

National Capital
Commission

Commission
de la capitale nationale

Canada

CAPITALizing on Research

A Compilation of Findings on
Canada's Capital Region





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Canada's Capital Region





At the National Capital Commission, 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 six studies:

- *Tourism in Canada's Capital Region;*
- *the Seniors Market Research Study;*
- *the Green Capital Visitor Study — Module I; and*
- *the Federal Employment Survey;*
- *the Call Centre study;*
- *corporate website — usability testing.*

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

The National Capital Commission's mandate is to build a great capital that will inspire pride in Canadians. Our goal is to make Canada's Capital a stimulating place to work and live for residents, and a destination of choice for travellers — with the support of the region's business, tourism and cultural sectors.

In this spirit of cooperation, we want to share with you the results of the major studies conducted by the NCC in 2001. Each year, the NCC launches studies on various topics in order to meet the changing needs of our social, economic and cultural environment.

CAPITALizing on Research focuses on the salient results of six studies involving local, national and international clientele, dealing notably with tourism in the Capital, the seniors' market and use of the green Capital.

Sincerely,

Marcel Beaudry
Chairman

Population of the NCR (Information from Statistics Canada)

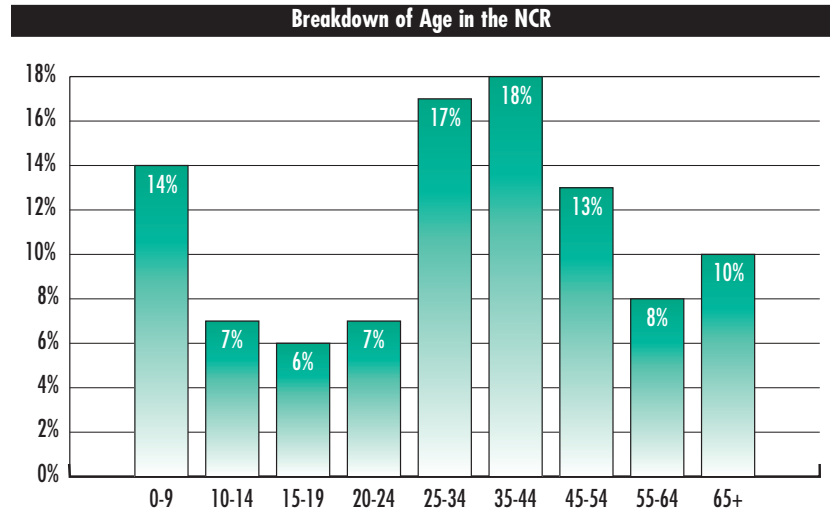
1991	1996	2001
941,814	1,010,498	1,075,938
	+7.3%	+6.5%

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%

CAPITALizing on Research



Did you know that the National Capital Commission (NCC) obtained feedback from more than 3,000 Canadians in 1999 on the various programs and projects that it manages?

The following questions and answers provide some exciting facts that came to light as a result of our research, which concluded in 2001. They also provide an overview of the types of projects that we undertook last year.

Who Visits the National Capital Region?

- In 1999, over 5 million visits were made to the National Capital Region (NCR), resulting in over CAN\$900 million in spending.
- Compared with 1995, overall visits in 1999 were at an all-time high: total visits to the NCR in 1999 increased by 8.57% from 1995.
- Of the Canadians who travelled to the NCR in 1999, 40% did so to visit friends and relatives.
- Sports and outdoor activities were among the most popular activities for Canadian visitors to the NCR in 1999.
- Visitors from France represented 23% of all overseas visits to the NCR in 1999.

Who Works in the National Capital Region?

- The Federal Government is the largest employer in the region. The NCC survey showed that in 1999, employment in the federal government had increased by 8% since 1996, to 107,000 employees.
- The number of term employees had increased by 3,495, and the number of contract workers by 3,520 over the 1996 amount.
- Nearly half of the federal organizations surveyed anticipated expansion within two years.
- More than one out of four organizations indicated that they had implemented some form of alternative workplace strategy (i.e., hotelling or teleworking).
- A growing number of people who work for the federal government live in Quebec — a 20% increase from 1996.
- The ratio of federal government employees working on the Ontario and Quebec sides of the NCR had remained at roughly 4 to 1 during the previous 15 years.

What About Canadians Aged 55 or Older?

- Of the Canadian population, 19.4% (or 5,757,585 people) are 55 or older.

What are their values, beliefs, and activities?

- In general, older Canadians have more pride in Canada than younger ones: 54% of Canadians 65 or older, and 20% of those 18 to 24, think Canadian heritage is greatly important.
- Of Canadians, 42% of those 65 or older, and 15% of those 18 to 24, think patriotism is greatly important; 57% of Canadians 65 or older, and 26% of those 18 to 24, agree strongly that Canadian history is interesting.
- Almost three quarters of Canadian seniors welcome a change and more emphasis on Canadian culture.
- Of Canadians 65 or older, 23% (the lowest rate of all age groups) volunteer time for non-governmental organizations (NGOs); however, they contribute an annual average of 202 hours each, which is the highest contribution rate per person for all age groups.
- More than 50% of those who usually watch the telecast of the Canada Day English evening show are 55 or older.

How is their relationship with the NCC?

- There are 112 seniors aged 55 or older (that is 7% of the NCC volunteer force) who

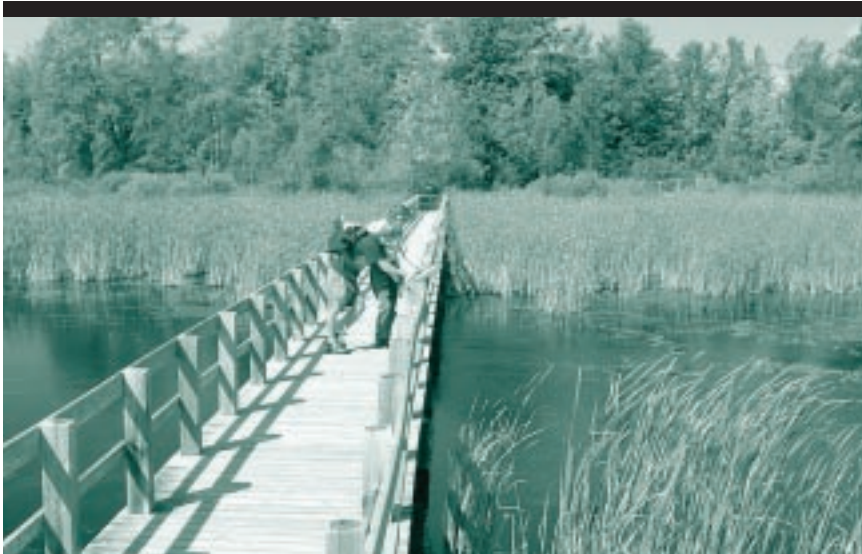
are involved in different volunteer functions at the NCC.

What about Canadian baby boomers?

- There are 9.7 million Canadian baby boomers (born between 1946 and 1965).
- Of boomers, 86% are employed (the highest rate among all age groups); 46% earn more than \$60,000 per household.
- By 2006, as the first boomers enter their 50s, the number of domestic travellers in the 51 to 60 age group will explode from 1.8 million in 1996 to an estimated 2.7 million. Between 2006 and 2016, these same boomers (aged 61 to 70), will push the number of domestic travellers for their new age group up from 1.3 to 1.9 million.
- Culture and heritage tourism, as well as soft adventure and walking activities, will increase considerably as boomers age.

What about NCR residents that are 55 or older?

- One in six NCR residents (or a total of 173,610 people) are 55 or older.
- Rockcliffe Park has the highest concentration of people over 55 (29.16%).



Accessing the NCC... Helping You Get Information

Our call centre

- The NCC conducted a survey of call centre users to improve services and facilitate the transition to the new NCC Contact Centre, which incorporates e-mail enquiries.
- Half of the callers surveyed ranked the NCC call centre higher than other call centres.
- The NCC call centre serves a well-educated clientele: four out of five callers had some post-secondary education.
- Two out of three callers would likely use e-mail rather than the telephone to communicate with the NCC.

Our corporate website

- The NCC conducted extensive qualitative research, which included the use of focus groups, to ensure that the NCC websites (launched in June 2001), met Internet users' needs.
- A group of volunteer Internet users evaluated draft content for the NCC corporate and event sites.
- The NCC's implementation of usability testing recommendations resulted in improved layout and organization of the two websites.

Our Green Assets...

How many visits does Gatineau Park receive per season?

- There are generally more than a million visits to the Gatineau parkways during the summer (mid-April to the end of November). Hiking, cycling, and driving are preferred activities.
- Of parkway users, 85% are NCR residents; just over 30% are 45 or older.
- During the winter, winter trail users make more than 250,000 visits to ski or hike on the trails.
- Of winter trail users, 95% are NCR residents and over 39% are 45 or older.
- The great majority of users of the Gatineau parkways (89%) and winter trails (90%) agree that access to fragile areas of the Park should be limited or prohibited.

How many visits does Stony Swamp receive per season?

- In 1999, Stony Swamp users made close to 400,000 visits over the summer (mid-April to end of November) and just under 200,000 visits over the winter (December to mid-April).
- Hiking, dog walking and nature observation were preferred activities on Stony Swamp trails.

So, who visits Stony Swamp?

- NCR residents are the primary users of Stony Swamp trails. Over 96% of summer users and 94% of winter users are NCR residents; 70% are from Nepean and Kanata, (which share a border with Stony Swamp).
- Close to a 1 in 3 summer users are 45 or older, whereas 2 in 5 winter users are 45 or older.
- Over 85% of Stony Swamp trail users agree that access to the fragile areas of the Greenbelt should be restricted or prohibited.

Tourism in Canada's Capital Region

Although not a direct member of the tourism industry, the NCC is influenced and acts as a key partner in the industry. Understanding the tourism market is clearly pivotal to fully exercising the mission of promoting pride and unity through the NCR. The need to have detailed and comprehensive knowledge of tourism market statistics in the region was apparent.

The Tourism in Canada's Capital Region study was initiated to assist managers and programmers in understanding the nature and the volume of visitors to the Capital region. The study is used to inform decision-making across all business lines, from public programming and marketing to planning and the development of the Capital.

The report provides a detailed synopsis of the 3 major NCR visitor markets: the domestic Canadian market travellers from the United States and overseas visitors.

In 1999, over 5 million visits were made to the NCR, resulting in over CAN\$900 million in spending.

	Visits	% of Visits	Spending
Canadians	4,601,000	81.5	\$565,654,000
Americans	563,000	10.0	\$158,901,000
Overseas Visitors	484,000	8.6	\$182,039,000
Total	5,648,000	100	\$906,594,000

Canadian visits to the NCR increased in 1999 compared to 1998. In 1998, the NCR suffered a 5.7% decrease in Canadian visits. In 1999 however, Canadian visits increased 5.55% to the 1997 level.

American visits to the NCR increased slightly (almost 2%) in 1999 compared to 1998.

Overseas visits to the NCR peaked in 1996 and 1997, but declined slightly in 1998 by 1.4%. In 1999, overseas visits declined even further by 0.6%.

Overall, after a decline in 1998, visits to the NCR started to increase again in 1999.

Compared with 1998, the total number of visits in 1999 increased by 4.6%. Compared with 1995, the overall number of visits in 1999 was at an all-time high. Total visits to the NCR in 1999 increased 8.57% from 1995 visits.

Seniors Market Study (Secondary Research)

Given Canada's evolving demographics, executive management identified the need to better understand the seniors market. Armed with this intelligence, the organization would be in a better position to anticipate the relative impact of this market on its existing programs and to anticipate the need to develop new ones.

The research covered different aspects of this market, ranging from demographics of NCR residents and Canadians, values

and beliefs, relationship with NCC programs, travel habits and patterns, volunteerism, use of information technology, and the impact of the ageing baby boomers.

Key findings from this secondary research revealed that there are close to 6 million people in Canada aged 55 years and older (19.4% of the Canadian population, based on the 1996 census), of which 173,000 live in the NCR (16.73% of the NCR population is 55 years old or older).

Mostly, seniors in Canada and the NCR enjoy fairly good health and are preoccupied with health care issues and staying fit. They are active in their communities: they donate more than any other age segment to charities and churches, and they volunteer — each senior contributes an annual average of 202 hours — the highest number for all age groups.

They have more pride in Canada than younger Canadians and place a greater value on heritage than other age groups. They are active travellers, especially to visit their friends and relatives, and tend to travel for longer periods.

Canadian seniors are slowly embracing information technology, especially the Internet. Current NCC programs and events do not target seniors specifically, but a fair number of seniors participate nevertheless.

Green Capital Visitor Study (Module I)

(Intercept and Telephone Survey)

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.

As an initial step in 1997, NCC staff conducted an analysis of 162 current external publications. This was the first time this type of analysis was done at the NCC. The end product, “The Green Capital — A Synopsis of External Research” provides a detailed study of Canadians’ attitudes on the environment and their outdoor activities.

Two other initiatives were conducted in 1998: the development of a green Capital user survey methodology and an economic impact study of Gatineau Park.

Designed to ensure that comprehensive, current and relevant information on green Capital users would be available to management on an ongoing basis, the user survey methodology facilitates the integration of future visitor studies, provides for better standardized data, and helps reduce costs. As a result of a number of working sessions with key NCC players, core questions were designed covering the subjects of user satisfaction, usage, impact of visit, expectations and motivations, trends and economic impact. The 3-year Gatineau Park and Greenbelt visitor study currently underway integrates elements of the standardized methodology while also adapting to site and budget constraints.

The economic impact study of Gatineau Park, completed in 1998, was based on existing information. The process reinforced the need for up-to-date, statistically valid user information — it quickly became apparent that the data available was outdated or that no data existed.

In 1999, the green Capital steering committee proposed a 3-year visitor study in Gatineau Park and the Greenbelt. Priority was given to those areas most heavily used by visitors: Stony Swamp in the Greenbelt and the Parkway Sector and winter trails in Gatineau Park. These sites have played a key role in the early establishment of green Capital visitor services in the NCR, and presently feature a wide variety of year-round trails, outdoor recreational infrastructure and heritage interpretation sites.

For the first time, the NCC has valid data on public use of Stony Swamp. Over 500,000 visits are made to the area throughout the year: 197,000 in winter, and 384,000 in spring/summer/fall. The majority of the visitors live within the NCR and speak English.

Visitors come to Stony Swamp to enjoy a natural environment (67%), and to observe the flora and fauna (54%).

Winter visitors to Stony Swamp express the most satisfaction with the opportunities to observe nature (96%), followed by the cleanliness of the site (91%). In the summer, visitors express satisfaction with the opportunity to appreciate nature (99%) and the condition and maintenance of the access roads (96%). They express the least satisfaction with the signs along the trails (24%).

Telephone interviews with residents of the areas bordering on Stony Swamp reveal that close to 3 out of 10 respondents (27%, or 109 out of 400) made at least 1 visit to Stony Swamp during the 12 months preceding the telephone survey.

In Gatineau Park, 1,079,000 visitors used the parkways during summer 2000. Visitors to the NCR make just over 15% of those visits. Generally, a little more than 80% of the summer visitors to the Parkway Sector of Gatineau Park were satisfied or very satisfied with each of the aspects about which they were asked.

Final counts at Gatineau Park winter trails revealed that there were 253,800 visitors between December 1999 and April 2000.

The elements or services with which the visitors to the winter trails of Gatineau Park were most satisfied were the condition and maintenance of the parking lots (96%) as well as the opportunity to admire nature (96.7%). They expressed the least satisfaction with the availability of food services (17.7%).

The management policies with which visitors to the Parkway Sector of Gatineau Park are most in agreement are that access to fragile areas of the Park should be limited or prohibited (89.5%) and that more interpretation activities highlighting the natural and cultural aspects of the Park should be offered (77.4%).

Visitors expressed the least agreement with the idea of a higher percentage of visitors paying a fee to maintain services (63.2%).

Telephone interviews with residents of the areas bordering Gatineau Park revealed that close to 2 thirds of respondents (66%, or 265 of 400) made at least 1 trip to Gatineau Park during the 12 months previous to the telephone interview.

The findings of each of these studies are particularly useful in

managing resources for public use and in developing marketing plans. In addition, in the case of Gatineau Park, the data is being used in the revision of the *Gatineau Park Master Plan*.

In 2000, work focused on Mer Bleue in the Greenbelt and Philippe and La Pêche lakes in Gatineau Park.

In 2001, because of the work being done on the revision of the *Gatineau Park Master Plan*, the decision was made to focus resources on the Gatineau Park summer trails rather than other sectors of Gatineau Park and the Greenbelt.

Federal Employment Survey (Mail-Back Survey)

Since the early 1970s, the NCC has collected information on the changing employment levels and location of federal institutions in the NCR for land-use planning activities and transportation decisions. Following the approval of the *Plan for Canada's Capital*, new statistics were required to support transportation planning and the development of the Core Area Sector Plan.

In 2001, Public Works and Government Services Canada (PWGSC) partnered with the NCC to conduct a self-completed mail-back survey on federal government employers during winter/spring 2001. This survey was designed to determine the location, volume and nature of the work carried out by all federal employees in the NCR.

In summary, some of the core findings to come out of the 2001 federal government employment survey are:

- NCR federal government employment has increased by

8.1% (8,000+) since 1996, to 107,184 employees.

- There has been a shift in the type of employee positions being filled. Permanent employees continue to decline in numbers (down 4.3% since 1996), while there have been significant increases in term employment (up by 3,495) and contract work (up by 3,520).
- Three in 10 organizations have moved all or part of their operations to other locations during the current fiscal year. Nearly half (48.5%) of the organizations surveyed expect to require additional building space in the next 2 years.
- Just over a quarter of the organizations surveyed indicated that they have implemented some sort of alternative workplace strategy.
- The ratio of federal government employees working on the Ontario and Quebec sides of the NCR has remained at roughly 4 to 1 over the past 15 years. However, the percentage of federal government employees living in Quebec has increased by approximately 20%. Of those, the percentage that commute to the Ontario side of the NCR to work has increased by nearly 20%. Conversely, the number of Ontario-based federal government employees has increased by approximately 4%, and the percentage of those employees travelling to Quebec to work has declined by approximately 15%.

Call Centre Study (Telephone Survey)

The Capital Call Centre provides a one-stop, integrated service for inquiries about National Capital Commission (NCC) corporate businesses and Capital programs. With the launch of the NCC's corporate website, the public is offered new opportunities to interact with the NCC, such as a "Contact Us" button which enables people to send e-mail to the Call Centre. To prepare for this new medium, the Call Centre is transforming into a contact centre. As well, in view of the recommendations of the Sussex Circle's study (*Enhancing Relations*) on the accessibility of the NCC, the new contact centre needs to build on the high-quality service model already in place, while ensuring that it meets the clients' needs for interactivity.

Capitalizing even further on the Sussex Circle recommendation on accessibility of the NCC to the public, the Call Centre study was initiated to determine the degree to which the service delivery meets the requirements of its clients, while assessing the need for alternative means of accessing the NCC through exploitation of new technologies.

Overall, the results of the survey show that the Call Centre is doing a good job of addressing the needs of its clientele. Typical Call Centre clients tend to be English-speaking (79%), female (72%), 44 years of age (on average), and well educated (over 80% with some post-secondary education). NCR residents are important customers of the

Call Centre, representing more than half of the callers.

The survey findings indicate that the Call Centre has been very responsive to client needs, with reasonable response times, delivery of services in both official languages and high satisfaction ratings for most aspects of the services received. Response to the proposed contact centre was also generally positive, although the telephone and personal access will both continue to be important means of communicating with the NCC.

Corporate Website — Usability Testing (One-on-One Observational Interviews)

Over the last 2 years, the NCC has been focusing on a corporate positioning strategy, the aim of which is to build a stronger public constituency, both locally and nationally. With the advent of the new City of Ottawa and growing coordination in the Outaouais region, there was an opportunity for a fresh look at the nature of the NCC's relationships. The NCC commissioned Sussex Circle to conduct an independent study to determine how the NCC could improve the way it interacts with other public sector entities, the public and interest groups.

In order to improve public access to information, the study recommended that the NCC make it a priority to develop an interactive corporate website. During the development of this site, a research consulting firm (Phase 5) was hired to conduct usability testing.

In-depth observational interviews were conducted with the seven target audiences of the



site. The interviews were conducted in 2 phases. Feedback from the results of the first phase was used to develop a partially functional prototype; the second phase entailed testing this prototype with potential users from each of the target audiences.

Some of the issues that needed to be addressed included questions such as:

- *Does the corporate site need to clarify its target audience?*
- *Is the content selected, structured and presented in such a way that it is most attractive to key client groups?*
- *What motivates users to seek information on the National Capital?*
- *What is their interest in the offerings of the NCC site in general, and the corporate site in particular?*

Key recommendations included refining some technical features to make the website easier to navigate. Phase 5 also recommended proactive promotional efforts geared to attracting and keeping users on the site.

Other recommendations were to build a database of website users, to use this database to communicate and promote, and to advertise in local media across Canada.

Phase 5 recommended on-line surveys to monitor public opinion of the NCC and to obtain feedback on the NCC's proposed activities and plans for the NCR. Linking the website to the survey would increase the credibility of the NCC's on-line component with members of the public, because such a link would demonstrate that the site seeks public input into the process of planning the Capital.

Tourism in Canada's Capital Region

Background

Based on Statistics Canada's Cities Project 1999, the Tourism in Canada's Capital Region study was created primarily to provide a detailed synopsis of the 3 major NCR visitor markets: the domestic "Canadian" market, travellers from the United States and overseas visitors.

The report will assist managers and programmers in understanding the nature and the volume of the visitors who visit the Capital. It can be used as information as well as a planning tool for future programming, marketing, outreach networks, development of the Capital's Core Area, urban parks and Gatineau Park.

Key Findings

Canada's Capital Region receives a myriad of visitors every year. In 1999, over 5 million visits were made to the NCR, 81.5% of which were by Canadians, 10% by Americans and 8.6% by overseas travellers. The total visits resulted in over CAN\$900 million in spending.

of spending, pleasure visitors spend more.

Among other Canadian metropolitan areas, Montréal generated the highest number of visits to the Capital, followed by Toronto. As expected, total visitors to the Capital originated mostly from Ontario, whereas a significant portion was from the province of Quebec.

Ontario visitors spent in total almost double the amount spent by Quebec visitors.

Just under half of the visits made by Canadians to the NCR were same-day trips; however, a considerable number of visitors stayed 1 or 2 nights. In terms of accommodations, two thirds of Canadian visitors stayed with friends and relatives, and almost a quarter stayed in commercial accommodations.

The NCR witnessed the highest volume of visits in the summer (mainly in August) and the lowest volume in the winter (especially in February).

Among the 12 Canadian cities surveyed, Toronto witnessed the largest volume of Canadian visits. The NCR secured fifth

	Visits	% of Visitors	Spending
Canadians	4,601,000	81.5	\$565,654,000
Americans	563,000	10.0	\$158,901,000
Overseas Visitors	484,000	8.6	\$182,039,000
Total	5,648,000	100	\$906,594,000

The Canadian market

Canadians travel to the NCR mostly to visit friends and relatives. The majority of them are between the ages of 35 and 54, very well educated and high earners.

The visiting friends and relatives market is the largest in terms of numbers of visits, but in terms

place in terms of number of visits by Canadians, preceded by Montréal, Quebec City and Edmonton.

The American market

The NCR received 563,000 visits from the United States in 1999, the majority of which were people on vacation. The



visitors tended to be older: more than a third were seniors aged 55 or older, and close to a quarter were early boomers (between the ages of 45 and 54). Americans travelled to the NCR mostly in pairs; however, a significant number of visitors also travelled alone.

In terms of region of origin, most of the visitors came from mid-Atlantic states, and therefore generated most of the spending. More specifically, a third of American visits originated from New York State.

Like Canadian visitors, Americans visit the NCR most during the summer months, followed very closely by spring months. The lowest volume of American visits occurred in January, February and March.

One quarter of American visitors to the NCR were same-day travellers. The majority, however, stayed overnight, with half of the visitors staying for 1 or 2 nights. In terms of accommo-

dations, most American visitors stayed in a hotel or a motel during their visit to the Capital, although about a third of these visitors stayed at the homes of friends and relatives.

Being fairly close to major U.S. cities, Windsor and St. Catharines-Niagara capture the largest number of American visitors. Toronto, usually the first city to receive Canadian and overseas travellers, is the third in the U.S. market. The NCR ranks seventh in terms of visits from the United States, preceded by Vancouver, Montréal and Quebec City.

Sightseeing and shopping are the activities that visitors from the United States engaged in the most. Interestingly, dining at high-quality restaurants is more popular than visiting historic sites, parks or museums.

The overseas market

Canada's Capital Region received 484,000 overseas visits

in 1999, the majority for vacations. The visitors tended to be older: close to half of them were early boomers (defined as people between the ages of 45 and 54) or seniors (55 or older), and they travelled mostly in couples.

In terms of geographic region of origin, they came mostly from Europe, and just under a quarter came from Asia. Overseas visitors from France represented a quarter of all overseas visits. A significant portion of overseas travellers also came from the United Kingdom and Japan.

Five-year trend

Canadian visits to the NCR increased in 1999 compared to 1998. In 1998, the NCR suffered a 5.7% decrease in Canadian visits due to the Ice Storm and the absence of the Renoir Exhibit at the National Art Gallery. In 1999, however, Canadian visits increased 5.55% to the 1997 level.

American visits to the NCR increased slightly (by almost 2%) in 1999 compared to 1998.

Overseas visits to the NCR peaked in 1996 and 1997, but declined slightly (by 1.4%) in 1998. In 1999, overseas visits declined even further by 0.6%.

Overall, after a decline in 1998, visits to the NCR started to increase again in 1999.

Compared with 1998, total visits in 1999 increased by 4.6%. Compared with 1995, overall visits in 1999 were at an all-time high. Total visits to the NCR in 1999 increased by 8.57% from 1995 visits.

Seniors Market Study

Background and Context

At the Strategic Retreat, the Executive Management Committee (EMC) identified the senior market as one that was important to the National Capital Commission (NCC) as a whole, as well as to specific branches. At this point, the NCC does not have a clear picture of this market and its potential. EMC and the individual branches require baseline information on this demographic that will enable them to make decisions regarding the respective service offerings.

Corporate Audit, Research and Evaluation conducted secondary research and consulted over 70 resources, ranging from government publications and databases and existing NCC research material to studies conducted by reputable consulting firms. The final output was in the format of 8 fact sheets, each reflecting the researched subject. These subjects were: demographics, values, leisure and recreational activities, travel and tourism, volunteerism, use of information technology and the media, involvement of NCC programs, and the impact of the ageing baby boomers.

For the purpose of this research, seniors were defined as those aged 55 years or over.

Quick Facts

The following are key findings from the market research study, presented by subject.

1. Demographics

National Capital Region

- 16.73% of the NCR population, or 173,610 people, are aged 55 years and older.

- In addition to English and French, seniors in the NCR speak Chinese, Italian, German and Arabic.
- The senior immigrant population in the NCR originated mostly from Europe (mostly the UK). The younger age group (55-64) is more ethnically diverse than the older age groups.
- Compared to Canadians in general, older residents of the NCR have attained higher education levels than their counterparts elsewhere in Canada.
- Almost a quarter of male residents in the NCR between the ages of 45 and 54 work in management.
- Both senior men and women in the NCR earn more than the Canadian average annual income: 21.4% of Canadian men aged 55 to 64 earn \$50,000 or more per year; 33% of senior men in the NCR in the same age category earn \$50,000 or more per year.
- Among the 27 NCR municipalities, Rockcliffe Park has the highest concentration of adults aged 55 or older (29.16%).
- Ottawa has the highest number of seniors (22.51% of Ottawa residents are 55 or older).

National

- 19.4% of the Canadian population (or 5,757,585 people) is aged 55 years or older.
- There are more females than males in all 4 age categories, and specifically in the group aged 75 or older (61.1% females and 38.9% males).

- Canadians aged 75 or older have the lowest level of formal education (40.82% have less than Grade 9 and 34.62% completed Grades 9 to 13).

International

- Italy, Germany, Greece and Japan have the highest proportion of seniors, whereas the United States has the highest total number of seniors (55,913,000 in 1997).

2. Values, attitudes and motivations

- About three-quarters of seniors aged 65 to 74, and two thirds of those aged 75 or older, rate their health as good, very good or excellent.
- A recent survey indicated that 43% of seniors 55 or older declared that Medicare/health care is their primary concern.
- Younger Canadians (18 to 34) are more concerned about the environment than older people (50 years old or older) and have the highest respect for environmental groups.
- 11% of environmental activists are seniors (55 years old or older), whereas the majority of activists (34%) are 25 to 34 years old followed by 35 to 44 years old (28%). Seniors however, do support new laws that protect the environment.
- Older Canadians have more pride in Canada than younger ones: 54% of Canadians 65 years old or older and 20% of those aged 18 to 24 think Canadian heritage is greatly important.

- Patriotism is greatly important for 42% of Canadians 65 or older and 15% of those 18 to 24; 57% of Canadians 65 or older and 26% of those 18 to 24 agree strongly that Canadian history is interesting.

- 43% of the 55- to 64-year-old donating population spent more than \$1,000 on gifts and charitable donations in 1996; the proportion donating more than \$1,000 is even higher for the 65 to 74 age group (46%) and the 75 and older group (47%).

- Canadians donate mostly to health organizations. Seniors donate the most.
- In 1997, 40% of all Canadian seniors (aged 65 or older) made donations to their church or to religious organizations.
- Canadian boomers are expected to inherit from their parents a trillion dollars in the course of the next 20 years. About 90% of the money will be passed along to the next generation, and 10% will be inherited by outside beneficiaries such as charities. The largest portion, about \$297 billion, will pass to Canadians currently in the 44 to 48 age group.

3. Leisure and recreational activities

- Of Ontario seniors, 75% are physically active. Walking (either for pleasure or for exercise) and gardening are the 2 most popular activities, with participation rates exceeding 70%. Rates for swimming, home exercise and social dancing range between 50% and 60%.

- Of the physically active population aged 55 or older in the NCR, 79% walk for exercise, 58% garden, 45% attend museums and art galleries, and 33% attend art and music festivals.

- In 1997, Canadians aged 60 or over watched television an average of 4.9 hours per day, almost 2 hours more per day than those between the ages of 18 and 59; 44% watch 2 or more hours of news and/or public affairs programming.

- Seniors aged 55 or older in the Ottawa/Hull region listen mostly to CBO-FM 91.5 (CBC Radio 1) (15%) and CFRA-AM 580 (13%).
- Seniors are also involved in “soft adventure” activities such as birdwatching, nature/wildlife viewing, hot air ballooning, hiking, and cross-country skiing.

4. Travel and tourism

- 860,000 Canadian seniors 55 or older visited the NCR in 1996 (19.7% of the domestic travelling population to the NCR).
- 124,000 American seniors 55 or older visited the NCR in 1996 (37.3% of the US travelling population to the NCR).
- 114,000 international seniors 55 or older visited the NCR in 1996 (27% of the overseas travelling population to the NCR).
- More Canadians 55 or older visit the NCR than Americans or overseas visitors.
- In 1996, more Canadians 55 or older travelled to the NCR to visit friends and

relatives than for any other purpose.

- The NCR was the third most often visited Canadian city by domestic senior travellers, the seventh most often visited city by American seniors and the fifth most often visited city by seniors from overseas.
- Seniors tend to travel for longer periods of time than the average traveller (4.6 nights versus 3.3) and are more likely to travel alone.
- The opportunity for socialization, exposure to novel situations, and escape from the stresses of daily life are powerful motivators for seniors to travel.
- Growing markets include the cultural/heritage market, the soft adventure market, and specialized niche markets, such as Elderhostel programs and volunteer vacations.
- Constraints to travel are security concerns, financial limitations, lack of time, lack of information, and poor health.
- Seniors expect basic quality factors, such as safety and security, sanitation and health, environmental considerations, independence, accessibility to services and facilities, and consumer protection standards.

5. Volunteerism

- Of Canadians aged 65 or older, 23% volunteer time for NGOs; this is the lowest rate of all age groups. However, they contribute an annual average of 202 hours each; this is the highest average for all age groups.

- Of seniors aged 55 to 64, 30% are volunteers contributing 160 hours annually.
- The largest amount of volunteer activity is for religious organizations, followed by social service and the arts.
- The peak volunteering age is between 35 and 44 years (37% of people in this age group volunteer).
- Of seniors aged 55 or older 112 (7% of NCC volunteers) are involved in different volunteer functions at the NCC.
- The largest amount of volunteer activity for people 55 or older at the NCC took place at Winterlude 2000 and in Gatineau Park

6. Seniors and information

- The NCR has the highest proportion (55.4%) of households that use computer communications regularly, including the Internet, electronic commerce and e-mail, as well as other methods of communications.
- In 1997, 13% of Canadian households headed by someone aged 65 and over owned a **computer**, up from 5% in 1990.
- In 1997, 4% of Canadian households headed by a senior (65 or older) had Internet service, compared with 15% of households with head under age 65.
- Nationally, 85% of seniors aged 65 or older get information about Canada via local TV news, whereas only 12% get information by using the Internet.
- Of seniors aged 55 to 64, 85% get Canadian information

through newspapers, versus 16% who get it via the Internet.

- In the NCR, men aged 55 or older watched on average 28 hours of TV per week in 1999; women aged 55 or older watched on average 33.5 hours of TV per week in the same year.
- Nationally, seniors 60 or older watch on average 4.9 hours of television per day; 44% of them watch 2 or more hours of news/public affairs programming.
- In the NCR, 54.8% of seniors between the ages of 50 and 64, and 48% of seniors aged 65 or older, read the Ottawa Citizen on a daily basis.

7. Seniors and the NCC

- Current NCC programs and events do not target seniors specifically, but a fair number of adults aged 55 or older participate nevertheless.
- More than 50% of those who watched the telecast of the Canada Day English evening show were aged 55 years or older (399,000); the same percentage was true for those who watched the telecast of the French noon show (244,000).
- Approximately 7% of Canada Day 1997 on-site participants were seniors aged 55 years or older.
- 17% of recreational pathway users are 55 or older, and 9% of Rideau Canal Skateway users are 55 or older.
- 45% of Rideau Falls visitors arriving on organized tour buses were 55 or older; 30% of non-tour bus visitors



to Rideau Falls were 55 or older.

- Over a million people visited the Gatineau Park parkways in the summer of 1999; 13.9% of these visitors were 55 or older, and close to 15% of winter trail users were 55 or older.
- Between 15% and 16% of Stony Swamp trail users are 55 or older.
- Research indicates that seniors, like people in other age groups, feel that user fees on NCC parks and attractions should not be implemented.
- Some 3.3 million Canadians, over 13% of the total population, have some form of disability. Whereas 4.4% of the population aged 15 to 24 has disabilities, that figure rises to 39.5% for those aged

65 to 84, and nearly 78% for those over 85 years of age or older.

- Most NCC parks, events and attractions are not 100% accessible. However, with minimal modifications, they could conform to Treasury Board Policy.

8. Impact of baby boomers

- Some 9.7 million Canadians were born between 1946 and 1965, and are considered baby boomers.
- Of boomers, 86% are employed (the highest rate among all age groups); 46% earn more than \$60,000 per household.
- By 2006, as the first boomers enter their 50s, the number of domestic travellers in the 51 to 60 age

group will explode from 1.8 million to an estimated 2.7 million. Between 2006 and 2016, these same boomers (aged 61 to 70), will push the number of domestic travellers for their new age group up from 1.3 to 1.9 million.

- The proportion of young travellers will remain constant, or may even decline.
- In 1996, 22% of visiting friends and relatives were over the age of 50. By 2006 the share of visiting friends and relatives over the age of 50 will jump to 27%, and further to 32% in 2016.
- Culture and heritage tourism, as well as golf and walking, will increase considerably as boomers age. Other activities expected to increase are bird-watching, opera, and theatre.
- As the boomers move through their 50s and 60s, it is predicted that a large number of them will leave big cities in search of a quieter and less expensive way of life.
- While the total number of seniors is greater in the cities, they represent a larger percentage of the population in the rural areas.
- As boomers retire, there will be a movement from large urban centres such as Toronto to more distant, smaller cities such as Guelph to the west, Collingwood to the north and Kingston to the east.
- When retired boomers move into smaller cities, they will want a small-town atmosphere, but at the same time be unwilling to give up such urban amenities as good restaurants and shopping.

The Green Capital

(Module I) — Executive Summary

The National Capital Commission (NCC) undertook a series of important studies to define visitor profiles, measure levels of satisfaction, and determine the uses, trends and predominant characteristics of the people who frequent the green spaces of Canada's Capital Region. These studies will be carried out over approximately 4 years.

Module I entailed a detailed analysis of Stony Swamp and the Gatineau Park Parkway Sector during summer 1999 and winter 1999-2000. These studies were conducted via intercept surveys at the 2 sites during both seasons, and as a telephone survey for residents of the areas surrounding Stony Swamp and Gatineau Park.

The summaries below outline the findings taken from the final reports of each study.

Stony Swamp:

**March 1 to April 15, 1999
and December 1, 1999 to
February 27, 2000**

A total of 475 questionnaires were filled out, with 77.9% responding and a refusal rate of 16.2%.

Profile of respondents/visitors

Men accounted for 59.4% (282 people) of the respondents, and women accounted for 40.6% (193 people).

Of the visitors, 94.8% lived within Canada's Capital Region, primarily in the municipalities of Nepean (202), Ottawa (145) and Kanata (78) on the Ontario side, and Aylmer (60), Hull (4), Chelsea (1) and Gatineau (1) on the Quebec side.

Of respondents, 5.2% lived outside the NCR, primarily

elsewhere in Ontario (4.6% of the respondents).

People aged 44 or under made up 61% of the visitors, while those aged 45 or older made up 39%.

English was the language spoken most often at home for 93.7% (445), and 5.3% (25) normally spoke French.

Of the respondents, 4% claimed an annual gross family income of less than \$20,000, while those earning more than \$80,000 represented 24.2% of the respondents, and those whose income was in the intermediate range made up 54.7% of the respondents.

During the winter, most people go to Stony Swamp alone (40.7%). Some go as part of a couple (24.8%) or with their families (22.5%).

Of the winter visitors, 67% had a dog with them when they visited Stony Swamp.

Visitor behaviour

During the winter, 96.7% of visitors to Stony Swamp accessed the site by car, compared with 0.8% on foot and 0.2% by bike.

Visitors came to Stony Swamp during the winter to enjoy a natural environment (67.4%), to spend time with friends or family members (54.7%), to observe the flora and fauna (53.7%) or to practise an outdoor leisure activity (46.5%).

In the winter, visitors to Stony Swamp came to walk their dogs (59.2%), hike (50.7%), observe the flora and fauna (11.4%) and cross-country ski (10.3%).

During the winter, 73.2% of the visitors to Stony Swamp spent an hour or less at the site

during a day trip, compared with 22.3% who spent between 1 and 2 hours.

Of the winter visitors to Stony Swamp, 87.8% had been to the site before, while 11.8% had not.

Visitor satisfaction

Winter visitors to Stony Swamp expressed the most satisfaction with the opportunities to observe nature (95.6%), followed by cleanliness of the site (91.4%). They expressed the least satisfaction with information provided on the natural phenomena at the site (23.8%).

Winter visitors to Stony Swamp found out about the site and the activities and services there primarily from previous visits (61.9%) and by word of mouth (42.7%).

Of the winter visitors to Stony Swamp, 84.8% identified the National Capital Commission as the organization responsible for managing the site, compared with 10.5% who had no idea who managed it.

The management issues with which the winter visitors to Stony Swamp agree most are:

- that access to fragile areas of the Greenbelt should be restricted or prohibited (85.4%); and
- that more interpretation activities emphasising the natural and cultural aspects of the Greenbelt should be offered (66.7%).

The management policies with which winter visitors to Stony Swamp disagree most are:

- that visitors to the Greenbelt should pay a fee to improve services (73.7%); and

- that guided hikes should be organized in the Greenbelt for tourist groups visiting Canada's Capital Region (39.1%).

Traffic survey

The number of visitors to Stony Swamp during the winter 1999-2000 season, (i.e., the period between March 1 and April 15, 1999 and between December 1, 1999 and February 29, 2000) is estimated at close to 200,000 (197,000).

Most visitors came to Stony Swamp during February (40.8% of the total traffic) followed by March (27.2% of the total traffic) during the days on the weekends (45.4% of the traffic) and between 10 am and 3 pm.

Stony Swamp: April 15 to November 30, 1999

A total of 553 questionnaires were filled out, with 86.5% responding and a refusal rate of 13.5%.

Profile of respondents/visitors

Of the respondents, 53% (293) were male and 47% (260) were female.

Of respondents, 96.7% (534) lived in Canada's Capital Region, primarily in Nepean (31.8%).

Of respondents, 68.4% were 44 years of age or under, while 31.6% were 45 or more.

English was the language spoken most often in the homes of 537 (97.1%) of the respondents, whereas 15 (2.7%) spoke French.

Of the respondents, 3.8% claimed an annual gross family

income of less than \$20,000, whereas 28.9% earned more than \$80,000 and 50.7% fell into the intermediate categories.

During the summer season, most people came to Stony Swamp with their families (43.2%); some came alone (28.9%), as a couple (17.5%) or with friends (15.9%).

Of the visitors, 44.5% had a dog with them when they visited Stony Swamp during the summer season.

Visitor behaviour

Most of the summer visitors to Stony Swamp (94%) accessed the site by private car, compared with 2.9% on foot and 2.4% by bicycle.

Most people visit Stony Swamp during the summer season to enjoy the natural environment (69.4%), to observe the flora and fauna (68%), to spend time with friends or family members (67.8%), or to practise an outdoor activity requiring relatively little effort (55.9%).

Hiking (88.6% of visitors), walking the dog (38.5% of visitors) and birdwatching or nature observation (32.8%) are the most popular activities for summer visitors to Stony Swamp.

Of the summer visitors to Stony Swamp, 66.2% spent an hour or less on the site during their day trip, compared to 28% who spent between 1 and 2 hours.

Of the summer visitors to Stony Swamp, 89.3% had previously been to the site, compared to 10.1% for whom it was their first visit.

Visitor satisfaction

The elements or services with which the summer visitors to Stony Swamp were most satisfied were the opportunities to appreciate nature (98.7%), followed by the condition and maintenance of the access roads to Stony Swamp (96%). They expressed the least satisfaction with the signs along the trails (24.4%).

Most summer visitors to Stony Swamp found out about the site, the activities they could do there, and the services offered from previous visits (79.6%) and by word of mouth (27.3%).

Of the summer visitors to Stony Swamp, 83.2% identified the NCC as the organization managing the site, compared to 15.2% who had no idea who managed it.

The management issues with which the summer visitors to Stony Swamp most agreed were:

- that access to fragile areas of the Greenbelt should be restricted or prohibited (89.8%); and
- that more interpretative activities highlighting the natural and cultural resources of the Greenbelt should be offered (76.6%).

The management policies with which the summer visitors to Stony Swamp most disagreed were:

- that visitors to the Greenbelt should be charged a fee to improve services (77.1%); and
- that tasteful advertising should be allowed in the Greenbelt to improve services (53%).

The telephone interviews with residents of the areas bordering on Stony Swamp revealed that

close to 3 out of 10 respondents (27% or 109 out of 400) made at least 1 trip to Stony Swamp during the 12 months preceding the telephone survey.

Proportionately, Stony Swamp visitors come as often from Nepean (52%) as from Kanata (48%), whereas among the people surveyed who had never visited Stony Swamp, there were more from Nepean (62%) than from Kanata (38%).

Traffic survey

The number of summer visitors to Stony Swamp (that is, between April 16 and November 30), is estimated at close to 400,000 people (384,000).

Visitors go to Stony Swamp most often during the month of October (30.7% of the total traffic), followed by September (13.3% of the traffic), during the weekends (39% of the traffic), and between 9 am and 11 am (25% of the traffic).

Gatineau Park Winter Trails:

December 1, 1999 to April 15, 2000

A total of 401 questionnaires were filled out, with 73% responding and a 22.7% refusal rate.

Profile of respondents/visitors

Men made up 63.3% (254 people) of the respondents and women 36.7% (147 people).

Of the 382 respondents, 95.3% live in Canada's Capital Region, mainly in the municipalities of Ottawa (190 people), Hull (61), Nepean (21), and Aylmer (16).

People aged 44 or under represented 60.6% of respondents, whereas those aged 45 or older made up 39.4% of respondents (368 people).

People who speak English most often in their homes made up 64.1% of respondents (257 people), whereas 35.6% (143 people) normally spoke French.

Almost 4% of respondents claimed an annual gross family income of less than \$20,000, whereas 24.5% of respondents claimed to earn more than \$80,000.

During the winter, most people come to Gatineau Park alone (33.8%), with friends (29.2%) or as a couple (21%).

Of the visitors, 7.7% had a dog with them when they visited the winter trails of Gatineau Park.

Visitor behaviour

Of the people who use the winter trails in Gatineau Park, 42.9% have a season pass for cross-country skiing, compared with 22.9% of visitors who use day passes; 28.2% of cross-country skiers did not have a pass when they went.

Of the visitors to the winter trails in Gatineau Park, 98% access the site by private car, compared to 1% in buses (organized groups) and 1% on foot.

Visitors go to the winter trails of Gatineau Park to practise an outdoor activity requiring relatively little effort (70.1%), to enjoy a natural environment (54.9%) and to spend time with family and friends (51.4%).

Cross-country skiing (83%) and hiking (16.2%) are the most popular activities among visitors to the winter trails of Gatineau Park.

Of the people who use the winter trails, 35.7% spend between 2 and 3 hours in the Park during their day trip,

compared to 33.2% who spend between 1 and 2 hours and 24% who spend 3 hours or more.

Of the people visiting the winter trails in Gatineau Park, 91.8% had been to the Park before, compared with 8.2%, for whom it was their first visit.

Visitor satisfaction

The elements or services with which visitors to the winter trails of Gatineau Park were most satisfied were the condition and maintenance of the parking lots (96%) as well as the opportunity to admire nature (96.7%). They expressed the least satisfaction with the availability of food services (17.7%).

The visitors to the winter trails in Gatineau Park found out about the existence of the site, the activities they could do and the services available mainly during previous visits (80.8%), by word of mouth (27.7%) and by means of brochures and cards about the Park (9.2%).

Of the people who use the winter trails of Gatineau Park, 68.1% identified the NCC as the organization that manages the Park, compared with 16.7% who identified the company ProFac and 14.2% who had no idea who managed it.

The management issues with which visitors to the winter trails of Gatineau Park agree most are:

- that access to fragile areas of the Park should be restricted or prohibited (90%); and
- that more interpretation activities should be offered to help visitors appreciate natural and cultural features of the Park (73.6%).

The management issues with which visitors to the winter trails of Gatineau Park disagree most are:

- that a higher number of visitors should pay a fee to maintain services (52.6%); and
- that tasteful advertisements should be allowed in the Park to maintain services (52.1%).

The telephone interviews with residents of the areas bordering Gatineau Park revealed that close to two thirds of respondents (66%, or 265 out of 400) made at least 1 trip to Gatineau Park in the 12 months preceding the telephone survey.

The proportion of interviewed visitors living in Hull (78.5%) and Chelsea (8.3%) is higher than that of interviewed non-visitors living in those municipalities (72.6% and 2.2% respectively).

Traffic survey

It is estimated that more than 250,000 people (253,800) used the winter trails of Gatineau Park during the 1999-2000 season (the period between December 1, 1999 and April 15, 2000).

Most visitors use the winter trails of Gatineau Park during the month of March (36.2% of the total traffic), followed by December (23.6% of the traffic), during the day on the weekends (61.25% of the traffic) and between 10 am and 3 pm (72.2% of the traffic).

Gatineau Park — Parkway Sector:

April 15 to November 30, 2000

A total of 805 questionnaires were filled out, with 81.2% of the people responding and a refusal rate of 17.4%.

Profile of respondents/visitors

Respondents were 39.1% male and 40.9% female.

A little less than 85% of summer visitors to the Parkway Sector of Gatineau Park came from Canada's Capital Region, while 11.7% came from elsewhere in Quebec and Ontario.

Close to 60% of the respondents to the survey on summer visitors to the Parkway Sector of Gatineau Park were between 25 and 44 years of age, compared to a little less than 9% who were between 15 and 24, and 31% who were 45 and over.

The majority of summer visitors to the Parkway Sector of Gatineau Park (55.9%) spoke English most often in the home, compared with 41.1% of visitors who spoke French and 3% who spoke other languages.

The annual gross family incomes of 86% of the summer visitors to the Parkway Sector of Gatineau Park were reported at higher than \$40,000.

Summer visitors to the Parkway Sector of Gatineau Park came with family (25.7%), alone (22.9%), as a couple (22%) and with friends (21.2%).

Close to 23% of visitors are alone when they visit the Parkway Sector of Gatineau Park during the summer season, compared to 77% of visitors who are in groups of 2 or more people.



Of the visitors, 5.2% had a dog with them when they visited the Parkway Sector of Gatineau Park during the summer season.

Visitor Behaviour

During the summer season, 81.1% of visitors to the Parkway Sector of Gatineau Park entered the site in private cars, while 13.4% were on bicycles and 5.5% used other means of transportation.

Visitors come to the Parkway Sector of Gatineau Park during the summer season to practise an outdoor activity requiring relatively little effort more often than to train to improve their performance.

The most popular activities for summer visitors to the Parkway Sector of Gatineau Park were hiking (55.7%) and driving (28.3%), followed by picnicking (14.4%) and swimming at the beach (13.2%).

During the summer season, 85.4% of visitors to the Parkway Sector of Gatineau Park spent 3 hours or less on-site during their day trips.

Of the summer visitors to the Parkway Sector of Gatineau Park, 86.2% had been to the Park before, compared to 13.5% for whom it was their first visit.

Visitor Satisfaction

Generally, a little more than 80% of the summer visitors to the Parkway Sector of Gatineau Park were satisfied or very satisfied with each of the aspects about which they were asked.

When asked about the availability of restaurants, the Gatineau Park Visitor Centre and security services provided by conservation officers or police, there was a high rate of non-response.

Summer visitors to the Parkway Sector of Gatineau Park heard

about sites and activities in the Park mainly from previous visits (74.4%) and word of mouth (25.5%).

Of the summer visitors to the Parkway Sector of Gatineau Park, 71.2% clearly identified the NCC as the organization responsible for managing Gatineau Park. Around 20% of visitors did not know who managed the Park.

The management policies with which visitors to the Parkway Sector of Gatineau Park are most in agreement are:

- that access to fragile areas of the Park should be limited or prohibited (89.5%); and
- that more interpretation activities highlighting the natural and cultural aspects of the Park should be offered (77.4%).

The management issues with which visitors to the Parkway Sector of Gatineau Park disagree most are:

- that a higher number of visitors should pay a fee to maintain services (63.2%).

Traffic Survey

It is estimated that more than a million (1,079,000) visitors used the parkways in Gatineau Park during the summer season of 2000 (between April 16 and November 30).

Visitors use the parkways of Gatineau Park most often during the months of June (23.5% of the total traffic) and July (15.8% of the traffic), during the days of the weekends (31.1% of the total traffic) and between 1 and 4 pm (35.4% of the total traffic).

Federal Employment Survey — Executive Summary

Over the past 25 years, the National Capital Commission (NCC) has conducted a survey with federal government employers every 2 to 5 years. Accurate data on the current state of federal public service employment is critical for the NCC in carrying out its mandate. The NCC requires reliable and valid statistics on federal government employment and location patterns within the NCR to fulfil its mandate of planning land use and assisting in the development of the NCR. Information from sources such as Statistics Canada's employment data does not provide enough detail to be useful for NCC purposes. In 2001, Public Works and Government Services Canada (PWGSC) partnered with the NCC to conduct a self-completed mail-back survey on federal government employers during winter/spring 2001. The intervening period between 1996 and the present has seen changes in the federal workforce due to recent and on-going streamlining of the public service. In the past few years, however, the public service has begun to hire more employees in response to the anticipated baby boomer retirements over the next 5 years. GPC Research was contracted to administer the project. The objectives of this study were to provide the NCC and PWGSC with information on:

- employment status, place of work, and province of residence for all federal employees within the NCR;
- past and future changes in employment location and building space requirements;
- inter-provincial travel patterns;

- total number of employees by postal code; and
- alternative workplace strategies, both planned and implemented.

Bilingual survey packages were mailed out to 130 federal government departments or organizations. Each organization was sent a bilingual survey package addressed to the Deputy Minister, Chair or equivalent position within the organization. Of these, 5 were duplicates, 2 organizations indicated that they did not have any offices in the NCR, and 6 reported that they were included under a department already reporting. Of the 117 eligible organizations, 11 refused to participate, leaving 106 organizations eligible, with 97 responding for a 92% response rate. The remaining nine organizations neither responded nor explicitly indicated they would not complete the survey; they are coded as no-response. Data collection began on January 29 and ended on June 5, 2001.

The survey results indicate there has been an overall increase in the number of federal government employees working in Canada's Capital Region to approximately 107,000, up from approximately 99,000 in 1996. This 8.1% increase is mostly due to the expanded numbers of term (up by 3,495) and contract (up by 3,520) positions. There is also a significant increase in the number of in-house consultants and other types of positions within the public service. The number of permanent employees, however, decreased by 4.3%. While the overall total number of federal employees in the

NCR has increased since 1996, these figures are still below the 1989 number of 114,149.

While overall federal employment in the NCR has increased, the overall employment of Schedule I organizations has not. Federal government departments, as defined by Schedule I (see table 5) of the Treasury Board's *Financial Administration Act*, have experienced a decrease in the number of employees over the past several years. Nevertheless, government agencies, commissions, and boards covered under Schedule II and Schedule III of the policy have increased employment. This is especially true for Schedule II organizations.

The number of employees working for Treasury Board-controlled organizations has declined by 7.8%, while non-Treasury Board organizations have seen a 75.6% increase in employment.

The relative number of employees working in the downtown cores of Hull and Ottawa continues to decline slowly as employment in non-core areas increases.

In terms of non-core areas, Tunney's Pasture continues to be a central site for federal employers, with the Rockcliffe/Montreal Road and River Road areas experiencing considerable growth since 1989. On the other hand, restructuring and downsizing since 1989 have affected the employment count in areas such as the Experimental Farm, Uplands, and Booth Street.

The survey also examined the place of work and place of residence for federal employees and how this affects inter-provincial

travel. The overall proportion of employees working on the Quebec side of the NCR has decreased by 0.8% since 1996. The overall proportion of federal government employees residing in Quebec has increased by 20.3%, while the relative proportion has also increased from 25.9% in 1996 to 28.8% in 2001. Further, the data suggests that there is an increase in the proportion of employees living on the Quebec side of the Ottawa River who travel to Ontario (+19.1%) to work. Conversely, there is a decrease in the proportion of employees on the Ontario side of the Ottawa River who travel to Quebec to work (-14.8%).

All organizations were also asked if they moved all or part of their operations during the current year. Approximately 3 in 10 said they have. This trend will continue as nearly half the respondents (48.5%) say they will be expanding within the next 2 years. Just over a quarter of survey organizations say they have implemented some sort of alternative workplace strategy.

In summary, some of the core findings to come out of the 2001 Federal Government Employment survey are the following:

- NCR federal government employment has increased by 8.1% (more than 8,000) since 1996 to 107,184 employees.
- There has been a shift in the type of employee positions being filled. Permanent employees continue to decline in numbers (down 4.3% since 1996), while there have been significant increases in term employment (up by

3,495) and contract work (up by 3,520).

- The number of employees working for Treasury Board-controlled organizations has declined by 7.8%, while non-Treasury Board organizations have seen a 75.6% increase in employment.
- Three in 10 organizations have moved all or part of their operations to other locations during the current fiscal year. Nearly half (48.5%) of organizations expect to require additional building space in the next 2 years.
- Just over a quarter of the organizations surveyed indicated that they have implemented some sort of alternative workplace strategy.
- The ratio of federal government employees working on the Ontario and Quebec sides of the NCR has remained at roughly 4 to 1 over the past 15 years. However, the percentage of federal government employees living in Quebec has increased by approximately 20%, and of those, the percentage that commutes to the Ontario side of the NCR to work has increased by nearly 20%. Conversely, the number of Ontario-based federal government employees has increased by approximately 4%, and the number of those travelling to Quebec to work has declined by approximately 15%.

Call Centre Survey — EXECUTIVE SUMMARY

The National Capital Commission (NCC) survey of Call Centre clients was conducted to establish a benchmark of the degree to which the current Call Centre service delivery infrastructure meets the expectations and needs of clients, while gauging and clarifying client needs for alternative means of accessing the NCC through the exploitation of new technologies. Specifically, the survey sought to:

- provide a profile of current users of the Call Centre facility;
- gauge client satisfaction with current services; and
- identify service options that need to be established in the new contact centre.

Methodology

The survey called for a total of 500 interviews with Call Centre clients from a total sample frame of 1,032 Call Centre clients who contacted the NCC Call Centre between mid-December 2000 to mid-February 2001. Fieldwork for the survey began on February 9, and was completed on February 28 2001, during which time a total of 502 interviews with NCC Call Centre clients were conducted.

Survey Results

Profile of NCC Call Centre Clients

Typical Call Centre clients tend to be English-speaking (79%), female (72%), 44 years of age (on average), and well educated (over 80% with some post-secondary education). NCR residents are important customers of the Call Centre, representing more than half of the callers and are also more likely to be repeat users and a source of referrals. Continuing

to address their needs for information will be an important consideration.

Use of the NCC Call Centre

More than two thirds of the clients surveyed were first-time callers, and repeat callers have used the Centre an average of 6.5 times in the past. More than half of repeat callers from the NCR (Ontario and Quebec) have called on behalf of out-of-town guests at some time, suggesting a potential market for the NCC. By far the most common means used to contact the NCC has been the telephone, followed by less than a quarter who have visited the Capital Infocentre and 1 in 5 who have used electronic or other means of contact.

Roughly a quarter of clients have referred others to the Call Centre, referring an average of 5 other people to the Centre.

Source of Awareness

Survey respondents first learned of the Call Centre through a variety of means. They were more likely to have heard of the NCC Call Centre through promotional materials, followed by telephone books/directories, the Internet, referrals, word of mouth and travel agents.

Reasons for Contacting the NCC

Two thirds of respondents contacted the Call Centre for information on specific sites or activities, and 1 in 4 were seeking information to help plan a trip. Four out of every 5 contacted the Centre on their own behalf, with much smaller proportions phoning for employers, out-of-town guests and friends living in the NCR. Varied types of information are



necessary to address the needs of all segments of clients. The most common types of information sought were for Capital events, recreation, general tourism and accommodation. Residency and frequency of visits are both significant determinants of the types of information sought. Currently, awareness of the variety of services available through the Call Centre is not high, especially among those outside the NCR.

NCC Call Centre Responsiveness

Survey findings on the responsiveness of the NCC Call Centre are quite positive: turnaround times are reasonable and the majority of clients usually received the information they were seeking after only 1 call. No problems were observed with respect to the delivery of services in clients' preferred official language. Only 1 client surveyed indicated being

unable to receive this service after making the request, and satisfaction with service in the official language was rated highest among all aspects of service about which survey respondents were asked.

Satisfaction

Satisfaction ratings are high for most aspects of the service received. Moreover, the information provided generally had a positive impact on clients' decisions to visit. While there was not a large segment of clients who left messages, the satisfaction ratings for this group were lower than those who contacted a staff member during their call. There also appear to be some problems with forwarding of information to clients through other means. This may be at least partially addressed with the increased availability of information electronically.

Use of Other Call Centres

Two in 5 survey respondents reported using other call centres. These other call centres were most likely to be operated by provincial or municipal governments. Relative to these other call centres, the NCC Call Centre was rated as the same or better by over 90% of these respondents.

Impact of Information

The survey findings suggest that information received from the NCC may have a moderate impact on clients' subsequent behaviour. More than half of the respondents who reported receiving information about sites, areas or events in the NCR reported that the receipt of this information made them more likely to make use of or visit the site or area.

Suggestions for Improvement

Roughly two thirds of surveyed clients were unable to provide a suggestion for how the Call Centre might be improved. The most common suggestions received from the remaining third of respondents were for more efficiency and less waiting, more precise or accurate information, more information on recreation and events, better promotion and the development of a website.

The NCC Contact Centre

Reaction to the concept of an NCC Contact Centre was generally positive. Use of e-mail communication appeals to a solid proportion of existing clients, although the new contact centre seems likely to attract potential clients in the younger age group (a segment that is not currently accessing

the Call Centre). The telephone can be expected to continue as an important mode of communication with the public, however. It will be important to continue to ensure personal access, as this is the top concern expressed around the transition to the contact centre.

Findings which show that the preferred mode of communication with the new contact centre will continue to be the telephone suggest that the survey results support the findings from the Contact Centre Research (CCR) Report, which concluded that delivery of services through e-mail may not decrease the overall number of telephone contacts but may rather increase the number of customer enquiries overall.

Together, this evidence suggests that resource issues, particularly with respect to staffing, may become a concern at some point during the transition to the contact centre.

Concluding Observations

Overall, the results of the survey show that the Call Centre is doing a good job of addressing the needs of its clientele. Residents of the NCR represent an important client base, and other potential markets within this group, such as NCR residents with visiting friends and relatives, could be explored. The survey findings indicate that the Call Centre has been very responsive to client needs, with reasonable response times,

delivery of services in both official languages, and high satisfaction ratings for most aspects of the services received. Response to the proposed contact centre was also generally positive, although the telephone and personal access will continue to be important means of communicating with the NCC.

The survey also identified areas where small proportions (i.e., between 5 and 9 percent) of surveyed respondents felt that improvements could be made, including better promotion of services offered through the Call Centre, improved services to clients who leave messages, and more information in certain areas (e.g., recreation and events).

Corporate Website — Usability Testing

Objective and Context

The main objective of this study was to assess the usability of features of the new National Capital Commission (NCC) corporate site, and to obtain suggestions for enhancing usability, content and functionality where these are issues.

Given the mandate of the NCC websites, to “provide public outreach (audience and clientele) and promote a public image of sophistication, expertise, credibility, openness and accessibility,” (NCC Guiding Principles) within the extensive business, political and cultural links between the National Capital and the rest of Canada, as well as overseas, the overall objectives of the research were placed within the following framework:

- The site’s primary target audience groups in terms of the NCC’s agenda:
 - *Does the corporate site clarify its target audience?*
 - *Is the content selected, structured and presented in such a way that it is most attractive to key client groups?*
- Users’ practical (professional and personal) interest in the NCC and the NCR:
 - *What motivates them to seek information on the National Capital?*
 - *What is their interest in the offerings of the NCC site in general, and the corporate site in particular?*
- The user groups’ cognitive expectations of an electronic Interface:
 - *How do users expect the interface to look and behave?*
 - *How do they expect the information to be structured?*

Key Recommendations

Phase 5 made some technical recommendations related to ease of navigation of the corporate website. Furthermore, Phase 5 recommended proactive promotional efforts geared to attracting and keeping users on the site.

Some of the recommendations were to add a “did you know” function, to build a database of site users, to communicate and promote through the database, and to advertise in local media across Canada.

Phase 5 recommended on-line surveys to monitor public opinion of the NCC, and to obtain feedback on the NCC’s proposed activities and plans for the NCR. Linking the website to the survey would increase the credibility of the NCC’s on-line component with members of the public, because such a link would demonstrate that the site seeks public input into the process of planning the Capital.

Other recommendations were to test the website annually over larger samples, to test the need for change, and to generate a General Usability Quotient to create a benchmark against which to measure the performance of future versions of the site.