BRITISH COLUMBIA | BC Parks

CASCADIA PARTNERS

Final Report - Review of Recreation Service Delivery Models

BC Ministry of Environment & Climate Change Strategy

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Confident Decisions.
Positive Outcomes.

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1. EXECUTIVE SUMMARY

In January 2018, BC Parks initiated the Review of Recreation Service Delivery Models to review BC Parks' current service delivery model and explore other service delivery opportunities. Cascadia Partners was engaged to complete the study, which had the following goals:

A. Identify the types of operating models being used for campgrounds in jurisdictions across North America and compare the advantages and disadvantages of these models;

B. Develop standardized metrics in the areas of park usage, financial results, and user satisfaction to benchmark BC's campground operations vs the other jurisdictions

C. Analyze key findings on the differences between jurisdictions and operating models and make recommendations to BC Parks

Cascadia identified 6 parks jurisdictions to study in order to gain insight on their models through interviews and data gathering:

- Alberta Parks
- Ontario Parks
- Washington State Parks
- Oregon State Parks
- California State Parks
- US Nationals Parks

The interviews with jurisdictions revealed a number of the key differences between a private and a public campground operating models. This information was validated during the data analysis where possible, and re-considered in light of the final metrics.

Ultimately, Cascadia found that there is no clear "best" model between the public and private options evaluated. Each model exhibited advantages and disadvantages and the best model for British Columbia rests with the importance that BC Parks places on a number of key "Decision Factors" that impact which model is optimal. See the table below for an overview.

Operating Model Decision Factors	Optimal Model: Private Model	Public Model
1. Campground Cost Management	✓	
2. Park System-Level Cost Management		✓
3. Generating Revenue through Increased Utilization	✓*	
4. Generating Revenue through Value-Add Services	✓	
5. Maximizing the Revenue Resulting from Growth**		✓
6. Customer Experience	✓*	
7. Access		✓
8. Conservation		✓
9. Brand Control		✓

* *Further Study Needed for this decision factor*

** *For Maximizing Revenue Growth to become a factor for BC Parks, the organization would likely need the ability to retain revenue. Currently, BC Parks remits revenue to the Ministry of Finance.*

In addition to insights on determining an optimal model, the data and analysis did provide some insights and considerations for BC Parks on current operations or planning, regardless of the model being used:

- Based on the financial metric findings, revenue could likely be increased through higher pricing, increased accommodation options or additional value-add services.
- BC Parks could consider the role of expanding revenue in reducing shortfalls (deficiency payments).
- The user satisfaction metrics suggest that, at a system level, BC campgrounds are effective from a customer satisfaction perspective

The findings of the Study provide directional considerations for BC Parks, but should be further explored through the following next steps:

1. Conduct a deep-dive on Washington State Parks and Ontario Parks to fully understand public campground operations.
2. Conduct a deep-dive on Alberta Parks to gain insight into the transition process and impacts of running a mixed model.
3. If an operating model change is being evaluated, a comprehensive business case is required.

2. INTRODUCTION

BC Parks has been providing recreation services using a mixed private-public service delivery model since the 1980s. BC Parks currently contracts 74 Park Operators/maintenance contractors to operate and maintain approximately 260 parks. The size and complexity of these agreements range from single parks to larger and more complicated operations across multiple parks. The cost of these contracted operations is nearing $30M annually, of which about 80% relies on recreation user fees collected from visitors to the parks, with the remaining cost covered by the Province. This cost has increased 35% over the last 5 years. BC Parks also directly operates a number of parks with primarily back-country recreation facilities primarily through Park Rangers.

Visitation to BC provincial parks is also increasing; in the last 5 years attendance increased 34% compared to a 6% increase in B.C.'s population overall. This increased visitation together with increasing cost of the existing model presents BC Parks with opportunities and challenges. This includes an opportunity to review BC Parks' current service delivery model and identify opportunities to modernize that model to increase effectiveness, efficiency, and overall visitor satisfaction.

The goal of the study is to:

A. Identify the types of operating models being used for campgrounds in jurisdictions across North America and compare the advantages and disadvantages of these models;

B. Develop standardized metrics in the areas of park usage, financial results, and user satisfaction to benchmark BC's campground operations vs the other jurisdictions

C. Analyze key findings on the differences between jurisdictions and operating models and make recommendations to BC Parks

3. APPROACH

Cascadia began this project with an initiation and kick-off phase to ensure that there was alignment on expectations and approach. Following this brief phase, we began contacting our target jurisdictions to identify local experts that were willing to engage with us regarding their park operating model. We identified six other jurisdictions and were able to connect and have conversations with each of them:

- Alberta Parks
- Ontario Parks
- Washington State Parks
- Oregon State Parks
- California State Parks
- US Nationals Parks

Our interviews with each jurisdiction were focused on the park operating models, the benefits of these models, the unique attributes of their organization and their opinions of different park operating models. Following our interviews, we submitted a data request for financial information to analyze and compare parks using operating and financial metrics. We received detailed financial data from Washington State and Alberta. For modelling purposes, we separated Alberta parks into those operated privately and those operated publicly.

In addition to the park usage and financial metrics in which we relied on accessing private data from our target jurisdictions, we amassed a wealth of user satisfaction metrics. We recorded the five-star scores given to just under 2,000 campgrounds across our target jurisdictions and analyzed the results to draw insights on the user satisfaction associated with private and publicly operated parks.

Cascadia analyzed and normalized the park usage and financial data (to ensure applies-to-apples comparison to the best of our ability) and created metrics that were comparable across jurisdictions. Finally, we drew conclusions from the analysis and have provided our insights and recommendations within this report.

4. OVERVIEW OF MODELS

4.1 Models Used in North America

The majority of Provincial and State campground operations in North America can be categorized as either being **public** or **private**, with occasional instances of other **"partnership models"** being used.

Under a **public model**, campground operations are fully run by the Province or State and staffed with public employees. This is the most common method of running campgrounds within provincial and state parks in North America. In BC, there are only a handful of park accommodations publicly which are very small in scope. Parks with public run services are sometimes referred to as "Own Force" parks.

Under a **private model**, campground operations are contracted out to private businesses (called "concessionaires" in the US). BC Parks is an example of a private model, where Park Operators run 156 front-country campgrounds. It is important to distinguish private operation of the campgrounds vs. other services within a park; many jurisdictions solicit private sector involvement for select ventures or services within their parks, while wide-scale contracting out of campground operations is far less common.

There are some arrangements in BC and other jurisdictions that do not fall directly into these two categories, which could be referred to as **partnership models**. Under these models, a jurisdiction will bestow responsibilities for park operations on a 3rd-party group likely to have a vested interest in maintaining the park – such as a municipality or non-profit group of local citizens. For example, this model implemented in a number of California State Parks in 2008 to relieve financial pressure on the State and ensure continued maintenance and services within their parks. These models are typically implemented on a park-by-park basis based on very specific drivers within the jurisdiction.

The focus of this study is on private vs. public models, and how these models may impact key metrics in campground and park operations.

4.2 Comparison of Public, Private, and Partnership Models

The major impacts of using a private or public model were identified through consultation with Parks officials in other jurisdictions. While not every impact will be relevant for each jurisdiction – and a number of these impacts depend on how a model is planned and executed – they provide a useful starting point for considering the differences between privately-run and public-run campground operations.

4.2.1 Advantages of Public Models

a) Increased Ability to Exercise Public Mandates (Such as Affordability)

Private sector involvement is driven by profit expectations, which can lead to challenges when public mandates can lead to reduced revenue or greater cost. For example, Oregon has a strong public mandate to maintain low prices for camping in State parks to ensure all citizens have equal access to enjoy parks. A public model gives them full control over setting prices as they see fit (this mandate acknowledges that the park system will require significant public funding).

b) Retain Entirety of Revenue from the Most Popular Parks

The private sector is typically most interested in bidding to service the most popular campgrounds – ones that have the highest potential for profitability. Sharing the revenue with a private provider could reduce the ability to subsidize the less-popular, rural campgrounds unless it is balanced out by enough cost savings over the course of the contract.[1]

c) Increased Ability to Share Resources

The greater the number of campgrounds and services operated by one organization, the greater the opportunity for sharing core staff across multiple parks and services. As part of Washington State's shift from being 60% reliant on public funds to being only 20% reliant, shifting their operating model from being park-centric to region-centric and sharing resources across many parks was a major factor. BC Parks has enabled some potential resource sharing in a private model through park bundles.

d) Greater Control of Park Management

Governments have public mandates that go beyond running campgrounds in Provincial and State parks. Other responsibilities include conserving the park environment and protecting the ecology, preventing illegal activity such as illegal hunting, maintaining all park facilities, running educational programs that engage citizens, and more. An advantage of public models for operating campgrounds is that staff can easily be aligned to government expectations for managing the park.

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[1] Note that BC Parks has mitigated this issue through the "bundle method" of contracting, whereby operators are responsible for both high-volume and low-volume campgrounds in their regional bundle.

4.2.2 Advantages of Private Models

a) Creates a Competitive Business Environment

Using competitive bidding for operating campgrounds encourages proponents to identify efficient means of operating a campground. This was a primary consideration for Alberta in the 1980's when they first began tendering campground operations in many parks. Alberta has also proven that private entities do not need to be the only ones competing for the business – Alberta Parks' has began including its own bids in the process, ensuring that the best option for operating the park is selected whether it is private or public.

b) Lower Impact from Government Funding and Priority Shifts

None of the jurisdictions examined were fully self-funded through park revenue. Some of the jurisdictions running fully-public campgrounds identified that funding cuts from government have had large impacts in the past on park services, including front-country campground operations. For example, Washington State laid off 160 park staff in 2012 due to a reduction in State funding; similarly, California had to cease its own campground operations in some parks due to financial challenges in 2012, turning them over to non-profits and municipalities. Contracting out parks services not only has potential for positive financial impacts, but also for greater long-term certainty.

c) Fewer Workforce Constraints

A public, unionized workforce can present a number of challenges for campground operations. Campgrounds require services for many hours in a day, on weekends and on holidays. Further, many campsites are seasonal. Some jurisdictions noted that, in some cases, a public workforce can be less flexible and able to meet these needs efficiently when compared with the workforce of a private provider.

d) Value-Added Services

The private sector has shown to be effective at identifying new value-added services in parks that compliment the campgrounds, and at implementing those service quickly and effectively when permitted. This is one way that a partnership between the private and public sector in parks can be beneficial from both financial and visitor services perspectives.

4.2.3 Advantages of Partnership Models

a) Shifts Stewardship and Operations to Locals

Putting local citizens – who are passionate about the stewardship and well-being of their natural environment – in charge of some park management is one way of ensuring that the park is cared for, particularly in the case where the government would be hard-pressed to provide that direct management due to financial constraints. While California shifted many parks to this model in 2012 due to financial constraints, they have continued with the model in many cases due to the positive outcomes of the locally-based management.

b) Additional Funding for Parks

California's experience has been that non-profits who takeover the park can at least be partially self-sufficient thanks to effective fundraising in the community. Many parks have greatly benefitted from a level of funding under this model that would have been prohibitive under the State budget for parks.

5. BENCHMARKING STUDY

Cascadia collected data from jurisdictions to analyze the effectiveness of campground operations in each jurisdiction, and the impact of using a private or public operating model. The following three categories of metrics were studied to produce a holistic view of campground operations:

1) Park Usage Metrics
2) Financial Metrics
3) User Satisfaction Metrics

"Key Metrics" in each category are discussed in this section. These metrics are analyzed from two perspectives: a comparison of jurisdictions, and a comparison of private vs. public operations.

Note that Alberta was the only jurisdiction studied with a significant number of front-country campgrounds run under each type of model. For this reason, analysis was conducted to separate the metric results of their private and public campgrounds and present the data separately.

5.1 Park Usage Metrics

5.1 Park Usage Metrics | 5.2 Financial Metrics | 5.3 User Satisfaction Metrics

Jurisdiction Overview – Park Usage Metrics

# = Key Metric	BC Private*	Alberta Private	Alberta Public	Wash. State Public	Ontario Public	Oregon Public
Number of Parks / Lands Managed	1,029	N/A	472	127	330	250
Total Hectares (millions)	14.0	N/A	2.9	0.05	8.2	0.04
Front-Country Campgrounds	156	108	103	76	92	54
Total Number of Sites	11,287	6,449	7,751	6,450	19,863	5,916
Avg Number of Sites per Park	72	60	75	85	216	110
Annual Overnight Bookings	889,708	330,738	392,535	639,569	1,400,211	871,362
1 Bookings per Campground	5,703	3,062	3,811	8,415	15,220	16,136
2 Bookings per Site	79	51	51	99	70	147
Total Available Nights	2,058,141	1,021,482	1,458,189	2,155,276	-	-
3 Campground Utilization	43.2%	32.4%	26.9%	29.7%	-	-
Annual Campers (Estimated)	2,847,065	1,194,344	1,375,640	2,155,276	-	2,788,358
Annual Day Use Visitors (Est.)**	20,882,000	N/A	9,700,000	27,845,000	9,000,000	50,770,000

** For BC, parks with front-country campgrounds are managed privately but the remaining park space is managed publicly. BC will be noted as "private" throughout as the majority of metrics focus on campground operations.*

*** Given the large differences in day use estimates across the jurisdictions, it is likely that the jurisdictions differ in their approach to defining a day use visit or developing an estimate.*

Notes

Annual Overnight Bookings: This is the total number of *paid* night stays across all campgrounds and includes every type of site. Note that a group site booking for a night counts as a single night booked, no matter how many users or spaces are used.

Total Available Nights: This is the total number of *available* nights that could be booked across all the sites in campgrounds. For example, a single campsite open year-round has 365 available nights. The total available nights is the grand total of availability for all sites in the jurisdiction. Note that Ontario and Oregon did not supply the data necessary to conduct this analysis.

Annual Campers: This is the total number of *campers*, with each camper counted once for every one of their overnight stays. For example, a party of 3 staying 4 nights would count as 12 overnight stays. In most cases, this total is based on an average number of campers per night stay as estimated by the jurisdiction.

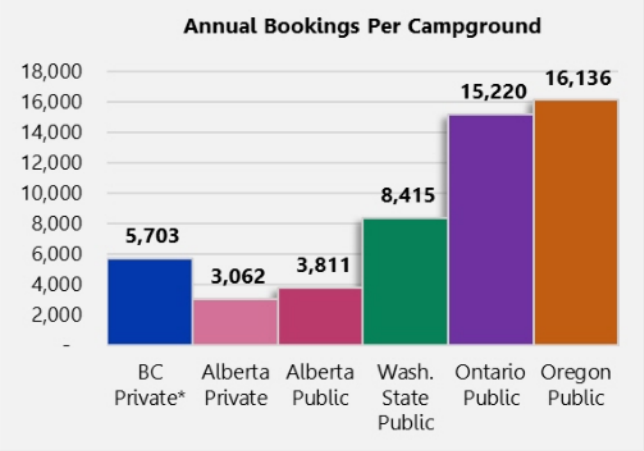
Ontario and Oregon: These jurisdictions could not be included in all metrics due to data availability.

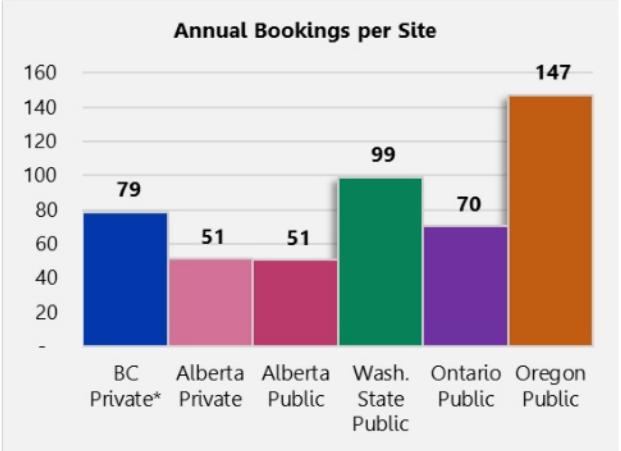
Years of Data Provided: All jurisdictions provided data from FY 2016/17.

Park Usage Metrics #1 and #2: Annual Bookings per Campground and Bookings per Site

Metric Definition: The average number of bookings for a campground in a single year; and the average number of bookings for a single "site" (campsite or accommodation within the campground)

These two metrics provide insight into how busy individual campgrounds are in the jurisdiction.





BC has busier campgrounds than Alberta overall, but not as busy as those of the three fully-public jurisdictions analyzed here: Washington State, Ontario and Oregon. It is important to note that Ontario and Oregon have very different operational profiles than BC: Ontario has the largest campgrounds with an average of 216 sites per campground (three times the size of BC's average campground), while Oregon manages 65% fewer campgrounds than BC. Alberta and Washington State have operational profiles that more closely match BC's.

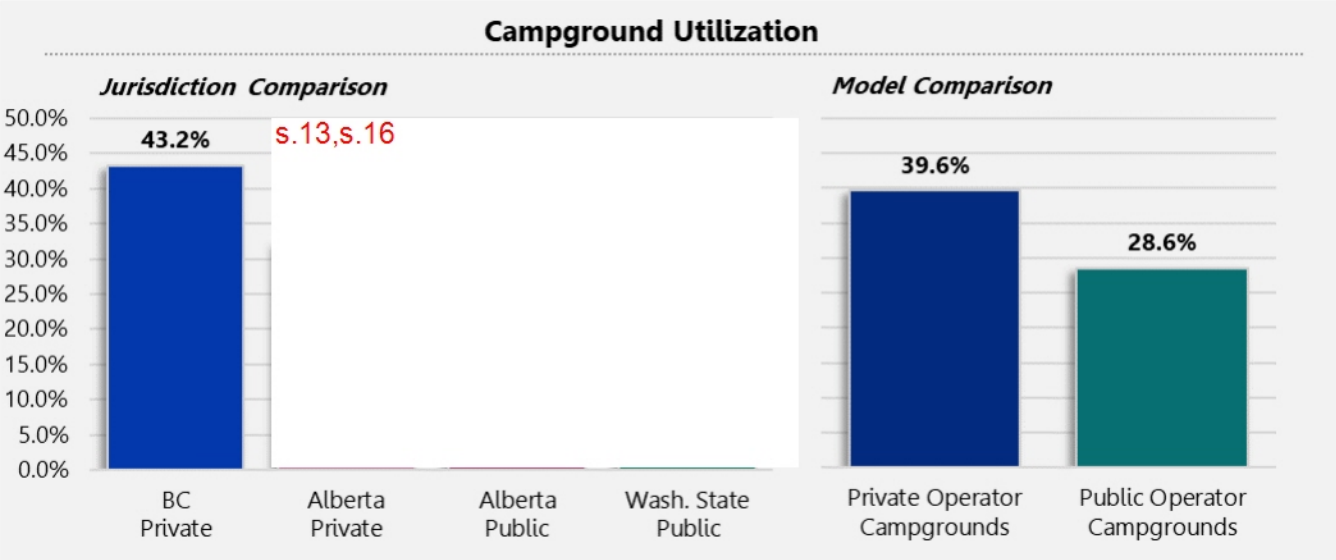
Alberta's campgrounds (both private and public) are relatively less busy than BC's. They also have 35% more revenue-generating, front-country campgrounds than BC, so they may face challenges with smaller rural operations. The impact of this is explored further in the financial metrics.

Washington's campgrounds (average of 75 sites per campground) are generally larger and busier than BC's (average of 64 sites per campground). While this creates the potential for greater efficiencies of scale, we will see in the financial metrics that the results will depend on many other factors such as the scope of services provided, their cost of operations and pricing.

Park Usage Metric #3: Campground Utilization

Metric Definition: For all available nights at campsites in the jurisdiction, the percentage of nights that were booked.

This metric considers how often the sites on a campground are booked. Low utilization could signify that there are campgrounds with very low demand, or that campgrounds are being kept open at times of year when usage is low.



BC's utilization is relatively high compared with the other jurisdictions studied. This could be because of a low overall cost of camping to front-country campers (see financial metrics), and the closing of campgrounds during slow seasons (see table below).

Analysis of campground seasons

	BC *Private*	**Alberta** *Private*	**Alberta** *Public*	**Wash. State** *Public*
Campgrounds open longer than 6 months per year	56	30	37	67
Percentage of total campgrounds	36%	28%	36%	88%

Identifying the optimal opening seasons for campgrounds will play a major role in financial success. Private operated campsites in the jurisdictions studied are utilized 11% more than the public sites.[2] It is possible that private operators are more aware of the optimal season and their revenue potential and cost for each time of year. It is also possible that the incentive for private operators to compete for bookings at their campground (such as through improved customer experience) serves to increase camping demand.

While staying open longer into the winter season may help to fulfill a mandate to provide access to outdoor recreation to the public, it will inevitably have a high impact on cost and financial sustainability

5.2 Financial Metrics

5.1 Park Usage Metrics | 5.2 Financial Metrics | 5.3 User Satisfaction Metrics

The primary focus of the financial metrics is to compare ability to generate revenue and manage cost. The greatest challenges with comparing financial metrics across jurisdictions are:

A) Each jurisdiction allocates costs to campground and park operations in different ways, making it difficult to develop an "apples-to-apples" comparison

B) Not all jurisdictions were capable of easily segmenting some types of revenue and cost needed for our metrics

To enable Cascadia to arrive as close to an "apples-to-apples" comparison as possible, significant analysis was done to make logical estimates of some revenue and cost elements in each jurisdiction. The approach of this analysis has been provided in the Notes on Approach Appendix.

Note on Campground Operations vs. Overall Park Operations

BC Parks is interested in benchmarking the operations of campgrounds as well as the overall park operation. From a financial perspective, this means identifying what constitutes park revenue and cost, and segmenting the specific campground operations revenue and costs. Through discussion with BC Parks we arrived at the following model:

[2] It is possible that Alberta Parks' selectivity on which of its parks are run privately vs. publicly impacts this metric

Revenue and Cost Definitions

Comparison of Campground Operations	
Campground Revenue	
✓ **DOES include:** • Campground Revenue is all revenue generated from any overnight stay in the park (including roofed sites, such as yurts, cabins, or other types of site) • Revenue generated from value-add services in a park, such as rentals	× **Does NOT include:** • Revenue from sources typically categorized as "Day Use," such as parking fees, entrance fees, conference bookings, etc. • Revenue from other fees not typically considered camping-related such as boating or permitting • Any type of grant or donation
Campground Cost	
✓ **DOES include:** • Operations cost of running a campground day-to-day, such as staffing, supplies and contracting of necessary services • Campground security and safety costs • Regular maintenance (that is not large enough to warrant capital costs)	× **Does NOT include:** • Cost of government administration • Capital investment • Park Conservation / Stewardship
Comparison of Overall Park Operations	
Park Revenue	
✓ **DOES include:** • Revenue from camping operations (overnight stays and value-add services) • Revenue from Day Use • Revenue from all other user-paid sources (boating, conferences, etc.)	× **Does NOT include:** • Any type of grant or donation • Interest • Revenue from merchandising and ventures deemed unrelated to services delivered in Provincial / State Parks
Park Cost	
✓ **DOES include:** • All cost of day-to-day campground operations • Cost of government administration • Cost of all other park services such as those related to conservation, stewardship, security and safety • Cost of visitor services and marketing	× **Does NOT include:** • Capital Investment • Amortization • Costs from delivering services deemed unrelated to services delivered in Provincial / State Parks

Jurisdiction Overview – Financial Metrics

# = Key Metric	BC Private	Alberta Private	Alberta Public	Wash. State Public	Ontario Public	Oregon Public
Campground Revenue	$28,496,289	s.13,s.16				
Revenue Per Site	$2,525					
1 Revenue per Night Stay	$32.03					
2 Revenue per Available Night	$13.85					
Campground Operations Cost	$29,180,741					
3 Cost Per Site	$2,585					
Cost per Night Stay	$32.80					
4 Cost per Available Night	$14.18					
Gross Margin - Camping Operations	-$684,452					
5 Margin per Site	-$61					

Notes

Total Camping Revenue and Cost: See "Revenue and Cost Definitions" table for guidelines on what is included within Camping Revenue and Camping Cost. Jurisdiction-specific estimates and assumptions are identified within the Appendix: Jurisdiction Data Notes.

Ontario and Oregon: These jurisdictions could not be included in all metrics due to data availability.

Years of Data Provided: All jurisdictions provided data from FY 2016/17, except for Oregon which has provided annualized data from 2015-17.

Financial Metric #1: Campground Revenue per Night Stay

Metric Definition: Average amount of revenue generated for each night that was paid for in campgrounds in the jurisdiction.

A night stay is defined as one paid night for a site, regardless of the number of campers. This metric is a starting point, identifying the average amount spent by campers for each of their night bookings, accounting for both the overnight accommodation and value-add services such as consumables and rentals.

Price is a primary factor within this metric although it considers all revenue generated from camping (including sales and rentals). On one hand, this information suggests British Columbians are benefitting from a low average cost of camping when compared with Alberta, Washington State and Ontario. On the other hand, BC Parks should consider whether there are opportunities to be generating greater revenue from campers during their stay.

Analysis of peak season price ranges of front-country campsites provides another point of comparison between the jurisdictions:

Analysis of Pricing for Peak Season Front-Country Tent Camping

BC *Private*	**Alberta** *Private*	**Alberta** *Public*	**Wash. State** *Public*	**Ontario** *Public*	**Oregon** *Public*
$13-$35	$10-$33	$18-$29	$25-$35	$32-$40	$17-$21

Price information was collected by surveying the price lists and/or reservation systems of the jurisdictions. The peak season price for a basic, front-country campsite for tenting was used. The range represents typical low-cost and high-cost campgrounds in the jurisdiction.

BC and Alberta are difficult to analyze from a price perspective due to the wide range in pricing between popular and less-popular campgrounds. For example, a large number of campsites reach the $35 / night price in Washington State, whereas very few front-country sites in BC reach that price.[3]

Nevertheless, the ranges make it clear that Washington State and Ontario offer fewer opportunities for camping on a small budget than the other jurisdictions, which would factor in their high revenue per night stay. Increasing price is one option to increase revenue per night stay, although increasing the number of value-add services and opportunities is another option that shouldn't impact affordability for low income families – a major consideration for parks organizations. Another factor in generating higher revenue is the use of "upgraded" sites; for

[3] "Camping Fees," Washington State Parks website. Accessed March 2018. https://parks.state.wa.us/166/Camping-fees.

example, Washington State offers a number of cabins, yurts and other roofed accommodation within its campgrounds for premium prices.

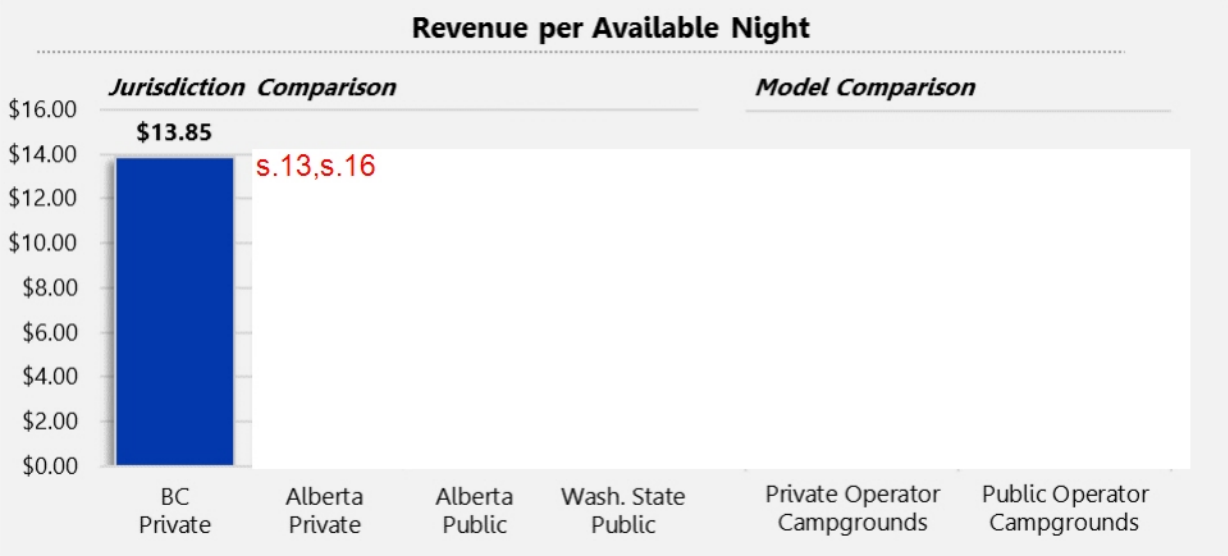
Finally, as the public campgrounds studied are generating 16% greater revenue per night stay than the private campgrounds, it must be considered whether the operating model has an impact. It is possible that current incentives and support in place for private providers in BC are not enough to produce the greatest potential profitable growth – but the jurisdictional differences identified in this analysis, such as in pricing and accommodation offered, suggests that it is likely jurisdictional differences in policy and strategy are playing a greater role.

Financial Metric #2: Campground Revenue per Available Night

Metric Definition: The amount of camping revenue when divided across all *available* nights for campsites in the jurisdiction.

One of the most commonly utilized metrics in the hotel industry is the "revenue per available room" (RevPar) metric as it accounts for the revenue generated from the available space and considers the utilization of the space. We have adapted this metric for campground operations.

The "total available nights" is based on the number of sites on all campgrounds, including roofed accommodation such as yurts, cabins, etc., and the number of days in the year that these sites are available to be booked. Campground revenue is then spread across all of these available nights to create this metric.



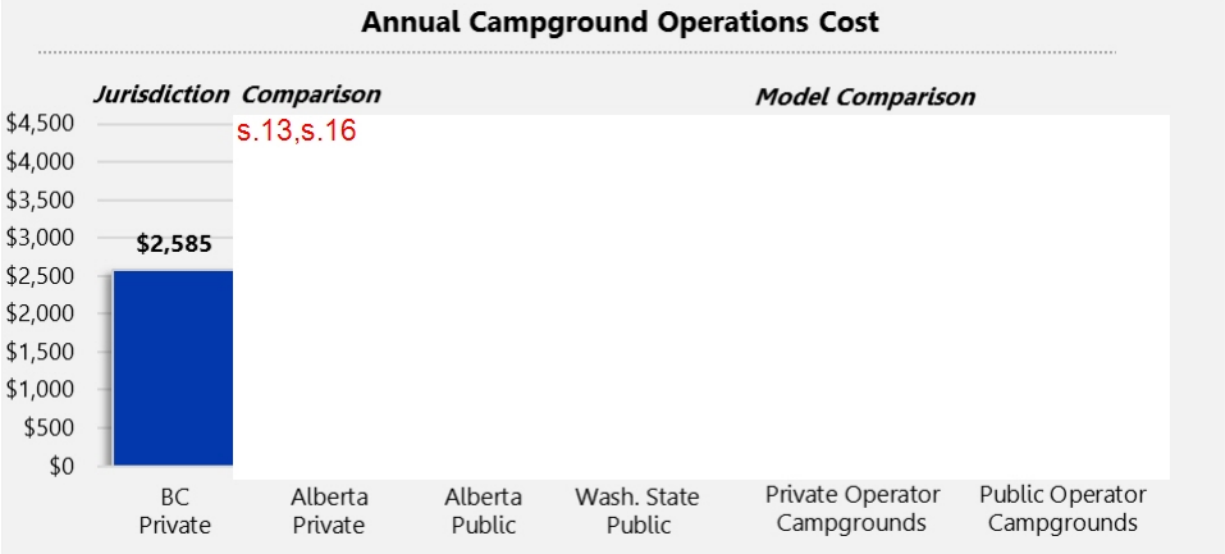
Despite BC's lower cost of camping, BC is relatively strong at generating revenue per available night as a result of its high utilization of sites. High utilization ensures that there is less "wasted" revenue potential, and from this perspective BC wastes very little of its potential compared to other jurisdictions.

The reason for success cannot be attributed to a private operator model, as private sites in Alberta have a revenue per available night that is 32% lower than BC's sites. The differences are more likely to do with differences in season length.

Financial Metric #3: Annual Campground Operations Cost per Site

Metric Definition: The average cost of operations for each campsite (or other accommodation) in the jurisdiction.

This metric identifies the total of fixed and variable costs attributable to the average site within each jurisdiction and provides insight into the financial efficiency of campground operations.



The cost per site is extremely high for Washington State Parks – likely because they largely operate all season long and have more roofed accommodation that is more expensive to maintain. A better comparison for BC is Alberta, where private operators have achieved a 12% lower cost per site than the public operated campgrounds.

More jurisdictions may need to be studied to draw meaningful insights. The comparison of models is currently skewed by Washington and its very different campground makeup from BC and Alberta. Sites in Washington are typically open all season long, and there are 250 roofed accommodations to look after such as yurts, cabins and other structures. Washington acknowledges in its Annual Report that its structures are relatively expensive to care for. By comparison, Alberta Parks has 37 "comfort camping" accommodations and BC Parks only maintains a handful of cabins – mostly in backcountry areas.

Financial Metric #4: Campground Operations Cost per Available Night

Metric Definition: The amount of campground operations cost when divided across all *available* nights at campsites in the jurisdiction.

This metric provides a different perspective on the efficiency of campgrounds, as it splits the cost across the available nights. While a jurisdiction's *cost per site* may be relatively high due to keeping campgrounds open in the winter season, their *cost per available night* may be low due to the fact that there are more nights to spread the cost across. The value of having these sites available will depend on policy and demand expectations.

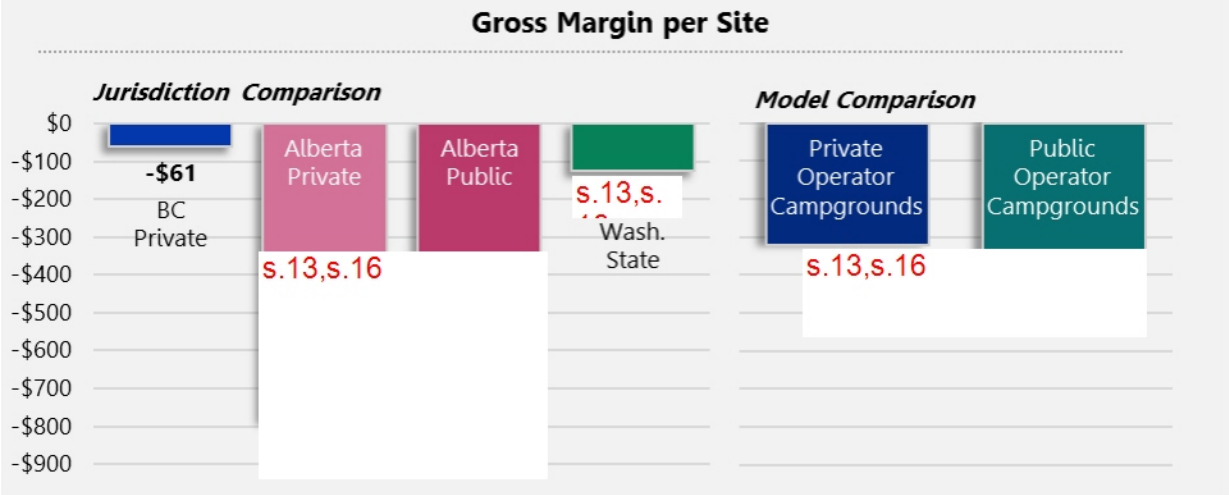
The private run campgrounds have a cost per available night that is almost 12.5% higher than the public run sites. This may be because the private run sites in the jurisdictions studied have much shorter open seasons than the public run sites: Only 33% of all private sites were scheduled to be open for greater than 6 months, compared to 58% of all public sites.

It is also possible that there are efficiency gains from running all campgrounds under a single organization. Note that Washington State, the only organization studied which runs all campgrounds under a single organization, has a noticeably lower cost per available night than the other jurisdictions. Their strategy for managing cost is to share staff across parks and services wherever possible – and this strategy has improved the financial results of their parks system over the past decade.

Financial Metric #5: Operating Margin per Site

Metric Definition: The total operating margin resulting from campground revenue and cost, when spread across all sites in the jurisdiction.

This metric summarizes the financial results of camping operations providing a valuable overview of jurisdictions and models.



BC Parks and Washington State Parks exhibit very similar financial result for camping operations – achieving near break-even despite utilizing entirely different operating models. While this data can only be used for directional insight due to the assumptions made, it is likely that Alberta does not achieve the same financial result as BC or Washington.

A strong possibility for Alberta's financial result is a combination of utilization and cost of operations. Alberta's campsite utilization is relatively low when compared to BC. Whereas Washington offsets its lower utilization with a low cost per available night, Alberta's cost remains higher. Rural operating locations, lack of economies of scale, and less accommodating weather in shoulder and off seasons may play a role.

It remains unclear without further information whether a private or public operating model makes a direct impact. While private operations seem to cost more on average in Alberta, BC has shown that private operations can be more financially efficient than Alberta's result.

Jurisdiction Overview – Financial Breakdown for Overall Park Operations

While campground operations are the focus of the analysis, it is worth considering the financial performance of overall park operations as well. Jurisdictions were able to provide high-level information on revenue and costs for their organization. The following table provides a breakdown of overall park operations revenue and costs.

	BC	Alberta	Wash. State	Ontario	Oregon
Campground Revenue	$28,496,289	s.13,s.16			
Day Use Revenue	$249,621				
Other Park Service Revenue	$2,847,150				
Total Revenue - Park Services	**$31,593,060**				
Campground Cost	$29,180,741				
Administrative & Other Cost	$25,706,532				
Total Cost - Park Services	**$54,887,273**				
Gross Margin - Park Services	**-$23,294,213**				
% Park Service Cost Covered by Rev.	**58%**				

Notes

Other Park Service Revenue and Cost: See "Revenue and Cost Definitions" table for guidelines on what is included within Camping Revenue and Camping Cost. Jurisdiction-specific estimates and assumptions are identified within the Appendix: Jurisdiction Data Notes.

BC Other Park Service Revenue: Includes revenue from Own Force park accommodation, boating, backcountry permits, misc. fees and licences, and park use permit fees, as well as ski hill revenue.

Alberta Other Park Service Revenue: Includes all non-campground revenue. For example: Land & Grazing leases, facility fees (e.g., Canmore Nordic Centre and Sikome Aquatic facility), permits and tours.

Washington State Other Park Service Revenue: Includes any revenue attributed to a park but not counted as either day use overnight accommodation.

Oregon Other Park Service Revenue: Includes revenue from day use and permitting.

Ontario Parks and Oregon State Parks: Due to limited data availability, costs could not be segmented by type. Further, Ontario's campground revenue has been estimated based on 2016/17 data on accommodation revenue and past revenue totals for other camping-related revenue such as rentals and sales.

Years of Data Provided: All jurisdictions provided data from FY 2016/17, except for Oregon which has provided annualized data from 2015-17.

While Washington State Parks generates significantly more revenue than BC Parks, this is attributed to the considerable day use revenue it generates thanks to various types of attractions. The revenue and costs attributable to these types of operations make it difficult to directly compare BC and Washington State in overall park operations.

Alberta is a better comparison based on scope of operations: both BC and Alberta care for large areas of parkland and generate limited revenue through day use and have limited numbers of attractions and facilities under care. BC has managed to keep park services costs down when compared to Alberta, despite having over 10 million hectares more land under care.

Ontario generates far greater revenue than the other jurisdictions owing both the campground and non-campground revenue. As noted previously, they manage very large campgrounds presenting outsized revenue potential compared to BC. However, due to limited data availability, it is impossible to ascertain the efficiency of campground operations. Through over $19 million in other revenue sources (from various permits, fees, and possibly other sources) they manage to cover the most of total operation cost of all the jurisdictions studied.

5.3 User Satisfaction Metrics

5.1 Park Usage Metrics | 5.2 Financial Metrics | 5.3 User Satisfaction Metrics

User Satisfaction Metrics reflect the satisfaction of campground users. Strong customer satisfaction means that the jurisdiction meets the public mandate for maintaining parks and providing access to outdoor recreation. These jurisdictions in turn are more likely to generate camping revenue in their parks as they choose camping in Provincial or State parks over alternative options.

The User Satisfaction Metrics were generated using reviews by visitors on TripAdvisor.com, considered the gold standard for user reviews and comparing experiences.

Jurisdiction Overview – User Satisfaction Metrics

# = Key Metric	BC Private	Alberta Private	Alberta Public	Wash. State Public	Ontario Public	Oregon Public	California Public	US National Public
Number of TA Reviews	2,008	s.13,s.16						
1 Average TA Rating (Camping)	4.43							
2 % Of Reviews that are 5-Star	60.1%							
% of Reviews that are 1- or 2-Stars	4.2%							
Potential Quality Issues	7							
3 Issues as % of total Campgrounds	4.5%							

Notes

BC Reviews: Only parks managed by private park operators were included in this data. A total of 187 of these parks had TripAdvisor reviews.

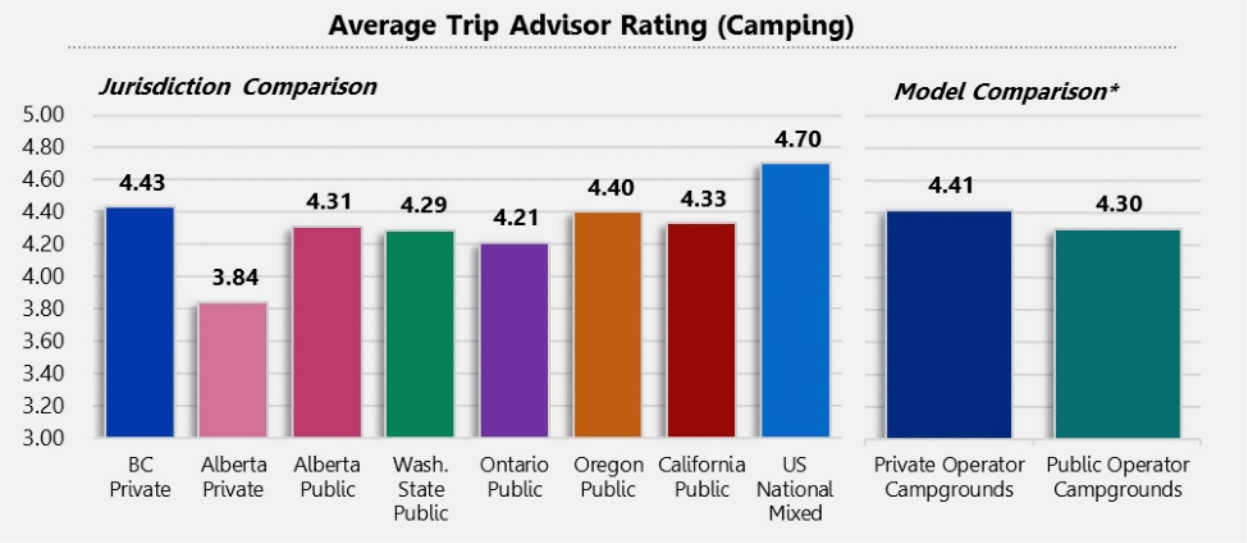
Average Trip Advisor Rating (Camping): Trip Advisor offers a feature for filtering reviews based on words used in the review. Our study filtered the reviews on Trip Advisor to only include reviews where the words "camp" or "camping" was used. While most of the time a review is based on a user's camping experience, there are some cases where the review is discussing camping is some other context. For example, a review may be based on the user's day trip experience but also mention that the park has campsites.

Potential Park Quality Issues: This is a quality measure identifying the number of campgrounds that have a relatively high proportion of 1- and 2-star reviews involving camping. Specifically, this identifies the number of campgrounds in the jurisdiction that have greater than 10 reviews and also have 10% or more of their reviews as 1 or 2 stars.

User Satisfaction Metric #1: Average Trip Advisor Rating (Camping)

Metric Definition: The average star rating for all parks, counting only reviews where camping is mentioned.

This metric simply counts all reviews mentioning camping on Trip Advisor for a jurisdiction's parks. It provides the highest-level overview of customer satisfaction.



**US National Parks omitted from Model Comparison due to having a mixed model whereby the public run parks are very different in scope from the private run parks.*

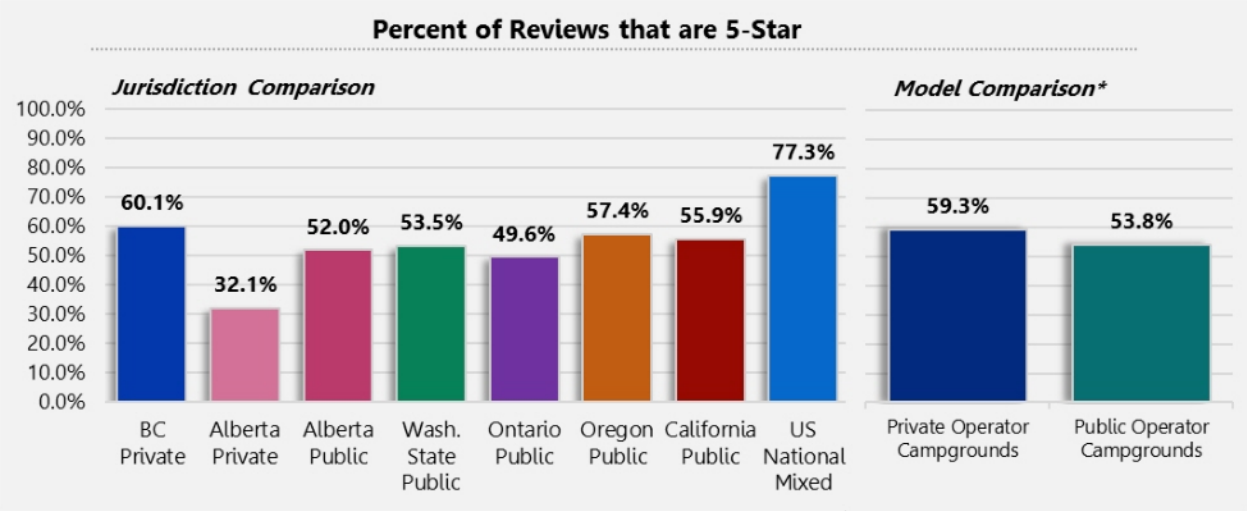
Aside from US National Parks – which have parks with some of the world's most iconic attractions – BC's parks have the best collective average rating at 4.43. This suggests that, on balance, the camping experience within BC is a good one and there should be no systemic concerns regarding customer satisfaction.

There is an insignificant average difference between private and public operated parks. While the difference between the private and public operated parks in Alberta are noticeably different, it is worth noting that Alberta has a very small sample size of reviews and less than 60 reviews for all private operated parks.

User Satisfaction Metric #2: % of Reviews that are 5-Star

Metric Definition: This metric identifies the total proportion of all reviews that are 5-star reviews (counting only reviews where camping is mentioned).

It is common for a Trip Advisor user to award a park 5-stars; average star ratings are collectively above 4 stars for every jurisdiction. Based on this user behaviour, any well-run campground should be receiving 5-stars the majority of the time. Most reviews below 5-stars will mean that some sort of deficiency was identified (although it should be noted that this deficiency will not always be in the control of the campground operator).



**US National Parks omitted from Model Comparison due to having a mixed model whereby the public-run parks are very different in scope from the private-run parks.*

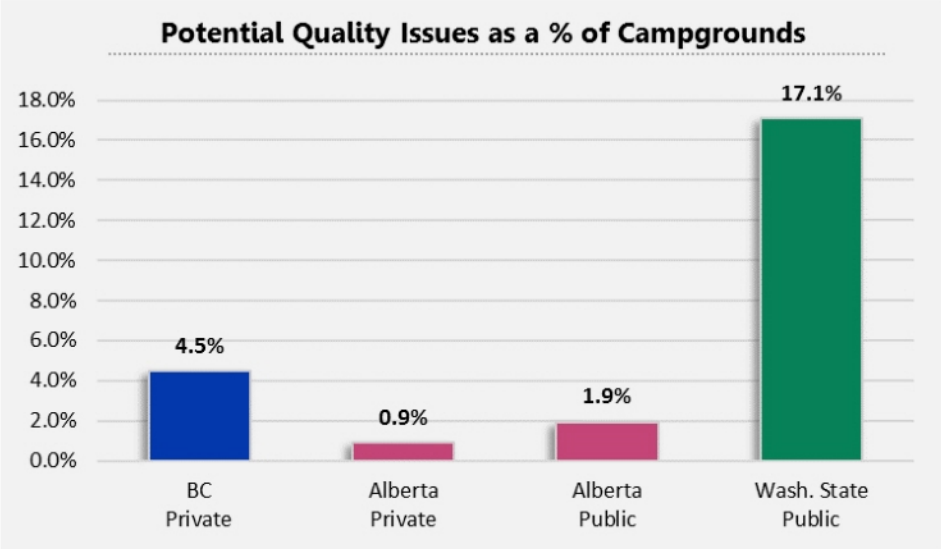
BC fares very well in this metric with a proportion of 5-star reviews that is over 6% greater than the aggregate of public operated campgrounds.

It should be noted that Alberta has a very small sample size of reviews. This metric can be assessed over time for Alberta after a greater amount of time has passed to determine if private campgrounds in the jurisdiction continue to receive lower ratings than public campgrounds.

User Satisfaction Metric #3: Potential Quality Issues as a % of Campgrounds

Metric Definition: The proportion of campgrounds in the jurisdiction that fall into the category of "potential quality issue." The definition of a potential quality issue is a campground with 10 or more Trip Advisor reviews that also have 10% or more of their reviews as 1 or 2 stars.

The purpose of this metric is to create a quality framework that can be compared across jurisdictions. As discussed, Trip Advisor contributors tend towards 5-star reviews – suggesting that a low review indicates a particularly poor experience. Even a 10% response of 1 or 2 stars can suggest an issue with service or campground upkeep consistency.



BC has 7 campgrounds that fall into this category, or 4.5% of all campgrounds. This is much stronger than Washington State; and Alberta is difficult to assess, as a low proportion of its campgrounds have greater than 10 Trip Advisor reviews.

6. KEY FINDINGS AND RECOMMENDATIONS

The Review of Recreation Service Delivery Models resulted in key findings based on interviews with stakeholders and benchmarking of the data available. These findings provide initial insight into next steps for BC Parks in terms of identifying an optimal service delivery model and possible impacts of private and public operations.

The findings have been segmented into the following sections:

s.13

Page 30 to/à Page 34

Withheld pursuant to/removed as

s.13

7. APPENDIX A: DETAILED JURISDICTION SCANS

7.1 Alberta Parks

Alberta has a significant number of both publicly-run and privately-run campgrounds, making their case fairly unique in North America. Of the parks with revenue-generating campgrounds, the Province manages 204 and private contractors operate 166.

Private contracting of campgrounds was introduced in the early 1980's with a goal of becoming more cost-effective, with 20- to 30-year contracts being awarded to contractors through a competitive process. An Alberta Parks Facility Operating Agreement (FOA) constitutes the following:[4]

> *A Facility Operating Agreement is to operate and maintain specific facility areas of a park on behalf of the Province (e.g. campground, day use area, boat launch).*
>
> *This includes:*
>
> - *Collecting fees*
> - *Completing administration processes*
> - *Performing all maintenance duties to government standards*
> - *Fulfilling basic levels of security duties for the public, and*
> - *Providing services as required to ensure a safe and clean environment for "happy campers."*
>
> *A FOA operator retains:*
>
> - *Camping fees net of any government-imposed levies and surcharges, and any other money collected on site.*
>
> *This money retained by the operator is expected to cover all their expenses and generate a profit. Generally, the Province makes no payment to the operator.*[5]

The "levies and surcharges" mentioned above include a $12 charge per reservation for all online reservations, and a $6 per night maintenance levy for any paid overnight stay.[6]

Alberta Parks handles "deficiency payments" to operators aby determining a deficiency amount up-front as part of the contracting process to be paid annually.

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[4] "Types of Agreements, Alberta Parks Website (https://www.albertaparks.ca/albertaparksca/about-us/get-involved/facility-operating-service-agreements/#types).
[5] Note that Alberta Parks DOES enter into deficiency payment agreements with operators despite this statement on their website.
[6] Information provided by Andy Scollay of Alberta Parks, February 2018.

Over the past decade a number of contracts have come up for renewal. Alberta Parks decided to repeat the competitive bidding process for contract renewal, but also made the decision to allow the Alberta Parks operations group to submit bids themselves for taking back operation of the parks. By allowing a public bid within the competitive process, it provides Alberta Parks with greater certainty that the operational model is the most effective they could achieve – giving the selection committee within the management area information on what both a private and public model could achieve.

Alberta Parks has been successful in many cases within the bidding process, taking back operations of some campgrounds previously being operated publicly. Given Alberta Parks' ability to now compete with private providers in terms of cost, there is ongoing discussions within Alberta Parks about the role of private providers and what the best role for private contractors is. One challenge with finding a role for private involvement is that contractors are most interested in the busiest parks with the greatest opportunity to revenue. It is important that any deal with the operator considers the fact that operating the park publicly could generate revenue needed to subsidize the smaller parks within the system.

While Alberta Parks does not charge Day Use fees, is has many other revenue streams including large recreational facilities (eg. Canmore Nordic Centre and Sikome Aquatic Facility), leases and permits, tours, rentals and concessions. In total, Alberta Parks generates over $8M annually from these sources. Further, Alberta Parks is able to retain their revenue within a Dedicated Revenue Fund as opposed to remitting to the Ministry of Finance.[7]

7.2 Washington State Parks

Washington State Parks manages its campgrounds in a fully-public model – with private involvement in select operations such as long houses and ski hills. It is important to note that the scope of Washington State Parks is far different from BC Parks: Washington has far less park space under its jurisdiction for maintaining and preserving, but has a far greater number of customer experience operations to manage such as historical sites like military forts, ranches, etc. As a result, Washington State Parks directly owns and maintains more than 2,800 buildings – which are "small, but isolated and hard to maintain."[8]

Over the past two decades, the parks system has suffered from budget tightening and has had to continually seek new methods of generating revenue. Their work to grow revenue and reduce their reliance on public funds increased park revenue by 117% between 2007 and 2015, and operations are now over 75% funded by park revenue.

[7] "2017-18 Government Estimates," Province of Alberta. Pg. 142.
[8] Budget Overview: 2017-19 Operating Budget Request, Washington State Parks, Pg 3.

Washington State Parks Revenue Sources Over Time

s.13,s.16

Washington State Parks attributes their success to taking a more business-focused approach to park operations. One major new source of revenue has been the Discover Pass, which can be purchased for a day or a year, and gives the user free vehicle access / parking on all State parkland. The Pass alone is generating over $18M annually. Adding services that complement the campgrounds has also helped to grow State Park revenue.

The State has also taken steps to curb cost increases by shifting away from park-by-park management to a regional approach with 20 regions (5-6 parks per region). Operationally, this has made it easier to create a shared staffing model for each region, with only the busiest parks having dedicated staff in some roles.

7.3 Ontario Parks

Ontario Parks manages 339 provincial parks[9] as a branch of the Ministry of Natural Resources and Forestry. Ontario's campgrounds are run primarily publicly by Ontario Parks, although there are a handful of both private operations and partnership operations with First Nations and municipalities.

Like Washington State, Ontario is an example of a jurisdiction that has made a large push over the past two decades to shift to a business lens in a bid to become self-sufficient. In 1996 Ontario Parks revenue only accounted for 42% of its cost, and today it is 90%. To support the concept of a business focus within Ontario Parks, the government set up a Special Account for Ontario parks so that it keeps its own revenues (as opposed to BC Parks, which relies on the Consolidated Revenue Fund for its full operating budget). With this business lens, the role of

[9] https://www.ontario.ca/page/ministry-natural-resources-and-forestry

private business in parks is expanding as more value-add services in parks are being contracted out, and Ontario Parks hit almost $90M in revenue in 2016.[10]

The process for deciding on the scope of private services in a park belongs with regional Parks Superintendents. When a Superintendent presents a business case for a new service, Ontario Parks will welcome private bids on the service and also identifies their own service capability prior to a decision being made on public vs. private. This enables Ontario Parks to increase its revenue potential not only on cores services, but also on value-add services that accompany the campground. There is a recognition that running large, busy campgrounds publicly and adding services generates the revenue necessary to subsidize the smaller, less frequented campgrounds across the province.

7.4 Oregon State Parks

Oregon has a fully publicly-run model (with few exceptions), operating 250+ State Parks, with about 230 campsites that see over 46 million overnight stays annually. Oregon has a parks operation that is much larger than many other provinces and state, utilizing a total budget of over $210M.[11] Oregon State Parks is a strong example of a parks program that is committed to 0-private model.

Public policy is a major factor in business and operating decisions in Oregon State Parks. Sources in the organization stress that equitability for the public in their ability to access park services is paramount to their mandate. For example, it is common for equitability to be a major factor in pricing decisions. This poses a challenge as cost increases, as the public does not always accept that prices increase in line with costs.

Oregon State Parks covers a relatively small amount of its operations budget through park revenue. This puts the organization in a vulnerable position by not having control over a large proportion of its budget. A major challenge is how to fund new services or cost increases given the uncertainty of its revenue. Further, the State has built up deferred maintenance – costs which have been put off for future years.

The role of the private sector is very small and based on historical circumstance. For example, there are two hotels on State Park land, as well as a park with both a campground and a conference centre where both are privately run.

7.5 California State Parks

California State Parks not only manages about 280 parks including 15,000 campsites, but also a large number of attractions such as museums, monuments, historical sites, and more. This

[10] https://news.ontario.ca/mnr/en/2017/11/ontario-parks-celebrates-top-summer-employees-1.html
[11] Oregon Parks and Recreation Department – Legislatively Adopted Budget, 2017-19 http://www.oregon.gov/oprd/Documents/2017-19_OPRD_Legislatively_Adopted_Budget_Final.pdf

makes the California State Operation very large compared to many other Provincial or State parks organizations, with a budget of over $260M.

The majority of campgrounds in California's state parks are managed by the State. The primary role of private business (concessionaires) is in value-added services that compliment campgrounds and day use areas. For example, California State Parks has brought in parking operators, and concessions out non-campground accommodation and event centres.

Between 2008 and 2010, a number of state parks with campgrounds had to be shifted from State control due to budgetary constraints. The following two models were adopted for some state parks:

- A "Cooperating Associations" model was established, whereby citizens could band together into a non-profit society to run the park using revenue from fundraising and park operations.
- Municipalities were approached to take over the operation of some parks.

Within this Study, we have referred to these types of models collectively as "Partnership Models."

The new models have largely been left in place despite the budgetary pressure being relieved. The State views these models as good ways to not only reduce California State Parks' day-to-day cost, but also have locals directly involved in the stewardship of their local park.

These alternative models do not erase California State Parks' involvement. There is still contribution from the State in terms of maintenance and conservancy. The organization is still working to understand the long-term impacts of using these models.

7.6 US National Parks Service

The US National Park Service (NPS) has a broad scope of services, overseeing 417 sites that not only include parks, but also monuments, historical sites, and more. The NPS leverages a mixed model: currently, only about 100 of the largest National Parks operations (including some campgrounds) are contracted out to private companies – but a desire by the federal government to reduce the budget may result in further privatization. The future of campgrounds in National Parks has created major debate across the country as the current US Federal administration explores fully privatizing campground operations.

NPS runs the majority of federal parks campgrounds publicly, but does have significant and growing involvement from the private sector ("concessionaires"). The NPS approach to look at using a concessionaire wherever there is a "significant business opportunity" to engage in. For example, the campgrounds that are concessionaire-operated are larger and have many services in the park.

Park Superintendents have control of park operations, and they will make decisions on what type of service model to use in the park. They will work with NPS to determine what type of

service NPS can provide publicly, and NPS will provide guidelines on the % of revenue expected to be remitted to the park from a private operation.

Budgetary pressure has been a major concern for NPS, creating pressure for even greater concessionaire involvement in national park campgrounds. Many of the NPS-run campgrounds have accumulated large amounts of "deferred maintenance" – required maintenance and capital investment in the park that could not be made in past years due to financial constraint. This is a theme across the United States for parks services – but unlike many State governments, the Trump Administration has shown clear interest in shifting as many services as possible, including campgrounds, into the private sphere.

8. APPENDIX B: JURISDICTION DATA NOTES

8.1 British Columbia

Park Usage Data

- The analysis of campground operations omitted all "Own Force" parks (operated by BC Parks) as these constitute a small number of operations, typically in the back-country.

Camping Operations Financial Data

- Revenue generated from the ServicePlus program is included, as are the reported costs of the program. ServicePlus is a program allowing Park Operators to run value-add services in their campground and retain all revenue. While BC Parks requests that all operators report both revenue and cost of ServicePlus, BC Parks acknowledges that ServicePlus activity is underreported, and this underreporting has not been estimated for this study.
- The revenue generated from fees for online reservations and the costs allocated to the reservation system are both included.

8.2 Alberta

Park Usage Data

- Estimated number of camper nights was provided only for campgrounds that use online reservations. The estimate for campgrounds that use phone bookings and that are on a first come first serve (FCFS) basis was made by applying the average utilization across all online reservation campgrounds to these other campgrounds.

Camping Operations Financial Data

- Alberta Parks supplied campground revenue by park only for online reservations. Revenue from campgrounds that use phone bookings and that are on an FCFS basis was calculated based on the difference between online reservation revenue and total camping revenue, and then allocated to either Alberta Parks campgrounds or private operators based on the percentage of total revenue-generating campsites operated by each group.
- Information on retained revenue by private operators, the deficiency payments paid and any net margin have not been provided by Alberta Parks. The net of deficiency payments and retained profit was estimated by using BC Parks as a benchmark (net of all deficiencies and profit as a % of total revenue).
- Included in the private operator revenue are the $6 Facility Redevelopment Levy and the $12 Online Reservation Fee, both of which are remitted to Alberta Parks to help cover costs of services for private campgrounds. Because these fees are used for campground

maintenance, the fee total has been identified as a cost for private operated campgrounds (and removed as a cost from Alberta Parks campgrounds).

- Estimating the amount of retained revenue required estimating the sum of the Facility Redevelopment Levy and Online Reservation fee. The Facility Redevelopment Levy was estimated using the calculation of total night stays across all private operated sites, as each night stay incurs a $6 charge. Alberta parks provided information on the average number of bookings, and this information was used to generate the average of Online Reservation Fees for private sites.
- Revenue from complimentary value-add services in public campgrounds was unable to be segmented out from a category of "other revenue sources" for Alberta Parks. Given the number of different categories of revenue within this account and the amounts generated from those categories in other jurisdictions, made a broad assumption that 25% of this account could be revenue attributable to public campgrounds.
- Alberta Parks provided total cost of Parks Operations, which includes administrative costs. The following assumptions were made in order to arrive at an estimate of campground operations costs:
    - The following categories were all considered as "Overall Park Operations" costs – and therefor removed from camping operations costs – to better align with the BC data, as the services of these functions are mostly carried out by public, salary staff in BC: Parks Visitor Experience, Parks Conservation Management, and Parks Infrastructure Management.
    - BC Parks data was used as a benchmark to estimate the proportion of all costs in the Parks Operations category that were used on campground operations (65.4%) as opposed to administrative costs. This BC benchmark was developed by comparing the "Salary, Benefits & Travel" expense category to BC's the total Camping Operations Cost arrived at through the Study.
    - The total cost of the Public Safety and Security category was allocated across Alberta Parks and private operators based on the proportion of all paid sites run by each.

8.3 Washington State

Park Usage Data

- Day Use visitors has been estimated by taking the 30,000,000 total visitors suggested in the State Parks Strategic Plan and subtracting the number of estimated camping visitors provided in the State Parks data set.

Camping Operations Financial Data

- Washington State Parks provided cost data at a high level (within the 2017-19 Operating Budget), and campground operations cost had to be determined using the following assumptions:
    - Washington State separates out only a small number of employees categorized as "administration" versus BC. As such, we had to assume that a proportion of their "Park Operations" budget included employees that would typically be considered as administrative under BC's definition. To begin our analysis, we grouped the following categories under a "Park Operations" umbrella before separating costs out: Park Operations, Administration, Winter Recreation, Park Improvement and Real Estate Management, and Natural & Cultural Resource Stewardship.
    - To determine the cost attributable to running camping operations vs. the many other operations that Washington State Parks oversees, it was assumed that the % of all cost attributable to camping was equal to the % of all revenue attributable to camping (55.7%). The resulting cost figure is an estimate of camping operations cost plus related administration cost. This BC benchmark was developed by comparing the "Salary, Benefits & Travel" expense category to BC's the total Camping Operations Cost arrived at through the Study.
    - To determine the amount of administration cost within the "Park Operations" category to remove, used BC as a benchmark for the percentage of cost dedicated to administration versus park operations (65.4%). The resulting figure represents the estimate campground operations cost for Washington State Parks.

8.4 Ontario Parks

Camping Operations Financial Data

- Revenue for Camping Operations includes the total revenue for camping accommodation for 2016/17, and an estimate for total camping-related sales and services. This estimate was developed based on the % of revenue that sales and services represented from 2012/13 as provided by the Ontario Ministry of Natural Resources 2012/13 annual report.

Overall Park Operations Financial Data

- Total revenue is based on the amount quoted in the Ontario Ministry of Natural Resources and Forestry Annual Report 2016-17, adjusted for an estimate for the amount of revenue unrelated to parks (an estimate developed based on 2012/13 cost data).
- The "Other Revenue" category is the difference remaining after accounting for campground revenue and day use revenue.

- Total cost is based on the amount quoted in the Ontario Ministry of Natural Resources and Forestry Annual Report 2016-17

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