

**A Report to
Saskatchewan Provincial Parks
regarding
Park Visitation
Attractions and Impediments**

July, 2004

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MAJOR OBSERVATIONS

Saskatchewan residents, whether they have personally visited a Provincial Park recently or not, consider the system of Provincial Parks to be of value to the people of the province. The major benefits they perceive as being derived from this resource is having a place to get away and relax and as sites for camping and other recreational activities.

The major attraction these Provincial Parks hold for visitors is as places to go camping or swimming and their proximity.

While there is some perception that fees and charges at Provincial Parks are higher than is reasonable, cost is not the major impediment to visits. Age or the individuals' stage in life is the major deterrent, followed by economic reasons and a lack of interest or time.

While most residents are required to travel less than an hour to visit a Provincial Park, they show a willingness to travel further if required.

Saskatchewan's Provincial Parks receive an extremely positive assessment from recent visitors. More than nine-in-ten rate their overall experience as "good" or "very good". Only two of 400 respondents rated their experience negatively.

While majorities of respondents suggested reasonable dollar amounts for entry fees below the current level, when they were presented with the actual amounts, a majority of visitors (52.9%) felt they were "about right".

Those in larger household units tend to be more positive towards fees, reflecting the nature of the way these are applied, as per vehicle entry fees rather than on a per capita basis.

A majority of visitors would favour the introduction of a short-term (two-hour) pass at a level of \$2 or less.

A large percentage of visitors favour significant subsidies for park users. Those with the highest household incomes favour the highest levels of subsidization of these costs.

Residents appear satisfied with the services and facilities currently offered at Saskatchewan Provincial Parks as there are few suggestions for additions or for changes.

There is some support for seeing food services, equipment rental operations and stores

in general operated by the private sector within Provincial Parks.

It appears that only some 6-7 percent of the province's population has never visited a Provincial Park and a majority have visited within the past five years.

I. INTRODUCTION

Decision Research Inc. was commissioned by Saskatchewan Provincial Parks to conduct a study of Saskatchewan residents' attitudes and habits in regard to the Provincial Parks. The study was to obtain the public's assessment of these Parks, the perceived benefits and attractions.

The study took the form of a random sample survey of 400 residents who had visited a Provincial Park within the last two years and an additional sample of 200 residents who had not been to a Provincial Park during that period.

A copy of the questionnaires administered in the survey is attached to this report, Appendix "A". Interviews were conducted during the period of July 19th to July 27th, 2004.

Top line data has been attached to this report, Appendix "B". A complete set of data tables has been forwarded to the Client under separate cover.

A survey of the size of the visitors sample will have a precision (range of error factor) of ± 4.4 percent at a 95 percent level of confidence (19 out of 20 times).

II. VISITS AND ATTRACTIONS

Those respondents who had been to a Provincial Park within the past two years were asked which parks they had visited. Interviewers were equipped with complete lists, including common names, and maps to assist in identifying parks, but, for the most part, visitors required no assistance and were not providing regional parks or other locations.

The Parks which appear to be the most visited sites were Pike Lake, Moose Mountain, Blackstrap and Cypress Hills.

PROVINCIAL PARK VISITED			
Park	1st Mention	2nd Mention	Total
Pike Lake	46	9	57
Moose Mountain	39	9	48
Blackstrap	33	14	47
Cypress Hills	27	16	43
Candle Lake	28	9	37
Greenwater Lake	23	10	33
Buffalo Pound	29	3	32
Good Spirit	22	7	29
Meadow Lake	18	11	29
Echo Valley	9	20	29
Rowan's Ravine	18	9	27
Duck Mountain	17	7	24

In total, 232 respondents had visited more than one Provincial Park during the past two years.

The proximity of the Park to one of the province's major urban centres contributed to high levels of visitation in many cases. Twenty-two of the 33 first mentions for Blackstrap and 33 of the 46 first mentions for Pike Lake were from respondents resident in Saskatoon. Seventeen of the 29 first mentions for Buffalo Pound were residents of Regina or Moose Jaw.

Those who had not been to a Provincial Park within the last two years were asked when their last visit would have taken place and a significant number had been to a Provincial Park within the past five years. Fewer than one-in-ten had never been to a Provincial Park.

LAST VISIT TO A PROVINCIAL PARK			
2 to 5 Years	–	81	(39.7%)
5 to 10 Years	–	44	(21.6%)
More than 10 Years	–	60	(29.4%)
Never Visited	–	19	(9.3%)

Twelve of the “never visited” were female and eight were under the age of 35 years of age.

Non-visitors tend to be older and, due largely to their age, tend to come from smaller households and have lower annual household incomes. The chart uses percentages to account for the different sample sizes.

DEMOGRAPHICS		
	Visitor	Non-Visitor
AGE		
18 to 35	21.1%	13.2%
36 to 54	44.5%	33.3%
55 to 64	18.8%	20.1%
65 or older	15.5%	31.9%
ANNUAL HOUSEHOLD INCOME		
< \$30,000	12.5%	27.5%
\$30 K to \$50 K	26.8%	26.0%
\$50 K to \$75 K	22.5%	13.7%
Over \$75 K	23.3%	11.3%
HOUSEHOLD SIZE		
One	11.8%	27.7%
Two	39.0%	41.6%
Three	17.3%	10.9%
Four	19.5%	11.9%
Four or More	12.5%	7.9%

The major factor inhibiting visits would appear to be age. This was confirmed

when non-visitors were asked if there was a particular reason that prevented them from visiting Saskatchewan’s Provincial Parks.

REASON DON'T VISIT			
Age	–	40	N
Health	–	7	O
Family Grown/Gone	–	22	N
Economic	–	27	-
No Interest	–	26	V
Own Cabin	–	7	I
Transportation/Distance	–	7	S
Time/Too Busy	–	26	I
New to Province	–	6	T
Go Outside/Regional	–	5	O
Negative Comments	–	6	R

Those who do visit Provincial Parks were asked what particular feature or activity attracted them to the Provincial Park(s). Up to three mentions were recorded. Camping, swimming and access were the main attractions.

ATTRACTION OF PROVINCIAL PARKS				
	1st Mention	2nd Mention	3rd Mention	Total
Camping	82	56	3	141
Swimming	63	53	20	136
Close/Access	63	10	5	78
Fishing	21	20	18	59
Boating	16	29	8	53
Nature/Wildlife	20	15	2	37
Owens Cottage	24	5	2	31
Golf	18	7	5	30
Cleanliness	7	8	5	20
Historical/Culture	7	5	3	15

Those who visit Provincial Parks were also asked how far they usually travel to

visit a Provincial Park and how far they would be willing to travel. While the high visitation for parks near major centres was noted, visitors tend to both travel considerable distance and appear willing to travel extensively to visit Provincial Parks.

USUALLY TRAVEL			
Less than 40 kms	–	61	(15.3%)
40 kms – 100 kms	–	91	(22.8%)
100 kms – 160 kms	–	121	(30.3%)
Further	–	126	(31.5%)

WILLING TO TRAVEL			
Less than 40 kms	–	17	(4.4%)
40 kms – 100 kms	–	48	(12.5%)
100 kms – 160 kms	–	89	(23.2%)
Further	–	230	(59.9%)

Males, those with larger families, higher incomes and residents of rural areas are generally willing to travel further to visit a Provincial Park than are others.

III. RATINGS

Park visitors were asked to rate certain aspects of their visit on a scale of from 1 to 5 where a “1” represented “very poor” and a “5” represented a “very good” assessment of that aspect.

Saskatchewan’s Provincial Parks receive an extremely positive assessment in all of the areas listed. More than 9 in 10 rated their overall experience positively.

PROVINCIAL PARK RATINGS				
“The facilities and services offered.”				
Very Poor	Poor	Fair	Good	Very Good
3 (0.8%)	10 (2.5%)	61 (14.0%)	213 (53.3%)	109 (27.3%)
“Security provided/sense of personal safety.”				
Very Poor	Poor	Fair	Good	Very Good
2 (0.5%)	6 (1.5%)	56 (14.0%)	205 (51.3%)	123 (30.8%)
“Value received for the fees charged for use of park.”				
Very Poor	Poor	Fair	Good	Very Good
8 (2.0%)	28 (7.0%)	106 (26.5%)	164 (41.0%)	83 (20.8%)
“How close these parks are to where you live.”				
Very Poor	Poor	Fair	Good	Very Good
7 (1.8%)	31 (7.8%)	83 (20.8%)	168 (42.0%)	109 (27.3%)
“How well natural and cultural resources are protected.”				
Very Poor	Poor	Fair	Good	Very Good
1 (0.3%)	9 (2.3%)	83 (20.8%)	168 (42.0%)	109 (27.3%)
“Overall experience in a Provincial Park visited.”				
Very Poor	Poor	Fair	Good	Very Good
1 (0.3%)	1 (0.3%)	33 (8.3%)	230 (57.5%)	130 (32.5%)

It speaks very positively to the Provincial Park System when only 2 of 400 individuals rate their overall experience negatively.

These assessments were positive across all subgroups. Older visitors tended to provide more “very good” assessments and also more “very poor” than did younger

visitors. Those in larger households were slightly less positive about “value” and generally less willing to give “very good” assessments. Lower income households also tended to be slightly less positive than were others. There was virtually no difference in ratings based on gender of respondent.

IV. BENEFITS

Both park visitors and non-visitors were asked if they believe that Saskatchewan’s system of Provincial Parks provides a benefit or are of value to the people of Saskatchewan. They were then asked what they felt the main benefit from having these Parks to be, or if not considered to be of value, why not.

There were 379 of the visitors (94.8%) who consider these parks to be a benefit and of those who were not sure or did not consider them to be a benefit only 9 gave specific reasons with 7 of these related to costs/fees.

Among the 204 non-visitors, 177 or 86.8% consider the Park System to be a benefit and only 10 had specific reasons for not considering them to be of value with 6 of the 10 referring to cost. The other 4 were simply not familiar with the Provincial Parks.

The following charts outline the benefits of the Provincial Parks System or the value, first as perceived by visitors.

BENEFITS OF SASKATCHEWAN'S PROVINCIAL PARKS SYSTEM AS PERCEIVED BY VISITORS			
	1st Mention	2nd Mention	Total Mentions
Places to Relax, Get Away	167	81	248
Camping	61	35	96
Other Recreational Activities	61	57	118
Learn About Nature, History or Culture	28	28	56
Tourism, Attract Visitors	19	22	41
Protection of Nature/Cultural Features	18	19	37
Economic Activity	7	10	17
Family Orientation	6	7	13
Maintenance/Upkeep	4	6	10

And as perceived by those who have not visited a park in the past two years.

BENEFITS OF SASKATCHEWAN'S PROVINCIAL PARKS SYSTEM AS PERCEIVED BY NON-VISITORS			
	1st Mention	2nd Mention	Total Mentions
Places to Relax, Get Away	64	34	98
Camping	42	14	56
Other Recreational Activities	32	25	57
Learn About Nature, History or Culture	11	14	25
Protection of Nature/Cultural Features	5	6	11
Tourism, Attract Visitors	19	6	25
Family Orientation	8	5	13
Maintenance/Upkeep	8	2	10

Both samples were then presented with a series of six factors that may be important benefits of Provincial Parks. They were asked to indicate how important these factors are using a scale of from 1 (not important) to 5 (very important).

BENEFITS OF SASKATCHEWAN PROVINCIAL PARKS					
Places to go camping.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	2.8%	2.3%	9.0%	33.3%	52.3%
Non-Visitors	2.9%	3.4%	12.3%	33.3%	48.0%
Places for other recreational activities.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	0.8%	2.8%	13.8%	48.8%	33.5%
Non-Visitors	2.0%	6.4%	16.7%	40.7%	33.8%

Site for learning about nature, history and culture.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	2.5%	5.0%	17.8%	44.3%	27.8%
Non-Visitors	3.9%	8.3%	19.1%	29.4%	37.3%
Attractions for visitors from other regions and provinces.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	1.0%	0.5%	14.0%	44.0%	39.0%
Non-Visitors	2.0%	3.4%	14.7%	41.2%	38.2%
Places to relax and be energized.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	0.3%	0.8%	3.0%	41.3%	53.3%
Non-Visitors	1.5%	1.5%	11.3%	34.3%	51.5%
Places that create valuable economic activity.					
	Not Important	Little Importance	Neutral	Important	Very Important
Visitors	0.5%	1.8%	12.8%	48.5%	34.8%
Non-Visitors	2.9%	3.4%	11.8%	46.1%	34.8%

Regardless to whether they have actually visited a Provincial Park recently or not, at least 4 out of 5 Saskatchewan residents attach significant importance to these benefits derived from the Provincial Park System. There was little variance across the demographic subgroups within the two samples.

V. ENTRY FEES

The questionnaire presented a series of questions to visitors dealing with the entry fee charged per vehicle for visits to a Provincial Park. They were first asked to indicate what they felt would be a reasonable dollar amount for the entry fee for a 1-day Pass, a 3-day Pass and for an Annual Permit.

In each case, a majority of visitors consider a “reasonable” price to be below the current actual charges.

REASONABLE DOLLAR AMOUNTS – ENTRY FEES				
1-Day Pass				
	Less than \$3	–	42	(10.5%)
	\$4 to \$6	–	197	(49.3%)
[actual amount \$7]	\$ 7	–	65	(16.3%)
	\$8 to \$9	–	18	(4.5%)
	\$10 or more	–	51	(12.8%)
3-Day Pass				
	Less than \$5	–	10	(2.5%)
	\$6 to \$9	–	73	(18.3%)
	\$10 to \$15	–	187	(46.8%)
[actual \$17]	\$16 to \$18	–	20	(5.0%)
	\$19 to \$22	–	41	(10.3%)
	\$23 or more	–	40	(10.0%)
Annual Permits (Yearly Pass)				
	Less than \$25	–	36	(9.0%)
	\$26 to \$35	–	84	(21.0%)
	\$36 to \$49	–	86	(21.5%)
[actual \$50]	\$50	–	83	(20.8%)
	\$51 to \$64	–	13	(3.3%)
	\$65 or more	–	36	(9.0%)

There were 62 visitors or 15.5 percent who could not offer an opinion in terms of the Annual Permit compared to around 7 percent not offering opinions on the shorter term passes.

The following chart shows the percentage of various subgroups who identified the current charge or higher as reasonable.

CURRENT FEE OR HIGHER REASONABLE			
1-Day Pass [\$7 or higher]			
Age	18 to 35	–	50.1%
	36-49	–	30.3%
	50-64	–	29.4%
	65+	–	32.2%
Gender	Male	–	33.1%
	Female	–	33.9%
Household Size	1 or 2	–	30.5%
	3 or 4	–	36.0%
	5 or more	–	38.0%
Household Income	< \$35 K	–	32.0%
	\$35K to \$50 K	–	29.9%
	\$50 K to \$75 K	–	30.0%
	Over \$75 K	–	43.0%
3-Day Pass [\$17 or higher]			
Age	18 to 35	–	38.1%
	36-49	–	21.9%
	50-64	–	26.9%
	65+	–	16.1%
Gender	Male	–	25.0%
	Female	–	25.4%
Household Size	1 or 2	–	21.2%
	3 or 4	–	27.9%
	5 or more	–	34.0%
Household Income	< \$35 K	–	28.0%
	\$35K to \$50 K	–	23.3%
	\$50 K to \$75 K	–	27.8%
	Over \$75 K	–	24.8%

Annual Permit [\$50 or higher]			
Age	18 to 35	–	40.5%
	36-49	–	32.6%
	50-64	–	36.1%
	65+	–	20.9%
Gender	Male	–	29.8%
	Female	–	35.7%
Household Size	1 or 2	–	27.6%
	3 or 4	–	35.4%
	5 or more	–	48.0%
Household Income	< \$35 K	–	36.0%
	\$35K to \$50 K	–	32.9%
	\$50 K to \$75 K	–	31.1%
	Over \$75 K	–	38.8%

Those who had not visited a Provincial Park within the past two years were asked what they would consider a reasonable dollar charge for a 1-day Pass per vehicle to visit a Provincial Park. In this case as well, a majority gave a dollar amount below the actual current charge of \$7.00.

REASONABLE CHARGE FOR 1-DAY PASS (Non-Visitors)			
1-Day Pass			
	Less than \$3	–	37 (18.1%)
	\$4 to \$6	–	81 (39.7%)
[actual amount \$7]	\$ 7	–	16 (7.8%)
	\$8 to \$9	–	9 (4.4%)
	\$10 or more	–	26 (12.7%)
	Don't Know/ Not Sure	–	35 (17.2%)

PERCENTAGE OF NON-VISITORS STATING CURRENT FEE (\$7) OR HIGHER REASONABLE		
AGE		
18 to 35	–	26.1%
36-54	–	23.5%
55-64	–	39.0%
65+	–	18.4%
GENDER		
Male	–	28.0%
Female	–	22.9%
HOUSEHOLD SIZE		
1 or 2	–	25.0%
3 or 4	–	26.1%
5 or more	–	25.0%
HOUSEHOLD INCOME		
< \$35 K	–	16.1%
\$35K to \$50 K	–	37.7%
\$50 K to \$75 K	–	32.1%
Over \$75 K	–	30.3%

Both samples were then provided with the actual amounts of the current entry fees – 1-Day Pass, \$7; 3-Day Pass, \$17; Weekly Pass, \$25; and \$50 for an Annual Pass. They were asked if they found these fees to be extremely low, somewhat low, about right, somewhat high or extremely high. A majority of visitors consider these fees to be “about right”.

CURRENT FEES (Park Visitors)			
Extremely Low	–	7	(1.8%)
Somewhat Low	–	23	(5.9%)
About Right	–	208	(52.9%)
Somewhat High	–	103	(25.8%)
Extremely High	–	32	(8.0%)

There were also 11 individuals who specified that the 1-day fee is high and 5 who found the fee for an Annual Permit high.

The youngest age group had the highest percentage finding the fees about right (64%) and the lowest percentage was among those over 65 years of age (48%). The larger the household, the more likely it was respondents would find fees reasonable. Those with lower incomes were more likely to consider these fees to be high while female respondents were more likely to find these fees to be reasonable.

Non-visitors were more likely than visitors to find these current fees to be high.

CURRENT FEES (Non-Visitors)			
Extremely Low	–	3	(1.5%)
Somewhat Low	–	13	(6.4%)
About Right	–	90	(44.1%)
Somewhat High	–	60	(29.4%)
Extremely High	–	28	(13.7%)

The non-visitor showed the same demographic variances as did the visitor sample with the largest disparity apparent among differing household sizes. Those in households of five persons or more found the current fees about right at a level of 63 percent compared to only 39 percent among single person households.

The application of these fees as per vehicle charges provides greater value to larger units and this fact is not lost on the public.

Visitors were also asked if they felt there should be a two-hour pass for people wanting to make a short visit such as to visit a restaurant and if so, what they felt a reasonable dollar amount would be for that fee. A majority of visitors would support the introduction of a short-term pass.

2-HOUR PASS			
FAVOUR			
Yes	–	223	(55.8%)
No	–	155	(38.8%)
Don't Know	–	22	(5.5%)
AMOUNT			
Free	–	75	(20.1%)
\$1 to \$1.99	–	97)
\$2 to \$2.99	–	75	(25.9%)
\$3 to \$3.99	–	31)
\$4 to \$4.99	–	11	(20.1%)
\$5 or more	–	25)
Don't Know	–	60	(8.3%)
			(2.9%)
			(6.7%)
			(16.0%)
)

VI. SERVICES AND FACILITIES

Subsidization

Interviewers told visitors that the services and facilities offered at Provincial Parks are paid mostly from user charges but are also subsidized to a degree. They were asked what they felt is the appropriate or proper percentage of the cost of providing these services and facilities that should be paid by the actual user. Most visitors are in favour of heavy subsidies.

PARK USER PORTION OF COSTS			
Over 100% / Profit	–	18	(4.5%)
All / 100%	–	8	(2.0%)
90% to 100%	–	22	(5.5%)
76% to 89%	–	46	(11.5%)
51% to 75%	–	56)
½ / 50%	–	96	(14.0%)
Less than ½ / <50%	–	73	(24.0%)
Don't Know / Not Sure	–	81)
			(18.3%)
)
			(20.3%)
)

The highest income group was the most in favour of heavy subsidies. Only 16 percent of those in the lowest income group felt the user should pay less than half the cost, while 25 percent of those in the highest income category found this level of subsidy appropriate. Larger household units also tended to be more favourable to higher levels of subsidy.

Additions

Both visitors and non-visitors were asked if there are any other services or facilities that they would like to see offered or available at Saskatchewan Provincial Parks that generally are not available at present.

Three-quarters of both groups were not able to identify specific services or facilities that should be added to the offerings at Provincial Parks.

Those who did respond tended to give more than one response and some responses were not a service or facility but a condition (less rowdiness, lower rates, etc.). A complete listing of the responses is included in Appendix “B”. The items which received multiple mentions among Park visitors were:

MULTIPLE MENTIONS OF SERVICES / FACILITIES (Conditions)		
Better/More Washrooms>Showers	–	10 mentions
Swimming Pools	–	10 mentions
Kids’ Programs/Activities	–	8 mentions
Store/Concessions	–	6 mentions
Golf Courses	–	5 mentions
Horseback Riding	–	4 mentions
Boat Rentals	–	3 mentions

There were also multiple references to more/free/better/dry firewood.

The responses from non-visitors, also in Appendix “B”, were similar to those of visitors with no item receiving more than three mentions (pools).

Delivery

Both visitors and non-visitors were asked if there are any services that they would like to see delivered or provided by a private operator in Provincial Parks.

The complete listing of responses is included in Appendix “B”. Multiple mentions among visitors included.

MULTIPLE MENTIONS OF SERVICES VISITORS AND NON-VISITORS WOULD LIKE TO SEE DELIVERED/PROVIDED BY A PRIVATE OPERATOR IN PROVINCIAL PARKS		
Food / Cafes / Restaurant	–	26 mentions
Boat/Bikes Rentals	–	21 mentions
Stores (general)	–	11 mentions
Golf	–	6 mentions
Most/All	–	3 mentions

Maintenance, liquor service, laundry, horseback riding, tours and theatre all received two mentions.

Among non-visitors the items receiving multiple mentions were:

Food Services (various)	–	12 mentions
Stores (general)	–	8 mentions
Rentals	–	5 mentions
Golf	–	3 mentions

Improvements

Those who have not been to a Provincial Park in the past two years were asked if there was anything that might be improved or changed about Provincial Parks or a particular Park that might encourage them to visit.

For four-out-of-five, there was no particular change that they could identify which would prompt them to visit. The responses from those who might be encouraged follows:

Lower Costs/Fees	–	8 mentions
Less Parties/Rowdiness	–	7 mentions
Firewood Charge	–	3 mentions

Other mentions include: age, boat rentals and fishing, campsites and amenities, dance halls, keep it clean, keep wood dry and out of rain, kids and all ages, lower age limits to drive snowmobiles, more activities, more advertising for tourism, more cabins and lakefront cabins, more parks with winter access, more year round facilities, movie night for kids and more activities, should be left in natural state, and too many rules.