# Lake Louise, Yoho, Kootenay Field Unit 2006 Campground Satisfaction

A Survey of Campers to LLYK's Front Country Campgrounds in the Summer of 2006: Kicking Horse Lake Louise Tent/Trailer Redstreak

> Prepared by the Social Science Unit Western and Northern Service Centre

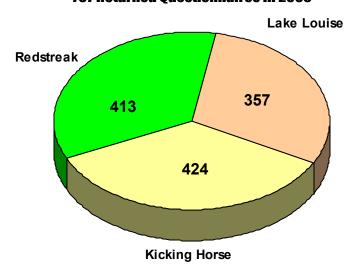
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### **About this survey**

- This report presents results from the 2006 survey of campers in the LLYK Field Unit
  - respondents were randomly selected from the following campgrounds
    - Kicking Horse
    - Lake Louise Tent and Trailer areas
    - Redstreak
- The survey's objectives were to:
  - determine satisfaction with the camping experience,

### 1194 Returned Questionnaires 767 Returned Questionnaires in 2005



LLYK Field Unit: 2006 Campground Performance Assessment
Prepared by the Social Science Unit, Western and Northern Service Centre

- The survey's objectives were to:
  - determine satisfaction with the camping experience
- Kicking Horse and Lake Louise distributed paper questionnaires
- Red Streak did personal interviews only
- Interpreting results
  - campers were randomly selected from the population of all campers who stayed at the campground during the survey period
  - the analysis assumes a response that is representative of all campers in each campground during the survey period and all responses are weighted to represent the population of occupied sites in the three campgrounds during the survey period
  - there is a degree of error associated with samples that is based on the sample size in relation to the population. This is referred to as the "margin of error" (for example, with a margin of error of ± 5%, if 42% of the respondents answered yes to a question, the true value should lie between 37% and 47%)
  - the margin of error for each campground is provided below based on a confidence interval of 95%. The confidence interval refers to how confident we can be that the true value lies within the range of values associated with the margin of error. In this example, we are 95% confident the true value lies between 37% and 47%
  - overall, the 1194 returned questionnaires have an associated margin of error of ±3.3% when representing the 42,072 occupied sites during the survey period

Campground	Surveys Distributed	Valid Responses	Response Rate	Margin of Error
Kicking Horse	1,100	424	39%	± 4.9%
Lake Louise	1,600	357	22%	± 5.3%
Redstreak		413		± 4.9%

### **Measuring satisfaction**

- Respondents rate their satisfaction with the campground's facilities and services
  - on a scale from 1 to 5, where 1 means 'not at all satisfied' and 5 means 'very satisfied'
  - full results are presented in the appendices
- This report uses three measures of visitor satisfaction:
  - mean (average) scores are described as either:
    - very good = 4.00 or highermay need attention = below 4.00
    - taken alone, averages do not reveal the proportion of campers who are *completely satisfied* nor those who are *dissatisfied*, so two other measures are included
  - "top box" scores suggest the proportion of completely satisfied clients
    - research in consumer behaviour has shown that totally satisfied respondents (top box) have a very low likelihood of switching to an alternative product or service, whereas those rating 4 or lower have a significantly higher propensity to switch.
    - the Parks Canada standard for a well-run facility or service is having 50% of respondents choose the top box
  - "low box" scores, on the other hand, suggest the proportion of **dissatisfied clients** 
    - this report considers scores of 1, 2 or 3 out of 5 to be low box scores
    - any facility or service where **more than 15%** of the campers chose the "low boxes" may warrant management attention
    - the Parks Canada standard for a well-run facility or service is having 85% of respondents choose the top two boxes (4.5 and 5/5)
      - this standard has been restated for these reports as the proportion scoring in the low-boxes to more clearly identify the measure being used and to avoid confusing explanations of the results
- This report uses a traffic light system to summarise the three satisfaction measures
  - ○ The green light indicates **high satisfaction** (all three measures above the thresholds described above)
  - O O The amber light indicates **good satisfaction** (one of the three measures failed to meet the thresholds)
  - ○ The red light indicates **low satisfaction** (two or three of the measures failed to meet the thresholds)

### **Overall summary of camper satisfaction**

- Overall, satisfaction with the 'overall camping experience' just meets the threshold of 50%
  - The mean average for all satisfaction items is higher due to the scores at Redstreak where personal interviews were used instead of a paper questionnaire
  - detailed results for each campground are presented in the following pages, full results are presented in the Appendix
- The satisfaction scores are very similar to last year's score's
- Another important measure of quality service is the likelihood of campers recommending the campground to their friends and/or family
  - all three campgrounds varied dramatically with 'very likely to recommend
  - Lake Louise (40%), Kicking Horse (50%), Redstreak (79%)

#### **Areas of Higher Satisfaction**

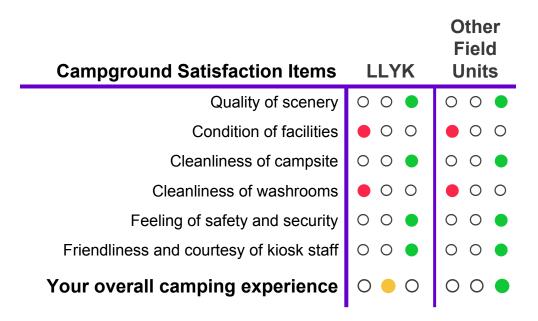
- Friendliness and Courtesy of Kiosk Staff
  - this item received the highest proportion of satisfaction ratings of 5/5 (and the highest mean score) in all three campgrounds
- Feeling of Safety and Security
  - unchanged from 2004 and 2005, this item received a 'green light' rating in all three campgrounds
- Cleanliness of Campsite
  - this receives a 'green light' rating in all three campgrounds

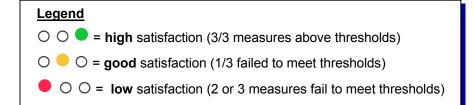
#### **Areas of Lower Satisfaction**

- Condition of facilities
  - this item received the lowest satisfaction scores in all campgrounds, but there were small increases in Lake Louise and Redstreak
  - this item also scores lower in LLYK than in all other participating Field Units (Banff, Jasper, and Prince Albert)
- Cleanliness of washrooms
  - a 'red light' item in all campgrounds, with the exception of Redstreak
- The overall camping experience
  - 'red light' item in both Kicking Horse and Lake Louise and a 'green light' in Redstreak
  - again, use caution when considering Redstreak's ratings due to the artificial inflation due to personal interviews

### Satisfaction at-a-glance: LLYK Campgrounds

- The satisfaction scores resulting in the 'red light' for 'cleanliness of washrooms' were consistent with the results from all Field Units (Banff, Jasper, and Prince Albert)
- Satisfaction scores for the 'condition of facilities' were noticeably lower in LLYK than in the other Field Units
- Campers' satisfaction with the 'overall camping experience' was a bit higher in LLYK than in other three Field Units
  - use caution due to inflated Redstreak scores

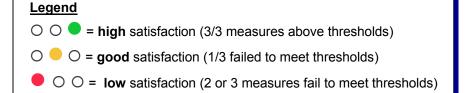




### Satisfaction at-a-glance: LLYK Campgrounds

- Most of the satisfaction items experienced only small changes compared to the Field Unit scores from 2004
- While also receiving a 'red light' rating in 2004 and 2005, campers' satisfaction with the 'condition of facilities' continues to be much lower than other FU's
  - only 37% of campers indicated that they were 'very satisfied' with this item
  - consistent with last year, low-box scores continue to be lower than average, with 25% of campers rating their satisfaction as 1, 2, or 3 out of 5
  - rated their satisfaction with this item
- Satisfaction with the 'overall camping experience' remain the same across the Field Unit
  - This item would likely continue to receive a yellow light rating if not for the inflated Redstreak scores

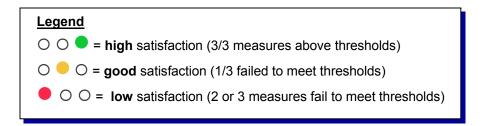
Campground Satisfaction Items	2006	2005
Quality of scenery	0 0 •	0 0 •
Condition of facilities	• 0 0	• 0 0
Cleanliness of campsite	00	0 0 •
Cleanliness of washrooms	• 0 0	• 0 0
Feeling of safety and security	00	0 0 •
Friendliness and courtesy of kiosk staff	00	00
Your overall camping experience	00	00



### Satisfaction at-a-glance: Kicking Horse

- The 'friendliness and courtesy of kiosk staff' and the 'quality of scenery' remain the items receiving the highest satisfaction rating form campers
- Satisfaction with the 'cleanliness of campsite' and 'feeling of safety and security' had a slight increase over 2005's results

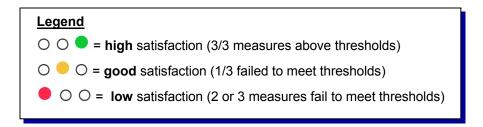
Campground Satisfaction Items	2006	2005
Quality of scenery	0 0 •	000
Condition of facilities	• 0 0	• 0 0
Cleanliness of campsite	00	0 0 •
Cleanliness of washrooms	• 0 0	• 0 0
Feeling of safety and security	00	0 0 •
Friendliness and courtesy of kiosk staff	00	0 0 •
Your overall camping experience	0 • 0	0 • 0



### Satisfaction at-a-glance: Lake Louise

- The satisfaction scores for the 'friendliness and courtesy of kiosk staff' decreased from 2005 (80% to 72%)
- Satisfaction with 'quality of scenery' received a 'yellow light' rating, reflecting a relatively high (17%) proportion of low-box (1, 2, or 3 out of 5) scores
  - this is the second year in a row this item has received a 'yellow light' rating in any campground satisfaction survey
- The analysis of previous results suggests that satisfaction with the 'quality of scenery' is highly correlated with satisfaction with the 'overall camping experience'
  - earlier research has concluded that it would be difficult to receive a 'green light' rating for satisfaction with the 'overall camping experience' if satisfaction with the 'quality of scenery' does not receive a 'green light' rating

Campground Satisfaction Items	2006	2005
Quality of scenery	0 • 0	0 • 0
Condition of facilities	• 0 0	• 0 0
Cleanliness of campsite	00	00
Cleanliness of washrooms	• 0 0	• 0 0
Feeling of safety and security	00	00
Friendliness and courtesy of kiosk staff	00	00
Your overall camping experience	• 0 0	• 0 0



### Satisfaction at-a-glance: Redstreak

- Redstreak received the most consistently high satisfaction scores of any of the three campgrounds in LLYK
- Again, personal interviews were conducted at this campground and as research shows, personal interviews yield higher top line results
- All items at Redstreak had in increase in top box scores over the 2005 results - that were collected by a paper questionnaire

Campground Satisfaction Items	2006	2005
Quality of scenery*	000	0 0 •
Condition of facilities	00	0 0 •
Cleanliness of campsite	00	0 0 •
Cleanliness of washrooms	00	0 0 •
Feeling of safety and security	00	0 0 •
Friendliness and courtesy of kiosk staff	00	0 0 •
Your overall camping experience	00	00

\*Not asked in 2006

# Legend ○ ○ ■ = high satisfaction (3/3 measures above thresholds) ○ □ = good satisfaction (1/3 failed to meet thresholds) ■ ○ □ = low satisfaction (2 or 3 measures fail to meet thresholds)

### Satisfaction At-a-glance: Recommend to friends/family

- Beginning with the 2004 version of the questionnaire, campers were asked about the likelihood that they would recommend this campground to their friends and/or family
  - analysis of the results from 2004 highlighted that the reported likelihood to recommend was strongly related to satisfaction with the overall camping experience
- Existing research points to the importance of high reported likelihood of recommending a service/facility (5/5) as an indicator of overall satisfaction
  - 57% of campers in the three LLYK campgrounds responded that they would be very likely to recommend this campground to their friends and/or family

	Not at all Likely to				Very Likely to	
	Recommend				Recommend	
	1	2	3	4	5	Mean
Would you recommend this campground to your friends/family?	3%	5%	15%	30%	48%	4.2

There was some difference by campground, overall the high likelihood that campers would recommend the campground to friends and/or family can be seen as another indication of their overall satisfaction with their camping experience if they are willing to recommend this place to those who matter the most to them

	Not at all Likely to Recommend				Very Likely to Recommend	
	1	2	3	4	5	Mean
Kicking Horse	1%	2%	12%	35%	50%	4.3
Lake Louise	4%	7%	18%	31%	40%	4.0
Redstreak	0%	1%	2%	18%	79%	4.8

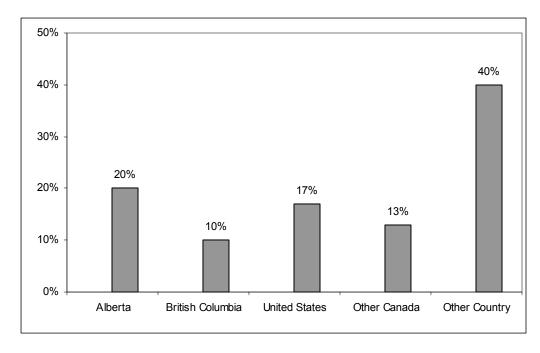
### **Visitor profiles:** Origin

Campers can be divided into four origin groups

_	Alberta	20%
_	BC	10%
_	Other Canada	13%
_	USA	17%
_	Other International	40%

- There was a high percentage of campers from Germany, Netherlands, and Switzerland
- The majority of campers have a passport for international travel
  - Kicking Horse (83%)
  - Redstreak (66%)
- Of the American visitors
  - 84% of Kicking Horse campers had passports and 75% of Redstreak campers

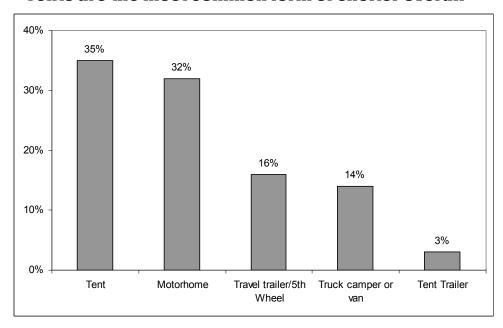
#### Almost half of the campers are from overseas...



<sup>\*</sup>Responses are weighted to represent the population of 17,712 eligible camping parties during the survey period. A discussion of this weighting appears in the Appendix.

### **Visitor profiles:** Camping Shelter

#### Tents are the most common form of shelter overall



Type of Camping Unit Used by Campground	Lake Louise	Kicking Horse	Redstreak
Tent	30%	40%	38%
Motorhome	36%	31%	12%
Large trailer/5th wheel	16%	8%	31%
Truck camper/van/car	14%	18%	6%
Small/tent trailer	4%	3%	13%

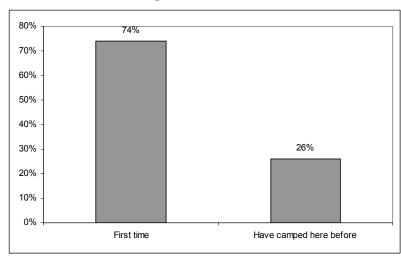
- The majority of campers at Kicking Horse and Redstreak use tents and Lake Louise campers motorhomes
- Tents are the most frequently used shelter by all Canadian groups and Americans (Alberta 43%, B.C. 55%, other Canadians 42%)
- Overseas visitors mostly use motorhomes (54%)

### **Visitor profiles:** Party Size & Previous Visits

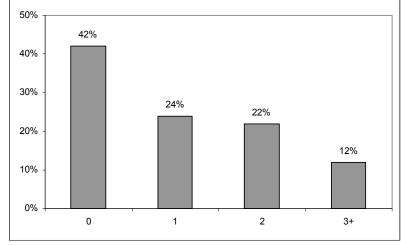
Average Party Size by Campground	Average Party Size
Lake Louise	2.7
Kicking Horse	2.8
Redstreak	3.7

- The average camping party size is 2.9 people
- The average party sizes are presented in the adjacent table as they allow us to estimate the number of people in a campground on any particular night for which the site count is known
- More than half of Alberta's visitors have stayed in these campgrounds before (64%)
  - 73% of Albertans have stayed at Redstreak
  - 63% of Albertans have stayed at Kicking Horse before
  - 50% of Albertans have stayed at Lake Louise before
- 62% of campers reported they would stay at this campground again

#### Most are camping here for the first time...



### Of the returnees, over half have camped here in the last two years...



### **Visit profiles:** Length of Stay

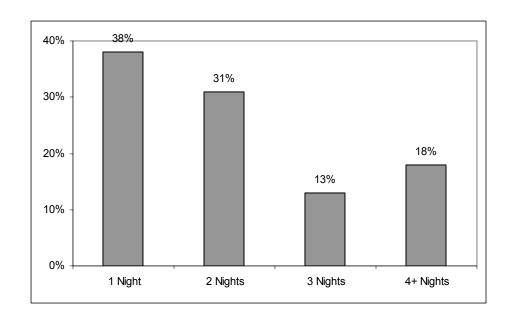
- The average length of stay in all campgrounds is 2.4 nights
- More than one-third of the visitors stay for one night only
  - More campers stay 4+ nights at Redstreak (47%) than Kicking Horse (13%) and Lake Louise (12%)
- The average length of stay varies slightly by campground:

Lake Louise
Kicking Horse
Redstreak
2.1 nights
4.2 nights

And by visitor origin:

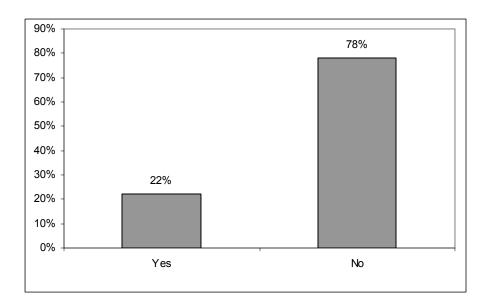
Other Canada
Alberta
British Columbia
U.S.A.
Overseas
2.1 nights
2.4 nights
2.5 nights
1.2 nights

#### One nights is the most frequent length of stay...



### **The pccamping Reservation System**

 22% of campers staying at Lake Louise indicated that they had made a reservation for their current visit



Why did you not make a reservation?		
	Did not make	
	a reservation	
Do not travel following a planned itinerary	40%	
Last minute trip/Decision to stop	10%	
Did not know about the service	19%	
Did not think a reservation would be		
necessary for this campground	9%	
Reservation fee too high	8%	
Do not like to make reservations	9%	
Other	5%	

### **Electric Fence**

- Overall, more than half of the campers at Lake Louise said the electric fence had no effect on their camping experience
  - Among the remaining 49%, the overwhelming majority indicated that the electric fence had a positive effect
  - Only 3% of all campers indicated that the electric fence had a negative impact on their camping experience
- It would appear that the electric fence had a greater negative impact on tenters as almost two-thirds (62%) of the reports of a negative impact on their experience came from the 30% of the campers who used tents.

	Very negative		No effect		Very Positive
Did the electric fence effect your	-2	-1	0	1	2
camping experience?	2%	1%	61%	11%	25%

# **Appendices**

- 1. Detailed Results
- 2. The Questionnaire
- 3. Sample Weighting

#### LLYK Campgrounds

(results are weighted to represent all occupied sites between June 25 and September 5, 2005)

LLYK Campgrounds	Not at all Satisfied				Very Satisfied		? Total onses
22 m Sampgrounds						1100p	Number
	1	2	3	4	5	Mean	of Cases
Quality of scenery	1%	3%	11%	27%	58%	4.4	30 197
Condition of facilities	2%	5%	18%	38%	37%	4.0	39 719
Cleanliness of campsite	1%	1%	5%	31%	62%	4.5	39 736
Cleanliness of washrooms	3%	6%	16%	34%	41%	4.1	37 843
Feeling of safety and security	1%	0%	3%	27%	69%	4.6	40 246
Friendliness ad courtesy of kiosk staff	0%	1%	4%	21%	74%	4.7	39 039
Your overall camping experience	1%	2%	10%	37%	50%	4.3	40 050

Kicking Horse

Kicking Horse	Not at all Satisfied				Very Satisfied		Total onses
	1	2	3	4	5	Mean	Number of Cases
Quality of scenery	0%	1%	4%	24%	71%	4.6	408
Condition of facilities	2%	6%	23%	44%	25%	3.8	405
Cleanliness of campsite	1%	1%	4%	31%	63%	4.6	407
Cleanliness of washrooms	1%	<b>7</b> %	25%	37%	30%	3.9	403
Feeling of safety and security	0%	1%	4%	32%	63%	4.6	403
Friendliness ad courtesy of kiosk staff	0%	0%	3%	18%	79%	4.8	405
Your overall camping experience	0%	1%	7%	46%	46%	4.4	407

Lake Louise

Lake Louise	Not at all Satisfied				Very Satisfied		Total onses
	1	2	3	4	5	Mean	Number of Cases
Quality of scenery	1%	3%	13%	29%	54%	4.3	332
Condition of facilities	2%	7%	20%	38%	33%	4.0	330
Cleanliness of campsite	1%	1%	7%	33%	58%	4.5	327
Cleanliness of washrooms	5%	8%	15%	36%	36%	3.9	312
Feeling of safety and security	2%	0%	3%	26%	69%	4.6	337
Friendliness ad courtesy of kiosk staff	0%	1%	5%	22%	72%	4.7	324
Your overall camping experience	2%	2%	14%	38%	44%	4.2	332

Redstreak

Redstreak	Not at all Satisfied				Very Satisfied		Γotal onses
	1	2	3	4	5	Mean	Number of Cases
Condition of facilities	1%	2%	7%	36%	54%	4.4	406
Cleanliness of campsite	0%	2%	3%	26%	69%	4.6	413
Cleanliness of washrooms	0%	1%	7%	29%	63%	4.5	379
Feeling of safety and security	0%	1%	2%	25%	72%	4.7	410
Friendliness ad courtesy of kiosk staff	0%	0%	2%	19%	79%	4.8	394
Your overall camping experience	0%	1%	2%	28%	69%	4.7	412

## **Appendix 2: 2006 Questionnaires**

			For Office Use only
61878	For Office Use Only	Welcome to Lake Louise Campground! Our goal is to provide you with the highest quality of services and programs. Please complete this form before you leave using the pencil provided. <u>Please return</u> the form to the campground kiosk.	Very likely to recommend Not at all likely to recommend  ○ 5 ○ 4 ○ 3 ○ 2 ○ 1
Welcome to Kicking Horse Campground! Our goal is to provide you with the highest quality of services and programs. Please complete this form before you leave using the pendi provided. Please return the form to the campground kiosk.	6. Have you stayed in this campground before?  O No O Yes  If yes, how many times in the past two years?  O 0 O 1 O 2 O 3 O 4 O 5 O 6 O 7+	Where is your permanent place of residence?     Alberta	<ol> <li>How well are we doing? Please rate your satisfaction with the following aspects of this campground (shade N/A for any items that do not apply to this visit).</li> <li>Very Not at all Satefied</li> </ol>
Where is your permanent place of residence?     Alberta	7. Will you stay at this campground again?  O No O Yes O Am not planning to return to the area  8. Would you recommend this campground to friends or famil  Very likely to recommend  O 5 O 4 O 3 O 2 O 1	O Residents' Pass O National Parks Annual pass  3. How many nights did you stay at this campground during	Condition of facilities
What type of pass are you using for this visit?     No pass	<ol> <li>How well are we doing? Please rate your satisfaction with the following aspects of this campground (shade N/A for ar items that do not apply to this visit).</li> </ol> Very Not at:	this visit to the park?  1	10. Did you reserve this campsite using the Parks Canada Campground Reservation Service (pccamping.ca or 1-877-RESERVE)?
3. How many nights did you stay at this campground during this visit to the park?  O 1  O 2  O 3  O 4  O 5  O 6  O 7 O 8  O 9  O 10  O 11  O 12  O 13  O 14+ 4. How many people were in your camping party? O 1  O 2  O 3  O 4  O 5  O 6  O 7+	Satisfied   Sati	d D1 O2 D3 O4 D5 O6 D7+	11. If you did not make a camping reservation, why did you not?  Did not know about the sentce  Do not travel following a planned illnerary  Last minute trip/decision to stop  Do not like to make reservations  Did not think a reservation would be necessary for this campground  Reservation fee too high
Which of the following did you use at this campground on this trip? (shade all that apply)     tent    tent trailer    truck camper or van     motorhome     travel trailer/5th wheel     Other	10. Do you currently have a passport for international travel?  O No O Yes	O No O Yes If yes, how many times in the past two years? O 0 0 1 0 2 0 3 0 4 0 5 0 6 0 7+ 7. Will you stay at this campground again?	O Other, please specify:  12. Did the electric fence around the campground effect your camping experience?
If you are willing to participate in future Parks Canada research proje	olying to this survey! cts, please provide your name and telephone number (North American Il only be used to contact you about research projects, in accordance with	If you are willing to participate in future Parks Canada research proje	Very positive No effect Very negative  2 0 1 0 0 -1 0 -2  plying to this survey!  ects, please provide your name and telephone number (North American ill only be used to contact you about research projects, in accordance with
Phone ( )		Canada's Privacy Legislation.  First Name  Last Name  Phone ( )   -	
Parks Parcs Canada Canada	Canad <b>ä</b>	Parks Paros Canada Canada	Canad <b>ä</b>

### **Appendix 3:** Sample Weighting

- The results of this survey have been weighted up to the population of campers who camped within the LLYK Field Unit during the survey period (July 1 to August 31)
- This population was defined by taking the total number of occupied sites (42,072) during this period:

Lake Louise 23,687
 Kicking Horse 8,505
 Redstreak 9,880

Dividing these numbers by the average length of stay reported by campers in each campground:

Lake Louise
 2.47 nights (26% with reservation)
 2.00 nights (74% without reservation)

Kicking HorseRedstreak2.09 nights4.15 nights

To produce the estimated population of camping parties (17,712):

Lake Louise
 2,435 camping parties (with reservation)
 8,837 camping parties (without reservation)

Kicking Horse 4,069 camping partiesRedstreak 2,381 camping parties

Valid responses (1,194) were weighted by campground so that the Field Unit's results presented in this report would reflect the entire population of occupied sites in these three campgrounds during this period:

Lake Louise
 95 questionnaires
 25.628 weight factor
 262 questionnaires
 33.728 weight factor

Kicking Horse
 Redstreak
 424 questionnaires
 9.598 weight factor
 5.766 weight factor