

National Capital
Commission

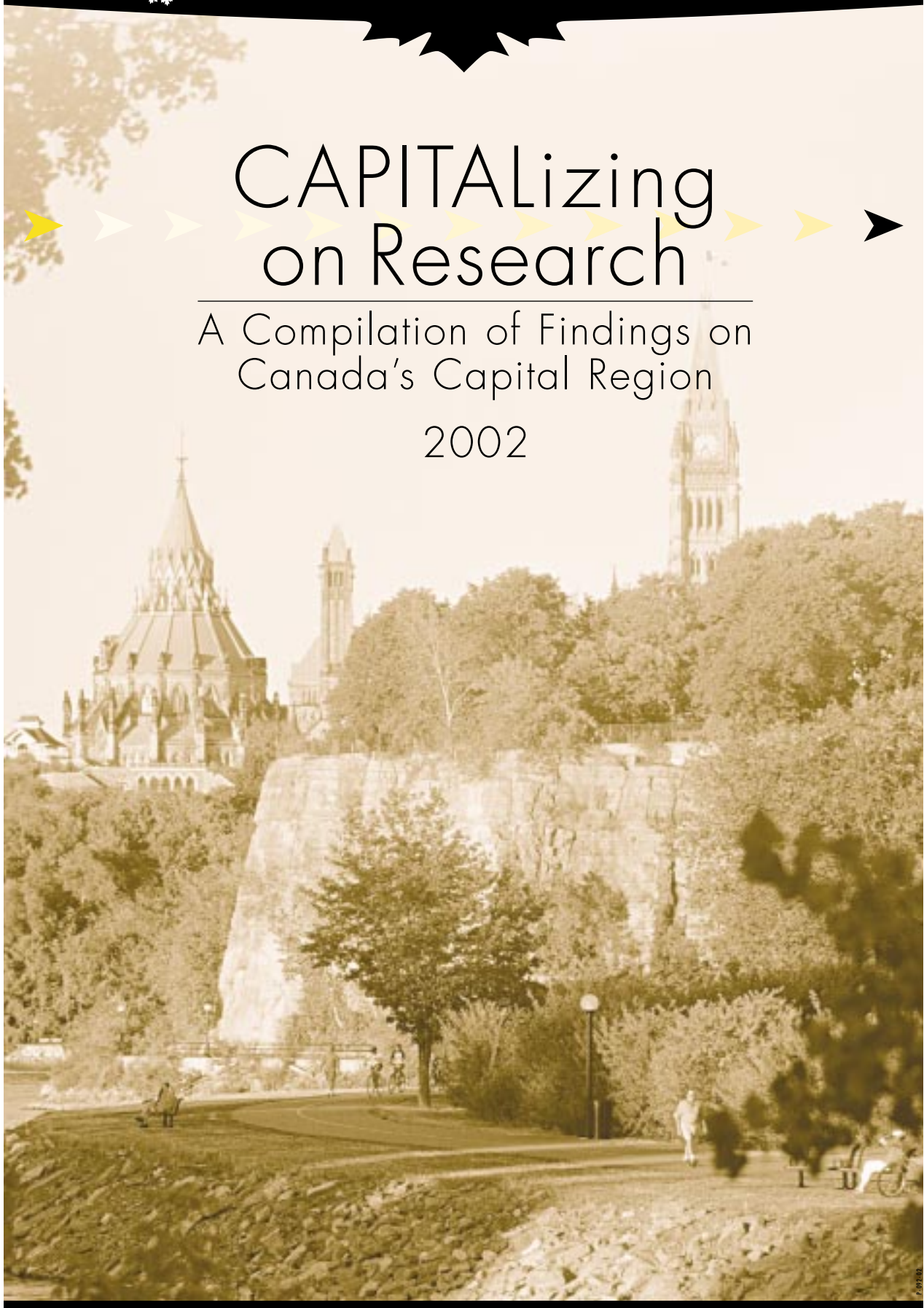
Commission
de la capitale nationale

Canada

CAPITALizing on Research

A Compilation of Findings on
Canada's Capital Region

2002






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Canada's Capital Region

2002

Corporate Audit, Research and Evaluation
National Capital Commission
Ottawa, Canada
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At the National Capital Commission (NCC), we use information about the National Capital Region (NCR) and about Canadians to guide us in our decisions. Here in this document, you'll find a collection of facts and numbers that provides a fascinating and useful snapshot of the human face of Canada's Capital Region — both residents and visitors alike. The information has been gleaned from the following seven studies:

- 1. Canadians Visiting Their Capital*
- 2. Interactive Visitor Information System (IVIS) at the Capital Infocentre*
- 3. Canada Day 2001*
- 4. Canada and World Pavilion 2001 Research*
- 5. The Green Capital (Module II)*
- 6. Alcatel Sunday Bikedays User Profile*
- 7. Youth Programming Study*

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The National Capital Commission Your Capital — Our Passion, Our Mission!

The mandate of the National Capital Commission (NCC) is to build a capital that will foster pride and unity among Canadians. The NCC's many responsibilities include organizing Canada Day on Parliament Hill, maintaining the Rideau Canal Skateway — the longest skating rink in the world! — managing a large number of green spaces, maintaining a substantial recreational pathway network and welcoming and providing information to visitors at the Capital Infocentre.

As it carries out its plans, programs and promotion of the National Capital Region, the NCC relies on many sources of public input, including research intelligence, to enhance its decision making.

Each year, the NCC initiates studies on various topics in order to meet the changing needs of our social, economic and cultural environment. We are strongly committed to cooperation, partnerships and networking, and we want to share with you the second version of *CAPITALizing on Research*, which contains the results of seven major studies conducted by the NCC in 2001–02.

This version of *CAPITALizing on Research* deals with Canadians visiting their Capital, the Canada Day celebrations and the best new attraction in Canada, the Canada and the World Pavilion. Furthermore, it includes research on the Capital's green assets as well as on one of the region's most popular outdoor activities, Sunday Bikedays. And, last but not least, given that Canadian young people constitute a key market for the NCC, research results from the latest Canadian teachers' surveys are incorporated into this document.

Yours sincerely,



Marcel Beaudry
Chairman

Population of the NCR (Information from Statistics Canada)

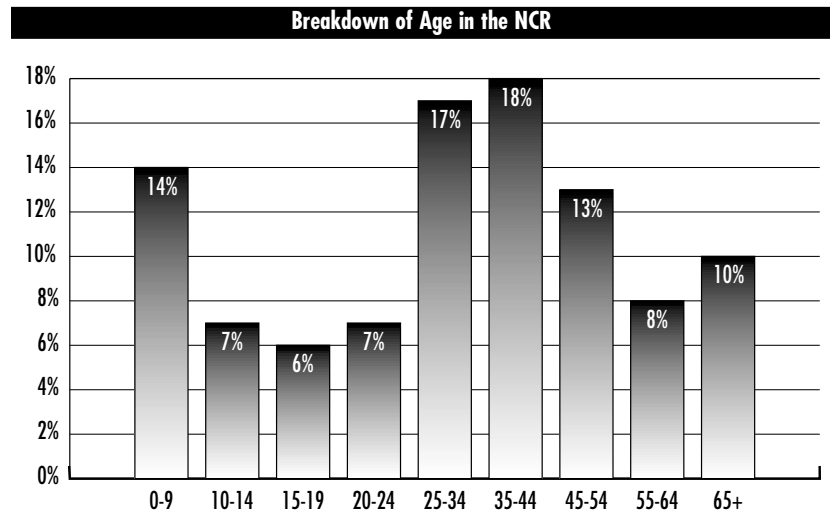
1991	1996	2001
941,814	1,010,498	1,075,938
	+7.3%	+6.5%

Land area in square kilometres in 1996: 5,686.45

(based on census results from 1991, 1996 and 2001)

The following data is from the 1996 census:

Age



Gender

Male	49%
Female	51%

Occupation

The top employer in the NCR is the federal government, followed by the high-technology sector.

Population Profile: Diversity

Non-immigrant population	832,595	83%
Immigrants*	161,885	16%
Non-permanent residents**	6,455	1%

* Immigrants are residents born outside of Canada.

** NCR residents with refugee status, student visas and business visas.

Profile of Immigrant Population (161,885): Place of Birth

United Kingdom	22,860	14%
Lebanon	10,040	6%
Italy	7,600	5%
United States	7,875	5%

Income

(based on population 15 years old or over; 1996 census; individual income)

The \$0-\$19,999 income bracket includes teens between 15 and 17 with part-time incomes and retired seniors aged 65 or older.

\$0-\$19,999	44%
\$20,000-\$29,999	15%
\$30,000-\$39,999	14%
\$40,000-\$49,000	10%
\$50,000-\$59,000	7%
\$60,000 +	10%

Education

(based on population 15 years old or over; 1996 census)

Less than grade 9	64,100	8%
Grades 9 to 13	251,620	32%
Trades certificate/diploma	21,770	3%
College diploma/CEGEP	182,605	23%
University	272,935	34%



1. Canadians Visiting Their Capital: How Many?

- Domestic travel in Canada was down 11% in 2001 compared to 2000.
- Canadians made 4,744,000 visits to their Capital in 2001, generating over \$800 million in spending.
- Of these trips, 36% were made to visit friends and relatives.
- August was generally the busiest month in the NCR for Canadian visitors — 14% of the trips mentioned above occurred in August.
- The number of Canadian visits to the NCR in December 2001 almost doubled compared to December 1999.
- The number of Canadian visits to the NCR in September 2001 decreased by more than a third compared to September 1999.

- The number of Canadian visits to the NCR in spring 2001 decreased by 40% compared to Spring 1999.
- The NCR was the fourth most visited Canadian city by Canadians, after Toronto, Montréal and Quebec City.

2. Interactive Visitor Information System (IVIS) at the Capital Infocentre: Orientation for NCR Visitors

- Users of IVIS who visited the Infocentre were in general highly educated.
- Groups consisting of five or more people increased over the two-year period.
- Perception of the Infocentre was overwhelmingly positive: more than 90% of visitors waited less than five minutes to use the IVIS, expressed

extreme satisfaction with the waiting time and found IVIS to be completely user friendly.

- Approximately 95% of visitors indicated that their expectations of the Infocentre were met or exceeded.

3. Canada Day 2001: A Snapshot of Canada's Most Popular Birthday Celebration

- In 2001, close to 300,000 people visited one of the four official Canada Day sites.
- Tourists generated 79% of the monetary gain recorded

from the Canada Day event. Generally, event participants produce a direct economic impact of approximately \$5.1 million.

- Of the participants, three quarters were between the ages of 18 and 44; 83% of visitors travelled to the NCR because of Canada Day.
- Overall, two-thirds of respondents felt that their Canada Day expectations were met.
- Of the people who participated in Canada Day activities, 57% strongly agreed that the event provides a greater sense

of pride in Canada; 90% of Canada Day participants had a greater sense of pride in being Canadian.

- Of the people surveyed who participated in Canada Day activities, 74% agreed that their awareness of the NCC had improved and 82% indicated improved perceptions of the NCR — both as a result of participating in Canada Day activities.

4. Canada and World Pavilion 2001 Research: Who Visits?

- A total of 62,131 Pavilion visits occurred from the middle of May to the beginning of October 2001. Visits occurred primarily on Sundays.
- Of the visitors, 85% reported being very satisfied or satisfied with their visit to the Pavilion. The key satisfaction driver was the “learning something new about Canadians” factor.
- During the first season of operation, the Pavilion had a strong awareness level vis-à-vis NCR residents; 23% of NCR residents said that they’d heard about the Pavilion, and 13% said that they had visited it.
- Visitors to the Pavilion had a high education level, were high earners and were mainly between the ages of 25 and 44.
- Half of the Pavilion’s visitors were NCR residents; the other half were tourists to the region.





5. The Green Capital (Module II): Natural Treasures in the Capital

A. Mer Bleue winter and summer seasons

Profile of winter season users: mostly male, predominantly English speaking, aged 45 or over, residing within the NCR (and specifically in Ottawa), earning more than \$80,000 per year, organized in small groups, accessing the site by car.

Profile of summer season users: male and female, primarily English speaking, aged 20 to 44, residing within the NCR, earning between \$20,000 and \$80,000 per year, consisting of families, accessing the site by car.

- Mer Bleue welcomed 72,100 visitors during the colder months and 29,600 during the warmer months.
- On average, 88% of Mer Bleue guests recognized the NCC role in this sector of the Greenbelt.
- Respondents were mainly local residents rather than visitors.

- Generally, these respondents reported close to 100% satisfaction with the site's natural milieu.

B. Philippe Lake

- More visitors were generally attracted to this site in July and August.
- Weekdays were generally busiest, with 62.2% of the volume.
- More than half of the visitors usually stayed for at least 24 hours.
- During the summer season, 111,100 visits were reported. Parent Beach, Breton Beach and Lusk Cave were the most popular sites.
- Each visitor spent about \$22 per day at Philippe Lake and about \$440 during their overall stay in the NCR.
- More than half of the visitors reported a gross household income of more than \$20,000 and less than \$80,000.
- Visitors reached Philippe Lake by car, bike or bus.
- Results showed that 96.1% travelled by car and 3% by

bicycle. Approximately 63% identified French as the language spoken most at home.

- Activities engaged in by most visitors were camping, swimming, hiking and boating.
- Campers made up 85.6% of Philippe Lake visitors' accommodations. Approximately 36% of the visitors recognized that the NCC manages the site; 45.7% identified Profac.

C. La Pêche Lake

- More visitors were generally attracted to this site in July: 53.1% of the site's visits occurred in July.
- Sundays were the busiest day of the week, with 46.8% of the summer season guests.
- Most visitors tended to stay for longer than four hours.
- A total of 38,200 visits were reported. The beach and La Pêche Lake are the most popular sites.
- Visitors spent about \$13.15 each per day at La Pêche Lake and about \$490 each during their overall stay in the NCR.



- More than half of the visitors reported a gross household income of more than \$20,000 and less than \$80,000.
- Visitors accessed La Pêche Lake by car, bus or minibus.
- Results show that 98.3% travelled by car and 1.7% by bus.
- Approximately 53.4% identified French as the language spoken most at home; 45.3% identified English as their language of fluency.
- Activities engaged in by most visitors were swimming, boating and fishing.
- Swimmers made up 57.7% of La Pêche Lake visitors, boaters 42.3%. Approximately 7.4% of respondents recognized that the NCC manages the site; 30.2% identified Profac.

6. Alcatel Sunday Bikedays User Profile: Sunday Bikedays... 30 Years of Outdoor Activities

- Key participants in the program: English-speaking males between the ages of 35 and 54 years, university educated with higher-than-average household incomes.
- Of the participants, 93% were NCR residents; 25% were employed through the Public Service and 18% identified themselves as high-tech professionals.
- Less than 10% of Bikedays participants wanted additional refreshments, longer hours, and surface repairs; 2% wanted Bikedays on Saturdays.
- Overall, 62% of respondents were satisfied with the current level of services offered.
- Specifically, 93% expressed satisfaction about rest areas, parking and riding surfaces, whereas 87% said they were content with on-site information.

7. Youth Programming Study: Canadian Youth... a Key Market for the NCC

- One-third of Canadian teachers were currently using NCC educational resource materials.
- Their satisfaction rated high among users of the NCC's resources and programs, for both outreach (programs for use in the classroom) and inreach (programs in the Capital); the most popular NCC programs were generally Canada's Capital Tours, *Capital Quiz*, and the Discover the Hill activity.
- More than 8 out of 10 teachers who visited the NCR were from Ontario or Quebec.
- Their choices for the most popular attractions ranked in the following order: Parliament Hill, the Museum of Civilization, the Museum of Science and Technology, the National Gallery of Canada and the Rideau Canal.
- Cost was a deterrent when planning and deciding on a trip to the NCR.
- Students were regular users of the Internet, both for in-class research and at home.
- Teachers made wide use of SchoolNet and federal government sites such as *Canada: A People's History*, for preparing to teach about the NCR.

1. Canadians Visiting Their Capital

With a mandate of fostering Canadian pride and contributing to the awareness and participation in Canada's Capital by promoting and animating the NCR, the NCC is a major player in the local tourism industry. Understanding the volume and the type of Canadian tourists who visit the Capital is crucial to the planning, programming and promoting functions at the NCC.

According to Statistics Canada's Canadian Travel Survey 2001, tourism in the NCR declined in 2001. After reaching a five-year high in 1999, the volume of Canadian tourists visiting the Capital began to decline in 2000 and registered a 10.3% decrease in 2001. This was a trend throughout Canada, with the exception of some cities, as the overall number of Canadian tourists traveling within Canada declined by 11% compared to the year 2000. This was in part due to the economic downturn at the beginning of 2001 and further compounded by the events of September 11.

Canadians made 4,744,000 visits to the Capital in 2001, of which 60% were overnight stays. August is usually the busiest month in terms of volume of Canadian visitors; in 2001, unusually, December was the next busiest. Canadian visits to the NCR generated over \$800 million in spending.

Although the overall number of Canadian visits declined in 2001, the NCR maintained its rank of fourth most visited Canadian city after Toronto, Montréal and Quebec City.

2. Interactive Visitor Information Service (IVIS) at the Capital Infocentre

Satisfaction ratings for both the Infocentre and the IVIS system exceeded 90%. Generally, 80% of IVIS users reported being in the company of at least one adult aged 26 to 64. Of respondents, 79% reported English as their first language and 21% reported French. Approximately half were university-educated. The majority of IVIS users originated from Canada, and most of the foreign visitors came from the United States, France and England. Many visitors used the IVIS to plan their visit to the NCR and learn about the Capital Region.

IVIS users in the month of February showed more repeat visitors than first-time visitors. Many parties of two adults between the ages of 26 and 64 visited the Infocentre. While the total number of visitors to the Infocentre that used the IVIS decreased from 66,599 to 60,034, from the 1998-99 time period to the 1999-2002 time period, groups consisting of five or more people increased during the two-year period. IVIS users spoke predominantly English and originated from Canada.

3. Canada Day 2001

Canada Day emerged as a well-received, well-planned and economically prosperous event. It was overwhelmingly identified as an event that increases pride in Canada and in being Canadian. Every year, the NCC plans and develops Canada Day to celebrate the country's birthday. As a follow-up to a



1993 study, research was undertaken in 2001 to develop a current profile of Canada Day participants. Both on-site visitors and NCR residents were surveyed; 62% of participants were repeat visitors.

Findings indicated that 95% of event participants rated the event as excellent or good. Some 300,000 people went to one of the four official Canada Day sites. The representative Canada Day participant was a young, well-educated tourist and visitor to the region, who spoke English and who expressed a greater sense of being Canadian. Average trip party size was 3.6 people, and 29% of participant parties included people under the age of 16. Total spending by event participants is estimated to have been \$8.5 million.

4. Canada and the World Pavilion 2001 Research

Research gathered about visitors to the Canada and the World Pavilion reveals awareness of and satisfaction with the Pavilion's demonstrations that display Canadian achievements and contributions. The Pavilion opened on May 9, 2001, with the goal of showcasing and conveying contemporary information about Canadian accomplishments on the world stage. Information regarding participant satisfaction, attendance levels and awareness was collected. Lines of evidence were collected by means of manual and electronic attendance counts, automated survey kiosks, an omnibus telephone survey and a guest book. The study measured global performance using

both quantitative and qualitative information from visitors to the Pavilion and people who did not visit the Pavilion.

Visitors linked their overall satisfaction with their experience to learning new information. Of visitor survey respondents, 85% were very satisfied or satisfied. The written comments in the guest book reflect pride, self-respect and reverence for the unique values that characterize Canadian personalities historically, contemporarily and internationally.

Generally, respondents became aware of the Pavilion while passing by or through word of mouth, newspapers and TV. With 62,131 visits in the first season, about half of the participants completing the automated kiosk survey lived in Ontario and had a university degree.

5. The Green Capital (Module II)

In 1997, the subject of the “green Capital” emerged as a priority focus relative to future planning and marketing. Multi-branch efforts ensued, one of which was the establishment of a steering committee for green Capital marketing. The committee identified the need for research so that decisions would be based on concrete information. Whereas Module I focused on Stony Swamp and Gatineau Park, Module II focused on Mer Bleue, Philippe Lake and La Pêche Lake. The focus for the Mer Bleue area in the Greenbelt was both the winter and summer seasons; for the two lake areas in Gatineau Park, the focus was on the summer season. The following results were reported for the second year of a four-year study.

A. Mer Bleue

Mer Bleue was evaluated by means of interviews and direct observation for the summer season (May 1 to November 30, 2000) and for the winter season (December 1, 2000 to April 15, 2001). These two lines of evidence summarized and compared the seasonal Mer Bleue outings, the level of satisfaction, the level of NCC awareness and the user profile.

The overwhelming majority of people who enjoyed Mer Bleue in summer and winter were from the NCR. Most of the winter season users (76.3%) were aged 45 or older; 52.8% of the summer season visitors ranged from 20 to 44 years. Group size tended to favour couples during the winter season. Families made up the largest proportion of summer season

visitors. During both seasons, a large majority of people went to the site by car. There were 72,100 visitors during the colder months and 29,600 in the warmer months, with the highest attendance recorded on Saturdays and Sundays.

In general, cross-country skiing dominated the winter season, and more than 85% of the visitors categorized themselves at the intermediate level of expertise within the sport, preferring a variety of tracks and slopes from easy to difficult. Most outings were from one to two hours and took place throughout the week. Skiers specifically reported satisfaction or extreme satisfaction measuring 93.1%. This figure increased to almost 100% when overall satisfaction with tracks, security and signage was taken into consideration. Summer season visits were motivated by the desire to experience the flora and fauna in the environment, to meet with family and friends, to walk and to picnic.

The study revealed that 99.3% of winter season users recognized the NCC as responsible for the management of Mer Bleue; 77.5% of the summer season visitors credited the NCC. Approximately three-quarters of the respondents supported the preservation and the promotion of this sector.

B. Philippe Lake

The period of assessment from May 1 to October 9, 2000, included in-person interviews and observational counts of visitors to obtain statistics about weekly, daily and hourly uses of the Philippe Lake sector. These two lines of evidence evaluated the level of satisfaction

and the economic impact of visitors.

Visitors and campers were surveyed about satisfaction. Philippe Lake guests were most satisfied with the security of their outing. Between 70% and 95% of visitors were content about roads to enter the park, cleanliness, footpaths and signage. Between 5% and 10% of visitors were least satisfied about the availability of information on activities, services, and the natural character of the park. Between 91% and 99% of campers were satisfied with comfort, cleanliness and tent sites. Campers were the least satisfied about the lack of publicity camping receives at Philippe Lake.

With a total of 111,100 visitors, Philippe Lake visitors also spent time at other NCC venues. Daily expenditures per visitor equalled \$21.76. Visitors stayed for an average of 5.2 days in the NCR. The primary motivation for 70% of the visitors to Philippe Lake was a trip to the NCR. While their spending equalled \$440 within the NCR, they spent more in Quebec than in Ontario.

On average, 85% of the visitors agreed that measures must be taken to preserve the integrity of the park as a natural and cultural resource.

C. La Pêche Lake

The period of assessment from June 1 to September 4, 2000, included in-person interviews and observational counts of visitors to obtain statistics about weekly, daily and hourly uses of the La Pêche Lake sector. These two lines of evidence evaluated the level of satisfaction and the economic impact of visitors.

Visitors and campers were surveyed about satisfaction. La Pêche Lake guests were most satisfied with the upkeep and maintenance of their excursion site. Approximately 92% of visitors were content with the cleanliness of the site, while 77% were pleased with the behaviour of visitors; 70% were happy with roads entering the park, and 63% were satisfied with security services. Less than 20% of visitors were dissatisfied about signage and the availability of information on activities, services and the natural character of the park. About 97% of campers were equally satisfied with comfort, cleanliness and tent sites.

The approximately 38,200 visitors to La Pêche Lake also spent time at other NCC venues. Daily expenditures per visitor equalled \$13.15. Visitors usually stayed for four days in the NCR. The primary motivation for 65% of the visitors to La Pêche Lake was a trip to the NCR. While their spending equalled \$490 within the NCR, they spent more in Quebec than in Ontario.

On average, about 70% of visitors agreed that the natural environment of the park must be preserved for future generations and for interpretive leisure activities, even if that meant paying a tariff for its maintenance.

6. Alcatel Sunday Bikedays User Profile

More than 90% of Alcatel Sunday Bikedays users were NCR residents and had previously participated in Sunday Bikedays. For this event, 62% of participants were satisfied with the current level of service pro-

vided throughout the day. More than 45% of respondents were aware of Alcatel's title sponsorship and 26% were cognizant of the NCC's responsibility. The NCC has been organizing Sunday Bikedays for 31 years.

Of the participants, 54% were between 35 and 54 years of age. In terms of education, 43% of the participants held a university degree. One-fifth of the participants were high-tech professionals. The same proportion of participants belonged to the private sector. Public servants accounted for a quarter of the total number of participants. Findings revealed an average household income of \$76,043.

The program takes place on the Ottawa River Parkway, Colonel By Drive, the Rockcliffe Parkway and the Gatineau Park Parkway; the highest number of children took part on the Rockcliffe Parkway. Less than 10% of the respondents said they would prefer to see extra safety facilities, such as refreshments and surface repairs.

7. Youth Programming Study

In terms of promoting and safeguarding institutions and treasures for generations, a key audience for NCC programs is youth. The NCC offers inreach and outreach services and products, such as teachers' guides and activities. NCC inreach programs propose the NCR as a prime educational travel destination for youth. NCC outreach programs provide educational programs that fit within the curricula of Canada's school systems. When planning a visit to the Capital,

Canadian elementary and secondary school teachers devoted twice as much in-class time to the subject of the Capital.

Teachers' levels of satisfaction for NCC resources such as *Capital Quiz* and *Cyber Pal Pursuit* ranked high. While resource availability and familiarity was not an issue, one-third of teachers used NCC resource materials. Most teachers who did not include the National Capital in their teaching plans reported that it was not relevant to their course or grade. When contemplating NCR programs or services, most teachers thought of social studies or history. Additional educational resources about Canada's Capital, government and history would be welcome.

Most of the class trips to the NCR led by teachers from Ontario and Quebec took place in May and June. Trips for Grades 4 to 6 usually lasted a maximum of two days; trips with students in higher grades lasted a maximum of three days. Teachers preferred group programs where students could actively participate and which included both education and entertainment. Cost influenced class travel decisions. For NCR trip planning, teachers shared and recommended information amongst themselves.

Although regular use of the Internet focuses upon federal government websites, teachers welcomed current, up-to-date information both in e-mail and in traditional brochure formats to prepare excursions and lesson plans. Generally, inreach initiatives for Grades 4 to 6 were more popular than teaching about the Capital to Grades 7 to 12.



1. Canadians Visiting Their Capital

With a mandate of fostering Canadian pride and contributing to the awareness and participation in Canada's Capital by promoting and animating the NCR, the NCC is a major player in the local tourism industry. Understanding the volume and the type of Canadian tourists who visit the Capital is crucial to the planning, programming and promoting functions of the NCC.

During the past few years, the NCC has been analyzing tourism data and trends in order to inform its business lines. In 2000, the NCC produced "Tourism in Canada's Capital Region" based on Statistics Canada's "1999 Cities Project." "Canadians and their Capital," this year's tourism report, examines solely the Canadian travelling market to the NCR. The data used for the analysis is based on the Canadian Travel Survey (CTS) 2001 and is comparable to the adjusted and official 1999 CTS.

Tourism in the Capital Region 1999-2001

After reaching a five-year high in 1999, tourism in Canada began to decline in 2000 and registered further decline in 2001.

Canadians made over 171 million visits within Canada in 1999¹ — an increase of 3.1%.

In 2000, the volume of visits began declining to 170 million visits and registered a sharp decline to 151 million visits in 2001².

The decrease in visits made by Canadians in Canada for 2000 was compounded by the economic conditions and the events of September 11 that affected the overall domestic tourism in Canada in 2001.

1999	2000	Change
5,292,000	5,169,000	- 2.3%

2000	2001	Change
5,169,000	4,744,000	- 8.2%

1999	2001	Change
5,292,000	4,744,000	- 10.3%

¹ Adjusted and official 1999 numbers released by the tourism division at Statistics Canada in July 2002; comparable to 2001 official CTS figures.

² Based on the Canadian Travel Survey 2001 — Statistics Canada.

A

Visit Duration	2001		1999	
	Number of Visitors (in thousands)	Percentage	Number of Visitors (in thousands)	Percentage
Annual Total	4,744		5,292	
One day	1,896	40.0%	2,394	45.2%
1 night	785	16.5%	787	14.9%
2 nights	1,071	22.6%	1,088	20.6%
3 nights	429	9.0%	440	8.3%
4 nights	238	5.0%	199	3.8%
5 to 9 nights	215	4.5%	281	5.3%
10 to 16 nights	97	2.0%	69	1.3%
17 to 30 nights	11	0.2%	32	0.6%
31 or more nights	1	0.0%	1	0.0%

B

Season of Visit	2001		1999	
	Number of Visitors (in thousands)	Percentage of Yearly Total	Number of Visitors (in thousands)	Percentage of Yearly Total
Annual Total	4,744		5,292	
January to March	1,087	22.9%	1,033	19.5%
April to June	848	17.9%	1,425	26.9%
July to September	1,476	31.1%	1,669	31.5%
October to December	1,332	28.1%	1,165	22.0%

The NCR, although not a major international airline hub, was also affected in 2001. Canadians made fewer visits to their Capital Region in 2000 and 2001.

Canadians made 5,292,000 visits to the NCR in 1999 — a peak in volume for the last five years. After a slight 2.3% decline in 2000 (5,169,000), tourism in the region dropped by 10.3% to 4,744,000 visits.

Profile of the Canadian tourist in the NCR

The profile of visitors remained unchanged over the past few years. Typical visitors to the region were between the ages of 35 to 54, had a high level of education, were employed in managerial and other professional types of occupation, were high earners, travelled mainly from Ontario (but a third from Quebec), drove between 80 and

800 kilometres with a primary trip purpose of visiting friends and relatives. The average one-way distance driven to the NCR was 402 kilometres.

Visitors usually travelled to the region alone or in pairs (two adults). The average party size was 1.90 people.

Visit duration

Although the overall number of visits dropped in 2001, there were some significant variances in the types of visits when compared with 1999, particularly relating to the visit duration, season and month of visit.

Proportionally, more visitors stayed overnight in the NCR in 2001: 60% of the visits to the region were overnight visits ranging from one to two nights. The average duration of the visits was 1.69 nights.

▣▣▣ **A**

Season of visit

After the economic downturn in the spring in 2001, the volume of visits dropped from 1.4 million in April, May and June 1999 to 848,000 visits during that same period in 2001. The events of September 11 slowed down the growth in tourism numbers for the July to September period in 2001: the volume of visits decreased from 1.6 million in 1999 to 1.4 million in 2001 for that period.

Interestingly, tourism recovered in the fall, and the volume of visits to the NCR increased from 1.1 million in 1999 to 1.3 million in 2001, all due to significant recovery in December as the next table illustrates.

▣▣▣ **B**

C

Month of Visit	2001		1999	
	Number of Visitors (in thousands)	Percentage of Yearly Total	Number of Visitors (in thousands)	Percentage of Yearly Total
Annual total	4,744		5,292	
January	323	6.8%	380	7.2%
February	394	8.3%	301	5.7%
March	370	7.8%	352	6.7%
April	249	5.2%	373	7.0%
May	314	6.6%	524	9.9%
June	285	6.0%	528	10.0%
July	500	10.5%	511	9.7%
August	646	13.6%	634	12.0%
September	330	7.0%	524	9.9%
October	393	8.3%	477	9.0%
November	325	6.9%	364	6.9%
December	613	12.9%	324	6.1%

Months of visit

August has traditionally been the busiest month in the Capital in terms of domestic tourism. In 2001, 13.6% of the total Canadian visits occurred in August.

Interestingly, December closely followed August in 2001. Almost 13% of the total Canadian visits occurred in December. In the last quarter of 2001, particularly in December, Canadian tourism rose again. Further analysis shows that family travel in Canada increased and Canadians travelled during the Christmas period to spend the holidays with their friends and relatives. The impact of this trend can be seen in the NCR, as the volume of visits increased from 324,000 in December 1999 to 613,000 in December 2001.

The growth registered in summer 2001, particularly for the month of August, was halted in September due to the events of September 11. Canadians made 194,000 fewer

D

Spending (in thousands of dollars)	2001	1999
Vehicle rental	39,321	26,703
Vehicle operation (incl. gas and repairs)	146,789	110,294
Local transportation	18,470	12,440
Food and beverages in restaurants and bars	193,780	166,587
Food and beverages in stores during trip	44,278	36,822
Accommodations	200,857	184,103
Recreation and entertainment	58,942	50,720
Clothing	76,413	71,917
Other costs	38,996	56,905
Total expenditures	817,846	716,491

visits in September 2001 than September 1999.

February was the fourth most popular month for visits by Canadians. Canadians made 93,000 more visits in February 2001 than 1999.

C

Spending

The total spending of Canadian visitors to the NCR in 2001 amounted to just over \$800 million. The bulk of the spending, however, was on accommodations and restaurants.

D

Activities

The type of activities that Canadians engaged in while visiting the NCR did not change. After visiting friends and relatives, shopping and sightseeing, participating in sports and outdoor activities remained one of the most cited activities (21%), followed by visiting a museum, art gallery (13.5%) or historic site (11%).

Market share

Although the number of visits to the NCR dropped from 1999 to 2001, its market share among other Canadian cities remained the same. With 548,000 fewer visits in 2001, the NCR still

	2001		1999		
	Number of Visitors (in thousands)	Percentage	Number of Visitors (in thousands)	Percentage	
Toronto	11,251	17.0%	12,576	17.3%	Toronto
Montréal	7,662	11.6%	8,259	11.4%	Montréal
Quebec City	4,888	7.4%	5,750	7.9%	Quebec City
NCR	4,744	7.2%	5,292	7.3%	NCR
Edmonton	4,221	6.4%	5,112	7.0%	Edmonton
Calgary	3,431	5.2%	3,969	5.5%	Calgary
St. Catharine's-Niagara	3,125	4.7%	3,668	5.1%	Vancouver
Halifax	3,050	4.6%	3,266	4.5%	London
Vancouver	3,036	4.6%	2,783	3.8%	St. Catharine's-Niagara
London	2,473	3.7%	2,771	3.8%	Halifax

ranked as the fourth most visited city by Canadians. Toronto, Montréal and Quebec City were still the three most visited.

► E

2. Interactive Visitor Information System (IVIS) at the Capital Infocentre

The Interactive Visitor Information System (IVIS) at the Capital Infocentre is a tool that helps users obtain information on the Capital and plan their itinerary.

The IVIS includes a survey feature that has been developed since its inception in 1996. Users are given the opportunity to create a passport. They can indicate their country or province of origin and print or stamp the attractions that they are planning to visit into the passport. Users are also encouraged to fill out a survey after they create a passport. The questionnaire consists of seven items, ranging from satisfaction with the Infocentre and the IVIS to profile of the users.

Infocentre management opted to examine the type of data that

had been stored in the IVIS for the last few years. For the purpose of this report, two years of IVIS data were explored, from April 1998 to April 2000. While mining the data and conducting analysis on users' responses, particular attention was given to the level of satisfaction and user friendliness of the IVIS, as well as the profile of the users.

Here are the key findings that emerged from this exercise:

- In February, the Infocentre witnessed more repeat visitors than first-time visitors.
- July and August were the only two months during which more respondents had not finished high school than had graduated from university. Presumably, it was high school teenagers who filled out most of the surveys for July and August.
- While comparing trends from 1998–99 to 1999–2000, a slight increase was noticed in groups of five or more people to visit the Infocentre.
- The most consistently sized party of visitors to the Infocentre were couples (two

adults between the ages of 26 and 64). In total, couples made up a third of all visitors to the Infocentre.

- Consistently, for the two-year period analyzed, and throughout each month examined separately, there has been a very high level of satisfaction with the Infocentre, with the waiting time to use the IVIS and with its user friendliness. All satisfaction ratings exceeded 90%.
- Overall, visitors to the Infocentre and users of the IVIS are highly educated: 45% of users had a university degree in 1998–99 and 48% in 1999–2000.

3. Canada Day 2001

To accomplish its mission, the NCC offers, among other things, public programs, events and sites such as Winterlude, Canada Day, the Canada and the World Pavilion and interprets sites such as Parliament Hill and Confederation Boulevard. The Canada Day celebrations represent a major undertaking for the NCC. The NCC commissioned PricewaterhouseCoopers to

undertake a study to assess the event, something that had not been done since 1993.

The main purpose of the 2001 Canada Day Study was to assess the impact of the Canada Day festivities and to develop a current profile of the Canada Day participant.

In order to meet the survey objectives of the Canada Day 2001 study, two key data collection techniques were used — an on-site intercept survey of 704 event participants and a local telephone survey of 387 NCR residents. On-site screener questionnaires to determine the incidence of tourists to locals totalled 1,974.

Following are a number of highlights from the report:

- Results showed that approximately 291,000 people visited one of the four official Canada Day sites.
- Not surprisingly, the venue with the greatest number of visits was Parliament Hill, at 255,000. The peak volume at Parliament Hill was 137,000, from 6 pm to 10 pm.
- Total spending by event participants was estimated at \$8.5 million, resulting in a direct economic impact of approximately \$5.1 million.
- The Canada Day festivities represent a significant attraction to visitors from outside the region.
- Visitors represented a third of all participants, and most of them indicated that the event was a primary reason for their visit. As is typical for any event such as Canada Day, tourists accounted for the majority of the economic impact to the region.

Tourists generated 79% of the economic impact of the Canada Day event.

- Generally, participants were predominantly English speaking. They were also reasonably young and well educated. This profile can be used to help plan entertainment and activities in future years. The profile suggests the need to keep things upbeat.
- Of the participants surveyed, 62% had attended a previous Canada Day event in the NCR. Not surprisingly, local residents were far more likely (77%) to have participated in a Canada Day celebration in the NCR than were tourists (33%).
- The average party size was 3.6 people. Jacques-Cartier Park was the most family-oriented site, with 55% of groups having children under 16 years of age, compared to an average of 29% across all sites.
- Participant expectations were generally met or exceeded, which indicates that the NCC is doing a good job of organizing the event. Moreover, 95% of all event participants rated the overall event as excellent or good.

Tourists were much more likely than local residents to indicate that their expectations were exceeded. A possible explanation for this is that tourists were less likely to have participated in a previous Canada Day event in the Capital, and hence were less aware of what to expect.

The event was successful in having a positive impact on pride in Canada and in being Canadian. The event also had a positive impact on perceptions of the NCR and the NCC,

though that impact was not as strong as the impact on pride.

Sponsorship recall was reasonable for most of the key sponsors. This was particularly true at Major's Hill Park and Jacques-Cartier Park.

Overall, the results suggested that the Canada Day event was a success. The four official sites attracted approximately 300,000 people from inside and outside the region and for the most part gave the participants a greater sense of pride in their country and heritage — the goal of any country's birthday festivities.

4. Canada and the World Pavilion 2001 Research

The Canada and the World Pavilion, a one-of-a-kind cultural destination, opened on May 9, 2001, in Ottawa. Through state-of-the-art exhibits, engaging programs and special activities, the Canada and the World Pavilion showcases the hundreds of Canadians who are making their mark around the world today. The Pavilion is the only tourist attraction devoted entirely to showcasing, under one roof, the many ways that Canada touches the world. More than ever, this new focus on international themes is timely, as boundaries open up and the global village becomes a reality.

Canadians and foreign visitors can see famous names and familiar faces, giants of stage and screen, as well as dozens of "I didn't know that!" stories featuring people who are making an impact in a variety of fields. The focus of the information is contemporary, emphasizing recent achievements or



contributions. Past events or actions that have significantly shaped Canada's international image are also included, not only because they are worthy of celebration, but because they help to set the context to better understand Canada's current presence in the world.

With the intent of enhancing the performance management of the Pavilion, an evaluation framework was developed in consultation with Pavilion stakeholders. In addition to ensuring that the "right" things got measured, the purpose of the framework was to facilitate the terms of performance information that would ensure accountability, evolve operational planning and control, further program advocacy, inform program evaluation and ultimately support strategic planning.

Four lines of evidence were used for the performance measurement of the Pavilion in its first year. Attendance counts (manual and electronic) were conducted every day. The

services of in-touch kiosks were retained to manage a self-selected/self-administered survey from June 29 until August 31. An omnibus telephone survey was conducted to measure local awareness of the Pavilion vis-à-vis residents of the NCR. Finally, a guest book was on display at the Pavilion from May to October, allowing visitors to share their comments in writing.

Attendance counts

A rigorous exercise was conducted to assess the attendance level at the Pavilion in its first season of operation. Attendance at the Pavilion is communicated by number of visits, a method of reporting that is consistent throughout the industry.

The following is an outline of visits to the Pavilion from May 9 until October 16, 2001.

Total visits: 62,131

Visits of indoor exhibits: 42,889

Tour group visits: 4,089

Visits to outdoor events: 9,752

Visits to events in the multi-purpose room: 525

Visits to Discovery Cart: 2,995

Visits to Rideau Falls Salon: 1,881

Self-administered survey

Visitors of the Canada and the World Pavilion were surveyed from June 29 to August 31, 2001. The purpose of the survey was to determine the characteristics and satisfaction of the visitors with the Pavilion site, programming and activities. Data was collected using two electronic kiosks (one was programmed with an English survey, the other with a French survey). There were 748 valid surveys.

Due to the self-selected/self-administered survey methodology, the findings are not necessarily representative of all Pavilion visitors. Nevertheless, the relatively high response rate (748

valid and completed surveys) makes the findings very useful.

The following are key findings from the visitor survey:

- Most respondents lived in the NCR, in Ontario (41%), had a university degree (58%), were aged 35-44 (24%), and were female (55%).
- Many respondents found out about the Pavilion when passing by (45%), some also found out by word of mouth (22%).
- Most respondents were first-time visitors (90%) and came to see what the Pavilion was all about (39%). Most visitors came to see the indoor exhibits (71%), visited on Sunday (26%) and stayed for one to two hours (51%).
- The majority of respondents were very satisfied or satisfied with their visit overall (85%), and learned new information during their visit (84% strongly agreed, or agreed, with the statement “I feel I have acquired/learned new information on my visit today”).
- The majority of respondents were particularly satisfied with staff friendliness (93% were very satisfied or satisfied) and washrooms (90% were very satisfied or satisfied). There were also high levels of satisfaction with staff knowledge (84% were very satisfied or satisfied).
- Of respondents, 69% said that they would be very likely or likely to return to the Pavilion, and 84% were very likely or likely to recommend the Pavilion to friends and family.

Key drivers of overall visitor satisfaction were learned new information and staff friendliness.

One of the Pavilion’s key strategic objectives was to offer visitors a learning experience and increase their feelings of pride after their visit. Research findings as well as comments received from visitors in the guest book revealed that the Pavilion is meeting its objectives.

Guest book

Most of the lines of evidence used for the Pavilion performance measurement were of a quantitative nature, so a guest book was on display to offer visitors opportunities to provide qualitative comments. In total, 369 comments were registered in the guest book for the entire season. While the majority of these comments were positive, there were few suggestions for improvement.

Local telephone survey with residents of the NCR

Given that the marketing campaign of the Pavilion’s first season targeted NCR residents, a local telephone survey was necessary to gauge awareness level of the new attraction. The survey occurred the week of September 26, 2001, with a sample of 500 NCR residents (N=500 (+/- 4.4%, 95% confidence level).

The following are key findings from the local survey:

- In its first season of operation, there was a high level of awareness of the Pavilion: 22% of NCR residents recalled seeing or hearing about the Pavilion.
- Respondents were asked to recall where they heard about the Pavilion, and the most-mentioned source was newspapers (32.4%), followed by TV (24.3%).

- Respondents mentioned “exhibits on Canadian achievements/contributions” when they were asked specifically what they knew about the Pavilion.
- Of the 22% of the respondents that were aware of the Pavilion, 13% had actually visited and 87% had not.
- When asked, respondents who had not visited the Pavilion stated that they had not had time to do so (50.5%). Further, just over 5% of the respondents were planning to visit.

Further research is planned for 2002–03. More information on the Canada and the World Pavilion is available at www.canadascapital.gc.ca/international.

5. The Green Capital (Module II)

The NCC has undertaken a series of important studies to determine how the green spaces in Canada’s Capital are used, to define the user profile, measure the satisfaction levels and identify the tendencies and predominant values of those who visit them. These studies will be conducted over a period of approximately four years.

This section is a summary of the results of phase 2 of the study on visitors to La Pêche Lake and Philippe Lake in Gatineau Park during the 2000 summer season, as well as Mer Bleue in the Greenbelt during the summer 2000 and winter 2000–01 seasons.

The study was conducted among visitors to La Pêche Lake and Philippe Lake in Gatineau Park during the 2000 summer season, as well as to Mer Bleue in the

Greenbelt during the summer 2000 and winter 2000–01 seasons. The goal of the study was to provide information on user characteristics and behaviour to the NCC authorities responsible for managing the sites. It also provides details on the visitors' level of satisfaction, and their views on certain management orientations and activities offered in Gatineau Park and the Greenbelt.

Sodem Recherche et Développement, the agent for the study, selected two research strategies to compile the information required to achieve the objectives:

- Face-to-face interviews with visitors
- Direct observation of the number of daily visitors

FINDINGS FOR MER BLEUE

2000 summer season: respondent and/or visitor profile

Gender

Male: 59% (191); female: 41% (133)

Origin

NCR: 89.2% (289) (in order of importance: Ottawa, 37.4% (108); Municipality of Gloucester, 23.2% (67); 11 other municipalities in the NCR, 39.6% (149)

Outside the NCR: other areas of Ontario, 60%; other areas of Quebec, 25.7%

Age

45 years and older: 47.2%; 20 to 44 years: 52.8% of all respondents (267)

Language

English spoken most often in the home: 77.2% (250); fluency in French: 21.3% (69)

It should be noted that 237 interviews (73%) were conducted in English, while 87 interviews (27%) were conducted in French.

Gross Family Income

Less than \$20,000: 8%; more than \$80,000: 20.7%; intermediate categories: 71.3%; refused to reply to the family income question: 15.1%

Visitor satisfaction with elements and/or services

Mer Bleue summer season visitors were most satisfied with the following:

- Opportunities to admire nature (97.9%)
- Cleanliness of the site (94.1%)
- Condition and maintenance of parking lots (91.5%)
- Signage on trails (89.2%)
- Information on the site's natural phenomena (88.9%)

Mer Bleue summer season visitors were most dissatisfied with the following:

- Information on activities and services at Mer Bleue (27.1%)
- Road signage for directions to the site (26.3%)
- Trail map (15.1%)
- Variety of activities offered (15.1%)
- Condition and maintenance of access roads to the site (14.5%)

Mer Bleue summer season visitors had most difficulty expressing an opinion (“don't know”) on the following:

- Variety of activities offered (29.3%)

- Information on activities and services at Mer Bleue (17.3%)
- Trail map (15.1%)
- Parking lot security (13.6%)
- Road signage for directions to the site (13.0%)

Level of knowledge about Mer Bleue and the Greenbelt

Mer Bleue summer season visitors learned about the site's existence and the activities and services that are available primarily through previous visits (66.4%) and by word of mouth (27.2%).

The other Greenbelt areas that were best known to Mer Bleue summer season visitors were, by order of importance:

Greens Creek (187)

Stony Swamp (162)

Shirleys Bay (151)

Pinhey Forest (149)

Pine Grove Forest (135)

A total of 77.5% of Mer Bleue summer season visitors identified the NCC as the agency responsible for managing the site, while 21.3% did not know who managed the site.

Opinion of visitors regarding certain management orientations and activities offered in the Greenbelt

Mer Bleue summer season visitors agreed most with the following management orientations:

- Limiting or prohibiting access to fragile Greenbelt environments (75.0%)
- Offering more interpretation activities to enable visitors to appreciate the Greenbelt's natural and cultural resources (73.5%)

- Offering more outdoor recreational activities in the Greenbelt (63.6%)

Mer Bleue summer season visitors disagreed most with the following management orientations:

- Requiring Greenbelt visitors to pay a fee to help improve services (62.4%)
- Allowing tasteful advertising in the Greenbelt to help improve services (51.5%)
- Organizing guided tours in the Greenbelt for tourist groups visiting the NCR (45.7%)

2000–2001 winter season: respondent and/or visitor profile

Gender

Male: 72.4% (297); female: 27.6% (113)

Origin

Nearly all (99.3%) from the NCR, especially Ottawa (97.1%)

Age

44 years or less: 23.7%; 45 years and older: 76.3%

Language

English spoken most often in the home: 77.1% (316); fluent in French: 22.9% (94)

Gross Family Income

Less than \$20,000: 1.7%; more than \$80,000: 59%; intermediate categories: 40%; refused to reply to the family income question: approximately 28.1%

Visitor satisfaction with elements and/or services

Mer Bleue winter season visitors claimed to be very satisfied (83.6%) or satisfied (15.9%) with all elements of the Mer Bleue site about which they had been consulted.

The main comments linked to user satisfaction with the Mer Bleue site during the winter season concerned improved maintenance of the trails and parking lots, trail and parking lot security, the ban on dogs and improved trail signage.

Mer Bleue users suggested other services or activities to make their visit to the site more enjoyable. They included benches, food and beverage services (hot drinks), shelters on trails, cycling and jogging trails, as well as a greater variety of site activities.

Level of knowledge about the Greenbelt

Mer Bleue winter season users learned about the existence of the site and the activities and services available primarily through previous visits (96.3%) and word of mouth (75.6%).

Of Mer Bleue winter season users, 99.3% identified the NCC as the agency responsible for site management, while 0.7% could not identify the managing agency.

A total of 95.4% of Mer Bleue winter season users stated that they had already invited persons living outside the NCR to accompany them to a Greenbelt site.

Opinion of visitors on certain management orientations and activities offered in the Greenbelt

Mer Bleue winter season users agreed most with the following management orientations:

- Allowing tasteful advertising in the Greenbelt to help improve services (70.3%)
- Limiting or prohibiting access to fragile Greenbelt environments (67.6%)

- Offering more recreational outdoor activities in the Greenbelt (61.4%)
- Offering more interpretation activities to foster a greater appreciation of the Greenbelt’s natural and cultural resources (61.2%)

Mer Bleue winter season users disagreed most with the following management orientations:

- Requiring Greenbelt visitors to pay a fee to help improve services (60.2%)
- Organizing guided tours in the Greenbelt for tourist groups visiting the NCR

PHILIPPE LAKE FINDINGS

Respondent and/or visitor profile

Gender

Male: 55.2% (185); female: 44.8% (150)

Origin

NCR: 55.8% (187)

Outside the NCR: other areas of Quebec, 28.4%; other areas of Ontario, 8.7%; other Canadian provinces, 2.7%; Europe, 2.7%

Age

15 to 44 years: 68.9%; 45 years and older: 31.1%

Language

French spoken most often in the home: 62.7%; fluency in English: 35.8%. It should be noted that 64.5% of the interviews were conducted in French while 35.5% were in English.

Gross Family Income

Less than \$20,000: 10.2%; more than \$80,000: 16.7%; intermediate categories: 56.1%; refused to reply to the family income question: 17%

Visitor satisfaction with elements and/or services

Philippe Lake summer season visitors were most satisfied with the following:

- Condition and maintenance of access roads in the Park (95.3%)
- Cleanliness of the site (91.0%)
- Behaviour of other visitors (83.9%)
- Condition and maintenance of trails (79.4%)
- Road signage for directions to lake (70.7%)

Philippe Lake summer season visitors were most dissatisfied with the following:

- Information on the site’s natural phenomena (10.8%)
- Information on the Park’s activities and services (9.0%)
- Road signage for directions to lake (8.4%)
- Availability of food and beverage services (8.1%)
- Cleanliness of sanitary facilities (toilets) (5.1%)

Philippe Lake summer season visitors had most difficulty expressing an opinion (“don’t know”) on the following:

- Availability of food and beverage services (55.8%)
- Gatineau Park Visitor Centre (55.2%)
- Information on the site’s natural phenomena (52.8%)
- Security services provided by conservation or police officers (42.7%)
- Cleanliness of sanitary facilities (toilets) (30.8%)

Philippe Lake summer season campers were most satisfied with the following:

- Their camping experience (99.4%)
- Location of campsite (98.6%)
- Cleanliness of campsite (97.7%)
- Comfort of tent site (95.4%)
- Number of sites for tents on the site (93.9%)
- Cleanliness of sanitary facilities (toilets) (91.0%)

Philippe Lake summer season campers were most dissatisfied with the following:

- Camping advertising and promotion (12.0%)
- Cleanliness of sanitary facilities (toilet) (5.7%)

Philippe Lake summer season campers had most difficulty expressing an opinion (“don’t know”) on the following:

- Quantity and quality of firewood (29.6%)
- Camping advertising and promotion (20.5%)

Level of knowledge about Philippe Lake

Philippe Lake summer season visitors learned about the existence of the site and activities and services primarily through previous visits (65.4%) and word of mouth (21.5%). The Gatineau Park Visitor Centre (8.1%) and the Park map (7.8%) were also important sources of information for visitors.

Of Philippe Lake summer season visitors, 45.7% identified Profac as the agency responsible for managing the site, 35.8% identified the NCC and 18.5% did not know who managed the site.

Opinion of visitors on certain management orientations and activities offered in Gatineau Park

Philippe Lake summer season visitors agreed most with the following management orientations:

- Adopting more measures to preserve the Park’s natural resources for future generations (94.3%)
- Offering more interpretation activities to enable visitors to appreciate the Park’s natural and cultural resources (75.5%)
- Limiting or prohibiting access to the Park’s fragile environments (71.4%)
- Requiring that a greater number of visitors pay a fee to help maintain services (70.2%)
- Offering more outdoor recreational activities in the Park (65.7%)

Philippe Lake summer season visitors disagreed most with the following management orientations:

- Allowing tasteful advertising in the Park to help maintain services (55.2%)
- Holding a festival in the Park (43.3%)
- Organizing guided tours in the Park for tourist groups visiting the NCR (26.9%)
- Holding more sporting events in the Park (23.6%)
- Requiring that a greater number of visitors pay a fee to help maintain services (23.3%)

Economic data on visitors to the Philippe Lake sector of Gatineau Park

Visitors to Philippe Lake during the summer season each spent an average of \$21.76 per day; 28.4% of visitor groups spent less than \$10 per day during their stay at Philippe Lake during the summer season.

The Philippe Lake campground is a definite tourist attraction in the NCR. Nearly 70% of tourists visiting the Philippe Lake site (69.6%) mentioned that staying at the campground was a factor in their decision to come to the NCR.

Tourists visiting the Philippe Lake site during the summer season stayed an average of 5.2 days in the NCR.

Camping was the principal type of accommodation for tourists visiting the Philippe Lake site during the summer season (85.6%).

Tourists visiting the Philippe Lake site during the summer season spent an average of \$440 for their stay in the NCR.

Most of the expenditures by tourists visiting the Philippe Lake site during the summer season were made in Quebec rather than in Ontario (86.3%).

LA PÊCHE LAKE FINDINGS

Visitor and/or respondent profile

Gender

Male: 59.4% (177); female: 40.6% (133)

Origin

NCR: 81.2% (242); other areas of Quebec: 12.7%

Age

15 to 44 years: 71.1%; 45 years and older: 28.9% of all respondents (258)

Language

French spoken most often in the home: 53.4% (159); fluent in English: 45.3% (135). It should be noted that 58.3% of the interviews (136) were conducted in French and 41.7% in English.

Gross Family Income

Less than \$20,000: 4.4%; more than \$80,000: 25.8%; intermediate categories: 51.6%; respondents who refused to reply to the family income question: 18.1%

Visitor satisfaction with elements and/or Services

La Pêche Lake summer season visitors were most satisfied with the following:

- Cleanliness of site (91.9%)
- Behaviour of other visitors (77.2%)
- cleanliness of sanitary facilities (toilets) (76.2%)
- Condition and maintenance of access roads in the Park (69.5%)
- Security services provided by conservation or police officers (63.1%)

La Pêche Lake summer season visitors were most dissatisfied with the following:

- Condition and maintenance of access roads in the Park (25.8%)
- Road signage for directions to lake (20.8%)
- Availability of food and beverage services (17.8%)
- Information on Park activities and services (16.5%)
- Information on the site's natural phenomena (15.1%)

La Pêche Lake summer season visitors experienced most difficulty expressing an opinion (“don’t know”) on the following:

- Availability of food and beverage services (67.5%)
- Gatineau Park Visitor Centre (59.7%)
- Information on the site's natural phenomena (57.1%)
- Condition and maintenance of trails (43.6%)

Camper satisfaction with elements and/or services

La Pêche Lake summer season campers were most satisfied with the following:

- Campsite location (96.7%)
- Tent campsite comfort (96.7%)
- Cleanliness of sanitary facilities (toilets) (96.7%)
- Number of tent sites (96.7%)

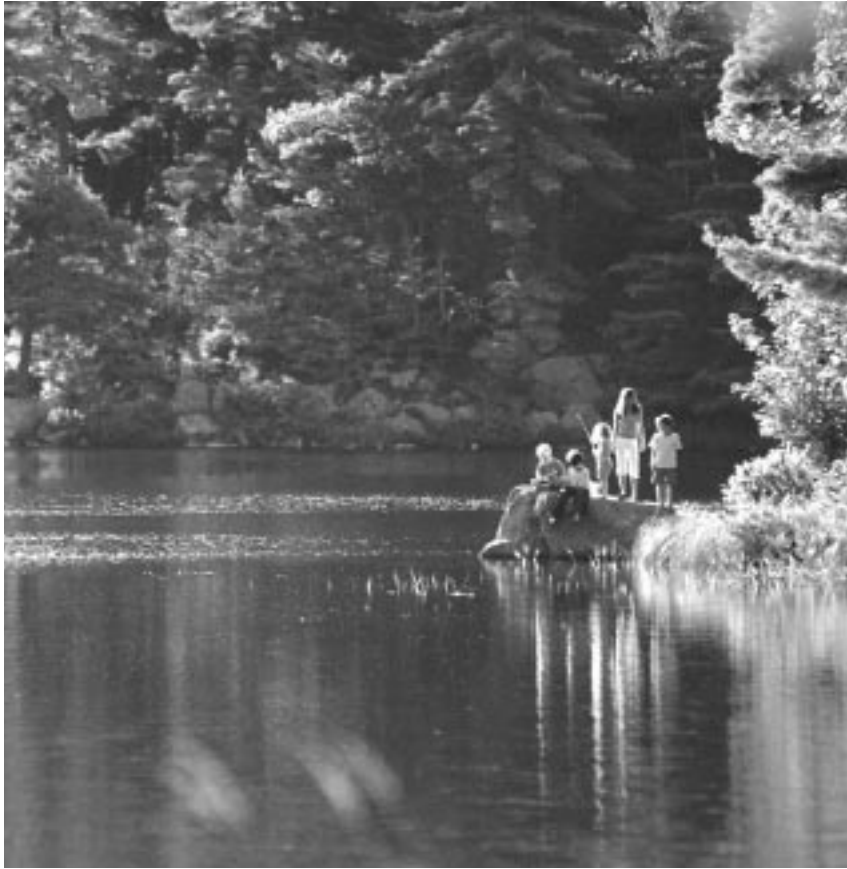
Level of Knowledge Regarding La Pêche Lake and Gatineau Park

La Pêche Lake summer season visitors learned about the site's existence and activities and services primarily through previous visits (73.8%) and word of mouth (25.2%).

Among La Pêche Lake summer season visitors, 62.4% said they did not know the name of the agency responsible for managing the site, while 30.2% identified the firm Profac and 7.4% identified the NCC.

Visitor opinion on certain management directions and activities offered in Gatineau Park

La Pêche Lake summer season visitors agreed most with the following management orientations:



- Adopting more measures to preserve the Park's natural resources for future generations (83.6%)
- Limiting or prohibiting access to the Park's fragile environments (76.8%)
- Offering more outdoor recreational activities in the Park (68.5%)
- Offering more interpretation activities to enable visitors to appreciate the Park's natural and cultural resources (57.7%)
- Requiring that more visitors pay a fee to help maintain services (57.0%)

La Pêche Lake summer season visitors disagreed most with the following management orientations:

- Permitting tasteful advertising in the Park to help maintain services (64.4%)

- Holding a festival in the Park (41.3%)
- Organizing guided tours in the Park for tourist groups visiting the NCR (40.3%)
- Requiring that more visitors pay a fee to help maintain services (39.3%)
- Holding more sporting events in the Park (29.5%)

Economic data on La Pêche Lake tourists

La Pêche Lake summer season visitors each spent an average of \$13.15 per day.

During the summer season, 57.4% of visitor groups spent less than \$10 per day during their stay at La Pêche Lake.

Canoe-camping at La Pêche Lake is a definite tourist attraction in the NCR. Approximately 65% of the tourists visiting the

La Pêche Lake site mentioned that staying at the Lake had been a factor in their decision to come to the NCR.

Tourists visiting the La Pêche Lake site stayed an average of four days in the NCR during the summer season.

For tourists visiting the La Pêche Lake site during the summer season, camping (52.7%) was the main type of accommodation, followed by staying with relatives or friends (26.3%).

Tourists visiting La Pêche Lake during the summer season spent an average of \$490 for their stay in the NCR.

Tourists visiting the La Pêche Lake site during the summer season spent most of their money in Quebec rather than in Ontario (81.0%).

6. Alcatel Sunday Bikedays User Profile

The Sunday Bikedays program is in its 31st season of operation. The program is held on the Ottawa River Parkway, Colonel By Drive, Rockcliff Parkway and the Gatineau Park Parkway every Sunday morning from Victoria Day weekend to the Labour Day weekend.

The NCC has gathered user count data for the program over the past 10 years and identified a need for socio-demographic data to serve as a benchmark for planning, recruitment of partners and operation. In August 2001, the NCC commissioned Opinion Search Inc. to develop a Sunday Bikedays user profile by conducting a random intercept survey of participants.

The key objectives of this project:

- To determine a visitor/resident ratio
- To determine basic demographics of users
- To obtain an overall profile in addition to profiles per parkway
- To determine the overall appeal of Alcatel Sunday Bikedays
- To obtain suggestions for improvements

The final survey instrument was designed by the NCC in consultation with Opinion Search and averaged seven minutes in duration. Alcatel Sunday Bikedays parkway users were defined as any people (NCR residents and visitors) using the designated parkways, whether walking, travelling by wheelchair, cycling or in-line skating. Only individuals 16 years of age or older, and only one individual per party, were included in this study.

Interviewers completed questionnaires for 441 users (i.e., overall results are accurate within a margin of error of 4.67%).

Surveys were conducted at each of the four parkways between August 12 and August 26, 2001. Generally, the overall findings are applicable to each parkway.

Major conclusions:

- The vast majority of Alcatel Sunday Bikedays users were NCR residents (93%). In addition, participants tended to be English-speaking (85%), male (63%), between 35 and 54 years old (54%), university educated (43%) and have an average household income of \$76,043.

- Nearly two thirds of users were either public servants (25%), hi-tech professionals (18%), or other private-sector employees (17%).
- An overwhelming majority of users (92%) had previously participated in Sunday Bikedays, and the average party was made up of two people. The Rockcliffe Parkway had the highest number of children participating.
- Users became aware of the event through word of mouth or radio advertising (31.5%) more than through other media.
- Awareness among users was low with regards to the organization responsible for the event. Nearly half of all respondents (over 45%) credited the sponsor of Sunday Bikedays, Alcatel, with the organizational responsibility of the program, instead of the NCC (26%). However, when prompted, a majority of respondents recalled that the NCC was involved in the organization of the event.
- Users were satisfied with on-site information, parking, rest areas and the riding surface and perceived these services to be very important. Access to water, first aid and washrooms were important to participants in Sunday Bikedays overall, but did not register a high level of satisfaction.
- Of respondents, 62% either expressed satisfaction with the current level of services or did not know which other services could be offered. Among the remainder, 10% would have liked to see more

water or refreshments on the parkways, 8% would have liked longer hours and 6% felt a need for surface repairs.

Main recommendations:

- To increase awareness of organizational responsibility for the event, the NCC name should be mentioned more frequently in promoting Sunday Bikedays.
- Overall satisfaction rates with Sunday Bikedays could be improved by increasing the number of water fountains, first aid stations and washrooms.

7. Youth Programming Study

In fulfilling its broad mandate and mission, the NCC places a significant priority on education in many forms in order to build awareness, knowledge, understanding and appreciation of the Capital's significance and resources. Canada's young people are a primary target audience for NCC educational initiatives, and the NCC has a number of programs covering the NCR as a prime educational travel destination for youth (inreach) and educational curricula within the country's school systems (outreach).

The NCC has been offering educational opportunities to youth (aged 10 to 18) visiting the Capital since 1988, and has a well-established range of programs and services, including an Internet guide, a travel planning service for teachers and non-profit groups, step-on guides, a game-show style performance and a variety of programs oriented around specific locations (such as Parliament

Hill). The NCC has also been involved in outreach programs which encompass a range of educational resources designed for use within school curricula, including educational activity sheets, the *National Capital Explorer*, A Time Travel Adventure and a classroom quiz game directed at specific school age audiences.

Young people are an important market for the NCC. The current cohort under the age of 18 (Grades 4 to 10) is known as “Generation Y.” It is the largest and fastest growing demographic group in Canada and the United States since the baby boom generation. It is the first generation to grow up in an Internet-focused world. There are eight million “dot com” Canadians and this group is growing faster than the overall population³.

Consequently, the NCC identified the need to conduct research with teachers, who represent a primary audience for both the inreach and outreach programs. The research study summarized in this report was designed to address key issues pertaining to the experiences, perspectives and expectations of teachers regarding these two important sets of educational programs offered by the NCC.

SUMMARY OF KEY FINDINGS

NCC programs and resources

The research examined the use of, and level of satisfaction with, various NCC outreach resource materials and inreach services.

- Overall, satisfaction was high among users of the NCC’s resources and programs, for both outreach and inreach.
- Among visitors to the NCR, the most popular NCC programs were Canada’s Capital Tours, *Capital Quiz*, and the Discover the Hill activity.
- Among outreach program clients, Capital Quiz is the most popular NCC resource, followed by *National Capital Explorer* and *Cyber Pal Pursuit*.
- A large majority of teachers reported that they would use new NCC educational resources if they were available.

Teaching about the National Capital

Teachers were also surveyed about the extent to which they currently include elements of the National Capital in their lessons.

- About a third of teachers were currently using educational resource materials supplied by the NCC.
- Teachers who had visited the NCR devoted twice as much class time to the Capital, in comparison with those who had never visited.
- Teaching about the National Capital was also more common among teachers of Grades 4 to 6, compared to teachers of Grades 7 to 12, as well as among those who had taken a class trip to the NCR.
- Most teachers who did not include the National Capital in their teaching plans reported that it was not rele-

vant to their course or grade. Fewer pointed to a lack of resources, or were “not familiar with the program.”

The research also addressed teachers’ educational resource “needs and wants.”

- Social studies/history was the subject area that teachers thought of most often in relation to NCC programs and services. Even so, the proportion of teachers who selected any single subject area was not large.
- The subject of most interest to teachers when choosing activities for an educational visit was social studies/history, followed by Canadian studies, science, geography and fine arts.
- Social studies was also the most often cited subject when teachers were asked if there were curriculum areas where they lacked educational resources. Language arts, math and Canadian studies each also made up a sizeable portion of responses.
- When asked about new resources they would like to have for teaching about the National Capital, the most frequently mentioned subjects were the Prime Minister, the election process, Parliament and history.
- A large majority of teachers considered the availability of supporting classroom materials to be important when planning an educational visit.

Class trips to the NCR

The research also addressed teachers’ past experiences with class trips to Ottawa.

3 See: Sutherland and Thompson, *Kidfluence: Why kids today mean business*. McGraw-Hill Ryerson, 2001.



Financial considerations/cost

The importance of cost and financial considerations as a factor in teacher decision-making was also made evident by the research.

- Cost was the most frequently cited reason why educational travel is on the decline, among those who held this view.
- Cost was the most frequently cited obstacle for teachers who had never visited the NCR, and these teachers would be more likely to do so if funding were available.
- Cost was the most important factor for teachers when choosing an educational travel destination, and it was the most often mentioned challenge faced by teachers when planning educational visits.
- Affordability was the second most important consideration of teachers — after curriculum — when choosing educational resources.

- More than eight out of ten teachers who visited the NCR were from Ontario or Quebec.
- Two-thirds of class trips took place in May and June.
- A substantial majority of class trips were three days or less in duration, and roughly 40% were day trips.
- The majority of Grade 4 to 6 trips were one or two days in length, while older grades were somewhat more likely to take three-day trips.
- Parliament and the Museum of Civilization were the most popular attractions among surveyed teachers, followed by the Canada Science and

Technology Museum, the National Gallery of Canada and the Rideau Canal.

Teacher preferences for activities while on a class trip were also assessed in the surveys.

- Over half of participating teachers indicated a preference for programs in which students could actively participate and which combine education with entertainment.
- The majority of teachers preferred activities of one hour or one-and-a-half hours in duration.
- Two-thirds of teachers preferred group rather than individual activities.

- More than half of teachers either did not have a classroom budget, or did not have funds available for travel.

Sources of information about educational resources

The surveys addressed a number of issues relating to teachers' sources of information for educational resources, travel destinations and programs, and other work-related needs.

The research revealed that teachers often look to their colleagues as a primary source of information. This is true in a variety of contexts:

- Recommendations from other teachers were the most frequently mentioned “best

source” for educational resources. Such recommendations were also teachers’ “most relied upon” source for educational resources.

- Aside from the Internet, colleagues were the most frequently cited source of information about educational travel.
- Colleagues were the most common information source for teachers when planning a trip to the NCR.
- Colleagues were the second most popular source of information for teachers about the NCC tour and itinerary planning service, after brochures.
- Colleagues were also the most-often-referenced source of information for finding useful work-related web sites.

Computers in schools

Finally, the surveys asked about teacher use and reliance on computers and the Internet.

The results indicated that teachers are regular users of computers and the Internet.

- Computer and Internet access is near universal among participating teachers.
- Eight in ten teachers used the Internet to conduct research when developing lesson plans.
- Two-thirds of teachers used the Internet in combination with other sources when looking for information on educational travel.
- SchoolNet, federal government websites, *Canada: A People’s History*, and *The Canadian Encyclopedia* were the most widely used Internet resources for preparing to teach about the NCR.
- Destination-specific and government websites were visited most often for educational travel information.

Despite all this, a detailed brochure remained the preferred

method of receiving information about educational travel for two-thirds of teachers. Moreover, teachers were split in terms of their preferred methods of receiving new and/or updated materials — almost half preferred traditional mail over e-mail.

The surveys also gauged teacher perceptions of student Internet use.

The results indicated that students are also regular users of computers and the Internet, at home and at school:

- Almost all schools had computers available to students that were connected to the Internet.
- Teachers reported including an average of four hours per month of student Internet research in their teaching plans.
- Most teachers believed that students averaged up to five hours per week on the Internet for schoolwork — both at school and at home.

Tell Us What You Think!

If you have any questions or comments about this report, please contact Halim Abi Khaled at the NCC, at (613) 239-5347 or at habikhal@ncc-ccn.ca.