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## Research Paper

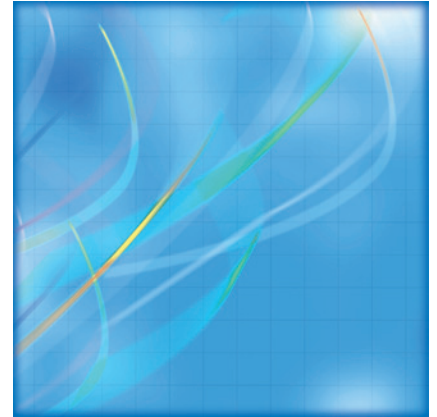
Analytical Paper Series — Service Industries Division

# Profile of campgrounds and outfitters

by Veronica Utovac

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*This paper represents the views of the author and does not necessarily reflect the opinions of Statistics Canada.*



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Service Industries Division

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## Abstract

Although over of all the campgrounds and outfitters combined were self-categorized as midscale accommodations, 87% of the campgrounds catered to an economy/midscale market while around 84% of the outfitters were midscale/upscale. Only outfitters derived more revenue from packaged vacations than from guest units. Americans made up the greatest number of those visiting Canada's hunting and fishing camps while campgrounds generated most of their business from Canadian travellers. Canada's pristine wilderness draws foreign travellers who want to experience world class hunting and fishing expeditions.

# Profile of campgrounds and outfitters

By *Veronica Utovac*

Veronica Utovac is with Service Industries Division

This feature will profile two industries, campgrounds<sup>1</sup> and outfitters<sup>2</sup>, which have not been closely examined previously, yet make up about three-quarters of the “other accommodations” industry group. In 2001, campgrounds made up 44% of the surveyed establishments in the other accommodations panel, while 30% comprised hunting and fishing camps. The remaining establishments in the panel that belong to the other accommodations group include bed and breakfasts (NAICS 721191), cottages and cabins (NAICS 721192) and rooming and boarding houses (NAICS 721310).

The results from the survey panel in 2001 indicate the majority

(65%) of campgrounds is located in a rural setting, followed by 15% near a highway and 12% in the outskirts of a town or city. Outfitters, on the other hand, were mostly found in remote locations which only had access by fly-in (62%). Another 31% of these hunting and fishing camps were also found in rural settings, accessible by car or bus.

Upon examining the type of markets that campgrounds and outfitters cater to, some distinguishing characteristics between these industries should emerge. Cross-tabulations and/or graphics of occupancy rates, revenue and cost distributions, employment shares and client base will be presented.

## Distinction between campgrounds and outfitters

The term “campgrounds” used in this report refers to RV parks and campgrounds as well as recreational vacation camps. The RV parks and campgrounds (NAICS 721211) in the panel include establishments operating serviced or un-serviced sites to

accommodate campers and their equipment<sup>3</sup> as well as trailer parks, campgrounds, recreational vehicle parks, tourist camping park and tourist camps.

Campgrounds also include recreational and vacation camps

1 -- RV Parks (NAICS 721211) and Recreational and Vacation Camps (721213). Federal, provincial and municipal campgrounds are excluded.

2 -- Hunting and Fishing Camps (NAICS 721212)

3 -- Including tents, tent trailers, travel trailers and RVs (recreational vehicles).

(721213). These establishments operate overnight recreational camps, such as children’s camps, family vacation camps and outdoor adventure retreats that offer trail riding, white water rafting, hiking and similar activities. Cabins and fixed campsites and amenities such as food services, recreational facilities, equipment and

organized recreational activities are usually found in these establishments.

Outfitters (NAICS 721212) are establishments that operate hunting and fishing camps. A broad range of services is often provided such access to outpost camps or housekeeping cabins, meals and guides. They may also

provide transportation to the facility as well as the sale of food, beverages, hunting and fishing supplies. Some examples of hunting found in Canada are game bird, black bear, deer, moose and caribou. Fishing experiences can include northern pike, lake trout, bass, brook trout, fly-fishing, to name a few.

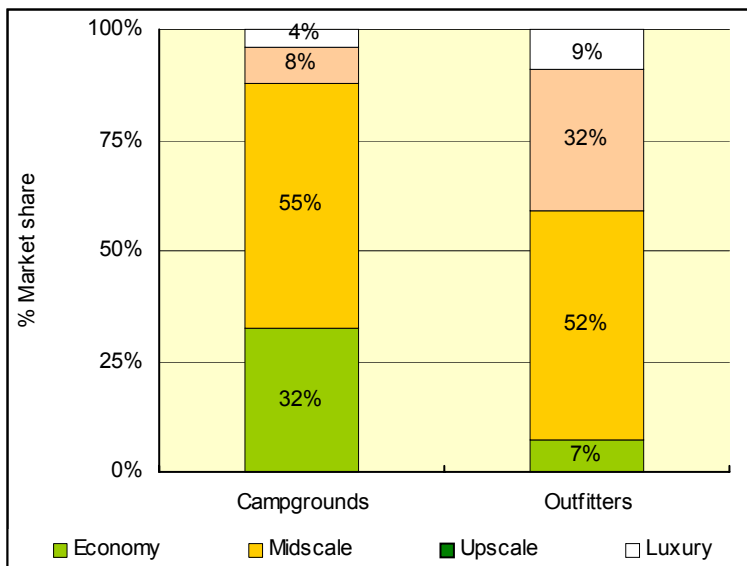
**Target markets**

In 2001, over half of the campgrounds (55%) and outfitters (52%) in the surveyed panel classified themselves as mid-scale. Chart 1 indicates that more campgrounds catered to an economy market (32%) than did outfitters (7%). Conversely,

outfitters tended to target upscale markets (32%).

Due to the low number of campground establishments that classified themselves as providing either “luxury” or “upscale”

accommodations, the data related to these two categories will not be analyzed further. Similarly, too few outfitters were categorized as “economy” and, thus, their data will be suppressed and therefore not analyzed.



**Chart 1.**  
Market shares of campgrounds and outfitters, 2001

**Average number of guest units is much larger for campgrounds than outfitters**

As shown in Table 1, the average campground offered 174

overnight sites, while outfitters on average had 22 guest units.

## Occupancy rates higher for outfitters than campgrounds

Table 1 also shows that outfitters had a higher occupancy rate (70%) than campgrounds (65%). Compare this with the lower occupancy rates of hotels<sup>4</sup> (63%), as well as resorts (60%) and motels (57%).

**Table 1.**  
Overview of campgrounds and outfitters in the survey panel, 2001

	Total	Economy	Midscale	Upscale	Luxury
<b>Campgrounds</b>					
Average number of guest units	174	163	184	...	...
Occupancy rate	65%	63%	67%	...	...
<b>Outfitters</b>					
Average number of guest units	22	...	23	27	25
Occupancy rate	70%	...	68%	76%	69%

**Note:** RV Parks and Campgrounds (NAICS 721211) and Recreational and Vacation Camps (721213). Federal, provincial and municipal campgrounds are excluded.

Hunting and Fishing Camps (NAICS 721212)

... Data suppressed, as there are too few establishments.

## Packaged vacations are a major source of revenue for outfitters

**Table 2.**  
Distribution of revenue by market class, campgrounds and outfitters, 2001

	Total	Economy	Midscale	Upscale	Luxury
<b>Campgrounds</b>					
Guest units	34%	32%	38%	...	...
Packaged vacations	27%	36%	22%	...	...
Meals	3%	5%	3%	...	...
Alcohol	1%	2%	1%	...	...
Merchandise	9%	9%	15%	...	...
Services	4%	3%	7%	...	...
Other revenue	22%	13%	15%	...	...
<b>Outfitters</b>					
Guest units	9%	...	12%	4%	8%
Packaged vacations	77%	...	66%	84%	81%
Meals	2%	...	2%	2%	2%
Alcohol	3%	...	3%	3%	3%
Merchandise	3%	...	4%	2%	2%
Services	1%	...	1%	2%	1%
Other revenue	6%	...	6%	7%	5%

**Note:** RV Parks and Campgrounds (NAICS 721211) and Recreational and Vacation Camps (721213) Federal, provincial and municipal campgrounds are excluded.

Hunting and Fishing Camps (NAICS 721212)

... Data suppressed, as there are too few establishments.

4 -- Includes motor hotels as well.

Outfitters derived the majority of their revenues (77%) from packaged vacations as shown in Table 2. Indeed, upscale and luxury outfitters derived over 80% of their revenues from vacation packages. Less than 10% of the revenues earned from

upscale and luxury outfitters came from the sale of guest units alone.

Unlike hunting and fishing camps, campgrounds derived more of their revenue from the sale of guest units than from packaged

vacations. Table 2 shows that revenue from guest units accounted for 34% of the revenues earned by campgrounds. Package vacations made up 27% of the revenues earned by campgrounds in 2001.

### Outfitters tend to advertise more than campgrounds

In 2001, the most popular tool for advertising for both campgrounds and outfitters was brochures. As shown in Chart 2, outfitters generally advertised more than campgrounds.

Trade shows were the second most common advertising method that outfitters used. In

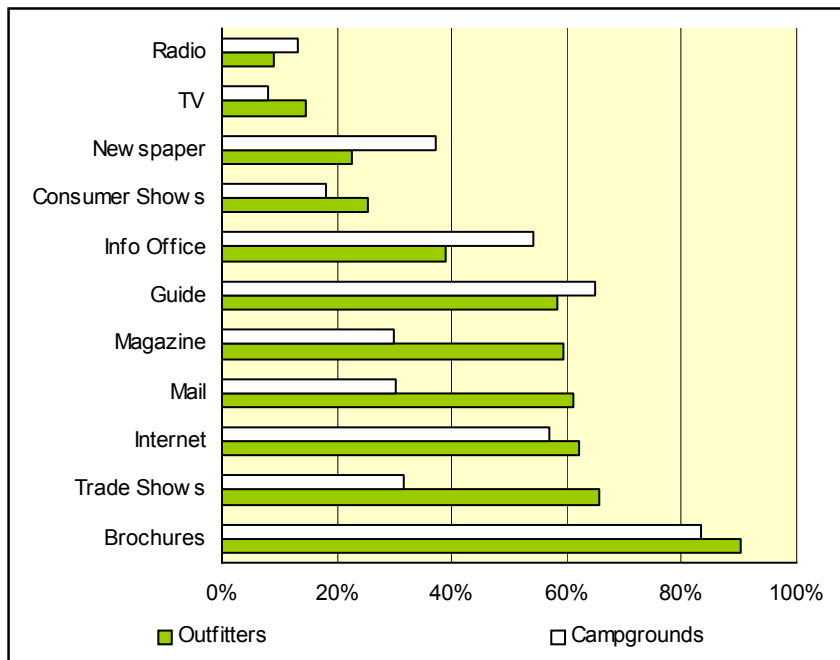
fact, trade shows were used almost twice as much by outfitters than by campgrounds.

Other marketing tools used more by outfitters than campgrounds were direct mail, magazine ads, consumer shows and television ads as well as the Internet.

Campgrounds, on the other hand,

made use of guide listings, information offices, news and radio more so than outfitters.

Campgrounds, as a group, had a higher profit margin on their cost of goods than did outfitters, which contributed to higher overall profits (Table 3).



**Chart 2.**  
Advertising methods used by outfitters and campgrounds, 2001



**Table 3.**  
Selected expenses by market class, campgrounds and outfitters, 2001

	Total	Economy	Midscale	Upscale	Luxury
<b>Campgrounds</b>					
Labour	31%	35%	33%	...	...
Cost of goods	13%	16%	16%	...	...
Occupancy costs	9%	11%	9%	...	...
Advertising	2%	2%	2%	...	...
Depreciation and interest	5%	4%	5%	...	...
Other expenses	26%	24%	24%	...	...
Profit	15%	9%	11%	...	...
<b>Outfitters</b>					
Labour	25%	...	23%	25%	28%
Cost of goods	15%	...	18%	13%	14%
Occupancy costs	6%	...	7%	5%	4%
Advertising	4%	...	4%	4%	4%
Depreciation and interest	7%	...	7%	8%	6%
Other expenses	34%	...	31%	37%	34%
Profit	9%	...	10%	9%	10%

**Note:** RV Parks and Campgrounds (NAICS 721211) and Recreational and Vacation Camps (721213). Federal, provincial and municipal campgrounds are excluded.

Hunting and Fishing Camps (NAICS 721212).

... Data suppressed, as there are too few establishments.

## Seasonal full-time employment dominates both campgrounds and outfitters

**Table 4.**  
Employment shares by market class of establishment, campgrounds and outfitters, 2001

	Total	Economy	Midscale	Upscale	Luxury
<b>Campgrounds</b>					
Full time employment	80%	70%	88%	...	...
Part time employment	20%	30%	12%	...	...
<b>Full year employment</b>	<b>13%</b>	<b>14%</b>	<b>11%</b>	...	...
Full time full year	9%	11%	9%	...	...
Part time full year	4%	4%	2%	...	...
<b>Seasonal employment</b>	<b>87%</b>	<b>86%</b>	<b>89%</b>	...	...
Full time seasonal	71%	59%	78%	...	...
Part time seasonal	16%	26%	11%	...	...
<b>Outfitters</b>					
Full time employment	88%	...	77%	94%	98%
Part time employment	12%	...	23%	6%	2%
<b>Full year employment</b>	<b>12%</b>	...	<b>18%</b>	<b>9%</b>	<b>10%</b>
Full time full year	10%	...	14%	9%	9%
Part time full year	2%	...	5%	1%	1%
<b>Seasonal employment</b>	<b>88%</b>	...	<b>82%</b>	<b>91%</b>	<b>90%</b>
Full time seasonal	78%	...	63%	86%	89%
Part time seasonal	9%	...	19%	5%	2%

**Note:** RV Parks and Campgrounds (NAICS 721211) and Recreational and Vacation Camps (721213). Federal, provincial and municipal campgrounds are excluded.

Hunting and Fishing Camps (NAICS 721212)

... Data suppressed, as there are too few establishments.

Given the seasonal nature of the business, both campgrounds and outfitters displayed similar employment shares (see Table 4). Close to 90% of those working in campgrounds and outfitters were seasonally employed.

Full-time employment also accounted for the greatest share of employment found in both campgrounds and outfitters (see Table 4). In fact, whether one

was employed seasonally or all year round, more workers in both campgrounds and outfitters were employed on a full-time basis than part-time.

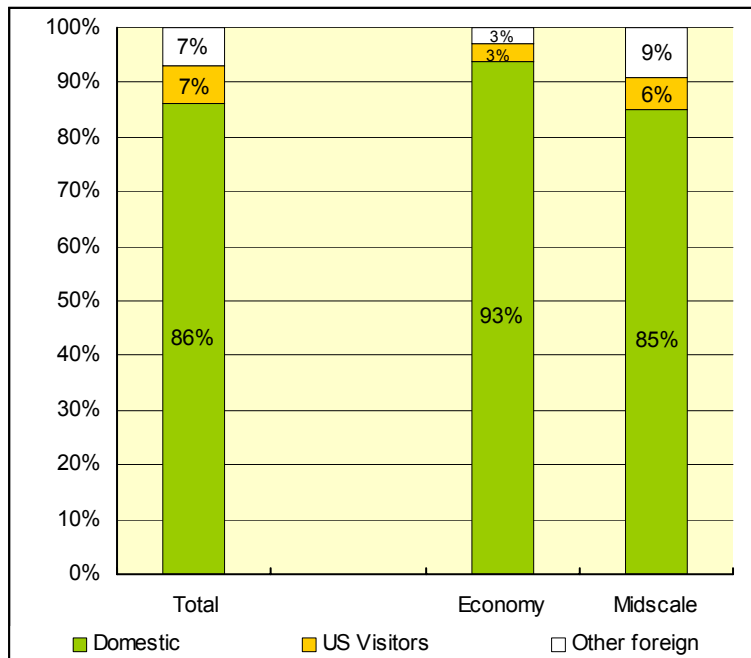
### Campgrounds attracted the highest share of Canadian travellers

Of the various forms of accommodation surveyed, campgrounds derived the largest portion of their business from Canadian travellers. Chart 3 shows that 86% of those staying

at campgrounds were domestic residents.

Motels followed as having the second highest share of domestic residents (85%), while hotels and

motor hotels derived 75% of their business from domestic travellers. Resorts derived 65% of their business from Canadian residents, while 36% of outfitter's clientele were domestic visitors.



**Chart 3.**  
*Client base of campgrounds by market class, 2001*

### Outfitters in Canada frequented by US residents

Overall, outfitters generated most of their business from foreign visitors. American visitors made up more than half of the guests (57%) staying in Canadian hunting and fishing camps. Luxury establishments had the greatest share of US visitors (80%) compared to the non-luxury outfitters (see Chart 4).

The variety of game and freshwater fish, available in Canada's beautiful and unspoiled landscape, appeal to American tourists.

As with hotels<sup>5</sup> and resorts<sup>6</sup>, foreigners preferred luxury to non-luxury outfitters (see Chart 4). Of those staying in luxury

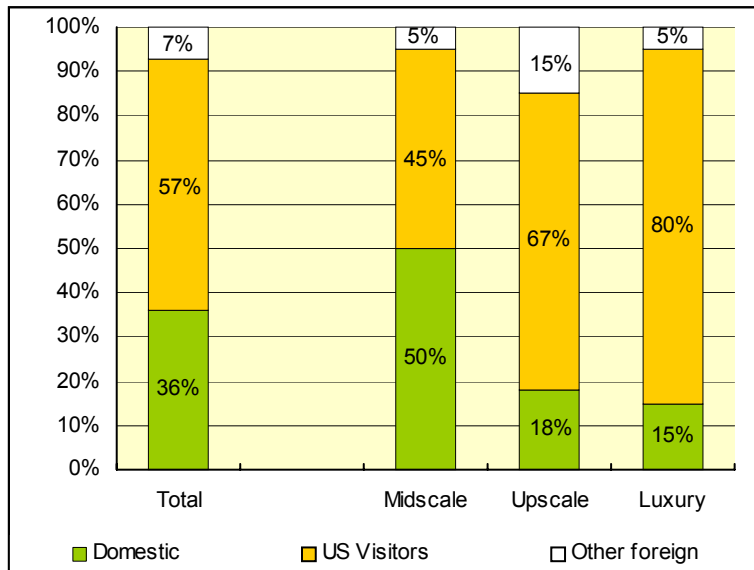
5 -- Includes the following North American Industry Classification (NAICS): 721111 (Hotels) and 721112 (Motor Hotels).

6 -- Traveller Accommodation Survey, A Report for the year 2001, Canadian Tourism Commission. Comparing the Performance of Hotels and Resorts

hunting and fishing camps, 85% were foreign visitors – most of

which were American residents. In fact, 4 out of 5 visitors to

Canada’s luxury outfitters were from the United States.



**Chart 4.**  
*Client base of outfitters by market class, 2001*

### Summary

Although over half of all the campgrounds and outfitters combined were self-categorized as mid-scale accommodations, 87% of the campgrounds catered to an economy/mid-scale market while around 84% of the outfitters were mid-scale/upscale. Only outfitters derived more revenue from packaged vacations than from guest units. As well, outfitters had higher occupancy rates than campgrounds. Of all the outfitters in the survey panel, the upscale outfitters had the highest share of packaged vacations, and the highest occupancy rate. Future analyses examining correlations between variables of interest, such as packages and occupancy rates, could provide further insight into

the operations of these establishments.

Outfitters advertised more than did campgrounds, and spent a greater share of their revenues on advertising. The relationship between advertising intensity and profits could also be investigated in a future study. Overall, campgrounds realized greater profits than the outfitters. Outfitters were faced with higher cost of goods and lower returns from the sales of meals and merchandise than campgrounds. Moreover, outfitters were faced with higher depreciation, interest and other expenses than campgrounds.

Outfitters and campgrounds displayed similar employment patterns. A significant amount of those working in these establishments were employed on a seasonal basis. As well, a larger share of workers was employed full-time than part-time.

Americans made up the greatest number of those visiting Canada’s hunting and fishing camps. As in the case of hotels and resorts, economy campgrounds generated most of their business from Canadian travellers while luxury hunting and fishing camps were mostly patronized by foreign visitors. Canada’s pristine wilderness draws foreign travellers who want to experience world class hunting and fishing expeditions.

## Analytical Caveats

Although the 2001 Traveller Accommodation Survey is not a full census, a significant degree of coverage for the major segments and key operating statistics of the industry is achieved. The panel survey data are presented to emphasize relative rather than absolute measures of the industries' business performance, structure and characteristics. However, in interpreting these data, the following considerations should be taken into account:

- Commencing with the 1998 survey year, the sample design changed from a strictly top-down approach to a probability sample stratified by industry type, province and revenue. As a result of this change, the survey panels after the 1997 reference year contain fewer hotels, fewer motels and more other accommodation services establishments. As well, the coverage of smaller-sized businesses has increased relative to the large establishments in the surveys subsequent to 1997.
- In preparing this report, Statistics Canada follows a thorough editing procedure with respondent follow-up for reported data but does not undertake any imputation for non-responding survey units. For this reason and because of a change in sample design, data are compiled based only on reporting businesses (the panel), thus any year-to-year comparisons are made between survey panels that are not statistically identical.
- In an establishment-based survey, some expenditure categories may be understated because of the expenses incurred by head office. For example, a portion of expenditures on advertising and marketing in the case of affiliated properties is indirectly made through the management fees paid by the franchisee.

## Methodology

The target population consists of all statistical establishments classified as **traveller accommodation services** according to the North American Industrial Classification System (NAICS 721) during the reference year 2001. Data users who wish to learn more about NAICS, its underlying principles, and many of the other statistical concepts discussed in this brief summary, are referred to the Introduction section of the Statistics Canada publication “North American Industrial Classification System: Canada 1997” (catalogue number 12-501).

The frame is the list that identifies the firms classified to the industry in question. The frame is maintained by Statistics Canada’s Business Register, using taxation account information (i.e. income tax, goods and services tax and payroll deductions records) submitted to Canada Customs and Revenue Agency. Provincial tourist accommodation guides and other directories, and internet newswire services are also used to ensure establishments are correctly identified prior to sample selection and survey mailout.

Commencing with the 1998 survey year, the methodology is no longer a cut-off sample of large establishments. Rather, the new methodology is a random sample stratified by type of industry, province, and establishment revenue size, designed to achieve a balanced representation of establishments from across accommodation services (NAICS 721). While larger establishments continue to be represented, smaller establishments are selected randomly. To contribute to industry total estimates, these sampled units are then multiplied by a sampling factor (i.e., “weighted up”) to represent all the smaller units in the stratum. For purposes of this report, however, all data are unweighted (each survey establishment represents only itself).

For national accounting purposes, the original sample is drawn to obtain a significant coverage of total revenue. Support from the Canadian Tourism Commission allows for additional questionnaires to be mailed to establishments beyond the number required for national accounting.

### *Response rate by industry, 2001*

Industry	Survey sample size	Report panel	Panel response rate
Hotel and motor hotel	1,294	920	71.1%
Motel	718	439	61.1%
Other accommodation	1,079	652	60.4%
<b>Total establishments</b>	<b>3,091</b>	<b>2,011</b>	<b>65.1%</b>

**Note:** Response rate equals questionnaires mailed back and accepted as complete divided by the total number of establishments sampled.

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