# Number of beds in each type
Comfort Camper Catchment

- 80% travel 300 km or less
- 56% travel 200 km or less
- 3% of visitation is international
  - Much less than the provincial international visitation rate
## Public Sector Utilization

<table>
<thead>
<tr>
<th>Park</th>
<th>Overall</th>
<th>Weekends</th>
<th>Weekends June 1 - August 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dinosaur Provincial Park</td>
<td>74%</td>
<td>86%</td>
<td>100%</td>
</tr>
<tr>
<td>Lesser Slave Lake Provincial Park</td>
<td>54%</td>
<td>77%</td>
<td>100%</td>
</tr>
<tr>
<td>Miquelon Lake Provincial Park</td>
<td>47%</td>
<td>69%</td>
<td>94%</td>
</tr>
<tr>
<td>Pigeon Lake Provincial Park</td>
<td>58%</td>
<td>81%</td>
<td>97%</td>
</tr>
<tr>
<td>Sir Winston Churchill Provincial Park</td>
<td>34%</td>
<td>45%</td>
<td>78%</td>
</tr>
<tr>
<td>Writing-on-Stone Provincial Park</td>
<td>82%</td>
<td>90%</td>
<td>97%</td>
</tr>
<tr>
<td>Wyndham-Carseland Provincial Park</td>
<td>48%</td>
<td>81%</td>
<td>94%</td>
</tr>
</tbody>
</table>
Public Sector Utilization

97%

The system is at capacity!

Avg. peak season utilization

Bookings doubled between 2014 (1,474) and 2016 (2,944)
Utilization is not quality driven!

Its lack of supply driven.

Implications for competition.
Nightly Rates

The average price per night for a comfort camping unit is $132

Range from $80 - $250 / night

$416 / night for private sector cabin (prime season)

$160 / night for public sector cabin (prime season)

$135 avg hotel room rate
Identifying Comfort Camping Market Segments
Understanding Comfort Campers

- Explorer Quotients
- Environics Analytics – PRIZM
- ATTA
Explorer Quotient (EQ)
Target Markets

- **Inexperienced Campers**
  - Those who want to camp but are new to it
  - May have limited camping gear
  - New Canadians

- **Looking for Refined Experiences**
  - Has previous camping experience but is tired of roughing it
  - Looking for something easier
  - Middle aged and older populations

- **Unlikely Campers**
  - Those who want to experience the outdoors but aren’t drawn to traditional camping experiences
  - Willing to stay overnight with the right amenities and services are provided

- **Families with Children**
  - Families looking for an easier camping option
  - Requires the family to haul less stuff
  - Comfort camping provides more time to enjoy camping

- **Backcountry Enthusiasts**
  - Associated with specific backcountry activities
  - Rustic experiences
  - Reduces the amount of gear that needs to be brought
Desired Comfort Camping Experience by Market Segment

Target Market Alignment to Comfort Camping Accommodation Types

**TYPE A:** INEXPERIENCED CAMPERS

**TYPE B:** LOOKING FOR Refined EXPERIENCES

**TYPE C:** UNLIKELY CAMPERS

**TYPE D:** FAMILIES WITH CHILDREN

**TYPE E:** BACKCOUNTRY ENTHUSIASTS

LEVEL OF SERVICE
What’s Important to Comfort Campers?
All About the Experience

- Unique landscapes
- Unique accommodations
- Unique activities

*Image retrieved from: Instagram*
# Landscape + Scenic Quality

## Scenic Preference – Top 2 Box

<table>
<thead>
<tr>
<th>Scenic Preference – Top 2 Box</th>
<th>No-Hassle Traveler (n=77*)</th>
<th>Free Spirit (n=123*)</th>
<th>Gentle Explorer (n=217)</th>
<th>Authentic Experience (n=93*)</th>
<th>Rejuvenator (n=70*)</th>
<th>Personal History Explorer (n=62*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rocky Mountains Natural Region</td>
<td>91%</td>
<td>97% CE</td>
<td>90%</td>
<td>93%</td>
<td>87%</td>
<td>93%</td>
</tr>
<tr>
<td>Foothills Natural Region</td>
<td>93%</td>
<td>90%</td>
<td>83%</td>
<td>98% BCE</td>
<td>90%</td>
<td>95%</td>
</tr>
<tr>
<td>Grassland Natural Region</td>
<td>86% CD</td>
<td>76%</td>
<td>74%</td>
<td>72%</td>
<td>78%</td>
<td>77%</td>
</tr>
<tr>
<td>Parkland Natural Region</td>
<td>73%</td>
<td>75%</td>
<td>70%</td>
<td>65%</td>
<td>65%</td>
<td>82% DE</td>
</tr>
<tr>
<td>Boreal Forest Natural Region</td>
<td>93% D</td>
<td>87%</td>
<td>85%</td>
<td>82%</td>
<td>88%</td>
<td>92%</td>
</tr>
<tr>
<td>Canadian Shield Natural Region</td>
<td>77%</td>
<td>78% D</td>
<td>73%</td>
<td>66%</td>
<td>81% D</td>
<td>71%</td>
</tr>
</tbody>
</table>

**Overall appealing:**

| Rocky Mountains Natural Region                      | 91%                        | 97% CE              | 90%                     | 93%                         | 87%                | 93%                              |
| Foothills Natural Region                             | 93%                        | 90%                 | 83%                     | 98% BCE                     | 90%                | 95%                              |
| Grassland Natural Region                             | 86% CD                     | 76%                 | 74%                     | 72%                         | 78%                | 77%                              |
| Parkland Natural Region                              | 73%                        | 75%                 | 70%                     | 65%                         | 65%                | 82% DE                           |
| Boreal Forest Natural Region                         | 93% D                      | 87%                 | 85%                     | 82%                         | 88%                | 92%                              |
| Canadian Shield Natural Region                       | 77%                        | 78% D               | 73%                     | 66%                         | 81% D              | 71%                              |

**Note:** Letters beside data points indicate significant differences between groups at the 95% confidence level. An asterisk (*) beside a base size indicates that it is a small base size and that those results should be considered with caution.
75% of existing comfort camping opportunities are in an area with a scenic resource assessment of moderate-high or above.
Services and Amenities

• washrooms are key
• access to camping equipment
• recreation equipment

*image retrieved from: breathebelltents.com
Activities and Attractions

• proximity to activities is key
• walkable from site
• day trips
Gaps in Alberta’s Comfort Camping Experience
Product Market Match Approach

Experience / Product Supply Strength

= Market Expectations / Demand

Experience Gaps
Product
Market
Match

EXISTING SUPPLY

High Strength

Low Strength

COMFORT CAMPING EXPERIENCES SOUGHT BY TARGET MARKETS CATEGORIZED BY:

COMFORT CAMPING LEVEL OF SERVICE + RECREATION AND TOURISM SETTING

DEMAND

High Demand

Low Demand
## Product Supply Strength

<table>
<thead>
<tr>
<th>Distribution by Recreation/Tourism Setting</th>
<th>Public Sector Offerings</th>
<th>Private Sector Offerings</th>
<th>Total</th>
<th>Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backcountry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Midcountry</td>
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<td></td>
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<td></td>
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<tr>
<td>Frontcountry</td>
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<td></td>
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<tr>
<td>Developed</td>
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<tr>
<th>Distribution by Scenic Resource Assessment</th>
<th>Public Sector Offerings</th>
<th>Private Sector Offerings</th>
<th>Total</th>
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<tr>
<td>High</td>
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<tr>
<td>Moderate to High</td>
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<tr>
<td>Moderate to Low</td>
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<td>Low</td>
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<th>Distribution by Park Region</th>
<th>Public Sector Offerings</th>
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<tbody>
<tr>
<td>South</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Central</td>
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<td></td>
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<tr>
<td>Northwest</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Northeast</td>
<td></td>
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<tr>
<td>Kananaskis</td>
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<table>
<thead>
<tr>
<th>Distribution by Natural Region</th>
<th>Public Sector Offerings</th>
<th>Private Sector Offerings</th>
<th>Total</th>
<th>Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boreal Forest</td>
<td></td>
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<tr>
<td>Canadian Shield</td>
<td></td>
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</tr>
<tr>
<td>Foothills</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Grassland</td>
<td></td>
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</tr>
<tr>
<td>Parkland</td>
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<td></td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td></td>
<td></td>
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</tbody>
</table>
Target Market Alignment to Comfort Camping Accommodation Types

Market Segment Demand

TYPE A: INEXPERIENCED CAMPERS

TYPE B: LOOKING FOR Refined Experiences

TYPE C: UNLIKELY CAMPERS

TYPE D: FAMILIES WITH CHILDREN

TYPE E: BACKCOUNTRY ENTHUSIASTS

LEVEL OF SERVICE
Product  
Market  
Match  
Example  

**TYPE D:**  
FAMILIES WITH CHILDREN

- **Ideal Situation:**  
  - Type 2: Frontcountry  
  - Type 3: Frontcountry  
  - Type 4: Frontcountry

- **High Demand:**  
  - Type 2: Midcountry  
  - Type 3: Midcountry  
  - Type 4: Midcountry  
  - Type 5: Midcountry  
  - Type 6: Frontcountry  
  - Type 6: Midcountry  

- **Low Demand:**  
  - Type 1: Backcountry  
  - Type 1: Backcountry  
  - Type 2: Backcountry  
  - Type 3: Backcountry  
  - Type 4: Backcountry

- **Area for Improvement:**  
  - Type 2: Midcountry  
  - Type 3: Midcountry  
  - Type 4: Midcountry  
  - Type 5: Midcountry  
  - Type 6: Frontcountry  
  - Type 6: Midcountry  

**High Strength**  
**Low Strength**
Gaps in the System: Level of Service

There is a shortage of types 1, 4+5 comfort camping units

*image retrieved from: thebackcountryhutcompany.com, curbed.com
Gaps in the System: Natural Regions

All comfort camping currently in Rocky Mountain and Boreal
Gaps in the System: Recreation Setting

All existing comfort camping units are in located within a front-country setting.
Gaps in the System: Recreation Setting

Lack of supply in backcountry and midcountry settings
A Decision Support Tool
Prioritizing investment opportunities

Which parks have the greatest potential for successful comfort camping investment?

- 470 parks and protected areas (at time of study)

We were asked to provide business cases for the Top 10
**21 Criteria**

**System Assessment**

**Legislative Review**
Gain understanding of where comfort camping is allowed in Alberta Parks

**Review for Gaps**
Ensure that no large gaps are created after reviewing location suggestions

**Pass/Fail Filter**
Exclude parks that are not Provincial Parks or Provincial Recreation Areas and do not enable overnight visitation

**Operational Factors**
Evaluate criteria that affect the operations of a comfort camping development

---

**Park Assessments**

**Stakeholder Engagement**
Source recommendations on where comfort camping should be located

**Market Factors**
Evaluate criteria which relate to target market appeal of Parks

**Review with Professional Opinion**
Ensure that candidate Park selections are not spatially redundant, in conflict with other operations, or raising any red flags

---

**Candidate Comfort Camping Parks**
Pass / Fail
Coarse Filter
(legislative & park management obligations)

Criteria

• Park Classification

• Presence of Overnight Use

• Park Identified During Engagement

Went from 470 sites to 75
Market Factors

(Quantitative, Qualitative & GIS based analytics)

Market factors were weighted highest

Criteria

• Current Overnight Visitation
• Short Haul Target Market Size
• Scenic Quality
• Park Uniqueness Factor
• Diversity of Cultural and Historic Resource Features
• Number of Recreation/Tourism Activities Within the Park
• Existing Guided or Interpretive Activities
• Activity Clusters within Driving Distance of 1 Hour or Less
• Travel time for airport or gateway to province
Operational Factors

(Quantitative, Qualitative & GIS based analytics)

Criteria

• Operational Season
• Consistent Appropriate Weather for Activity Base (ice, snow, sun)
• Environmental Sensitivity to Activities
• Staff Accommodations Available within 60 Minutes
• Potable Water Supply Available
• Power Options
• Waste Options
• Reliable Communication Options
• Major Suppliers within 90 Minute Drive of Park
• Distance to Nearest Unseen Community
Analysis Results

- Top 10 sites. Not the only sites to consider!
- Client constraints were applied (e.g. excluding a park class).
- Sites greatly favor front country, types 2-4.
- Some identified experience gaps remain (e.g. mid / backcountry, type 5)
- Some other park classes might have been deemed appealing to private sector investment were included in the assessment or the ensuing business cases.
Conclusion +
Take Aways
To match demands, there is a need for:

- Increase peak season supply
  - At capacity

- Higher quality
  - Strong utilization due to demand and low supply
  - Uniqueness

- Better distribution
  - Landscapes

- More diversity
  - Level of service
  - Recreation Setting

*Images retrieved from: avenuecalgary.com, dezen.com
Thank you

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