

NPCA Campground Study Board Meeting

Fall 2025



Section 1

Key Findings

Big Picture – Sector Trends

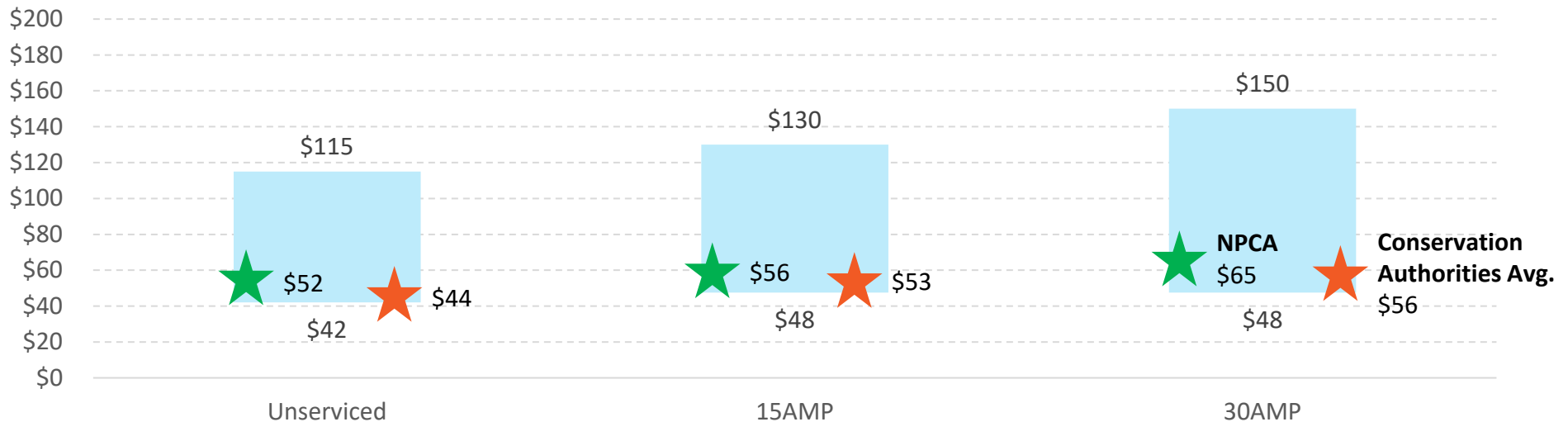
Eight key changes affecting NPCA campgrounds

Trend		Scale	Likelihood	Description
	Long-Pandemic Boom	Global	Certain	Pandemic era surge in outdoor recreation is proving durable, sustaining high ongoing demand for campgrounds
	Growth in Glamping	Global	Certain	Expanding segment of campers who are looking for higher-comfort and enhanced amenities
	Sustainability Push	Global	Probable	Emphasis on eco-friendly amenities (green energy, EV charging) shaping campground investment priorities
	Outdoor Wellness	Global	Possible	Growing recognition of the role that outdoor spaces – such as campgrounds and parks – play in personal wellness
	Year-Round Camping	Global	Probable	Winter camping evolving from a small niche to a more common, practical seasonal recreation option
	Tourism Spillover	Regional	Probable	Niagara region continues to grow as a tourist destination, leading to new opportunities to connect outdoor recreation to the boom
	Changing Demographics	Regional	Certain	Campers are becoming younger and more diverse, changing needs and expectations for camping operators
	Domestication of Travel	Regional	Probable	Canadians are redirecting their travel and leisure spend, creating opportunities for more domestic recreation

Pricing – Transient

NPCA towards lower end of the range, but above peers

Overnight Fee (excl. sewage)



Observations

- Outside of some private campgrounds (e.g., Sherkston Shores), most camps are clustered at bottom of the range
- NPCA generally above the average of other Conservation Authorities, particularly for un-serviced and 30AMP

Considerations

- Some potential for targeted decreases in transient pricing to better match peers

Pricing – Seasonal

NPCA near or below closest peers

Seasonal Fee

Authority	Campground	On-Site Sewage	15AMP	30AMP
NPCA	Long Beach	No	\$2,938	\$3,357
	Chippawa Creek			
TRCA	Albion Hills	No	\$3,912	
	Indian Line	No	\$4,537	
		Yes	-	\$5,000
HCA	Fifty Point	Yes	-	\$5,900
LPRCA	Deer Creek + Backus Heritage	No	\$2,497	\$2,847
	Haldimand + Norfolk	Yes	\$3,023	\$3,329
GRCA	Pinehurst Lake	No	\$2,901	



Observations

- In both the 15 & 30AMP sites, NPCA is the lowest among peers; partially impacted by other sites offering sewage
- Private campsites typically only have 30AMP offerings, expanding the top end of the range

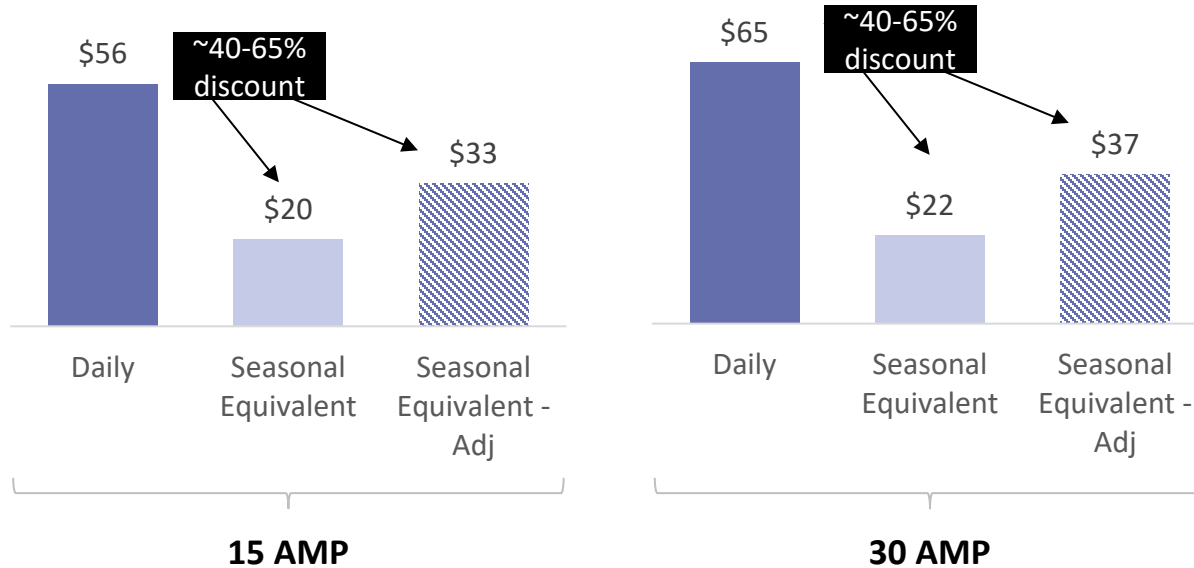
Considerations

- [Some impetus for considering price changes on seasonal sites based on peers](#)

Pricing – Relative Comparison

Seasonal fees compared to Peers

Overnight Fee



Notes on Methodology

- Intent is to translate the current seasonal fees into an equivalent nightly rate
- The “Seasonal Equivalent” takes the seasonal rate and divides it by the number of operating days (150)
- The “Seasonal Equivalent – Adj” reduces the number of operating days to reflect 60% of seasonal bookers only use weekends

Observations

- Converted to an equivalent daily rate, seasonal fees are approximately 60% less than daily rates for transients
- When accounting for actual usage (i.e., weekend focus), the discount drops to ~30-40%

Considerations

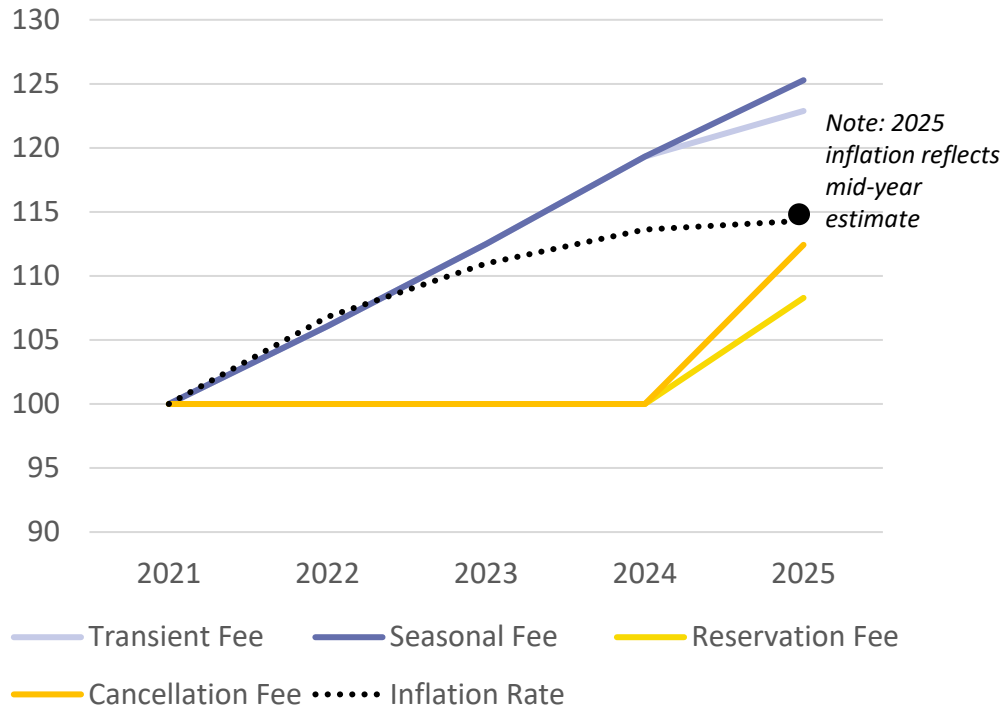
- Discount comparison between NPCA and Peers shows very similar pricing models and seasonal discount rate
- Discounts offered by peers considerably less appealing when weekend site usage is factored in

Pricing

Recent fee increases have begun to outpace inflation

Price Changes Relative to Inflation

Index = 2021



Observations

- Transient and seasonal fees have moved in lockstep at a stable ~6% per year
- This rate kept fees in line with inflation in 2022/2023 but have outpaced it since
- Ancillary fees increased in 2025, closing the gap relative to inflation and core overnight fees

Considerations

- Comparison may be challenging due to lack of history prior to 2021 where fees may have lagged inflation
- Steady rate of growth has likely helped clients accept increase as it creates predictability, but is challenging now that inflation is slowing
- Growing gap between fees and inflation suggests some challenges may arise justifying further price increases with clients

Amenities – Benchmarking

NPCA with complete amenities but fewer upgrade options

	Long Beach	Chippawa	Albion Hills	Indian Line	Rattlesnake Pt	Valens Lake	Fifty Point	Deer Creek	Backus	Halidmand	Norfolk	Pinehurst	Rockpoint	Selkirk	Turkey Point	Long Point	Rondeau	Port Burwell	Sherkston	Pleasant Beach	Campark	NET Camping	Bissell’s Hide.	Shangri la	Jelleystone	KOA
AMENITIES																										
Recreation																										
Hiking Trails	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓
Picnic Pavilions	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✓	✓
Pools / Splash Pads	✗	✗	✓	✓	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓
Beach Access	✓	✓	✗	✗	✗	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Rental Upgrades																										
Cabins / Yurts	✗	✗	✓	✗	✗	✓	✗	✗	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓
Premium Locations	✓	✓	✗	✓	✗	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✓	✗	✓	✗	✓	✓	✓	✓
Other Amenities																										
Wifi	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✓	✓	✓	✓	✓	✓
Sewage Hookups	✗	✗	✗	✓	✗	✗	✓	✗	✗	✓	✓	✗	✗	✗	✗	✗	✗	✗	✓	✗	✓	✗	✓	✓	✓	✓

Observations

- Basic offering from NPCA is generally in-line with other peer campgrounds
- Fewer options for upgrades caps financial potential of the NPCA campgrounds

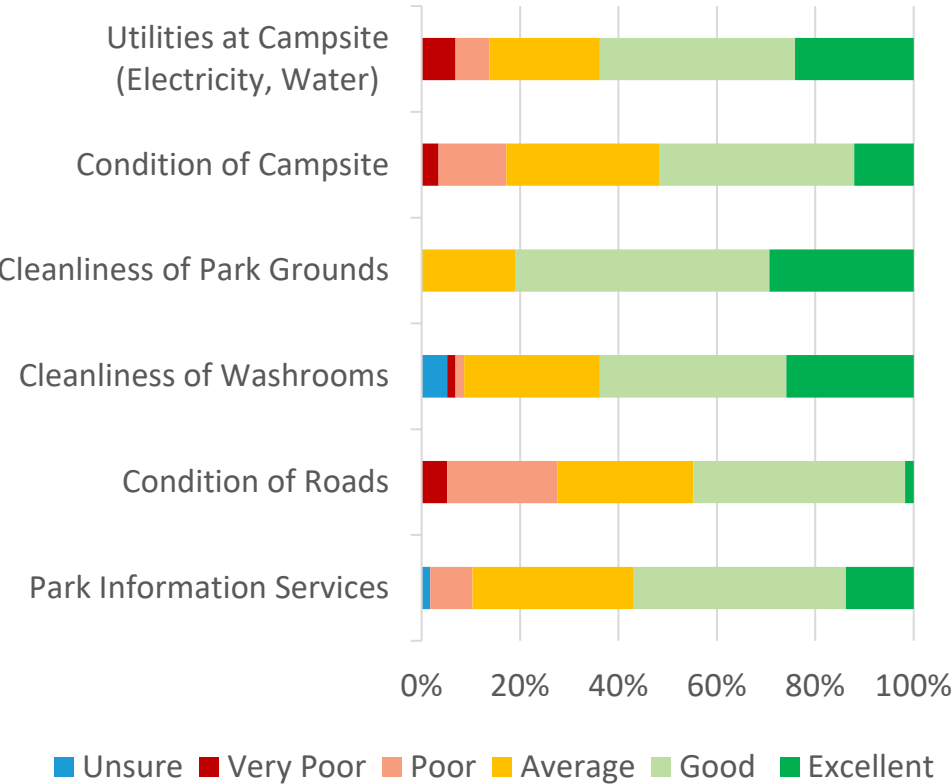
Considerations

- Limited differentiation to justify a premium level price, but equivalently minimal rationale from an offering perspective for NPCA to lag peers pricing

Servicing – On-Site Services

Well reviewed, but some common complaints highlight potential areas of improvement

Service and Maintenance Quality
% of Total % of Total Respondents



Source: Internal NPCA reports

Observations

- Generally positive feedback on amenities from seasonal campers; this result is expected given high rate of retention
- Free-form feedback indicated that some dissatisfaction may come from breaker load capacity, or comparisons to more recently updated amenities
- Condition of codes and campsites primary areas of feedback; this priority was reflected in the open comments as well

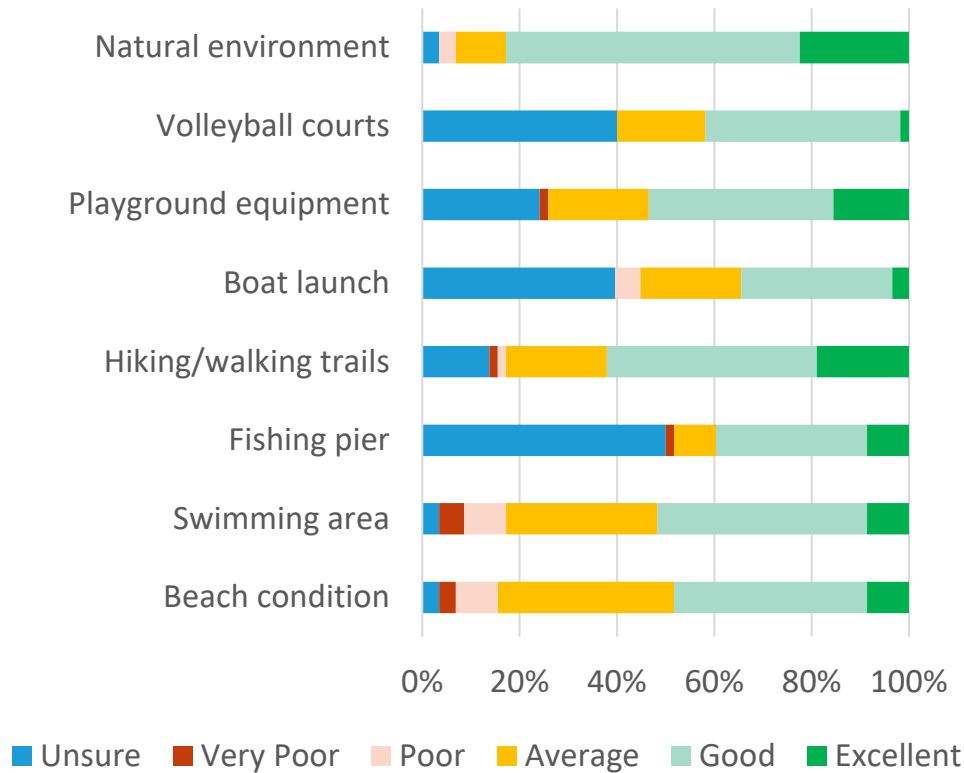
Considerations

- Seasonal campers did not highlight prominently a need for changes in the servicing; NPCA would not be inclined to make investments based on their input

Servicing – Park Amenities

Generally good condition of amenities but with some unknowns

Amenities Condition
% of Total Respondents



Source: Internal NPCA reports

Observations

- Overall condition of amenities seen as above average
- Only a select few amenities with high proportion of “not applicable”, largely ones requiring specific equipment (e.g., boat launch) or targeting specific demographics (e.g., playground equipment)

Considerations

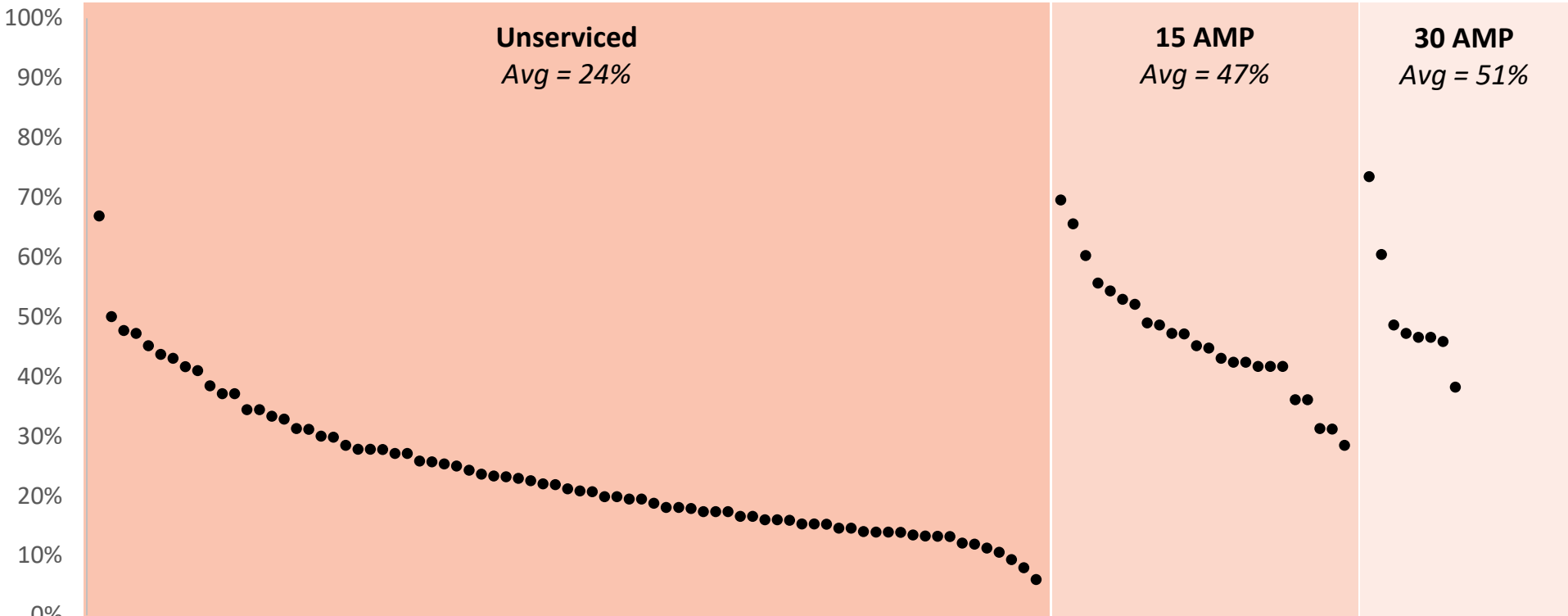
- Natural amenities continue to be strength of NPCA campgrounds (i.e., natural heritage, walking trails)
- Any attempts to attract younger demographics may necessitate further investments in different amenities
- Beach and swimming areas lagged other amenities and signal potential areas for investment – particularly given their universal applicability

Servicing – Impacts

Servicing a key determinant of utilization rates, though only minor impact of increasing all the way to 30 AMPs

Capacity Utilization by Transient Site (2024)

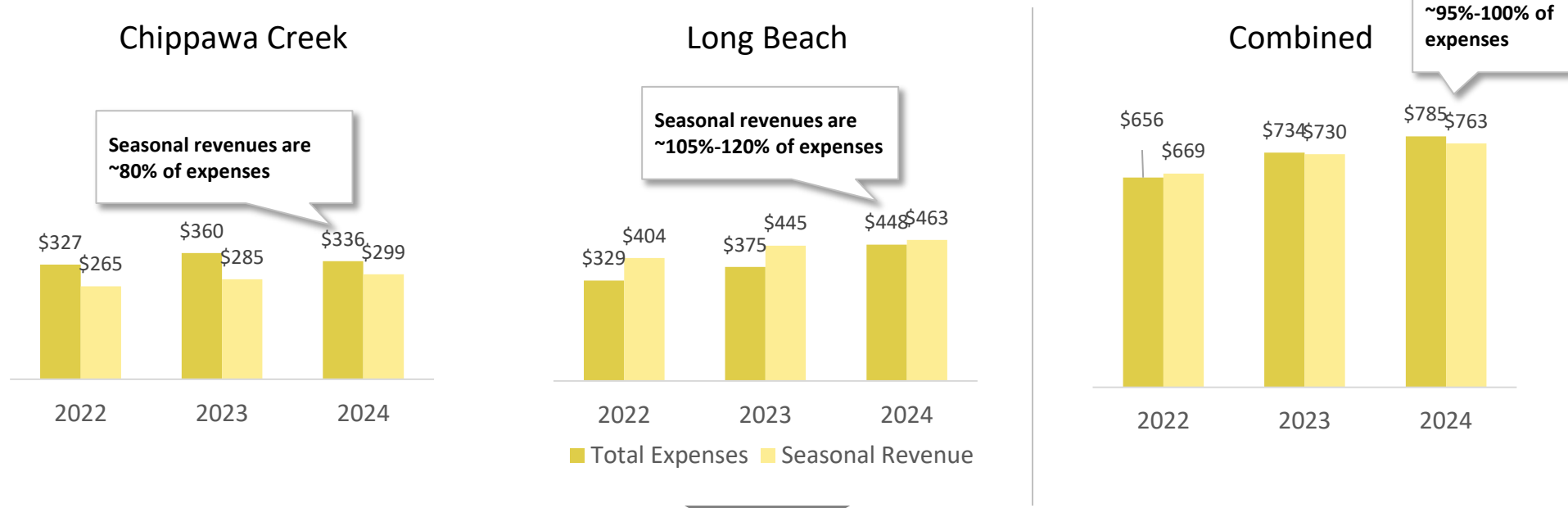
% of Total Operating Days



User Mix – Breakeven

Seasonal revenues substantially cover operating expenses

Cost Recovery from Seasonal Bookings



Observations

- Both campgrounds are able to cover the majority of their operating expenses through seasonal revenues alone
- Chippawa Creek is more dependent on some transient revenues in order to break-even

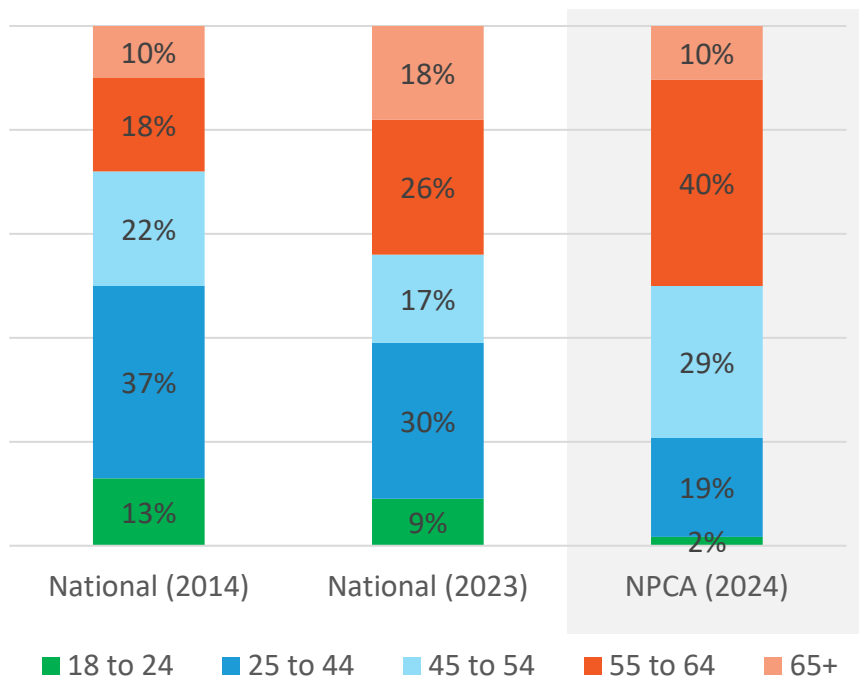
Considerations

- Significantly derisks operations for the parks, with transient revenues instead creating opportunities to invest and fill one-time maintenance needs

User Mix – Demographics

NPCA seasonal campers generally skew older than national averages

Campers by Age Group and Source
% of Total



Source: KOA. Camping in Canada (2024); Internal NPCA reports

Observations

- National surveys indicate the average camper has gotten older over the previous decade; the national share of campers over 55 years of age is similar to seasonal campers at NPCA
- However, as a result of a larger middle age demographic (ages 45-54), NPCA has a substantially smaller share of younger campers (ages 18-44)

Considerations

- Some attrition risk as these groups may become less interested in camping as they age
- NPCAs relatively small share of younger campers represents a risk as it threatens ability to replenish client base; likely reflects the lock-in of longstanding seasonal campers

User Mix – Alternative Seasonal Models

Three broad categories

Model	Description	Pro	Con
Open Lotteries	All waitlist participants enter lottery for sites annually, not just for new sites	✓ Ensures equitable access and opportunities for booking ✓ One-time annual process; doesn't require ongoing management	× Unpredictable for end users; can be difficult to plan × Large annual effort to reallocate sites
Tenure Caps	Sites have a maximum time allotted to them before individuals go to the general waitlist	✓ Forces some turnover to allow for new users ✓ Still creates some continuity year-to-year	× Can lose longstanding booking users × Unclear when the “clock” should start when implementing (i.e., based on years to date, or start new)
Use Priority	Sites are prioritized based on type of user (e.g., membership, ancillary services purchased, size or type of group)	✓ Helps with targeting of specific underserved or high priority groups ✓ Can allow for cross-selling other services / memberships	× Process can be criticized in terms of which groups receive priority × Requires punitive measures if users no longer meet criteria (e.g., cancelled memberships)

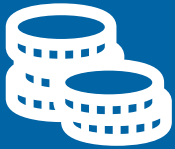
Section 2

Recommendations

Guiding Principles

While all options were assessed for their financial impact, four broad objectives guided our assessment

FISCAL RESPONSIBILITY



Does the option create resources to invest in new services & keep a state of good repair?

FUTURE READINESS



Does the option prepare NPCA for changing camper behaviours and preferences?

COMMUNITY NEEDS



Does the option ensure NPCA continues to serve the needs of local and regional stakeholders?

COMPETITIVE PARITY



Does the option enhance the attractiveness of NPCAs offering relative to its peers?

Recommendations: Servicing

Establish a new baseline for servicing on all sites

Proposed Options

Option	Description
A 15AMP All Transient Sites	Give all transient sites basic servicing to up utilization
B 30AMP Upgrade Seasonal	Increase premium-like offering for seasonals
C 30AMP Upgrade All Sites	Full upgrade of sites to maximize earning potential



Rationale

- All the lowest utilization transient sites are unserved → **adding servicing a way to significantly improve revenue potential**
- Peers are making site upgrades; some private operators are now offering up to 50AMP → **upgrades are a way to stay in-line with peers**
- No material difference in utilization for 30AMP vs 15AMP sites → **while there's some revenue upside from price differences, not clear that the upgrade is fully worth it**
- Adding servicing is consistent with broader trends (e.g., glamping, younger campers, changing seasons) → **servicing is a way of future proofing the business**

Note: final recommendation is dependent on cost of upgrades; NPCA will need to evaluate the return on investment relative to the capital cost; there may be limited difference between 15 and 30AMP upgrades, in which case Option C is recommended

Recommendations: Pricing

Adjust fees for seasonal campers

Proposed Options

Option	Description
A Slight increase in seasonal pricing	Continue recent increases of around 5%
B Significant price increase	Target increase by 10-15%, relying on waitlist to manage any attrition
C Decrease transient pricing	Bring in-line with other conservation areas



Rationale

- Seasonal currently has an extensive waitlist → ***while there is risk of attrition, it suggests some pricing power for NPCA for seasonal***
- Investments in servicing (Recommendation 1) will need a source of funding, both for upfront capital costs and ongoing maintenance → ***fee increases can help offset this cost***
- Fees have increased slightly ahead of inflation in recent periods → ***any further increases must be modest***
- NPCA has comparable pricing to peers → ***modest increases will keep it within a similar range***

Note: Option C would be considered if NPCA does not see an increase in transient bookings after making servicing upgrades – a key component to the business case for doing so.

Recommendations: Site Mix

Set seasonal allocation to cover fixed costs and create a “floor” for revenues

Proposed Options

Option	Description
A Increase the seasonal share	Target a 75/25 split seasonal to transient to accommodate the full waitlist
B Increase the transient share	Target a 60/40 split seasonal to transient over time



Rationale

- Broad trends point to persistent, sustained demand for camping → ***the typical risks of relying on transients may be declining***
- Current demographics of seasonal campers pose some risks from overreliance (i.e., age, geographic concentration) → ***transients present and opportunity for diversification***
- Transients charge a relative premium compared to seasonals → ***more transients may improve financial position of NPCA***
- Transients have historically appeared a poor financial choice due to lack of servicing on sites → ***upgrades can change their economic potential substantially***

Path Forward

A gradual approach to implementation

NEAR-TERM

- Launch upgrades to transient sites, pending confirmation of resourcing and return on investment based on final cost estimates (work is already underway)
- Monitor cost to go to 30 AMPs; there's limited near-term upside, but is a way to “future proof” the campgrounds if the cost difference is minimal
- Increase pricing for seasonal campers, monitoring for attrition that is not mitigated by existing waitlist; maintain existing booking approach to minimize disruptions

MEDIUM-TERM

- Monitor utilization on transient sites as upgrades are completed; if increase in utilization is not achieved, modifications to transient pricing may be required
- If utilization is increasing, begin a gradual shift in the mix of sites from seasonal to transients (e.g., reallocating unused seasonal sites)

LONG-TERM

- Reevaluate booking policies as the number of seasonal sites shrinks toward 60% of total; NPCA should reassess the alternative models (e.g., open lotteries and tenure caps)