



STEP

St. Paul / Elk Point
Economic Development Alliance

Tourism Accommodation Strategy:

*Supporting Tourism Growth
in the STEP Region*



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Executive Summary

The accommodation sector is a cornerstone of tourism development in the STEP Region, comprising the Town of St. Paul, the County of St. Paul, and the Town of Elk Point. As the tourism industry continues to evolve in response to shifting traveller preferences, global trends, and regional dynamics, the need for a forward-looking, sustainable, and inclusive accommodation strategy has become increasingly urgent.

This Accommodation Strategy Report presents a comprehensive plan to enhance the region's tourism infrastructure by promoting the development and diversification of the local accommodation sector. It serves not only as a tool for enhancing visitor experiences and extending overnight stays but also as a catalyst for economic development, job creation, and community well-being.

Regional Context and Industry Challenges

Tourism in the STEP Region remains moderately developed, with most visitor activity occurring during the peak months of May to September. While the region boasts several strong tourism assets, including lake-based recreation, sports events, and outdoor experiences, the accommodation sector faces a range of challenges. These include:

- A heavy reliance on workforce accommodation, with a need to diversify offerings for leisure, wellness, and experience-driven travellers.
- Aging infrastructure across several motels and hotels, limiting the region's ability to attract higher-spending visitors.
- Many operators have limited online presence and marketing capacity, which reduces the region's visibility in competitive tourism markets.
- Seasonal demand fluctuations contribute to the underutilization of existing assets, limiting year-round revenue generation.
- Accessibility and inclusivity gaps across fixed-roof and non-fixed-roof accommodations, affecting the ability to serve a diverse array of guests.

Strategic Research Foundations

The strategy builds upon extensive literature and industry reviews that highlight key macro-level trends in Canadian tourism, including the rise of alternative accommodations, increasing demand for wellness- and nature-based experiences, the growth of the short-term rental (STR) economy, and the need for sustainable tourism practices. Regional data provided by Destination Canada and the Alberta Hotel and Lodging Association reinforces the opportunity to target long-stay, value-driven travellers and leverage accommodation development as an economic engine. Stakeholder consultations across the STEP Region, including interviews with hotel, motel, campground, and STR operators, have further validated these insights and provided localized perspectives on market conditions, visitor behavior, operational barriers, and future potential.

Key Sector Insights and Opportunities

The report presents a nuanced picture of the accommodation landscape in the STEP Region, identifying distinct yet interconnected subsectors: fixed-roof accommodations, short-term rentals, and non-fixed-roof accommodations, including campgrounds and glamping.

Hotels and Motels in the region primarily serve workforce clients, business travellers, followed by leisure travellers. However, opportunities exist to reposition select properties toward boutique-style, themed, or co-working-focused stays. The upcoming 2026 Alberta Winter Games and local sports events offer significant potential for event-based tourism growth.

Short-term rentals (STRs), including log cabins, treehouses, and nature-based lodgings, are gaining popularity among visitors seeking personalized and immersive experiences. While demand is high, especially for summer and weekend stays, operators face regulatory uncertainty and infrastructure constraints. Formalizing STR policy and integrating it into the broader tourism ecosystem will be essential for long-term success.

Campgrounds and Glamping have experienced record visitation growth, particularly from local and adjacent regional markets. The County and Town of St. Paul operate well-regarded sites that offer strong visitor amenities. However, there is a clear need for reinvestment in accessible infrastructure, modern booking systems, and product diversification (e.g., geodomes, huts, and year-round accommodations) to meet the expectations of new camper demographics and outdoor adventurers.

Strategic Framework for Growth

The report proposes ten strategic areas to guide investment, innovation, and coordination across the STEP Region's accommodation sector. These strategies are designed to support inclusive, sustainable, and competitive growth while preserving community values and local identity:

1. Economic Development and Investment
 - Diversify the region's accommodation base to include boutique hotels, rural stays, Indigenous-led accommodations, and experiential lodging options.
 - Support investor confidence and business readiness through market toolkits, investment promotion, and strategic use of Destination Marketing Fees (DMFs).
2. Enhancing Unique Accommodations and Storytelling
 - Use authentic regional narratives, cultural partnerships, and creative design to position accommodations as part of the visitor experience.
 - Showcase local identity through design, programming, and curated visitor packages.
3. Advancing Campground Competitiveness
 - Benchmark campground performance, set visitation targets, and invest in site upgrades that support both accessibility and comfort.
 - Implement integrated digital booking and analytics platforms to better understand visitor behavior and improve marketing.
4. Supporting Sustainability in Small Accommodation Enterprises
 - Offer sustainability training and financial incentives to improve water conservation, energy use, and waste management practices in STRs and motels.
 - Position sustainability as a competitive advantage to appeal to values-driven travellers.
5. Balancing STR Growth with Housing and Community Needs
 - Develop clear, locally appropriate STR policies that allow for flexibility while protecting community cohesion and housing availability.
6. Investing in Workforce Development and Industry Support
 - Expand training programs such as SuperHost and develop modules for high school students and frontline staff.
 - Encourage collaboration between accommodation providers, economic development offices, and tourism organizations.
7. Increasing Predictability and Access in Visitor Flow
 - Use rural STRs to absorb overflow during major events and enhance agritourism and alternative accommodations to support regional dispersion.
8. Strengthening Event Partnerships and Regional Marketing
 - Align accommodation providers with regional festivals, sporting events, and meetings markets to drive consistent visitation.

- Implement coordinated, joint marketing campaigns to build destination awareness and seasonal promotions.
- 9. Embedding Cultural, Environmental, and Inclusive Values
 - Incorporate Indigenous tourism development, 2SLGBTQ+ welcoming practices, and accessibility standards into hospitality training and operations.
- 10. Developing Year-Round Attractions and Itineraries
 - Extend the season through micro-huts, winter glamping, and off-grid stays, paired with event-based and themed itinerary packages.

Priority Actions for Implementation

Based on stakeholder input and regional readiness, the strategy identifies four key priorities for immediate action:

- **Enhance Unique Accommodations** that reflect STEP's landscapes, stories, and hospitality.
- **Strengthen Event Partnerships** to leverage major regional events, niche experiences, and increase overnight stays.
- **Advance Campground Competitiveness** through a competitive benchmark assessment to guide focused investments in operational decision-making, infrastructure upgrades, and inclusive design.
- **Invest in Year-Round Attractions** to support off-season travel and local economic resilience.

These actions aim to support the region's goal of attracting longer-stay, higher-value, and repeat visitors while improving the quality of life for residents, expanding workforce opportunities, and reinforcing STEP's position as a distinct, welcoming, and experience-rich destination.



1. Literature Review

Introduction

The accommodation sector plays a vital role in the tourism industry, making a significant contribution to economic growth, employment, and destination competitiveness. As consumer preferences evolve and external challenges shape industry trends, accommodation providers must adapt their strategies to maintain a competitive edge. Key themes influencing the sector include sustainability, niche accommodations, digital transformation, regional development, and Indigenous tourism. These aspects are central to understanding the current dynamics of the accommodation industry and its strategic responses to emerging challenges and opportunities.

Sustainability in the Accommodation Sector

Sustainability has become a significant focus, driven by increasing consumer demand for eco-conscious travel. Accommodations have incorporated sustainable practices, including energy-efficient solutions, water conservation initiatives, the integration of climate technology, and sustainable food offerings (Climate Trade, 2024). Hotels and modern inns have adopted LED lighting, motion-sensor lighting, smart thermostats, towel reuse programs, and opt-out housekeeping to minimize environmental impact. While many accommodations have implemented these measures, effectively marketing sustainability initiatives remains a challenge. Research suggests that well-communicated sustainability efforts enhance brand reputation and competitive positioning (Climate Trade, 2024).

Airbnb hosts and short-term rental operators are also encouraged to install solar panels, purchase renewable energy credits, and implement low-flow water fixtures to reduce their environmental footprint. The adoption of digital tools such as real-time carbon footprint monitoring and offset programs further enhances sustainability efforts within the sector (Climate Trade, 2024).

The Rise of Niche and Alternative Accommodations

Changing traveller preferences have led to the expansion of niche accommodations, prioritizing personalized and experiential stays. Wellness retreats, farm stays, and boutique hotels cater to travellers seeking relaxation and health-oriented experiences, while pod accommodations and micro-hotels offer compact, budget-friendly lodging solutions (Frontenac County, 2024). The rise of glamping—luxury camping in upscale yurts, treehouses, and eco-lodges—has also gained popularity among travellers seeking immersive outdoor experiences.

Condominiums, timeshares, and fractional ownership models continue to grow, particularly in rural and emerging tourism destinations. Their success depends on maintaining high occupancy rates and offering repeat-visitor incentives. Additionally, home-sharing policies are being explored in some regions to facilitate small-scale accommodation businesses and support local tourism growth (Maple Ridge Tourism Strategy, 2023).

Market Trends and Digital Transformation

The hospitality sector in Canada accounts for 25%-35% of tourism-related expenditures (BC Accommodation Industry Overview). Notable market trends include the rise of budget boutique hotels, which merge affordability with curated guest experiences, and the growing impact of the sharing economy, with platforms like Airbnb disrupting traditional hotel models. The increasing demand for same-day bookings highlights the shift toward flexible travel planning.

Digital transformation plays a vital role in maintaining competitiveness, with accommodations prioritizing an online presence, reputation management, and seamless booking processes (BC Accommodation Industry Overview). Hostels and budget accommodations utilize digital tools, including touchless entry, QR code check-ins, and social media engagement, to attract younger, experience-driven travellers (PEI Tourism Strategy, 2023).

Operational Best Practices for Accommodation Businesses

Operational best practices emphasize market awareness, strong customer service, competitive pricing, extended operational seasons, property improvements, and effective digital engagement (Nova Scotia Accommodation Business Guide, 2020). Authentic experiences and cultural immersion are becoming increasingly important to travellers, with platforms like TripAdvisor and Instagram significantly influencing booking decisions.

Coastal tourism accommodations prioritize service quality enhancements over rigid infrastructure-based standards. Legislative reforms in destinations such as the Canary Islands have focused on enhancing customer experience, digital reputation management, and hospitality training to meet evolving consumer expectations (Strategies to Improve Quality in Coastal Tourism).

Destination-Specific Accommodation Strategies

Localized accommodation trends provide further insights into regional development. In Langford, the Municipal Regional District Tax (MRDT) funds tourism initiatives under four pillars: destination marketing, destination development, visitor services, and sports and event tourism (Langford Five-Year Tourism Strategy, 2023). Emerging trends in Langford include outdoor adventure tourism, remote work-friendly accommodations, Indigenous tourism initiatives, and digital transformation.

Post-pandemic tourism recovery strategies in Prince Edward Island (PEI) emphasize labour market improvements, private-sector investment, and infrastructure development. PEI has experienced a rise in slow travel, with visitors opting for longer stays and increased spending, alongside the growth of wellness tourism and rural tourism through cottage rentals and nature-based travel (PEI Tourism Strategy, 2023).

Maple Ridge faces accommodation shortages, prompting recommendations such as encouraging hotel chain investment, expanding RV resorts and camping facilities, and regulating short-term rentals. Additionally, placemaking, Indigenous storytelling, and farm-to-table experiences are key tourism drivers in Maple Ridge (Maple Ridge Tourism Strategy, 2023).

National-Level Accommodation Growth Strategies

At the national level, the Hotel Association of Canada has outlined a growth strategy emphasizing workforce development, visitor accessibility, hotel expansion, and inclusive and sustainable tourism. Key objectives include training and retention initiatives, infrastructure investments, and the addition of 315,000 new hotel rooms by 2030, along with diversity-driven hiring and reconciliation efforts (Hotel Association of Canada, 2022).

Alberta's Accommodation Industry: Performance, Challenges, and Growth Projections

Post-Pandemic Recovery and Industry Growth

Alberta's accommodation sector has experienced a strong recovery following the COVID-19 pandemic. Between 2022 and 2023, key performance indicators showed significant improvement, with an 11%

increase in the average daily rate (ADR) and a 22% rise in revenue per available room (RevPAR). This growth has been driven by increasing demand for domestic and international travel, as well as the stabilization of Alberta's energy sector (CBRE & AHLA, 2023).

However, despite these positive trends, the industry continues to face several ongoing challenges, including fluctuating weekday occupancy rates, rising labour costs, deferred maintenance, and escalating insurance premiums. Additionally, housing affordability has emerged as a critical issue, prompting policy discussions around primary residence requirements, 30-day rental limits, and restrictions on short-term rental investment properties (AHLA, 2023).

Economic Outlook and Hotel Development

According to projections from the CBRE AHLA Outlook Presentation (2024-2025), Alberta's GDP is expected to grow between 0.6% and 2.7% over the next two years, with continued expansion in both leisure and business travel. By 2028, overnight visits to the province are anticipated to reach 16.3 million, with overseas visitation projected to increase by 6.5% in 2024 (CBRE, 2024).

Major Urban Markets

- Calgary: The city's GDP is forecasted to grow by 1.9% in 2024, rising to 3.4% by 2028. Hotel development remains strong, with new projects such as the Element Calgary Downtown and Hampton Inn Downtown expected to contribute to an anticipated 67% occupancy rate by 2025 (CBRE, 2024).
- Edmonton: The city's GDP is expected to reach \$118 billion by 2028, despite a projected unemployment rate exceeding 7%. Edmonton's hotel occupancy is forecasted to hit 59% by 2025 (CBRE, 2024).

Accommodation as a Driver of Tourism Growth

To support Alberta's target of increasing visitor expenditures to \$25 billion by 2035, Travel Alberta has identified the need for an additional 7,000 hotel rooms. A CBRE analysis commissioned by Travel Alberta highlights three near-term accommodation projects—a luxury ecolodge and two resort hotels—that will add 360 new rooms to the province's tourism inventory. The construction of these projects is projected to generate \$184 million in GDP, create 1,500 jobs, and contribute \$6.3 million in tax revenue. Visitor spending from these developments is expected to reach \$1.1 billion between 2029 and 2035 (Travel Alberta, 2025).

Resort Market Performance

Alberta's resort market remains a top performer within Canada's accommodation sector. The ADR in Alberta's resort destinations is forecasted to reach \$455 in 2024, while the province-wide ADR is expected to increase to \$156 by 2025, with RevPAR projected to hit \$95 (CBRE, 2024).

Investment Trends and National Comparison

Alberta remains a leading destination for hotel investment in Canada. In 2023, the province recorded \$356.9 million in hotel transactions, with an additional \$226 million in deals reported in 2024. Alberta ranks second in Canada for hotel investment, following Ontario, with the majority of transactions concentrated in major urban centers (CBRE, 2024).

Comparison with Other Canadian Markets

- Vancouver is expected to lead the Canadian hotel market in 2025, with a projected RevPAR of \$230.
- Toronto follows with a RevPAR of \$175, while Calgary and Edmonton are forecasted to reach \$122 and \$92, respectively (CBRE, 2024).

- Canada's national occupancy rate is expected to stabilize at 66% through 2026, with ADR projected to reach \$217 by 2027 (CBRE, 2024).

Workforce Shortages and Housing Affordability

One of the most pressing challenges in Alberta's accommodation industry is workforce shortages. To meet future demand, an estimated 20,000 new accommodation-related jobs will be required. This issue is further exacerbated by concerns over housing affordability, particularly for employees in the accommodation and food services sector, where the housing price-to-income ratio ranges between 12 and 13, significantly higher than the provincial average of 7 (AHLA, 2024).

Tourism-dependent communities such as Banff, Canmore, and Jasper face additional pressures due to limited land availability, making workforce housing particularly challenging to secure. In response, the Alberta government has proposed a tourism workforce housing strategy to support hospitality workers and alleviate housing shortages in these regions.

Long-Term Industry Outlook

While Alberta's tourism and accommodation sector remains on an upward trajectory, several risks persist, including economic uncertainty, inflation, and financial constraints affecting discretionary travel. However, substantial investment activity, increasing visitor numbers, and continued economic growth position Alberta's hotel industry for sustained expansion in the coming years (CBRE, 2024).

2. Destination Canada's Tourism Data Collective Information for St. Paul, County of St. Paul, and Elk Point

The Tourism Data Collective Information Summaries provide an overview of tourism-related economic and employment data for three Census Subdivisions within Alberta's Lakelands Tourism Region: St. Paul, St. Paul County No. 19, and Elk Point. Tourism activity in the region is moderate, with St. Paul experiencing the highest tourism prevalence among the three areas. The Visitor Spend Index for the Lakelands region is 0.7 times the national average, indicating that tourism spending in the region falls below the national benchmark. Visitor expenditures are primarily domestic and subject to seasonal fluctuations, with peak months occurring in summer.

The region's tourism business landscape varies, with St. Paul hosting 52 tourism-related businesses, while St. Paul County No. 19 has 20, and Elk Point has 7. These businesses span food and beverage, accommodation, transportation, recreation and entertainment, and travel services; however, breweries, wineries, and distilleries are not categorized as tourism businesses in this dataset. More broadly, the general business environment across the three areas differs: St. Paul has 1,278 total businesses, dominated by health care, agriculture, and real estate; St. Paul County No. 19 has 956 businesses, focusing on transportation, agriculture, and construction; and Elk Point has 107 businesses, primarily in professional services, retail trade, and resource extraction.

Tourism employment also varies across the region. St. Paul employs 235 people in tourism, representing 9.0% of total employment, higher than the national average of 8.2%. St. Paul County No. 19 employs 135 people in tourism (4.3% of total employment), while Elk Point has 30 tourism employees (4.8%). St. Paul has a notably strong Indigenous and immigrant workforce, with 21.3% of its tourism employees identifying as Indigenous and 25.5% as immigrants. In contrast, St. Paul County No. 19 has 7.4% Indigenous and immigrant tourism workers, while Elk Point reports 0% for both demographics.

Accommodation availability varies significantly across the three areas, according to the Tourism Data Collective. St. Paul has between 100 and 499 hotel rooms and 5–24 short-term rental units, yet its occupancy and revenue per room indices remain below the national average. St. Paul County No. 19 offers 25–49 hotel rooms and 5–24 short-term rental units, with higher-than-average occupancy (1.7 times the national average) and revenue per room (1.5 times the national average). Elk Point has 25–49 hotel rooms and 1–4 short-term rental units, with significantly lower occupancy and revenue per room indices (Tourism Data Collective, March 2025).

Visitor accessibility is influenced by proximity to the nearest airports. The airports that are within a 2-hour drive of St. Paul, Alberta are as follows:

- The St. Paul Aerodrome (CEW3) is located approximately 3.7 km west of St. Paul, Alberta.
- The Elk Point Municipal Airport (CEJ6): Situated about 15 km east of St. Paul, near Elk Point, Alberta. It features a 1,369-meter (4,492-foot) asphalt runway.
- Bonnyville Airport (CYBF): Located approximately 54 km northeast of St. Paul in Bonnyville, Alberta.
- Cold Lake Regional Airport: Found around 90 km northeast of St. Paul in Cold Lake, Alberta.
- Vegreville Airport: Approximately 67 km southwest of St. Paul in Vegreville, Alberta.
- Lloydminster Airport (CYLL): Located about 158 km southeast of St. Paul in Lloydminster, Alberta.
- Edmonton International Airport (YEG): Approximately 223 kms away from St. Paul, Alberta.

Housing affordability is also a concern for tourism employees, with 24.0% of St. Paul households, 14.0% of St. Paul County No. 19 households, and 23.5% of Elk Point households spending 30% or more of their income on shelter costs.

In conclusion, tourism in the Lakelands region plays a moderate role in the local economy, with St. Paul being the most tourism-intensive area. Visitor spending is below the national average, and accommodation capacity varies across the region. Tourism employment is notably strong in St. Paul. Accessibility to St. Paul is predominantly rubber tire traffic, with visitors arriving from regional communities, Lloydminster and Edmonton, Red Deer and Calgary.

Indigenous Tourism and Accessibility in the Accommodation Sector

Indigenous tourism has emerged as a significant growth area, with the Indigenous Tourism Association of Canada (ITAC) promoting Indigenous-owned accommodations and cultural tourism experiences. Government initiatives support these efforts as part of broader economic diversification strategies (ITAC, 2024). Alberta's outdoor recreation economy, which generates \$2.3 billion annually and supports over 36,000 jobs, underscores the importance of sustainable tourism management and infrastructure investment (TIAA, 2023).

Accessibility in the hospitality sector remains a concern, with challenges including insufficient accessible facilities, a lack of staff training, and gaps in emergency preparedness. Best practices recommend the use of standardized accessibility templates, infrastructure assessments, and collaboration with local organizations to enhance inclusivity (Alberta Barrier-Free Design Guide, 2023).

Conclusion of Literature Review

Several key insights emerge from the literature on trends and strategies in the accommodation sector. Sustainability is both a moral imperative and a competitive advantage, with effective marketing of eco-friendly practices attracting premium-paying guests. Experiential accommodations, such as wellness retreats, glamping, and boutique hotels, continue to drive demand. Digital transformation, including touchless entry, real-time booking capabilities, and online engagement, is essential for maintaining competitiveness. Strategic investment in accommodation development, as evidenced by case studies from Langford, Maple Ridge, and PEI, underscores the importance of targeted investment in tourism growth. The accommodation sector stands at a pivotal moment, requiring stakeholders to embrace innovation, sustainability, and strategic planning to thrive in an evolving tourism landscape.

While it is crucial to support current stakeholders, enticing new entrants, especially those interested in launching unique accommodations, requires a clear understanding of emerging trends and strategic opportunities. The literature highlights several approaches that can inspire and attract potential investors or entrepreneurs:

1. **Highlight Growing Demand for Experiential Stays:** Emphasize the strong and growing market for *experiential accommodations* like wellness retreats, glamping, and boutique hotels. Prospective operators are more likely to be enticed when they see that unique, themed, or niche accommodations are in high demand and often command premium pricing.
2. **Promote Sustainability as a Market Differentiator:** Show how integrating *eco-friendly and sustainable practices* not only aligns with personal and global values but also offers a competitive edge. Marketing these green credentials effectively can attract a segment of guests willing to pay more, a key motivator for entrepreneurs.
3. **Showcase Digital Transformation as a Low Barrier to Entry:** Many small-scale or independent operators may be daunted by tech requirements. However, digital tools such as real-time booking, touchless check-in, and social media marketing have become increasingly accessible

and user-friendly. Demonstrating how these tools can be leveraged with minimal upfront cost might encourage those on the fence.

4. Use Case Studies to Illustrate Success: Drawing from examples such as Langford, Maple Ridge, and PEI, strategic investment in accommodations has led to tangible growth in tourism. These success stories can be shared to illustrate the return on investment and community impact of opening unique lodging options.
5. Foster a Supportive Ecosystem: To attract new stakeholders, communities can offer *incentives*, *planning support*, or *training programs* tailored to niche accommodation development. Creating a local environment that reduces risk and fosters innovation can help encourage potential operators to act.

3. Key Findings: The Local Perspective

Accommodation Stakeholders and Key Findings in St. Paul, County of St. Paul, and Elk Point

Overview

The accommodation sector in St. Paul, County of St. Paul, and Elk Point comprises a mix of short-term and long-term stay providers, primarily catering to workforce accommodations, business travelers, event attendees, and leisure travelers. This report synthesizes findings from multiple accommodation providers in the region, identifying key trends, challenges, and opportunities within the local hospitality sector.

Accommodation Stakeholders: Hotels and Motels

The assessment includes various accommodation establishments across the region:

St. Paul:

- **Canalta Hotel:** A mid-sized hotel catering primarily to business travelers and event attendees. It sees increased traffic in the summer months due to ATV and snowmobiling tourism and offers predictable amenities such as a swimming pool and breakfast.
- **The Landing:** A tourism initiative aligned with regional economic development strategies. It has strong ties with First Nations and Métis communities and is popular for sports events, weddings, and conferences.
- **St. Paul Lodge:** A small lodge primarily serving transient workforce guests.
- **Galaxy Land:** A diverse accommodation provider catering to construction workers and long-term guests.
- **Woodland Motor Inn:** A mixed-use property that accommodates both short-term and long-term guests.
- **Portage College** – seasonal college dorm rooms available to leisure and business travellers.
- **Kings Hotel** – not available for assessment or consideration.

Elk Point:

- **Hilltop Motor Inn:** A recently acquired and renovated motel that serves both the workforce and leisure travellers.
- **Elk Point Motel and RV Park:** A long-established business catering mainly to oil and construction workers.
- **Bethel Hotel:** A recently renovated hotel located in the heart of Elk Point, offering rooms and suites that cater to leisure travellers.
- **Mikey Mac, in Mallaig** – an adult entertainment venue, can be found at this establishment.

Key Findings

Market Segments and Demand

Accommodation providers in St. Paul and Elk Point serve distinct customer segments, primarily workforce accommodations, business travellers, and event attendees, with leisure travellers representing a smaller portion of the market. Hotels such as the Canalta Hotel and The Landing attract domestic business travelers and event participants, typically accommodating stays of one to two nights. These establishments, along with Hilltop Motor Inn, also support regional tourism development strategies by enhancing visitor experiences and strengthening local infrastructure.

In contrast, properties such as St. Paul Lodge, Galaxy Land, Woodland Motor Inn, Elk Point Motel and RV Park, and half of the occupancy of the Hilltop Motor Inn primarily accommodate long-term workforce guests, including those from the construction, oil, and roadwork industries. Some of these workers stay for extended periods, sometimes exceeding a year. Seasonal fluctuations have a significant impact on demand, with peak occupancy occurring between May and October, followed by lower occupancy levels during the winter months.

Event-based demand is also a factor in regional accommodation needs. Rodeo events, sports tournaments, and bookings related to allied industries, as well as upcoming events such as the 2026 Alberta Winter Games (held in Glendon, Cold Lake, and Bonnyville), are expected to drive increased demand. Family weekend getaways are common, with tourists generally preferring higher-end accommodations that offer amenities such as swimming pools and hot tubs. The accommodation sector mid-week bookings are slower than weekend bookings for leisure travellers.

Challenges

Despite steady occupancy rates, accommodation providers face several operational hurdles:

- **High Operational Costs:** Increased expenses related to utilities, maintenance, and staffing exert financial pressure on businesses.
- **Aging Infrastructure:** Many properties require significant upgrades, but revenue limitations and fluctuating demand hinder major renovations.
- **Limited Marketing Reach:** Several establishments lack an online presence, relying solely on word-of-mouth or direct inquiries.
- **Competition from Alternative Accommodations:** The rise of short-term rental platforms and other lodging options presents a growing challenge.
- **Staffing Shortages:** Retaining employees, particularly in housekeeping and maintenance, remains a persistent issue.
- **Limited Accessibility Upgrades:** Although staff are trained on accessibility standards, only a small percentage of rooms currently meet these requirements.
- **Reputation Concerns:** Certain hotels, such as King's Motel, suffer from poor reputations, which can impact overall regional perception and competitiveness.

Opportunities for Growth and Development

The hotel and motel categories of the accommodation sector in St. Paul, the County of St. Paul, and Elk Point play a crucial role in supporting regional economic activity. While workforce accommodations remain the dominant market segment, diversifying clientele and improving infrastructure and marketing strategies can strengthen long-term sustainability.

To enhance the region's accommodation offerings, there is a need to integrate hotels into broader tourism strategies. Potential opportunities include developing partnerships with local businesses, expanding co-working reception areas, leveraging upcoming regional events to attract new visitors, and creating mid-week promotional campaigns for the intergenerational leisure travelers. Addressing

challenges such as operational costs, staffing shortages, and infrastructure investments will be key to ensuring continued growth and success in the hospitality industry.

4. Short Term Rentals

Definition of Short-Term Rentals (STRs)

Short-term rentals (STRs) are accommodations that are rented for a limited duration, typically less than 30 days. These rentals are commonly facilitated through digital platforms such as Airbnb, VRBO (Vacation Rental By Owner), and Expedia, providing a range of lodging options that include entire homes, private rooms, and shared spaces. STRs serve as an alternative to traditional hotels and are particularly attractive to travellers seeking flexible and often cost-effective accommodation options.

Regulatory Context and Market Characteristics of Short-Term Rentals (STRs) in Alberta

The regulation of short-term rentals (STRs) in Alberta is primarily managed at the municipal level, with local governments establishing bylaws, licensing requirements, and zoning regulations to ensure compliance with housing policies and community standards. STR operators must also adhere to provincial and federal tax regulations, including a 4% tourism levy introduced on July 1, 2023, with exemptions for specific groups such as government employees, diplomats, military personnel, Indigenous individuals on reserves, and long-term stays of 28 days or

more:(https://www.alberta.ca/tourism-levy#:~:text=The%20tourism%20levy%20is%204,or%20maintenance%20for%20the%20accommodation.)).

The tourism levy in Alberta is a 4% charge on the purchase price of short-term accommodation. This includes fees for smoking or vaping in non-smoking rooms, routine cleaning and maintenance, pet accommodations, additional amenities such as refrigerators or extra beds, and various booking, service, and administration fees, including those charged by online brokers. The levy must be collected, reported, and remitted to the Tax and Revenue Administration (TRA) by any person responsible for administering short-term accommodations in the province. Major municipalities, such as Calgary and Edmonton, enforce additional requirements, including business licensing, fire inspections, and adherence to safety and advertising regulations, while Alberta Health Services may conduct health inspections.

Short-term rental regulations vary across municipalities due to the absence of provincial guidelines, allowing each locality to establish rules that align with its specific needs. Many municipalities require operators to obtain a business license and comply with zoning laws, which may limit short-term rentals to specific areas. Condo owners must also ensure their corporation's bylaws permit such rentals, as some explicitly prohibit them. Certain municipalities enforce additional restrictions, such as banning overlapping bookings, capping the number of guests per property, and requiring hosts to include their business license number in advertisements. Furthermore, record-keeping obligations require hosts to document guest details, including names, email addresses, and stay durations, which must be provided to municipal authorities upon request.

STR accommodations in Alberta vary in type, including entire units (such as apartments, houses, or condominiums), private rooms within occupied residences, and shared spaces with communal amenities. Operators range from individual homeowners supplementing income to commercial enterprises managing multiple units, with corporate STRs providing hotel-like services. Demand is concentrated in urban centers such as Calgary and Edmonton, where event venues and business districts drive bookings, as well as in major tourist destinations like Banff, Jasper, and Canmore, which attract seasonal travellers. STRs are also expanding into rural areas to support eco-tourism, workforce accommodations, and alternative travel experiences.

STRs contribute to Alberta’s tourism economy by diversifying lodging options, increasing guest spending, and providing income opportunities for homeowners and investors. However, they also present challenges, including concerns over housing affordability, community disruptions, and regulatory enforcement issues related to taxation, zoning, and licensing. The sector has rebounded since the COVID-19 pandemic, driven by increased domestic and international travel, the flexibility of remote work, and a growing preference for alternative accommodations. Municipalities, particularly in high-tourism areas, are implementing stricter regulations to balance STR growth with housing availability and neighbourhood stability, while discussions continue on potential provincial-level standardization.

Technology is playing a growing role in STR operations, with hosts leveraging smart home systems, keyless entry, and noise monitoring to enhance security and the guest experience. Property management software and dynamic pricing tools are becoming industry standards to optimize occupancy and revenue. Consumer trends indicate a shift toward experience-driven stays, sustainability-focused accommodations, and options that cater to families or pets. As Alberta’s STR market evolves, ongoing regulatory oversight and adaptation to shifting consumer preferences will be critical in ensuring sustainable growth while addressing housing and community concerns.

Case study Example: Sylvan Lake, Alberta

Sylvan Lake regulates Short-Term Accommodation Rentals (STARs), which are businesses that rent out homes or portions of homes for stays of 28 days or less. To operate a STAR, owners must apply for and obtain a business license to ensure safety, maintain neighbourhood relations, and protect housing availability. The Town has managed short-term rentals since 2004 under the term “tourist homes.” In 2022, a new STAR bylaw replaced previous regulations, streamlining the process and clarifying the rules. The bylaw permits secondary and garage suites, as secondary suites ensure compliance with safety standards and support business owners while safeguarding neighbouring properties. Fees include a \$250 application charge, with annual license costs of \$300 for 1–3 bedrooms and \$450 for 4 or more bedrooms. Appeals also require a \$250 fee.

For further information on Alberta STRs, please visit:

Town of Canmore Short Term Rental Policy: <https://www.canmore.ca/your-business/permits-and-licenses/bnbs-and-short-term-rentals>

Sylvan Lake Short-Term Rental: <https://www.sylvanlake.ca/en/business-development/short-term-accommodation-rentals.aspx>

Sylvan Lake also has a Good Host Guide: <https://www.sylvanlake.ca/en/business-development/resources/2022-Good-Host-Guidebook.pdf>

Short-Term Rental (STR) Market Analysis for STEP

The short-term rentals in the STEP Region are found in the County of St. Paul and are as follows (those with an asterisk are permitted with the County of St. Paul):

- Vincent Lakefront Log Cabin *
- Hidden Treehouse Chalet
- Hobbit Haven
- Cart Cabins, Rustic Off Grid Cabin*
- Stoney Lake Retreat

- Cozy Lakeside Cabin
- Everlong Acres Hideaway and Belle Tent*
- Moosehaven Lakehouse*
- Cedar Shake Cabin, Garner Lake
- Farm Stay, Cozy Ranch Retreat
- Cottage in Two Hills County No. 21 Lake Front Cabin on Lac Sante
- Lake Blossom,
- Country Cabin at Kehewin

Short-term rentals continue to serve as high-demand alternative accommodations, with occupancy rates reaching up to 80% in select locations since May 2024, according to interviews with STRs. The STR sector in the STEP region primarily attracts couples, families, and small groups seeking tranquil, nature-based retreats, with repeat visitation and extended stays being notable trends.

The availability of STRs and unique lodging options remains limited, with only 14 identified Airbnb listings in the area. However, detailed information on these properties is sparse. Notable unique stays include the Log Cabin at Vincent Lake, Lake Blossom, the Treehouse Chalet at Elk Point, Carts Cabins, Everlong, and Wildly Eweneek Cabins, among others. There is significant potential for further development in this sector, with opportunities to introduce innovative lodging concepts such as earth homes and Hobbit Haven-style accommodations, which could enhance the region's appeal to visitors seeking distinctive and immersive experiences.

Despite strong market interest, operators face regulatory challenges, particularly concerning zoning and taxation, which may hinder future expansion. Enhancing infrastructure, such as road access and digital connectivity, could further support sector growth. There is a lack of formal partnerships with local tourism businesses, presenting an opportunity for collaborative marketing initiatives. Additionally, while social media has been a key driver of bookings, there is a growing interest in direct booking platforms to reduce reliance on third-party sites, such as Airbnb.

Future growth opportunities include expanding seasonal adaptability, particularly winter operations, incorporating sustainability practices, and integrating wellness tourism offerings. For further information on trends in wellness tourism, please visit the Tourism Café at <https://www.tourism-connects.com/>. However, accessibility remains a critical area for improvement, with limited infrastructure upgrades currently planned to accommodate diverse visitors. Strengthening stakeholder support in marketing, policy refinement, and infrastructure investment will be essential in fostering a more resilient and competitive regional accommodation market.

Key Findings for STEP

- **Seasonal Demand:** Peak occupancy occurs from May to September, driven by weddings, sporting events, and leisure travel.
- **Challenges:** Regulatory constraints, competition from alternative accommodations, and limited availability of short-term rentals for workers and event attendees.
- **Marketing Strategies:** Airbnb and social media dominate promotional efforts, with increasing interest in regional collaboration initiatives.
- **Sustainability Efforts:** Some properties are adopting eco-friendly measures, such as composting toilets and solar lighting, though broader implementation remains limited.
- **Accessibility:** A need for improved infrastructure to better accommodate guests with diverse needs.

- **Emerging Trends:** Growing demand for unique accommodation experiences, including glamping and geodomes, alongside a need for enhanced accommodation options to support local events.

Moving forward, targeted investment in infrastructure, policy support, and collaborative marketing will be crucial in strengthening the short-term rental sector and enhancing its long-term sustainability. These themes will be discussed further in the strategies section.

5. Non-Fixed Roof Accommodations (Campgrounds & Glamping)

Non-fixed Roof Accommodations are part of the outdoor recreation, outdoor tourism and nature-based tourism sectors. This sector comprises visitors who want or feel the need to connect to land and water, have an appreciation for nature, and are often motivated to act as environmental stewards of the outdoors. Outdoor recreation and tourism encompass a range of activities, from soft adventure tourism, such as hiking and golf, to hard adventure tourism, which involves greater risk and specialized knowledge and equipment, including ice climbing or white-water rafting. Outdoor activities such as mountain sports, water recreation, fishing, camping, cycling, snow sports, and motorized trail use depend on well-maintained outdoor assets that multiple stakeholders value, require ongoing investment, and must be carefully managed to ensure safety and a welcoming experience for visitors.

Literature for Camping: Key Findings and Trends

The contemporary camping and outdoor hospitality sector is undergoing substantial transformation, shaped by forces of innovation, competitiveness, environmental responsibility, and inclusivity. Across studies, there is a consistent emphasis on reimagining camping through upgraded infrastructure, diversified offerings such as glamping, and socially responsible operations.

Competitive Differentiation through Strategic Investment

Grande et al. (2023) and Grande (2021) highlight that competitiveness in camping is no longer solely about location or natural beauty; rather, it involves strategic investment in site-level (firm) and destination-level assets. A firm-destination model and multi-criteria benchmarking framework identify four distinct camping profiles—from underperforming sites to high-performing destinations—providing valuable segmentation tools for planners and operators. These frameworks allow underdeveloped or less scenic areas to attract visitors through infrastructure, unique accommodations, and diversified services (Grande et al., 2023; Grande, 2021).

The Rise of Glamping and Experiential Travel

Milohnić et al. (2019) explore the transformation of camping into glamping, a trend driven by younger travellers seeking comfort, sustainability, and unique experiences in nature. The study documents a dramatic increase in glamping units, especially in Croatia, with stakeholders recognizing glamping as essential to the future of the industry. The lack of standardized definitions, however, poses challenges for regulation and market development.

Environmental Ethics and Visitor Behavior

Blye and Halpenny (2020) assess pro-environmental attitudes among Canadian campers and reveal a surprising disconnect between environmental knowledge and behaviors. While backcountry visitors reported higher awareness of Leave No Trace (LNT) principles, front-country users demonstrated stronger pro-environmental attitudes. These insights emphasize the importance of context-specific environmental education and behavior change strategies.

Accessibility Gaps in Nature-Based Tourism

Groulx et al. (2024) uncover critical barriers to accessibility in British Columbia's nature-based tourism infrastructure. Only 5% of audited sites met accessibility standards, with deficiencies in trail surfacing, signage, and washroom facilities. The findings highlight the gap between Canada's barrier-free aspirations and the practical realities on the ground, calling for immediate attention to inclusive design.

Alberta's Crown Land Economy

Alberta's Crown Land outdoor recreation economy highlights the sector's significant economic contributions, with Albertans spending \$2.3 billion on trip-related expenditures, averaging \$258 per day trip and \$757 per overnight trip. Although outdoor recreation accounts for only 0.8% of Alberta's GDP, its employment impact is 6.1 times more significant than the forestry and logging industry and represents 63% of jobs in agriculture (TIAA Report, 2021). The report, with input from 19 outdoor recreation groups, underscored the importance of recognizing and investing in this sector to prevent economic leakage to neighbouring provinces. It proposed six strategic actions to support growth, emphasizing Alberta's diverse natural landscapes as a foundation for a strong and sustainable outdoor recreation economy.

The Crownland Outdoor Recreation Report highlights the significant economic impact of Alberta's outdoor recreation sector, with direct implications for the accommodation and outdoor tourism sectors. Albertans spend \$2.3 billion annually on Crown land outdoor recreation trips, along with an additional \$376 million on recreation-related equipment and accessories. On average, overnight trips generate \$757 per visitor, creating demand for campgrounds, backcountry lodging, and other types of accommodations. Public lands account for 33% of all outdoor recreation trips, yet generate only 22.6% of total spending, highlighting an opportunity for enhanced infrastructure and services to capture a greater share of visitor expenditures. Gateway communities—towns near Crown lands—are key economic beneficiaries, as visitors frequently spend on accommodation, food, equipment rentals, and guiding services. There is a clear opportunity for investment in tourism infrastructure, including lodging/huts, trails, and amenities, to attract high-value visitors, extend trip durations, and strengthen rural economies, with TIAA advocating for increased investment in this sector.

In early 2024, Alberta witnessed a resurgence in recreational vehicle (RV) sales, reflecting a renewed consumer interest in camping following the economic challenges of 2023. With nearly 20% of Alberta households owning an RV—well above the national average of 14%—the province continues to stand out as a leader in RV and camping activity. Nationally, camping remains a popular leisure pursuit, with over 6.3 million Canadian households identifying as campers in 2023, a 29% increase from 2019 despite a slight dip from the 2022 peak. Notably, the camping demographic is shifting, with younger Canadians increasingly participating; in 2023, 44% of campers were under the age of 35. In Alberta, the camping sector contributes significantly to the provincial economy, generating approximately \$933 million in GDP annually and supporting nearly 10,950 jobs. Notably, 34% of residents actively engage in camping activities. This data suggests that camping, particularly RV camping, is not only a growing and youthful leisure trend in Alberta but also a significant economic driver, indicating strong potential for continued investment in campground infrastructure and tourism services.

Data from the Canadian Camping and RV Council's 2015 Economic Impact Report highlights the potential for campground expansion, with Canada hosting 4,231 campgrounds and 423,283 campsites, including 215 municipal campgrounds in Alberta. Additionally, other lodging options in Canada include 7,851 cottages, 339 yurts, and 2,446 "Ready to Camp" units, with Alberta accounting for 510 of these alternatives. Interestingly, in 2023, Alberta had the lowest reported number of yurts (and glamping options) as well as a low rate of private campgrounds compared to other provinces. The increased demand for glamping accommodations positions the STEP region for additional opportunities, including adventure huts (small huts), geodomes, trapper tents, yurts, and mobile units.

Municipal Public Campgrounds

The STEP region is home to five municipally run campgrounds (Stony Lake, West Cove, Bellevue Lake, Floating Stone, and Riverview Campground), as well as one provincial park, Whitney Lakes Provincial Park. These campgrounds are renowned in the region for their well-designed layout, spacious sites, comprehensive amenities, and serene rural settings.

The campgrounds characteristics are as follows:

Campground	# of Sites – Powered	# of Sites Unpowered	Details
The Iron Horse Trail Campground, St. Paul	88		Amenities, in town, close to soccer fields and Reunion Station, and fishpond
Overnight Campground, Town of St. Paul	24	16	Picnic tables, firepits, etc.
Elk Point Motel RV Park	17		Infrastructure improvements are needed, drainage needed
Elk Point Recreation Park (by golf course)	17		Amenities – playground, picnic area, showers and near golf course
Elk Point – River Park Campground	8	4	Day use, picnic, playground,
Bellevue Lake	34		Playground, boat launch, accessible mats
Westcove	66		Spray Park, picnic pavilion, boat launch
Floating Stone	65	15	Picnic pavilion, beach, playground
Stony Lake	40		Boat Launch, picnic shelter, beach
Whitney Lakes Provincial Park – Ross Lake	18	131	
Whitney Lakes Provincial Park - Whitney lake	45		
Total	422	166	
Overall Total			588

For a complete listing of campground amenities, please visit the Town of Elk Point, County of St. Paul, and the Town of St. Paul municipal websites.

Campground Analysis and Visitor Trends in the County and Town of St. Paul

County of St. Paul Campgrounds

The County of St. Paul operates four key campgrounds: Westcove (473 bookings in 2024), Floating Stone (796 bookings in 2024), Bellevue (570 bookings in 2024), and Stony Lake (527 bookings in 2024). Analysis of 2024 visitor trends reveals that the Edmonton Region remains a major visitor source,

particularly for Floating Stone (likely influenced by as one of the top 10 beaches in Alberta). Campgrounds such as Bellevue and Stoney Lake have experienced strong patronage from visitors originating in adjacent areas. County residents themselves also account for a significant portion of campground usage across all sites. While distant visitors currently represent the smallest share, this segment is showing signs of consistent growth.

Looking at multi-year visitation data from 2019 to 2024, the County of St. Paul experienced notable fluctuations. The total number of visitors per year increased from 1,254 in 2019 to 1,654 in 2021, then declined slightly in 2022 (1,245) and 2023 (1,258). However, 2024 marked the highest visitation year on record, with a total of 1,878 visitors, representing a 49.8% increase over 2019. County resident visitation fluctuated over the years, peaking at 27% in 2024. Visitors from adjacent regions demonstrated steady growth, reaching 35.3% in 2024. In contrast, the proportion of visitors from the Edmonton Region, which once dominated, dropped sharply to 20.8% in 2024 from a previous high of 40–50%. Meanwhile, visitor numbers from distant areas rose to 16.9%, indicating the county's expanding tourism reach.

In light of these trends, the County should prioritize targeted marketing efforts aimed at the Edmonton Region and adjacent areas to increase overall visitation. Investigating the decline in Edmonton-based visitors in 2024 is warranted, as is upgrading campground infrastructure to accommodate growing demand from local and adjacent visitors. Additional strategies may include developing rainy-day, experience-based promotions that link campground stays with town-based attractions, and leveraging technology—such as QR codes, digital passes, and mobile apps—to monitor visitor engagement and support local businesses.

Town of St. Paul Campgrounds

The Town of St. Paul manages two campground facilities: Iron Horse (381 bookings in 2024) and the Overnight Campground (95 bookings). Visitor distribution in 2024 shows that 64% of Iron Horse Campground guests came from outside the local, adjacent, and Edmonton regions. This trend is likely tied to sports tourism, given the campground's proximity to soccer fields. At the Overnight Campground, 48% of visitors came from distant regions, though local and adjacent representation remains strong.

Comparing 2023 and 2024 data, total visitation to town campgrounds rose modestly by 4%. Local and adjacent visitors increased by 11%, while Edmonton Region visitation declined by 47%. Notably, distant visitors grew by 54%, now representing the fastest-growing segment. These trends suggest that sports tourism plays a significant role, particularly for the Iron Horse Campground. This presents an opportunity to broaden the Town's marketing reach to distant visitors while also developing visitor packages tied to local sports events to maintain and increase this momentum. The downward trend in Edmonton Region visitation, mirroring that of the County, suggests the presence of shared contributing factors—potentially including economic shifts, competitive offerings in other regions, or marketing limitations.

Combined Regional Analysis: 2023–2024 Bookings

In 2023, the County recorded 1,258 campground bookings, while the Town had 458 bookings, for a regional total of 1,716. Of these, 408 visitors came from adjacent areas (342 in the County, 66 in the Town), and 338 were local (289 in the County, 49 in the Town). Edmonton Region visitors totalled 698, and distant visitors accounted for 272 (108 in the County, 164 in the Town).

In 2024, bookings increased significantly to 1,878 in the County and 476 in the Town, for a total of 2,354. Adjacent area usage rose to 740 (663 in the County, 77 in the Town), and local usage reached 558 (507 in the County, 51 in the Town). Edmonton Region visitors decreased to 486 (391 in the County, 95 in the Town), while distant visitor numbers grew to 570 (317 in the County, 253 in the Town).

Combined booking statistics for 2023 and 2024:

Campground Bookings (2023)	County of SP	Town of SP	Total
Total Bookings:	1258	458	1716
2023 Adjacent to CSP Usage	342	66	408
2023 Within CSP Usage	289	49	338
2023 Edmonton Region	519	179	698
2023 Further	108	164	272

Campground Bookings (2024)	County of SP	Town of SP	Total
Total Bookings:	1878	476	2354
2024 Adjacent to CSP Usage	663	77	740
2024 Within CSP Usage	507	51	558
2024 Edmonton Region	391	95	486
2024 Further	317	253	570

Strategic Implications for the St. Paul, County of St. Paul and Elk Point Region

The decline in visitation from the Edmonton Region across both County and Town campgrounds is a notable concern that warrants detailed analysis. Understanding contributing factors, such as competing destinations, transportation accessibility, or shifts in marketing effectiveness, will be critical to reinvigorating this important visitor segment. At the same time, the increasing interest from distant visitors highlights a valuable opportunity for expanded marketing efforts and outreach to non-regional markets.

Sports tourism, including rodeos, soccer, and baseball tournaments, and regional attractions, such as the Iron Horse Trail, continue to be major drivers of visitation, particularly in the Town of St. Paul. Strengthening partnerships with sports leagues and tournament organizers could enhance campground utilization. Moreover, integrated promotional strategies that connect local businesses, community events, and cultural attractions with campground experiences can further solidify the relationship between town amenities and outdoor accommodations. It is essential to acknowledge that campgrounds offer a vital accommodation option during periods of concentrated events in the region. In addition, independent travelers and autonomous family travellers who seek campgrounds value the flexibility and freedom that they offer. Further description of promotional ideas for campground integration can be found in **Appendix B**.

Finally, investment in comprehensive tracking systems—such as QR codes, visitor surveys, loyalty programs, mobile application data, and visitor logs—will provide critical insights into visitor motivations and behaviours. This information will inform adaptive marketing strategies and infrastructure planning. For instance, Floating Stone’s broad appeal is partially due to its high beach rating (source to be identified). At the same time, Westcove’s popularity among local residents is attributed to amenities such as the spray pad and pavilion rentals. These features demonstrate the value of aligning site-specific assets with strategic visitor engagement approaches.

Current Considerations

As identified in the *Tourism Opportunities Report (2023)*, diversifying accommodation options in St. Paul, the County of St. Paul, and Elk Point is a strategic priority to increase overnight stays. A key initiative to support this goal is the development of a business plan for unique accommodations at the West Cove Municipal Campground. These accommodations are being designed to align with existing trail infrastructure and planned future developments. Travel Lakeland and the STEP Economic Development Alliance have commissioned Arcadis to work on this project, utilizing a phased approach and proposing four to six geodomes or huts. These units will provide year-round accommodations that support multi-seasonal activities (cross-country skiing and snowshoeing) utilizing the trail system, which is already there, while enhancing relationships with service groups that currently use or could use Westcove.

However, several municipal challenges influence the feasibility of tourism-oriented accommodations. Local councils have expressed hesitancy, citing concerns related to sewage disposal, securing necessary funding, and the potential overlap with existing community facilities, especially with respect to the proposed development of a more prominent central hub at Westcove. Additionally, the municipal campgrounds in St. Paul and Elk Point currently operate at a deficit and face ongoing management challenges, which further complicate the expansion of new accommodations.

To address these issues, several strategies can be explored. Primarily, reframing and promoting campgrounds as local economic and tourism development assets that provide regional benefits. Across jurisdictions, campgrounds are operated under a range of governance and management models, including those that are municipally operated, run by not-for-profits, private enterprises, or through public-private partnerships. Each model supports different goals, such as revenue generation, revenue neutrality, or even operational loss. Transitioning a campground from a municipally run model to an alternative model can shift management responsibilities away from municipalities, creating more sustainable long-term operations.

The STEP region should continue to use and maintain its online reservation systems to enhance visitor data collection and marketing efforts. At the same time, addressing operational concerns—such as staffing, maintenance, service standards, liability, and safety—is essential to ensure the long-term success and viability of campground and glamping developments. Understaffed or underserved campgrounds can result in increased liabilities and reduced visitor satisfaction. For further information on this, please see: Alberta Recreation and Parks Association, 2021. “Best Practices for Campground Management.”

A case study example of a shift in management and operational models to a public-private partnership in 2019 is the Town of Devon. They transitioned the management of their municipal campground, Devon Lions Campground, to a public-private partnership model by partnering with the local not-for-profit service club, the Devon Lions Club. This shift enabled the municipality to reduce its direct operational responsibilities and costs, while allowing the Lions Club to reinvest profits into the campground and broader community initiatives. Under this model, the campground has seen improved maintenance, extended operating seasons, increased customer satisfaction, and enhanced programming. The

partnership also provided more flexibility in staffing and volunteer engagement, contributing to a stronger sense of local ownership and economic benefit. Some key takeaways from this experience are that:

- Public-private or community-based partnerships can enhance the sustainability of campgrounds.
- Reinvesting revenues locally fosters community support and aligns tourism efforts.
- Shifting management away from the municipality can reduce financial deficits and operational burdens.
- Partnering with local organizations can enhance programming, services, and seasonal flexibility.

It is also recommended that the Town of St. Paul and the County of St. Paul explore a framework, beyond simple visitation or booking tracking, to evaluate the condition and competitiveness of their municipal campgrounds. One option is using a Benchmarking Assessment Framework, as outlined in the *Strategies* section of this document (see Strategy 3 and **Appendix C**). A broader scan of benchmarking models and evaluation frameworks can also be undertaken. However, two others are outlined in **Appendix D**.

6. Strategies for Sustainable Growth and Competitiveness in the Accommodation Sector

1. Economic Development and Investment Strategies

To enhance the sustainability and competitiveness of the accommodation sector, targeted economic development initiatives are essential. Key strategies include:

- **Diversification of Clientele:** Focus on connecting and partnering with the accommodation sector to expand marketing efforts to attract event-based guests, including leisure travellers, sports tourists, and business travellers (e.g., meetings and conventions, weddings, sports tournaments, and cultural events), which can create new revenue streams beyond workforce accommodations. Notable upcoming sports tournaments, as well as the 2026 Winter Games, are of particular interest.
- **Expanding and Diversifying Accommodation Options:** Promote hotel development opportunities, including Canalta expansions and transforming the Woodlands Motel into a boutique stay with co-working space. Position Portage College lodging as a viable option, while supporting rural stays like farm experiences and unique rentals to increase capacity. Leverage recent renovations at Elk Point's Bethel Hotel and Hilltop Motor Inn through joint marketing. Set an initial target to increase hotel occupancy rates by 3% to 5% to drive growth in overnight visitation (Stay Magazine).

The County of Frontenac has Business Investment Tool Kits that are available for a variety of tourism accommodation categories, including bed and breakfasts, niche resorts, pod accommodations, commercial cottage development, and upscale camping. They are available here:

<https://www.frontenacounty.ca/en/business/accommodation-strategy.aspx#>

- **Supporting Indigenous-Led Accommodations in the STEP Region:** To grow tourism in a way that reflects the culture and diversity of the St. Paul, County of St. Paul, and Elk Point (STEP) region, there is an opportunity to support the development of Indigenous-led accommodations such as Water Spirit Retreat at Frog Lake First Nation and others. This approach involves collaborating with local Indigenous entrepreneurs and communities to create unique, culturally rich accommodations that offer visitors meaningful experiences rooted in Indigenous traditions and stories. Indigenous Tourism Alberta and Indigenous Tourism Canada can assist with partnerships, access resources, and contribute to shared goals of economic opportunity, cultural celebration, and reconciliation.
- **Advancing Accessibility in the Accommodation Sector:** To address ongoing accessibility gaps across hotels, motels, unique stays, and campgrounds, this strategy recommends a coordinated approach to inclusive improvements. The Creating Accessible Hotels in Alberta report shows that while many properties offer accessible entrances, significant challenges remain in room design, staff training, emergency planning, and communication supports. Over half of guests with disabilities reported unmet needs, and 78% of operators lacked training. We recommend conducting regular accessibility audits, utilizing the Hotel Accessibility Self-Assessment Guide, and adopting best practice room and bathroom templates. Progress should be supported through targeted funding, incentives, and partnerships with organizations like the Voice of Albertans with Disabilities to provide training and assessments, framing accessibility as both a human right and a market opportunity.

- Destination Marketing Fee (DMF) Model: Implementing a 3% DMF can generate funds for tourism promotion, aligning with Travel Lakeland, and overnight stay incentives. Please reference the “Recommendations for the Governance & Administration of Destination Marketing Fees” (2011) produced by the Alberta Hotel and Lodging Association.

2. Enhancing Accommodation Experiences through Unique Offerings

To attract a broader range of visitors, market to niche travellers, and strengthen regional identity, accommodations should differentiate themselves through unique offerings:

- Investment in Alternative Accommodations/STRs: Developing eco-lodges, themed resorts, and floating accommodations that highlight regional heritage and environmental uniqueness, such as houseboats like Voyageur Houseboats, which align with the Lakeland theme. Research by de Sousa et al. (2023) highlights those alternative accommodations, such as castles, treehouses, and houseboats, create immersive, experience-driven stays that enhance destination branding and visitor engagement.
- Experiential Lodging & Storytelling: Marketing accommodations by leveraging local narratives, emphasizing authenticity, and utilizing influencer partnerships and virtual tours. Research suggests that experiential and emotional engagement is key to guest satisfaction, particularly for alternative accommodations that offer unique and deeply immersive experiences. Itemizing the story narration of the property, location, and region to build the brand narrative. Key unique assets include the Landing Pad, rural and nature-based accommodations, and those situated close to the Iron Horse Trail.
- Curated Guest Experiences: Integrating cultural workshops, adventure tourism, and farm-to-table dining to provide a holistic and immersive visitor experience. This can be done through partnerships, event-based tourism, and the arts and culture sector (refer to Arts and Culture for Tourism Report). Examples may include a partnership package between the Hilltop Motel and the Allied Arts Dinner Theatre Performances, with a special dinner and access to guest actors.

3. Recognition of the Importance of Campgrounds in Tourism and Economic Development by Advancing Campground Competitiveness, Accessibility, and Infrastructure.

Focus on enhancing campground performance and market reach through targeted benchmarking and investment in inclusive, accessible infrastructure.

- Benchmarking for Competitiveness: Utilize strategic benchmarking (Grande et al., 2023; Grande, 2021) to assess site performance, prioritize upgrades, and enhance amenities such as digital connectivity, entertainment, and wellness offerings. Conduct a benchmarking evaluation for all municipal campgrounds to identify and prioritize maintenance and investments that maximize revenue generation and enhance the customer and visitor experience.
- Establishment of Baseline Targets for user visitation at campgrounds following a Benchmarking Assessment. With a total of approximately over 580 bookable campground sites (in the Town of St. Paul and the County of St. Paul), and assuming that there are 90 consecutive days that camping may occur (months of June, July and August), the region has the potential for an estimated 52,920 bookable campground nights. The County of St. Paul and the Town of St. Paul may wish to set yearly targets for each municipal campground, following the competitiveness benchmarking assessment, to drive calculated visitation.
- Investment in Inclusive and Accessible Camping Infrastructure: Campsite operators and policymakers should prioritize universal accessibility through community-based planning, detailed online information, signage, and maintenance (Groulx et al., 2024). This enhances the

marketability and adaptability of the campgrounds to cater to diverse populations and families, including individuals with varying mobility needs.

- **Integrated Digital Booking and Visitor Analytics Strategy:** Implement a unified, customer-focused online booking system for campgrounds (e.g., CampSpot, Let's Camp, RoverPass, Checkfront, CampgroundBooking) that captures visitor data through digital guestbooks. Integrate this data with an advanced CRM and AI-driven analytics to analyze visitor behaviors and preferences. Leverage insights for personalized marketing, improved customer experiences, repeat visitation, and streamlined customer care, optimizing operational efficiency and visitor engagement.
- **Flexible Booking Models:** Implement tiered seasonal pricing, mid-week package deals, and dynamic availability to manage demand fluctuations and encourage off-peak travel, thereby optimizing revenue generation.

4. Sustainable Practices in Small Tourism Accommodation Enterprises (STRs)

Sustainability remains a challenge for small accommodation providers, necessitating the following strategies:

- **Education and Capacity Building:** Establish training programs that focus on water conservation, waste reduction, and renewable energy. This can be done for hotels, as well as STRs. Studies (Midgett et al., 2020) highlight the need for improved sustainability knowledge among small accommodation operators, as many confuse sustainability with financial survival rather than a long-term commitment to environmental balance.
- **Financial Incentives & Investment Support:** Introducing tax incentives, grants, and low-interest loans to encourage sustainability investments for STRs. Research has shown that cost barriers prevent many operators from adopting eco-friendly measures, even when long-term benefits are acknowledged.
- **Regulatory & Policy Support:** Enhancing coordination and support between policymakers and tourism stakeholders to clarify sustainability compliance requirements and encourage responsible STR development.

5. Integrated STR Policies for Housing and Tourism Balance:

- **STR Zoning & Regulation:** Implementing zoning restrictions, licensing requirements, and taxation policies to manage STR density and economic contributions. Research (Vizek et al., 2023) confirms that a high concentration of STRs can distort housing markets, increasing property prices and reducing affordability for residents in urban and densely populated neighbourhoods, with a lesser effect than in rural areas.
- **Diversified Accommodation Infrastructure:** Just like any healthy economy, prioritizing diversification within an industry sector is recommended. Prioritizing the development of hotels and motels, boutique hotels, and campgrounds to provide a balanced approach and reduce over-reliance on short-term rentals (STRs) or developments in this sector. Research indicates that destinations with a higher proportion of hotels and campsites tend to maintain better economic and social stability, rather than relying solely on a high influx of STR.

6. Strengthening Workforce Training & Industry Support

A well-trained workforce is critical for ensuring high service standards in accommodations. Key strategies include:

- **Increasing Participation in Training Programs:** Encouraging engagement with Portage College's SuperHost Program and expanding accessible training through Chambers and Community Futures organizations. Offering a modular version of SuperHost for high school students

interested in building their CVs and potentially securing summer employment with NGOs, museums, or campgrounds.

- Defining the Role of DMOs & EDOs: Establishing clear guidelines on how destination marketing organizations (DMOs) and economic development organizations (EDOs) can support accommodation operators. This may be through partnership marketing, membership drives, and establishing a 3% tax levy to support the building of the tourism ecosystem in the STEP region.
- Encouraging Hotels to Promote Local Tourism: Enhancing collaboration between hotels and local tourism assets, including trails and small businesses. Start with a Welcome Binder, PowerPoint Presentation, Orientation Flat Sheet, Tourism Maps, and Weekly E-newsletters to support front-line service staff training.
- Connect the STEP region accommodation sector to initiatives available with Tourism HR Canada. Tourism HR Canada and the Canadian Hotel Association host webinars, seminars, and employment recruitment drives, among other initiatives, to support Canada's hospitality and frontline service workers. In January 2025, Tourism HR Canada introduced the Tourism Workplace Accessibility Clinic. This program offers complimentary, tailored advisory services to tourism employers, focusing on Disability-inclusive recruitment and retention, workplace accessibility enhancements, guidance on accommodations and compliance. In addition, Tourism HR Canada is enhancing its Emerit Tourism Training programs.

7. Ensuring Predictability & Access in Travel

To address fluctuations in accommodation demand and visitor behaviour trends:

- Optimizing Rural and Alternative Stays: Utilizing Airbnb and rural accommodations to absorb overflow from significant events, such as the Cold Lake Air Show and the 2026 Winter Games. Provide an updated listing to the Event Coordinators and Conference Planners well in advance to showcase unique stays and offerings.
- Enhancing Agritourism Engagement: Support the development of agritourism lodging by leveraging the region's agricultural strengths. Connect with Destination Canada's 2025 Agri-Tourism Initiative for guidance. Survey Open Farm Day participants to identify and encourage those with potential for a farm stay to explore accommodation opportunities. Recognize existing niche operators, such as Eweneek Adventures (in the Lakeland Region), and explore additional niche markets. Cross-reference with Artisans at Work Initiative, who may wish to consider providing alternative stays and accommodations.

8. Strengthening Event Partnerships & Marketing Strategies

Events can significantly drive accommodation demand. To maximize their impact:

- Supporting and Investing in Meetings and Convention Marketing: Supporting further initiatives and investments in the Meetings and Convention sector to organize and market to business travellers utilizing the tourism asset inventory and launch the Meetings and Conventions website. Utilizing the Arts and Culture for Tourism Strategy, align and collaborate to expose business travellers to arts and culture initiatives. An example
- Event-Accommodation Integration: Identify key major events and establish relationships with the Rodeo Committee, Soccer Tournament Coordinators, Hockey Tournament Coordinators, Softball Tournament Coordinators, outdoor tourism events (such as Iron Horse Trail events), the Meetings and Conventions market and capitalizing on the 2026 Winter Games. Establishing long-term event partnerships, offering visitor engagement strategies such as welcome packages, and establishing a system to track return on investment for these event-based initiatives.

- Integrating Wellness Tourism into Accommodations: To attract high-spending wellness-focused visitors and cater to this growing market segment (Global Wellness Institute), the STEP region should integrate spa services, yoga sessions, mindfulness experiences, and wellness retreats into existing accommodations (at hotels, motels, or unique accommodations, size permitting). Partnering with local practitioners and offering curated stay-and-wellness packages can extend visitor stays, elevate guest experiences, and increase tourism revenue.
- Joint Marketing Campaigns: Encouraging St. Paul and Elk Point accommodations to collaborate on regional advertising rather than operating individually. Collaborate with Travel Lakeland on joint marketing initiatives that offer incentives for travel in the region, such as Staycation Promotions and resident rates. Opportunities for marketing to intergenerational travellers are also possible. Consider a spin on Disney’s “Let the Memories Begin Campaign” for the Travel Lakeland area.
- Direct Marketing for Campgrounds: Implementing online reservation systems to collect visitor data and improve targeted marketing efforts. This includes online marketing via e-newsletter to registered visitors who have attended in the past.

9. Emphasizing Environmental, Cultural & Inclusive Values in Accommodation

To meet the evolving expectations of younger travelers and socially conscious tourists, accommodation providers in the STEP region can prioritize the following strategies:

- Sustainability & Cultural Commitments: Embed environmental stewardship and local cultural storytelling into branding, design, and guest experiences. This may include aligning with sustainability certifications, integrating Métis and Indigenous cultural elements, and offering seasonal or event-based activities tied to local heritage. Promoting eco-friendly practices in marketing will strengthen appeal among conscious travelers.
- Expanding Inclusive Hospitality Training: Evolve the SuperHost and related customer service training to more robustly incorporate modules on inclusive tourism, cultural sensitivity, accessibility, and welcoming practices for 2SLGBTQ+ individuals. Delivery could be scaled through partnerships with Portage College, the Chamber of Commerce, local tourism operators, and a shared high school curriculum to create a consistent standard of inclusive hospitality across the region.
- Promoting Sustainable Accommodation through Certification: Encourage accommodations across the STEP region to adopt internationally recognized sustainability certifications, such as Green Key, Green Globe, or Biosphere Responsible Tourism, by developing targeted incentives, promotional support, or recognition programs. Achieving these certifications will elevate the marketability of local accommodations, attract eco-conscious travelers, and position the region as a committed leader in sustainable tourism practices.
- Developing Signature “Stay with Purpose” Packages: Encourage local accommodation providers to co-create “Stay with Purpose” experiences that combine overnight stays with opportunities to support local artists, conservation projects, or cultural events. These packages can differentiate the region, foster community benefits, and attract value-based travelers seeking meaningful connections during their visit. A strong opportunity awaits with the Hilltop Motor Inn and the Elk Point Dinner Theatre, as well as Choir Concerts, etc.

10. Investment in Year-Round Attractions & Itinerary-Based Tourism

To reduce reliance on seasonal events and ensure consistent tourism demand:

- Year-Round Attractions Development: Encouraging the establishment of sustainable tourism attractions that operate beyond peak event seasons. This could include:

- West Cove Municipal Campground micro-huts development for winter camping, in partnership with the Lakeland Ski Club (currently being researched).
- Working with private entrepreneurs to expand off-grid lodging, such as eco-friendly huts at Mann Lake Golf Course, to provide unique, nature-based accommodations that align with the rural landscape brand. Mann Lake Golf Course would also be a prized location for a winter culinary experience, such as a steak pit incorporated in an on-site circular structure. See Grill Kota, Tamarack Shack in Manitoba for further information: <https://www.tamarackshackandtipi.com/explore>
- **Itinerary-Based Tourism:** Designing structured tourism itineraries (e.g., "Little 5 Fabulous Food Stops") to guide predictable visitor movement and encourage multi-day stays. Provide itineraries that align with and complement major event-based tourism initiatives, ensuring marketing efforts are timed and coordinated with parallel offerings.

Short Summary of Strategies

1. Economic Development & Investment

- Diversify guest types (e.g., event, sport, business travellers).
- Expand options like boutique stays, co-working motels, and Indigenous-led accommodations.
- Improve accessibility and introduce a 3% Destination Marketing Fee to fund tourism promotion.

2. Unique Offerings

- Develop eco-lodges, houseboats, and themed resorts.
- Use storytelling and local narratives in marketing.
- Create curated guest experiences tied to arts, culture, and adventure.

3. Campground Development

- Benchmark site performance and set visitation targets.
- Improve inclusivity, digital booking, and flexible pricing models.
- Upgrade infrastructure to enhance competitiveness and visitor satisfaction.

4. Sustainable Practices for STRs

- Provide sustainability training, financial support, and clear policy guidance.
- Address misconceptions and barriers related to eco-friendly operations.

5. STR Policy & Balance

- Introduce zoning/licensing to manage STR density.
- Promote a mix of accommodations to reduce overreliance on STRs and support housing balance.

6. Workforce Training & Industry Support

- Expand hospitality training (e.g., SuperHost).
- Define DMO/EDO roles in partnership marketing.
- Promote local attractions via front-line staff tools and national training programs.

7. Predictability & Access

- Use Airbnb and rural stays during peak events.
- Grow agritourism accommodations through Open Farm Day and artisan partnerships.

8. Event Partnerships & Marketing

- Support meetings and conventions to boost demand.
- Link events with accommodation promotions and wellness offerings.
- Collaborate on regional marketing campaigns and digital campground promotions.

9. Environmental, Cultural & Inclusive Values

- Embed sustainability and Indigenous storytelling.
- Enhance inclusive training (e.g., 2SLGBTQ+, accessibility).
- Develop “Stay with Purpose” packages linking stays to local causes or experiences.

10. Year-Round & Itinerary-Based Tourism

- Invest in winter and off-season lodging (e.g., eco-huts, culinary huts).
- Create themed itineraries to encourage longer stays and align with events.

Conclusion

To ensure sustainable growth and enhanced competitiveness in the accommodation sector, a multi-pronged strategy is essential—one that blends investment, innovation, collaboration, and inclusivity. These strategies focus on diversifying clientele and offerings, enhancing visitor experiences through unique and culturally rooted accommodations, and expanding capacity through both traditional and alternative infrastructure. Strategic event partnerships, workforce training, and regulatory improvements support long-term resilience, while environmental, cultural, and inclusive values ensure alignment with evolving tourist expectations. Ultimately, a coordinated approach that leverages local strengths and fosters cross-sector collaboration will position the region’s accommodation sector as both competitive and sustainable.

7. Strategy Considerations for Short-Term Rentals

Strategic Approach to Short-Term Rentals (STRs): Considerations for Municipal Accommodation Policy

The information presented in this report is considered and must be reviewed by the appropriate planning and development personnel, stakeholders and authorities. The information presented is within the lens, assumptions and interpretations that STRs are viable and appreciated alternative accommodation options that assist in diversifying the accommodation sector categories, provide expanded options for visitors, allow for further brand identification for the region and cater to niche travellers who are looking for strong emotional attachments to the area and sensory stimulation. It is within these considerations that respect for planning and development guidelines is considered, but not restricted, to avoid creating an adverse landscape for STR advancement.

Introduction

Short-term rentals (STRs) have become an increasingly significant component of the tourism and local economic landscape. They offer flexible accommodation options in rural, resort, and underserved areas, presenting both opportunities and challenges for municipalities. STRs can enhance tourism and provide supplemental income for residents but may also impact housing availability and neighbourhood dynamics.

Municipalities must strike a balance between realizing the economic benefits of STRs and ensuring adequate regulatory oversight that protects health, safety, and long-term community interests. This report outlines strategic goals, policy options, and best practices to guide municipalities, such as the County of St. Paul, in establishing a practical, development-friendly STR regulatory framework.

Regulatory Considerations

Municipalities may regulate STRs using a combination of tools:

- **Development Permits:** These may be required to ensure that buildings used for STRs meet safety and occupancy standards. Some municipalities exempt existing or low-impact structures from this requirement.
- **Licensing and Registration:** Licensing programs provide a structured approach to monitoring and regulating Short-Term Rentals (STRs), typically through annual or multi-year licenses and associated fees.
- **Zoning Bylaws:** STRs can be defined and permitted as either primary or conditional uses in specific zones. Clear zoning ensures that land use is appropriate, and the community is well-suited.
- **Taxation and Fees:** Municipalities may impose taxes on STR income (such as lodging or accommodation taxes) and implement tiered licensing fees based on the scale of the operation.

Approaches to STR Regulation

Municipalities can adopt one of several approaches, depending on local priorities and context:

- **Encouraging STRs:** Reducing or eliminating development permit requirements, waiving licensing fees, and offering incentives can promote STR growth, especially in tourism-dependent or accommodation-scarce regions.

- **Moderate Regulation:** A balanced approach involves allowing STRs with certain safeguards, such as registration, safety inspections, and bylaw compliance.
- **Strict Regulation or Restriction:** Municipalities may impose zoning restrictions, extensive permitting, or even prohibitions in specific zones to preserve residential housing or address community concerns (e.g., the Town of Banff).

To implement an appropriate regulatory framework, municipalities should:

1. **Engage Stakeholders:** Consult residents, businesses, and STR operators to understand local priorities and concerns.
2. **Assess Existing Regulations:** Review current zoning bylaws, tourism strategies, and housing policies.
3. **Develop a Clear Policy Framework:** Establish transparent rules for permitting licensing, safety, and enforcement.
4. **Monitor and Evaluate:** Regularly assess the effectiveness of STR policies and adjust as necessary.

Strategic Goals

- Enable responsible STR development through consistent regulation.
- Ensure STRs meet minimum safety, health, and building code requirements.
- Maintain housing availability for long-term residents while supporting tourism growth.
- Provide a transparent and streamlined compliance process for operators.

Policy Recommendations

1. Establish Local Definitions and Clear Use Classifications

- Define STRs locally, rather than relying on federal definitions (e.g., CRA).
- Categorize STRs by type (e.g., primary residence rentals, investment properties, tourist cabins, domes).
- Include STRs in zoning bylaws as:
 - Permitted uses in rural/residential areas.
 - Conditional uses in agricultural or mixed-use zones where appropriate.

2. Streamlined Licensing and Permitting

- Introduce an annual municipal STR license with multi-year options to reduce administrative load.
- Require development permits only for structural changes. For existing buildings:
 - Exempt low-impact, non-structural changes.
 - Require a declaration or use permit confirming STR operation.

3. Building and Life Safety Standards

- Ensure STRs comply with building, fire, and health codes.
- Mandate guest safety features:
 - Multiple egress points.
 - Smoke and carbon monoxide detectors.
 - Safe plumbing/electrical.
 - Sanitary washrooms.
- For temporary structures (e.g., yurts or domes), require:
 - Washroom access.
 - Fire safety and emergency plans.

- Adequate insurance and structural soundness.

4. Insurance, Parking, and Noise Requirements

- Require operators to show proof of liability insurance.
- Limit occupancy based on legal bedrooms (per National Occupancy Standards).
- Mandate one off-street parking space per rental bedroom; prohibit RVs parked on public streets overnight.
- Enforce compliance with municipal bylaws on noise, pets, and nuisance.
- Require operators to inform guests of applicable rules and bylaws.

5. Taxation and Fee Structure

- Use a tiered fee model based on the number of rooms offered.
- Consider fee reductions or waivers for:
 - Operators who rent their primary residence.
 - Those earning below a set income threshold.
- Provide accommodation tax exemptions for STRs operating below a minimum threshold (e.g., nights/year or income cap).

6. Education and Enforcement

- Publish an STR Operator Handbook outlining expectations and compliance obligations.
- Create a digital registry of all licensed STRs, connected to municipal GIS.
- Schedule risk-based property inspections.
- Maintain an online portal for STR registration, complaints, and renewals.

A Supplementary Report produced by the University of Calgary on Short Term Rentals should be reviewed in full: https://hdp-ca-prod-app-cgy-engage-files.s3.ca-central-1.amazonaws.com/6116/9773/4648/Short-Term-Rental-Regulation-in-Canada_0923updated.pdf

A summary of this report is available in **Appendix E**.

Summary of Strategic Considerations

Policy Tool	Strategic Use
Zoning & Land Use	Permit or conditionally permit STRs in rural/residential zones; exclude others.
Licensing & Registration	Require STR licenses with annual or multi-year options; include insurance and compliance.
Development Permits	Limit to new builds or structural changes; exempt minor alterations.
Safety Requirements	Enforce safety, health, and building code compliance.
Parking and Noise	Require off-street parking; enforce local bylaws.
Fee Structure	Use tiered or waived fees to promote responsible hosting.

Policy Tool	Strategic Use
Education & Communication	Provide guidance and tools for operators and community awareness.

Conclusion

The regulation of short-term rentals remains a local decision shaped by each municipality's context and goals. A well-structured and safety-conscious policy can ensure that STRs support tourism, economic vitality, and community well-being. By adopting a moderate regulatory approach—one that strikes a balance between opportunity and oversight—the County of St. Paul and other municipalities can manage short-term rental (STR) growth responsibly while aligning with their planning and development priorities.

8. Key Strategy Prioritization

Priority 1: Enhancing Visitor Engagement Through Unique Accommodations (Strategy 2)

Enhancing visitor engagement through unique accommodations can be a key priority for St. Paul, the County of St. Paul, and Elk Point, aiming to set the region apart by showcasing memorable places to stay that are deeply connected to the area's culture, history, and landscape. This approach addresses the growing demand for meaningful, eco-conscious travel experiences while promoting longer stays and off-season visits. From cozy cabins and farm stays rooted in Métis and settler heritage to accommodations along the historic Iron Horse Trail, the region offers authentic stories that create lasting connections between visitors and place. By developing packages that pair overnight stays with local cultural and culinary offerings—such as Indigenous experiences, arts and culture events, prairie cuisine (such as a steak pit), and rural festivals—and using influencer campaigns and digital storytelling to broaden awareness, this strategy strengthens the region's brand and supports year-round tourism growth.

Priority 2: Strengthening Event Partnerships & Marketing Strategies (Strategy 8)

Events are a key driver of overnight stays in St. Paul, the County of St. Paul, and Elk Point, making it essential to integrate accommodations more fully into the regional event economy. Whether visitors attend community tournaments, cultural festivals, or major events like the upcoming 2026 Winter Games, tailored lodging packages and localized experiences can encourage extended stays and deeper engagement with the region. Prioritizing this strategy helps maximize high-traffic opportunities, supports collaborative marketing, and enhances booking predictability for local accommodations. By bundling events with nearby attractions and lodging, launching joint regional campaigns, and applying visitor data to drive targeted re-marketing efforts, the region can strengthen tourism offerings, increase business stability, and build long-term partnerships that promote a cohesive and compelling destination experience.

Priority 3: Advancing Campground Competitiveness and Accessibility (Strategy 3)

Campgrounds are a vital part of the tourism offering in St. Paul, the County of St. Paul, and Elk Point, serving as key assets for attracting families, outdoor enthusiasts, and budget-conscious travellers. As interest in nature-based and wellness-oriented travel continues to grow across Alberta, investing in the modernization and promotion of local campgrounds presents a valuable opportunity to enhance visitor satisfaction, extend stays, and encourage repeat visits. Upgraded amenities, improved digital access, and inclusive infrastructure will make the region more accessible and appealing to a broader range of visitors. Meanwhile, flexible pricing and data-driven marketing can help boost off-peak and shoulder-season use. By benchmarking current sites and prioritizing enhancements, the region can position its campgrounds as high-quality, welcoming gateways to rural exploration, thereby strengthening its role in Alberta's growing outdoor tourism economy.

Priority 4: Investment in Year-Round Attractions & Itinerary-Based Tourism (Strategy 10)

Investing in year-round attractions and itinerary-based tourism can be a strategic priority for St. Paul, the County of St. Paul, and Elk Point, aimed at encouraging more extended visitor stays and creating a more balanced tourism economy. By offering curated itineraries that highlight the region's culinary offerings, cultural heritage, and outdoor adventure—across all seasons—visitors are given compelling reasons to explore beyond a single site or event or in partnership with events, curate cluster

experiences. This approach helps smooth seasonal peaks and slumps, attracts niche and return travellers, and strengthens local businesses by connecting accommodations with regional attractions. Branded itineraries, such as a “Winter Wellness Weekend” or “Little 5 Fabulous Food Stops,” along with investments in off-season experiences like winter micro-huts or culinary domes, can add structure and appeal to travel planning. Aligning these efforts with significant events and available accommodations will help build predictable visitor flows and promote year-round tourism across the region.

Addition Strategic Priorities:

These strategies still offer long-term value but may serve better as supporting mechanisms for the top four:

- Economic Development & Investment (Strategy 1): Important for growing accommodation supply but requires demand-side strategies to be effective.
- Sustainable STR Practices (Strategy 4): Critical for sector health and environmental integrity but less directly tied to length-of-stay expansion.
- Workforce Training and Local Promotion (Strategy 6): Supports quality service delivery and community engagement, thereby enhancing visitor satisfaction over time.

9. Conclusion

The accommodation sector across St. Paul, the County of St. Paul, and Elk Point stands at a pivotal point in its development. This strategy underscores the sector's pivotal role in driving regional tourism growth, promoting community well-being, and fostering economic diversification. With visitor preferences shifting toward personalized, experiential, and sustainable stays, the region is well-positioned to capitalize on its natural assets, cultural heritage, and strong community values. Strategic investment in unique accommodations, such as boutique motels, heritage-inspired short-term rentals, and immersive outdoor lodging, can offer compelling and differentiated visitor experiences while supporting year-round tourism. Event-driven demand, particularly with upcoming opportunities such as the 2026 Alberta Winter Games, underscores the need for stronger partnerships between accommodations and events, as well as coordinated marketing.

Campgrounds, an essential component of Alberta's outdoor tourism ecosystem, must be modernized and made more accessible to meet increasing demand and ensure inclusive participation. Meanwhile, short-term rentals offer flexible and scalable lodging options that must be regulated thoughtfully to ensure alignment with community goals, housing stability, and economic sustainability. Integrating digital tools, benchmarking, and flexible pricing models across all accommodation types can strengthen competitiveness and responsiveness to visitor trends.

Key enablers—such as workforce development, sustainability training, infrastructure investment, and cross-sector collaboration—must be prioritized to build a resilient and adaptable accommodation landscape. This strategy advocates for a unified regional approach that combines innovation with cultural authenticity, environmental stewardship with economic opportunities, and destination branding with strategic investments. Together, these efforts will ensure the region's accommodation sector not only meets current demand but evolves to become a cornerstone of a sustainable and compelling visitor economy.

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Appendix A: Key Informant Interviews

- Canalta St. Paul
- The Landing Hotel & Conference Centre
- Woodland Motor Inn
- St. Paul Lodge
- Galaxy Motel
- Elk Point Motel & RV Park
- Hilltop Motor Inn
- Carts Cabins,
- Everlong
- Marianne Jenke, Travel Lakeland

Appendix B: Promotional Ideas for Campground Activity Integration (source: Baylee Jeffrey, County of St. Paul)

1. Rainy Day Guides & Activity Lists:
 - Create brochures or posters at campgrounds promoting indoor activities in St. Paul (e.g., museums, shops, restaurants, Aquatic Center, Library).
 - Include enticing options like Lakeland Brewery, The Nest, Happy House, Bears BMX and Bike Shop, Warehouse Sports, and unique attractions like the UFO Landing Pad, Peter Fiddler, Fort George Buckingham House.
2. Discount Partnerships:
 - Partner with local businesses to offer exclusive discounts or special deals for campground visitors.
 - Provide campers with a coupon booklet or digital pass they can scan at participating businesses.
3. Event Promotion:
 - Highlight upcoming events in St. Paul through campground advertisements.
 - Offer shuttle services or guided tours to special events or markets (Open Farm Days, St. Paul Rodeo, St. Paul/Elk Point Farmers Market)
4. Local Experience Packages:
 - Promote themed packages that include visits to local attractions, shopping, and dining experiences.
 - Provide maps and suggested itineraries at campground reception areas.
5. Rainy Day Shuttles:
 - Offer free or low-cost shuttle services from campgrounds to town on rainy days to encourage indoor activities (not likely but included it anyways).
6. Interactive Digital Promotion:
 - Install interactive screens or QR codes in campgrounds that link to a dedicated webpage showcasing things to do in St. Paul.
 - Include customer testimonials or videos of popular local activities.

Appendix C: Determinants and Attributes for Assessing Campground Competitiveness.

Source: Kevin Grande, Laurent Botti and Raquel Camprubi. Journal of Outdoor Recreation and Tourism 42 (2023) 100618, p. 1-13.

Camping Side (Internal Firm Resources):

1. Bathing Area
2. Entertainments & Organized Activities
3. Sports & Non-Organized Activities
4. Multimedia Areas
5. Lodging Facilities
6. Additional Sales

Destination Side (External Environment/Location Resources):

7. Natural Attractions
8. Man-made Attractions
9. Other Attractions
10. Outdoor Activities
11. External Access
12. Internal Access

The 57 Attributes (Grouped by Determinants):

1. Bathing Area

1. Indoor pools/Heated pools
2. Bathing Area
3. Wellness (e.g., spa, sauna)
4. Baby pools
5. Aquatics playground
6. Beach/river/lake access
7. Waterslides park

2. Entertainments & Organized Activities

7. Kid clubs
8. Family events
9. Organized games
10. Childcare & babysitting
11. Nature-based activity

3. Sports & Non-Organized Activities

12. Playground areas
13. Free collective sports
14. Free individual sports
15. Free outdoor activities
16. Rental outdoor activities

4. Multimedia Areas

- 17. Music instruments/dance floor
- 18. Games room/amusement machines
- 19. Wi-Fi or internet access
- 20. TV or video-projection
- 21. Undercover outdoor areas

5. Lodging Facilities

- 22. Multiple types of accommodations
- 23. Pitches with electricity
- 24. Disability access
- 25. Pet friendly
- 26. Collective cooking & dining facilities

6. Additional Sales

- 27. Restaurant/bar/snack
- 28. Store/market
- 29. Medical services
- 30. Beauty services
- 31. Laundry (washing machines & dryers)

7. Natural Attractions

- 32. Forest or woods nearby
- 33. Beach, sea, or ocean nearby
- 34. Lake or river nearby
- 35. Mild climate
- 36. Rustic atmosphere
- 37. Hiking or cycling circuits
- 38. Navigable sea/river/lake

8. Man-made Attractions

- 39. Sports/leisure activities
- 40. Sports/leisure facilities
- 41. Winter infrastructure
- 42. Summer infrastructure
- 43. Kid-friendly environment

9. Other Attractions

- 44. Labels and certifications
- 45. UNESCO heritage or major sites
- 46. Festivals or important events

10. Outdoor Activities

- 47. Paid activities/visits
- 48. Non-paid activities/visits

11. External Access

- 49. Ease of access by private vehicles
- 50. Public transport connections
- 51. Major roadways/highways
- 52. Connection to airport
- 53. Train station access
- 54. Harbour access

12. Internal Access

- 55. Walking/jogging/hiking trails
- 56. Shuttle/transport to attractions
- 57. Parking availability

Appendix D: 1. 4 Examples of Benchmarking Assessments for Campgrounds

1. Sustainable Tourism 2030 Benchmarking Tool

Developed by: *GreenStep Solutions* (Kelowna, BC)

Overview:

This Canada-based framework provides a comprehensive benchmarking tool that can be used by tourism businesses, destinations, and accommodations—including campgrounds—to assess sustainability performance. It aligns with the **UN Sustainable Development Goals (SDGs)** and offers tailored reports and improvement plans.

Why it's relevant for campgrounds:

- Measures sustainability performance across key areas: environmental, social, cultural, and economic.
- Provides a **Sustainability Score** and recommendations for improvement.
- Enables comparisons across similar-sized operations or destinations.

Use Case:

The District of Tofino used this benchmarking system as part of its sustainable tourism planning, including campground operations and public facilities.

Source: [Sustainable Tourism 2030](#) and [greenstep.ca](#)

2. Tourism Destination Development Plan Toolkit (TDDP)

Developed by: *Destination British Columbia*

Overview:

While intended for destination-wide planning, this toolkit offers modules and worksheets that can be adapted to assess campground assets. It focuses on infrastructure readiness, visitor servicing, experience delivery, and market alignment.

Why it's relevant for campgrounds:

- Includes asset mapping and gap analysis tools that can be applied to individual sites (e.g., campgrounds).
- Promotes alignment with broader regional or provincial tourism goals.
- Offers a **structured evaluation process**: current state, desired future state, and action plan.

Use Case:

Used in communities such as **Fernie, Revelstoke, and Golden, BC**, where campgrounds were analyzed in the broader context of outdoor tourism development.

Source: Destination BC Tourism Planning Toolkit: <https://www.destinationbc.ca/learning-centre/category/brand-resources/>

3. Tourism Optimization Management Model (TOMM)

Developed by: South Australian Tourism Commission and Tourism Kangaroo Island

Overview:

TOMM is a performance-monitoring and decision-support system originally developed for destinations under tourism pressure but has been adapted for smaller-scale tourism assets like parks and campgrounds. It assesses environmental, social, economic, and experiential indicators to ensure tourism assets are aligned with sustainable development goals.

Why it's relevant for campgrounds:

- Includes metrics for visitor satisfaction, community support, environmental carrying capacity, and infrastructure use.
- Can help measure tourism impact holistically—not just volume—especially useful when evaluating campground quality and sustainability.

Key Features:

- Uses Key Performance Indicators (KPIs) across multiple dimensions (social, economic, ecological, and managerial).
- Encourages community involvement in the monitoring process.
- Supports adaptive management and long-term planning.

Source: McArthur, S. (1997). *TOMM: A model for implementing sustainable tourism*. Journal of Sustainable Tourism.

4. Green Key Eco-Rating Program (adapted for campgrounds and outdoor accommodations)

Managed by: Green Key Global

Overview:

Originally designed for hotels, the Green Key Eco-Rating Program is now used by a wide range of accommodations, including campgrounds and glamping sites. It assesses environmental performance in areas such as energy conservation, waste management, community outreach, and operational efficiency.

Why it's relevant for campgrounds:

- Helps identify sustainability gaps and opportunities.
- Builds trust with eco-conscious visitors and funding agencies.
- Encourages staff training, responsible operations, and better maintenance standards.

Key Features:

- Uses a standardized scorecard system across five levels (1–5 Keys).
- Includes on-site verification and annual performance reviews.
- Aligns with broader green tourism certification systems (e.g., Canada's Sustainable Tourism 2030).

Source: [Green Key Global](#)

Appendix E: Summary of “The State of Short-Term Rental Regulation in Canada” by Cameron and Tedds (2023)

Introduction

The rise of STRs, driven by digital platforms like Airbnb, has disrupted traditional accommodation sectors, introducing new economic opportunities and challenges. While STRs support tourism and economic activity, they also pose issues related to housing affordability, neighbourhood disruption, and enforcement gaps. Canadian municipalities are on the frontlines, adapting local policy responses to this evolving market.

Section 1: Understanding STR Policy

Policy Toolbox

The STR policy toolbox consists of:

- Zoning & land use: controls on where STRs can operate.
- Licensing & business regulation: establishing rules and permits.
- Taxation: collecting municipal/provincial accommodation taxes.
- Enforcement tools: from education to audits and data-sharing with platforms.

Policy Goals

Four overarching goals emerge:

1. Preserve long-term rental housing and neighbourhood character.
2. Uphold guest safety and consumer protection.
3. Recover costs and ensure fair taxation.
4. Encourage high compliance and data transparency.

A strategy encouraging STRs should highlight how appropriate policy tools can enable safe, regulated STR growth while addressing concerns through a balanced, locally responsive framework.

Section 2: STR Policy Across Canada

25 municipalities across Canada were analyzed, representing a diversity of urban and tourism-focused contexts. As of late 2023:

- Most major cities have STR policies.
- Some, like Winnipeg and Whitehorse, are in early stages of regulation.
- Several provinces (e.g., Québec, PEI, Nova Scotia, Newfoundland) oversee STR licensing at the provincial level.

Relevance for Strategy: This landscape provides models to support STR integration, showing that local and provincial coordination is feasible and increasingly common.

Section 3: Policy Goals, Definitions & Restrictions

Policy Intent

Common goals across jurisdictions include:

- Protecting housing supply.
- Minimizing community nuisance.
- Supporting tourism infrastructure.
- Enabling income generation from principal residences.

Key Restrictions

- Many jurisdictions restrict STRs to principal residences, avoiding full commercialization.
- Some restrict STRs to certain zones or building types (e.g., no STRs in secondary suites or multi-unit buildings).
- Night caps (e.g., 180 days/year) and quotas are used in places like Toronto, Iqaluit, and Banff.

Promoting STRs can be aligned with housing and community preservation through carefully designed rules (e.g., principal residence requirement and zone-based permitting).

Section 4: Licensing and Safety Standards

Licensing frameworks serve two main purposes:

1. Establish operational and safety standards.
2. Track market activity and improve compliance.

Three types of licenses exist:

- Broad: one license for all STRs.
- Use-based: based on whether the STR is a primary or secondary property.
- Unit-based: tailored by dwelling type, number of rooms, or other factors.

Many municipalities (e.g., Calgary, Saskatoon) have tiered systems to distinguish between small-scale and commercial operators.

A licensing system with tiered fees and simple processes can formalize the sector and attract responsible operators.

Section 5: Taxation

STRs are increasingly being taxed like traditional accommodations:

- Sales taxes (GST/HST).
- Accommodation taxes (provincial/municipal).
- Revenue from these taxes is often used to support housing and tourism promotion.

Emphasizing that STRs contribute equitably through taxation supports public acceptance and positions STRs as legitimate formal accommodations.

Section 6: Compliance and Enforcement

Enforcement Approaches

- Soft strategies: education, outreach, registration databases.
- Licence-oriented: linking permits with compliance.
- Traditional enforcement: audits, inspections, and complaint-driven responses.
- Platform engagement: requiring platforms to share data or remove non-compliant listings.

Compliance mechanisms are essential to ensure STR legitimacy, particularly when easing restrictions or promoting new growth in the sector.

Section 7: Bringing It Together

Typology of Canadian Approaches

The report identifies a range of policy models—from restrictive to permissive—with most jurisdictions now converging on a balanced, regulated framework that allows STRs while minimizing negative impacts.

Promising Practices

- Principal residence restrictions to protect housing supply.
- Tiered licensing for proportional oversight.
- Data-sharing with platforms for enforcement.
- Integration with broader housing, tourism, and community plans.

Gaps & Opportunities

- Inconsistent definitions and rules across provinces.
- Limited data for enforcement in some jurisdictions.
- Need for clearer, simpler regulatory frameworks.

Encourage policy consistency and collaborative frameworks that enable municipalities to regulate STRs effectively while supporting their growth as formal, legitimate accommodations.

Strategic Takeaways for Encouraging STRs

1. Position STRs as part of a diversified accommodation strategy, especially in rural or tourism-dependent areas.
2. Advocate for principal residence-based models, which preserve housing stock and enable residents to generate income responsibly.
3. Promote fair licensing and taxation, ensuring STRs contribute in a manner similar to hotels and motels.
4. Support compliance through education and platform partnerships, rather than relying solely on punitive enforcement.
5. Align STR policies with broader tourism, housing, and community development goals.
6. Review the use of STR revenues (e.g., accommodation tax) to fund affordable housing or tourism infrastructure, which improves public acceptance.