
Report To: Board of Directors

Subject: NPCA Campground Analysis and Operating Strategy

Report No: FA-53-25

Date: November 21, 2025

Recommendation:

THAT Report No. FA-53-25 regarding NPCA Campground Analysis and Operating Strategy **BE RECEIVED**;

AND THAT recommendations included in the NPCA Campground Analysis and Operating Strategy, as presented in Appendix 1, **BE ENDORSED**;

AND THAT recommendations included in the NPCA Campground Analysis and Operating Strategy be implemented through operating strategies and annual budget processes, seeking Board direction as required.

Purpose:

The purpose of this report is to update the Board of Directors on a NPCA Campground Analysis and Operating Strategy completed by Canvas Strategy Consulting Group and seek Board endorsement of the proposed recommendations.

Background:

Niagara Peninsula Conservation Authority owns and operates two campgrounds in Niagara that provide a variety of recreational services, including seasonal and transient camping. Long Beach Conservation Area, located in Wainfleet, Ontario, features 205 campsites divided into two sections by Lakeshore Road. On the North Side, there are 47 serviced sites with 30-amp power and 22 non-serviced sites. The South Side, also referred to as the Lakeside section, includes 83 serviced sites with 30-amp power, 25 serviced sites with 15-amp power, and 11 non-serviced sites. Additionally, the South Side features 19 extra 30-amp serviced sites along the “Ridge,” the most desirable area overlooking Lake Erie. Of the total sites, 145 are designated as seasonal, with 48 sites available for transient or overnight bookings.

Chippawa Creek Conservation Area, also situated in Wainfleet, along the Welland River features Dils Lake, a man-made reservoir ideal for swimming, paddling, and fishing. The campground offers 45 non-serviced sites, 70 serviced sites with 15-amp power, and 40

Report No. FA-53-25

NPCA Campground Analysis and Operating Strategy

Page 1 of 5

serviced sites with 30-amp power. Of the 155 sites, 98 serviced sites are allocated for seasonal use, with 58 sites available for transient camping.

Discussion:

Camping has experienced a significant surge in popularity over the past decade, becoming one of Ontario's most sought after recreational activities. This growth has been driven by factors such as post-pandemic lifestyle shifts, where COVID-19 restrictions encouraged Canadians to seek safe, affordable outdoor experiences. In 2022, approximately 500,000 Canadian households camped for the first time, and by 2023, over 6.3 million households participated in camping which is an increase of 29% compared to 2019. Ontario represents a substantial share of this trend, with 18% of residents identifying as campers.

Nationally, Canada's camping market is projected to reach \$317.6 million by 2025, with an annual growth rate of 7.83% through 2030. NPCA has mirrored this momentum, with campground revenues rising by \$170,000 (16%) since 2021 and growing waitlists of 30–60 for seasonal sites at each location annually. This reflects both the industry's expansion and the increasing demand for NPCA's offerings.

To capitalize on the growing demand for NPCA's campgrounds, the NPCA contracted Canvas Strategy Consulting Group to complete an analysis and operating strategy to support NPCA's campgrounds. The project included a study of the financial, operational and strategic performance. The work consisted of four components:

- Performance Analysis – A review of internal data, including financials, occupancy rates, and operational metrics, as well as benchmarking against comparable public and private campgrounds.
- Customer Insights – Analysis of existing survey data from seasonal campers, to understand camper preferences and satisfaction.
- Peer Benchmarking – A comparison between NPCA campgrounds and peers to understand its positioning and opportunities to incorporate sector best practices.
- Trend Research – A review of major sector and regional trends and their potential impact on the future trajectory of NPCA campgrounds.

The results of the analyses culminated in a series of options for NPCA campground offerings, including pricing, services provided, and campground user mix (transient vs seasonal). These options were assessed against four overarching objectives identified by NPCA staff:

1. Fiscal Responsibility: Options were evaluated to ensure prudent financial management, maximizing value for NPCA investments and minimizing financial risks to the organization over time.

2. Community Needs: Choices reflected a commitment to serving diverse users by responding to community expectations, ensuring accessibility, and fostering inclusiveness through engagement with interested parties.
3. Future Readiness: Options were assessed for their ability to anticipate and adapt to changing visitor needs, demographics, and environmental factors, ensuring resilience and long-term success.
4. Competitive Parity: Decisions aimed to meet or exceed industry standards by benchmarking against peers, ensuring NPCA campgrounds remain attractive in a competitive regional market.

The results of these analyses culminated in a series of key findings and recommendations included in the final report (Appendix 1). Below summarizes some of the key highlights and recommendations.

Electrical Servicing

The study found that most amenities and services offered at NPCA's campgrounds are rated positively by seasonal campers. NPCA's core offerings are generally in line with peer organizations, but the absence of luxury amenities, such as cabins, Wi-Fi, and sewage hookups, places NPCA at a competitive disadvantage compared to private operators, especially as demand for "glamping" and enhanced services grows.

Electrical servicing emerged as a key factor in site performance, with unserviced transient sites showing notably lower utilization rates. The report recommends upgrading all transient sites to be serviced to improve utilization and revenue, with a further recommendation to consider upgrading all sites to 30AMP if capital cost differences are minimal, thereby future proofing NPCA's offerings.

Competitive Rates

On pricing, the analysis revealed that both seasonal and transient fees have increased at a rate exceeding inflation, with NPCA's transient fees higher than those of other conservation authorities, while seasonal fees were found to be slightly lower. NPCA seasonal fees are near the middle of the peer range being lower than Toronto and Region Conservation Authority (TRCA) and Hamilton Conservation Authority (HCA), but similar or slightly higher than Long Point Region Conservation Authority (LPRCA) and Grand River Conservation Authority (GRCA).

The study recommends a modest increase of seasonal pricing by 5%, reflecting NPCAs positioning at the low to mid-end of the peer range. As for transient camping, the study recommends decreasing or freezing rates, which are presently priced as a premium relative to most peers. It is further recommended to continue to evaluate rates when the feasibility of servicing upgrades has been determined.

Seasonal and Transient Site Ratio

It is recognized that seasonal bookings provide stability for NPCA campgrounds, supported by a strong and consistent waitlist. However, it also identifies demographic risks, as the seasonal camper base is largely older and locally concentrated. To address these concerns and ensure long-term sustainability, the report recommends adjusting the site allocation to create a more balanced mix of users. Specifically, it is recommended that campgrounds implement a 60% seasonal and 40% transient site ratio.

Currently, Long Beach offers 75% seasonal and 25% transient sites, while Chippawa offers 65% seasonal and 35% transient sites. Adjusting the site ratio is intended to diversify the user base, improve public accessibility, and maximize the overall value and utilization of the camp sites.

The study examined various models for managing seasonal camping across Canada and the United States. It concluded that only a limited number of distinct approaches exist for site allocation, primarily on a first-come, first-served basis or through a lottery system. In addition, the study reviewed practices from comparable recreational services with seasonal and repeat customers, such as marinas and ski lodges. The findings recommend that, as the balance between seasonal and transient sites evolves, NPCA should reassess its booking policies to ensure alignment with best practices and customer needs.

Next Steps

To ensure successful execution of the recommendations, the report promotes a phased implementation approach that balances investment with flexibility and ongoing evaluation. In the short term, priority will be given to the feasibility of upgrading unserved transient sites to improve utilization and revenue, alongside adjustments to seasonal pricing while maintaining flat transient rates. These recommendations have been incorporated into the proposed 2026 Conservation Areas Fees as shown in Report No. FA-51-25, which recommends a 4.5% increase to seasonal camping fees to better align with market conditions, while maintaining the current transient camping rates to remain competitive.

The medium term will focus on monitoring booking patterns for upgraded sites, refining servicing and pricing strategies, and continuing gradual site mix rebalancing through natural seasonal attrition.

In the long term, it is recommended that as the mix of seasonal and transient sites changes over time, NPCA should periodically review its booking policies. It is further recommended that NPCA introduce programming traditionally associated with transient-focused campgrounds or private operators, including luxury camping (glamping), off-season camping, and other innovative offerings to diversify and enhance visitor experiences.

Financial Implications:

The short-term recommendations of the report that have financial implications have been proposed within the 2026 Conservation Area Fees and have also been reflected within the 2026 NPCA operating budget. Medium to Longer term recommendations will continue to be assessed through asset management capital planning and implemented through future operating strategies and Capital projects.

Links to Policy/Strategic Plan:

Goal 3.1 – Create equitable access to greenspace for the health and well-being of people

Goal 6.1 – Ensure responsible, sustainable, and sound fiscal practices

Goal 6.2 – Optimize self-generating revenue using innovative approaches

Related Reports and Appendices:

Appendix 1: NPCA Campground Analysis and Operating Strategy

Authored by:

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Niagara Peninsula Conservation Authority: Campground Study

Prepared by **CANVAS**
strategy consulting group



Background

Niagara Peninsula Conservation Authority's campgrounds play an important role in the organization's mission. They have been not only important recreational assets for the community and unique opportunities to experience the region's natural heritage, but their financial performance has been an important contributor to NPCA's stability and longevity as well.

To ensure that Chippawa Creek and Long Beach campgrounds could continue to play this role – and identify opportunities for them to further NPCA's mission – this study of the financial, operational, and strategic performance was launched in Summer 2025. The work consisted of four components:

- A. **Performance Analysis (Annex A)** – A review of internal data, including financials, occupancy rates, and operational metrics, as well as benchmarking against comparable public and private campgrounds.
- B. **Customer Insights (Annex B)** – Analysis of existing survey data from seasonal campers, to understand camper preferences and satisfaction.
- C. **Peer Benchmarking (Annex C)** – A comparison between NPCA campgrounds and peers to understand its positioning and opportunities to incorporate sector best practices
- D. **Trend Research (Annex D)** – review of major sector and regional trends and their potential impact on the future trajectory of NPCA campgrounds

The results of these analyses culminated in a series of options for key aspects of NPCA campground offerings, including pricing, servicing, and user mix. These options were assessed against four overarching objectives identified by NPCA staff:

- 1. **Fiscal Responsibility:** Options were evaluated to ensure prudent financial management, maximizing value for NPCA investments and minimizing financial risks to the organization over time
- 2. **Community Needs:** Choices reflected a commitment to serving diverse users by responding to community expectations, ensuring accessibility, and fostering inclusiveness through stakeholder engagement.
- 3. **Future Readiness:** Options were assessed for their ability to anticipate and adapt to changing visitor needs, demographics, and environmental factors, ensuring resilience and long-term success.
- 4. **Competitive Parity:** Decisions aimed to meet or exceed industry standards by benchmarking against peers, ensuring NPCA campgrounds remain attractive in a competitive regional market.

The results of these analyses culminated in a series of recommendations and proposed implementation plan that are included at the end of this report.

Key Findings

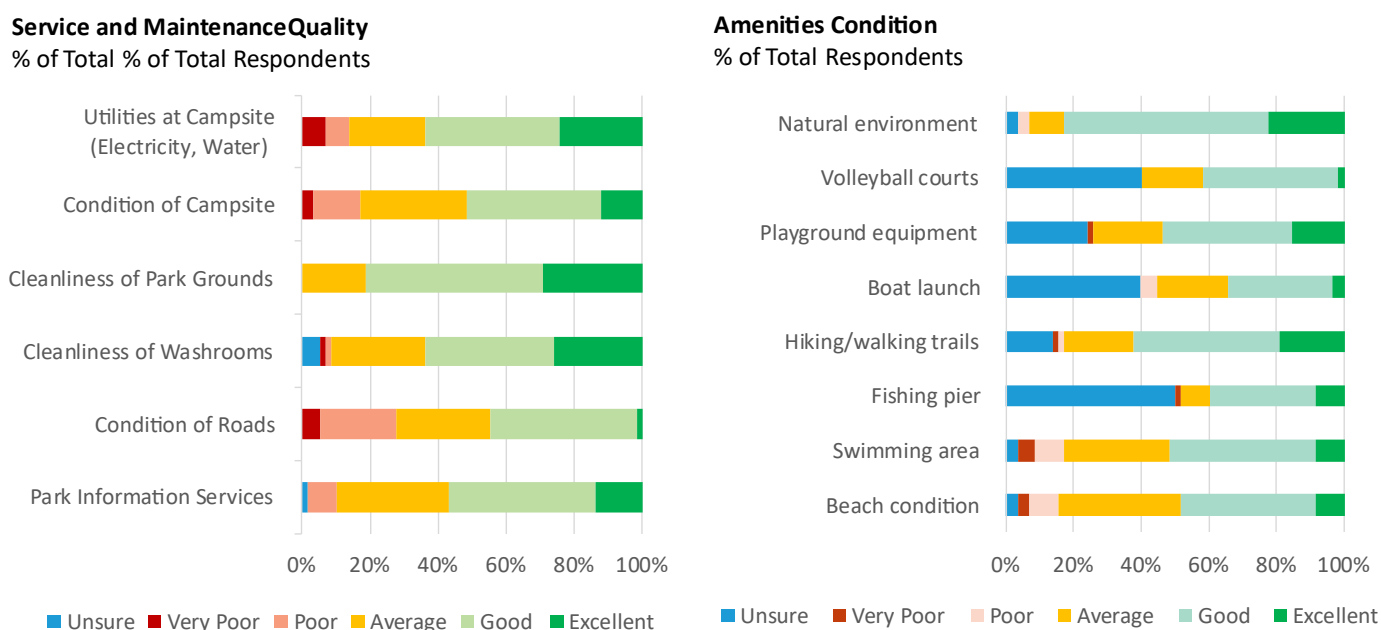
Servicing

In general, user feedback suggested relatively positive view of service and amenity quality on NPCA campgrounds. Per Figure 1 below, nearly all services and amenities were rated in “good” or “excellent” condition, with only swimming and beach areas generating more mixed – though still positive – results.

Notably, a material portion of respondents indicated they were “unsure” about conditions of various amenities on-site. While some relate to specialized activities that require specific equipment – such as the boat launch or fishing pier – others are more age dependent – such as playground equipment. This may reflect the older age of seasonal campers responding to the survey; the importance of and views on these amenities may change if the NPCAs target audience does as well.

Figure 1 – Views on Service and Amenity Condition for 2024 Season

(Note: Seasonal Campers Only)



Per Figure 2, compared to peers, NPCA generally had similar types of core services available. Where there were gaps, they were generally covered by other features – such as NPCAs lack of pools / spas being mitigated by its beach access. Only sewage hookups represented a potential gap available from some operators and highlighted in survey responses but not available from NPCA.

However, the benchmarking also reinforces the expected gap to private operators in terms of luxury amenities. Nearly all private operators included offered premium locations, cabins / yurts, and other features such as wifi connectivity whereas few conservation authority campgrounds do. This observation is particularly important in light of the growing interest in luxury camping (“glamping”) that was noted as part of the study, an opportunity which private operators are best positioned to capture.

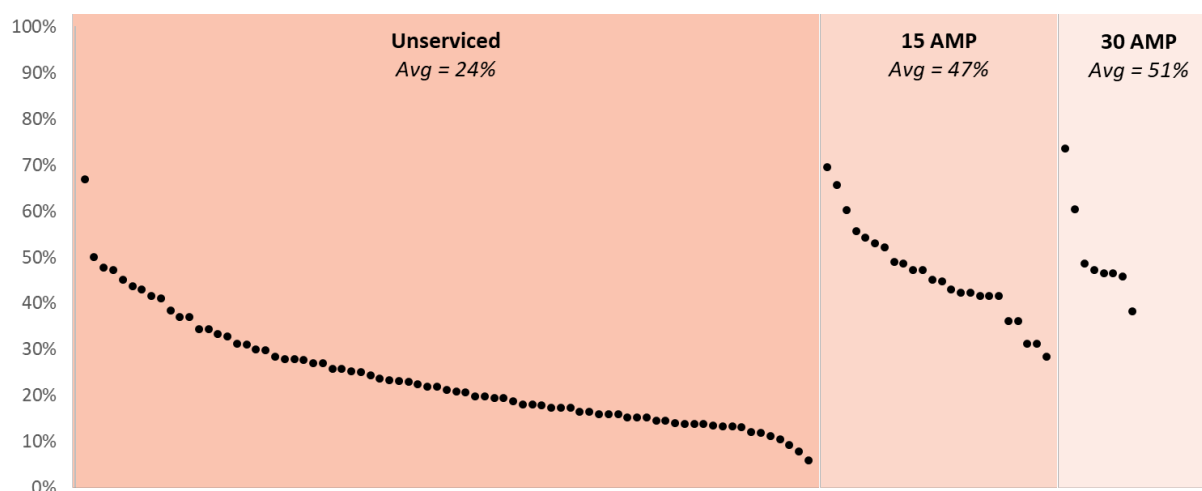
Figure 2 – Comparison of Services Offered by Campground

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

Within servicing, electrical access on site emerged as a key determinant of performance – particularly for transient sites where utilization can be a challenge. As shown in Figure 3, all of the lowest performance transient sites across both campgrounds were un-serviced – pointing to a smaller demand for this type of camping. This finding is consistent with observations from the peer benchmarking – where many peer campsites have already upgraded many or all of their sites to incorporate some level of servicing. Similar investments to Chippawa Creek and Long Beach may not only be a method to improve performance but also keep pace with others.

If the case for adding servicing to campsites was clear, the appropriate level of servicing to target was less so. The relatively small differences historically in site usage between 15AMP and 30AMP sites suggests that in the near term relatively limited improvement in utilization rates may be achieved simply by upgrading to 30AMP service. However, the growing trend towards more luxury forms of camping and the expanding roster of electrical appliances used by many campers suggests that the need for future upgrades may be unavoidable.

Figure 3 – Percentage Utilization of Transient Sites by Servicing Level
(Note: each marker = 1 site)

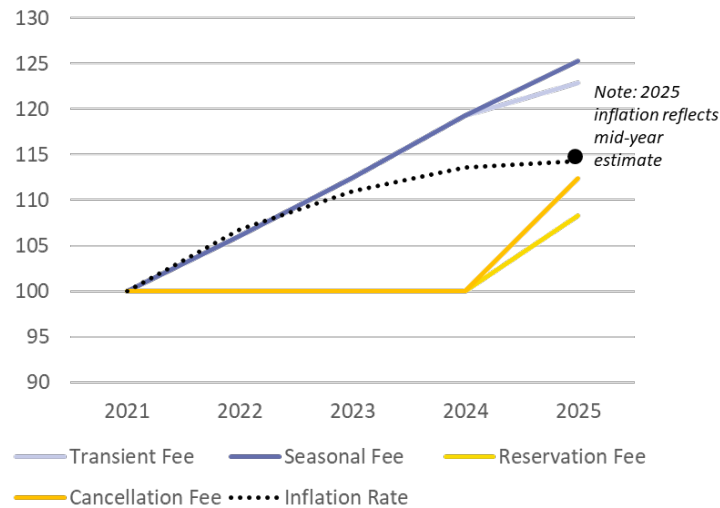


Pricing

The assessment of pricing focused exclusively on seasonal and overnight fees given the ease of comparability with other campgrounds and the fact they account for 85-90% of total revenues for Chippawa Creek and Long Beach. While there may be room for modifications to other prices, their effects were deemed to be marginal.

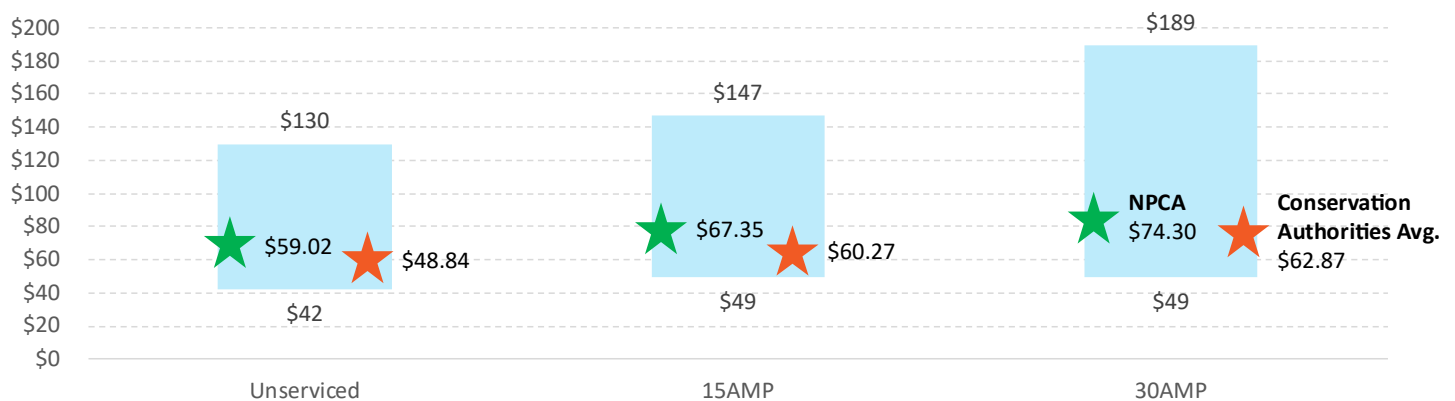
As context, both seasonal and transient fees have steadily risen in recent years at ~5% per year. In part, this has been driven by the findings of a 2021 Watson & Associates fee review – which provided a method to more accurately price NPCA services according to their true underlying costs. However, as a result of increases growth in fees have outpaced the rate of inflation – particularly in 2024 and 2025 as the pandemic-era inflation rates subsided. As a result, there may be resistance or attrition from users from further increases.

Figure 4 – Historical Pricing Relative to Inflation (Index = 100 in 2021)



While NPCA fees are within the broad price range for peer campgrounds, when compared to their most direct comparable – i.e., other conservation authorities – they positioning is more nuanced. For example, as shown in Figure 5, NPCA fees are generally higher for transient sites than other conservation areas, particularly for un-serviced sites.

Figure 5 – 2025 Transient Overnight Pricing + HST (excl. Sewage)



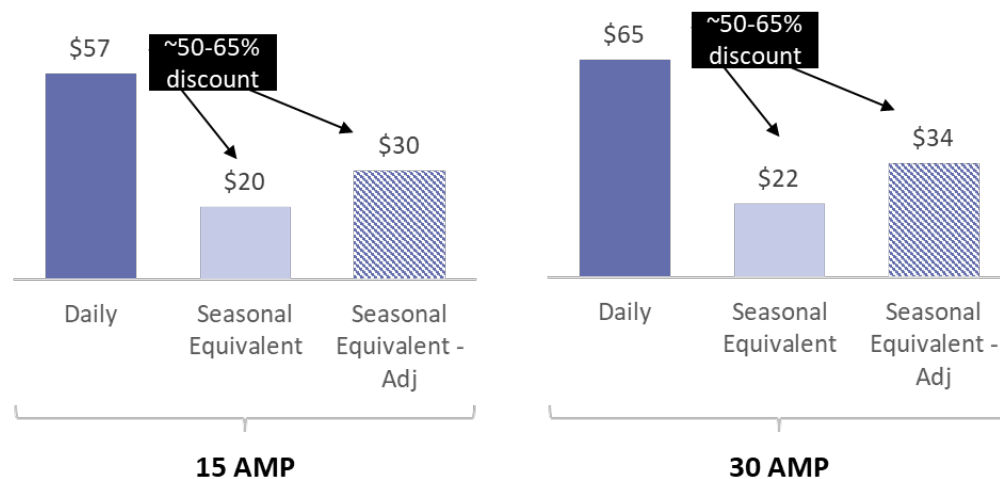
Fewer campgrounds offer seasonal packages. Relative to those that do, per Figure 6, NPCA seasonal fees are near the middle of the peer range: lower than TRCA and HCA, but similar or slightly higher than LPRCA and GRCA.

Figure 6 – 2025 Seasonal Pricing (excl. HST)

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	
HCA	Fifty Point	Yes	-	\$5,900
LPRCA	Deer Creek +	No	\$2,497	\$2,847
	Backus Heritage	Yes	\$3,023	\$3,329
GRCA	Pinehurst Lake	No	\$2,901	

Similar to other campgrounds, seasonal campers receive a discount under NPCA's current pricing. Figure 7 adjusts the seasonal pricing to an equivalent daily price – first based on the total number of bookable days in season, and then by the typical days used by seasonal campers (i.e., Thursday → Sunday). The results highlight that on a per day basis seasonal campers receive a 50-65% discount relative to transients.

Figure 7 – Transient Pricing vs. Equivalent Seasonal Pricing (2025 Rates)



User Mix

Returning customers are a crucial part of the business model for most campgrounds as they represent a stable source of revenue from which to make investments and plan future years. This is particularly true in NPCA's case where, per Figure 8, revenues from seasonal renters have represented ~95-100% of expenses in recent years. This leaves fees from transient fees to cover any capital expenditures or substantial year-to-year fluctuations that NPCA may experience.

Figure 8 – Seasonal Camping Breaking-Even on Costs



Per Figure 9, nearly all peers to NPCA have seasonal or repeat customer offerings. Only Ontario Parks sites and some conservation areas do not appear to offer similar programs – likely owing to unique aspects of their public service mandate. Though limited information was available on the specific allocation for peers, examples that were available – such as Albion Hills and NET Camping indicated ~70% of sites were allocated to seasonals – a similar ratio to NPCA sites. In NPCA's case, it likely could offer more sites as seasonal rentals if desired, as demonstrated by its waitlist of ~30 campers prior to the start of the 2025 season.

Figure 9 – Returning Customer Programs by Campground

	Campground	Seasonal Packages	Dedicated Sites	Repeat User Perks
Conservation Authorities	Long Beach	Yes	Yes	Yes
	Chippawa Creek	Yes	Yes	Yes
	Albion Hills	Yes	Yes	Yes
	Indian Line	Yes	Yes	Yes
	Rattlesnake Point	No	No	Yes
	Valens Lake	No	No	Yes
	Fifty Point	No	Yes	Yes
	Deer Creek	Yes	Yes	No
	Backus Heritage	Yes	Yes	No
	Pinehurst Lake	Yes	Yes	No
Provincial Parks	Rock Point	No	No	No
	Selkirk			
	Turkey Point			
	Long Point			
	Pinery			
	Rondeau			
Private Operators	Port Burwell			
	Sherkston Shores	Yes	Yes	No
	Pleasant Beach	Yes	Yes	No
	Campark Resorts	Yes	Yes	No
	NET Camping	Yes	Yes	No
	Bissell's Hideaway	Yes	Yes	No
	Shangri-La	Yes	Yes	Yes
	Jellystone Niagara	No	No	Yes
	KOA Niagara	No	No	Yes

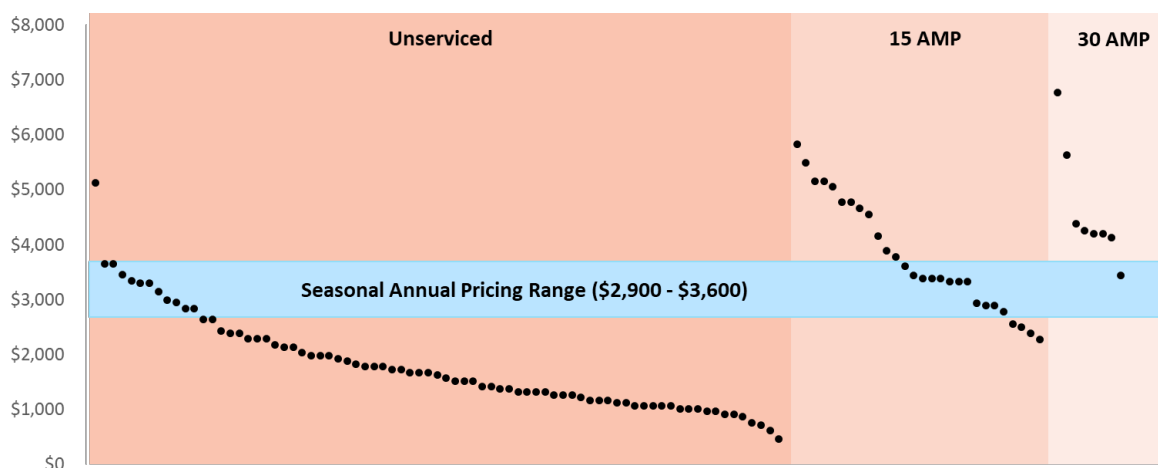
There are relatively few distinct models for managing seasonal camping waitlists in both Canada and the US. All the examples identified allocated sites on either a first-come, first-serve basis or through a lottery system – whereby all waitlist participants would enter a draw for an equal shot at new sites as they become available. Looking outside of campgrounds however to other recreational amenities with seasonal / return customers – such as marinas, ski lodges, and others – there are a few other approaches available.

Figure 10 – Seasonal Site Allocation Models

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)

Attracting seasonal bookings typically requires more than offering greater convenience and flexibility to users through uninterrupted access to their sites. As discussed in the previous section on pricing, discounts on the per day fee are an important component – in NPCAs case representing 50-65% decrease from transient rates. However, the impact is that many transient sites – particularly serviced ones –generate more revenue than seasonal ones – even when accounting for their lower utilization rates. This dynamic is shown in Figure 11.

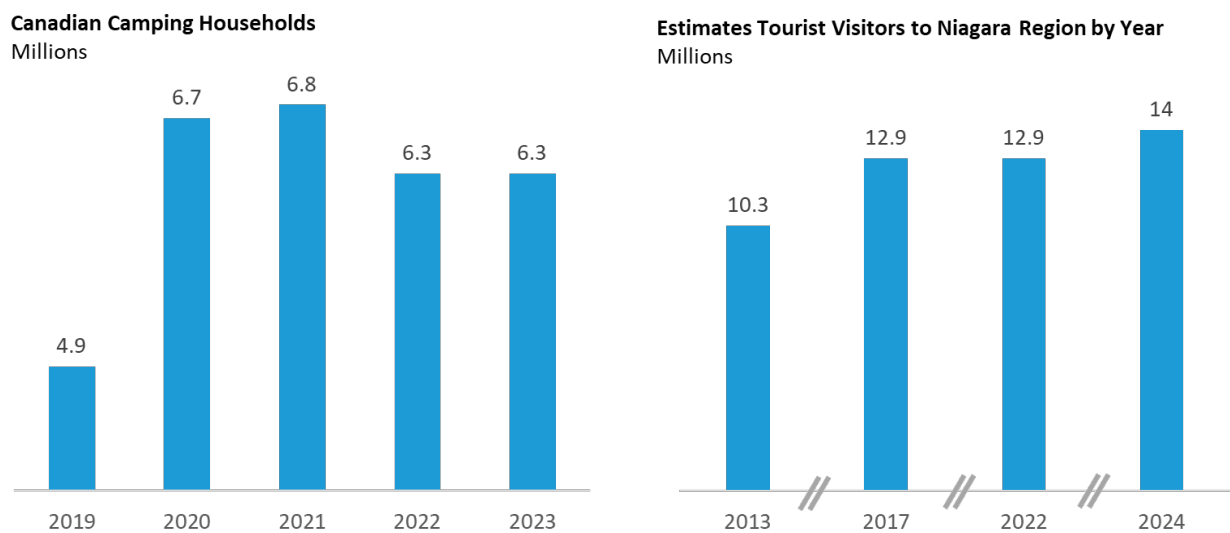
Figure 11 – Annual Revenue per Transient Site by Servicing Level (2024)



This trade-off is often made as a way to mitigate risk from over-reliance on transient campers. In periods when camping is less popular, transient camping can fluctuate substantially season-to-season creating volatility in revenues and complicating decisions around staffing or capital investments.

However, many recent trends point to strong, stable demand for camping. Though the substantial surge in camping demand in 2020 was driven by the COVID-19-pandemic, even as the restrictions subsided demand has remained strong. Figure 12 shows that despite a slight retreat in 2022, camping use has stabilized in Canada. This is occurring at the same time as overall tourism in the Niagara Region continues to grow. While this does not directly implicate NPCA campsites, it aids marketing and exposure and creates potential certain experience well-suited to transient campers (e.g., day trips).

Figure 12 – Stabilizing Levels of Camp Users and Tourist Visitors

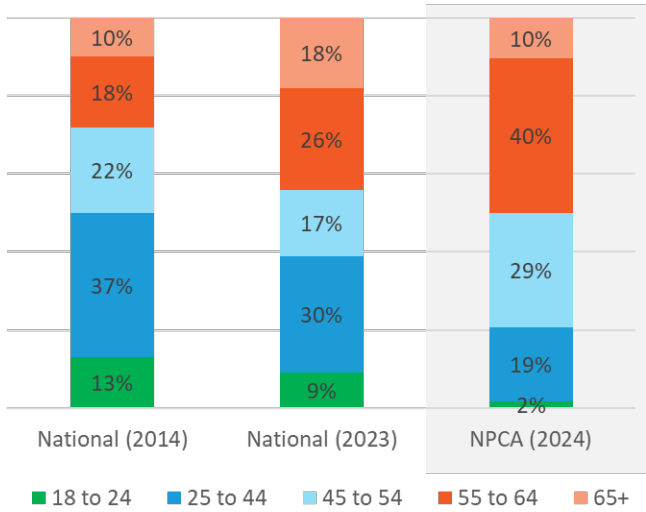


At the same time that trends seem to be suggesting risks from transient campers are decreasing, an inspection of demographics of NPCAs existing seasonal campers highlights emerging ones. For example, as shown in Figure 13, NPCA campers are generally substantially older than national averages – highlighting a risk that at some point in the future these loyal, existing users may not be able to use NPCA campgrounds.

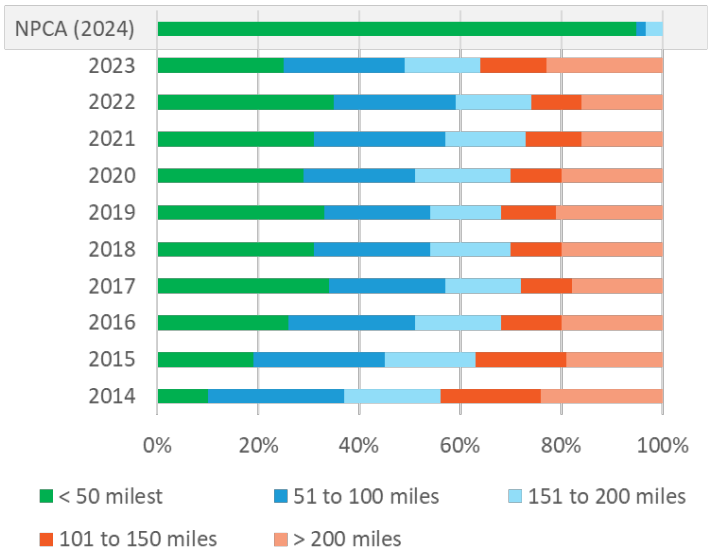
Similarly, unlike national statistics which highlight campers typically traveling a range of distances to their chosen sites, seasonal campers are almost exclusively concentrated in the immediate area. While this is to be expected given the impracticality of traveling long distances to repeatedly use a site, the geographic concentration poses some risks – for example, if there is a downturn in the local economy of Niagara Region.

Figure 13 – Demographics of NPCA Seasonal Campers

Campers by Age Group and Source
% of Total



Campers by Distance Traveled
% of Total



Options

In consultation with NPCA staff, a variety of options were assessed for each of servicing, pricing, and user mix. These were all evaluated based on their potential impact on the core objectives outlined earlier – i.e., fiscal responsibility, future readiness, community needs, and competitive impact – relative to the status quo. The results of this analysis are shown in Figure 14.

Servicing

Three options were assessed for how NPCA may choose to introduce upgrades to its sites, ranging from targeted servicing additions (e.g., 15AMP to transient only) to more comprehensive upgrades (e.g., 30AMP on all sites). More extensive upgrades – such as 50AMP service – or other types of servicing – such as the addition of sewage on site – were considered but ultimately excluded due to the substantial investments required and unclear need / demand. Note that the analysis was also limited by the fact cost of upgrades are not yet available – which would impact the assessment of financial feasibility in particular. Regardless, all options generated positive results on the key objectives, though with varying degrees of impact:

- Option A: upgrading all transient sites to 15AMPs is likely to generate the highest ROI for NPCA, given that the increase in utilization and revenue potential per site is greater coming from un-serviced → 15AMP versus 15AMP → 30AMP.
- Option B: upgrading all 15AMP seasonal sites to 30AMPs would generate a moderate financial return given the (a) modest increase in seasonal prices from 15AMP to 30Amp and (b) the fact that no increase in utilization can be expected (since unlike transient sites, seasonal sites are already fully booked). Upgrading in this way would be primarily a way to ensure future readiness as electrical requirements of appliances and devices on campsites continues to grow.
- Option C: upgrading all transient and seasonal sites to 30AMP would combine the benefits of both Option A and B and substantially prepare NPCA for future servicing expectations of campers as well as position it as a leader amongst peers in terms of this offering. There is risk in this scenario, however, that NPCA overbuilds near term given there is not yet a majority of users highlighting demand for 30AMP services.

Based on these results Option A is the recommended approach as a way to balance investment with potential upside and future proofing of NPCA sites. It closes a servicing gap at what is anticipated to be a more modest cost, while also improving NPCA positioning relative to peers.

However, this recommendation is pending the final results of NPCAs site servicing study which is expected in fall 2025. The results of that study will clarify the relative cost of a 15AMP vs 30AMP upgrade. If the differences are found to be modest or immaterial, Option C is recommended.

Pricing

While a range of flexible pricing models were considered – such as weekend only fees, large group fees, or weekday leasing of seasonal sites – they were generally deemed impractical and excluded from analysis as a result. Instead, three options were considered:

- Option A: modest increase the seasonal pricing by 5%, reflecting NPCAs positioning at the low to mid-end of the peer range. This would have a modestly positive financial impact, creating some additional capacity for investment. While there is some potential for pushback from existing seasonal users, this being a similar increase to previous years helps with predictability and may mitigate some of the risk.
- Option B: a more aggressive increase the seasonal pricing by 10-15%, reflecting NPCAs pricing power as demonstrated by the pent-up demand on NPCAs existing waitlist. This would have a clear positive financial impact but would come at the cost of reduced competitiveness of the offerings. There is a clear risk that by pricing its seasonal sites closer to the top-end of the peer range – in particular, without offerings such as on-site sewage – NPCA may experience attrition of seasonal users as a result and would need to count on its existing waitlist to make up the difference.
- Option C: decreasing the transient pricing by 10-15% would be targeted at improving the competitiveness of NPCAs transient sites, which are presently priced at a premium relative to most peers. It would also respond to community feedback regarding the availability of NPCA sites. The cost to NPCA of this option would be financial – particularly for serviced transient sites. The impact may be mitigated if the decrease in price encourages more bookings.

Based on these results, Option A is recommended as a conservative but still financially prudent approach. Option B is not recommended due to the potential attrition risk.

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. Slower uptake after upgrades may simply reflect the awareness lag for campers to learn about NPCAs newly upgraded offerings – a dynamic that could be addressed through more competitive pricing.

User Mix

Two options were evaluated proceeding in opposite directions. Unlike pricing and servicing where options could be combined or sequenced, for user mix the proposed approaches are mutually exclusive paths that NPCA could take.

- Option A: changing to an 80/20 seasonal/transient mix would allow NPCA to accommodate the full extent of its seasonal waitlist. This would have the impact of providing further stability to NPCAs revenue, but at the cost of further reductions in access for the community through fewer transient spaces. It would also make NPCA more dependent on an aging population of seasonal campers – creating some risks long-term.
- Option B: changing to a 60/40 seasonal/transient mix would help increase access and create opportunities for new campers to try NPCA. Financially, while there would be a reduction in the stable seasonal revenues for NPCA, there is potential for revenues to grow in aggregate given the premium paid by transient users for access to serviced sites. This option poses operational challenges for how to manage a reduction in seasonal sites equitably.

Option B is recommended as a way to maximize value from existing NPCA sites.

Figure 14 – NPCA Campgrounds Option Analysis

Type	Option	Fiscal Responsibility	Future Readiness	Community Need	Competitive Position
Servicing	15AMP All Transient Sites <i>Recommended – Pending results on cost of servicing</i>	Improve Provides a way to improve the utilization for currently poor performing transient sites	Slightly Improve Ensuring a minimum level of servicing on-site is responsive to growing demand / use of electrical appliances and utilities	Slightly Improve Creates greater access for transient users to serviced sites	Slightly Improve Peers are moving towards basic levels of servicing across all their sites
	30AMP Upgrade Seasonal	Slightly Improve No impact on utilization as sites are already fully booked, but slightly higher earning potential through higher fees	Slightly Improve Prepares seasonal sites for ongoing servicing demands but does not address transient	Neutral Addresses minor feedback from seasonal campers regarding level of service	Slightly Improve Addresses the competitiveness of seasonal sites only
	30AMP Upgrade All Sites	To be Determined Maximizes earning potential but at higher cost; validate cost of servicing before proceeding	Improve Ensures all sites are ready for future servicing demand	Slightly Improve Similar impact to Option A, though also creates parity between seasonal and transient campers	Improve Will distinguish NPCA from other sites due to full servicing
Pricing	Slight Increase for Seasonal <i>Recommended</i>	Slightly Improve Increases earning potential from seasonal sites, with only modest attrition expected that is accounted for by waitlist	Neutral No impact on future readiness	Neutral No impact on community demand	Slightly Worsen Moves NPCA higher in the range of seasonal fees amongst peers, but still well within the middle band

Type	Option	Fiscal Responsibility	Future Readiness	Community Need	Competitive Position
		Improve Significant increase in earning potential; some risk that over time attrition could exceed waitlist	Neutral No impact on future readiness	Neutral No impact on community demand	Worsen NPCA pricing begins to approach high end of seasonal fee range and without some of the more premium on-site services (e.g., on-site sewage)
	Decrease Transient	Worsen Reduces earnings from transients, though may be mitigated by increased bookings	Slightly Improve Helps attract more and different types of transient bookings	Improve Makes transient camping more accessible to a broader audience	Improve Moves pricing more in-line with peers
User Mix	Increase Seasonal Share	Slightly Improve Adds to the portion of revenues that is stable and guaranteed within a season	Neutral Further locks-in NPCA to seasonal campers, though would allow for some new seasonal campers from the waitlist	Slightly Worsen Reduces the accessibility of NPCA sites to the general public on a transient basis	Neutral No competitive impact
	Increase Transient Recommended	Neutral Trades-off some revenue certainty with potential for per site earnings	Improve Diversifies the campers who are using NPCA sites	Improve Potential to greatly increase the accessibility of NPCA sites to the public	Neutral No competitive impact

Path Forward

To ensure the successful execution of the recommended strategy, NPCA should adopt a phased implementation approach. This will allow for manageable investment, ongoing evaluation, and flexibility to adapt based on camper response and operational realities.

Short-Term

The primary focus for NPCA should be on launching the upgrades to transient sites. This is likely to be a multi-year process, given the need for permitting, infrastructure planning, and construction that is required. Through this process NPCA may deem that certain sites are impractical for servicing or that the expected ROI from the investment is low (i.e., a site is poorly situated such that even with servicing it is unlikely to be frequently booked). This will affect the scope of the proposed project.

As part of these upgrades, NPCA should explore the cost differential between 15AMP and 30AMP service on sites. As previously discussed, while 15AMP is likely to be sufficient to drive improvements in utilization (and thus financial performance), 30AMP upgrades will hedge NPCA against growing future demands for electrical services on-site. If there is a limited differential in the capital cost, NPCA should do 30AMP upgrades instead.

As part of funding these upgrades, NPCA should implement the seasonal pricing increases recommended for the upcoming season. NPCA should monitor the impact of the pricing change on seasonal booking rates to determine whether future modifications are required or if full booking of seasonal sites is still achieved. As discussed previously, prices for transient camping should be kept flat between seasons.

Medium-Term

In the coming years, NPCA should focus on monitoring utilization to assess the effect of its upgrades for transient sites. If the expected increases in utilization of transient sites are not achieved as a result of upgrades, it may suggest ongoing challenges with pricing competitiveness or a lack of additional demand. NPCA should consider further price changes or marketing efforts in these instances.

If the impact on transient utilization meets or exceeds expectations, NPCA should explore a gradual rebalancing of the site mix between seasonal and transients targeting a more equitable 60-40 seasonal-transient mix. It is recommended this be achieved through a gradual process – such as reallocating unused seasonal sites to transient for future seasons.

Long-Term

As the site mix between seasonal and transient evolves, long-term NPCA should evaluate its booking policies. If seasonal sites begin to represent a small proportion of total NPCA sites it may need to explore alternative models for site allocation – such as open lotteries or tenure caps – to allocate these sites, enabling turnover and equitable access.

At this stage, NPCA may also begin to explore alternative programming that has historically only been provided on transient-dependent campgrounds with higher degree of servicing – such as private sector operators. This may include luxury camping / glamping, off-season camping, or other opportunities to expand its offering.