Parks Canada Parcs Canada

Evaluation of Parks Canada's Visitor Service Offer

January 31, 2012

Office of Internal Audit and Evaluation

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Canada

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EXECUTIVE SUMMARY

The Visitor Service Offer (VSO) sub-activities in the Agency's Program Activity Architecture (PAA) account for an estimated 30% of all expenditures from 2007-2008 to 2009-2010. Visitors to Parks Canada (PC) administered places account for approximately 66% of Agency's total revenues, which exceeds $100M annually. Assets associated with the VSO represent 40% of the estimated $10B in replacement value of the Agency's asset portfolio.[1] If the VSO is not well managed it could result in a loss of revenue and visitors, harm to the natural and cultural resources that are at the core of the PC experience, limit the achievement of the mandate of public enjoyment of protected places, and ultimately impact on the ability of the Agency to sustain protected heritage places for future generations. Given the materiality of the investment in the VSO and its importance for the Agency's mandate, it was identified as a high priority for evaluation in both the 2009-2010 and 2010-2011 Parks Canada Evaluation Plans.

EVALUATION ISSUES

Consistent with the requirements of the *Treasury Board* (TB) *Policy on Evaluation* and associated directives, the evaluation addressed:

1) **Relevance:** Is the provision of the VSO consistent with federal and Agency legislation, mandates, roles, and priorities? Does the Agency have in place guidance, tools and processes for understanding potential user demands and expectations and is this information used to guide the development of the offer over time? Is the demand for the VSO and/or for aspects of the offer sufficient to justify the offer?
2) **Effectiveness:** Is the Agency meeting or likely to meet its corporate and internal performance targets for the VSO?
3) Cost-Effectiveness: Is the program efficient and economical in producing outputs and achieving outcomes? To what extent can the desired outcomes be attributed to the actions of the program?
4) **Design and Delivery:** To what extent has the program design and changes in the design over the last few years been communicated, understood, and supported by Agency staff? Are potential negative consequences of the program identified and managed? To what extent are alternative delivery mechanisms considered and used to support program outcomes?

METHODOLOGY

Data from multiple lines of evidence were collected for the evaluation. Lines of evidence included a review of more than 6000 pages of documents and paper files as well as a variety of sources of secondary data in the Agency (i.e., financial, asset, visitor and public opinion data); site visits to 16 national parks, one national marine conservation area and 17 national historic sites; an on-line survey of the Agency's VE managers; 25 interviews with PC staff in National Office or Service Centres and 80 interviews with staff in the field; 47 individual interviews with partners and stakeholders as well as three group interviews with 17 additional partners or stakeholders, and case studies of the costs and operations of four parks not administered by the Agency (i.e. three in Canada and one in the United States).

1 This is based on Asset Management System data, which is known to have limitations.

FINDINGS

There is strong evidence that providing a VSO is consistent with the Agency's mandate, overall government priorities, and public expectations. The Agency's VSO is similar to that of many other parks systems.

Order of magnitude estimates of demand for PC places, suggest that more than 20M Canadians visit a PC administered place each year. There is reasonable evidence that visits are declining although it is difficult to determine with any certainty the extent of the decline given various sources of error in determining the number of visits each year.

While it is unreasonable to expect the Agency to have quantitative data on demand for each of its many specific VSO services or activities, we found that the Agency, with a few minor exceptions, lacks national level quantitative data on both the supply and the demand for **any** of the components of the VSO, although local data exists in some places (i.e., local campground occupancy statistics or trail use data).

Various sources of qualitative information suggested at least moderate demand for many of the facilities, activities and services offered by the Agency. There is general consensus that demands are changing and that visitors are looking for more creature comforts; more technology based services; and more unique, authentic, interactive, personalized, and diverse experiences. There is also a sense that the market is fragmenting and that the service offer has to adapt through expanding the range of opportunities available. Field-level managers indicated a need for more time, resources, and expertise to use the available information to plan, implement, and adjust their offers. A consistent message during the evaluation was that the website needs improvement. Although web renewal efforts are underway, we are unsure if stated timelines for completion of this exercise (July 2012) will be met.

The Agency's hierarchy of performance expectations directly or indirectly related to visitors includes commitments that 65% of Canadians will report a personal connection to a PC administered place by March 2014, that the overall number of visits will increase by approximately 10% between March 2009 and March 2015, that (90%) of on-site visitors will enjoy and be satisfied with their visit, and that 85% will report that the place visited is meaningful to them. The targets are generally clear and measurable and we confirmed that they are likely measuring distinct outcomes. Measuring and reporting on the number of visits and the satisfaction of visitors are common metrics for most protected area organizations.

There is considerable evidence that the activities and outputs that form part of the VSO are produced. The Visitor Experience Assessments tool (VEAs), which serves as a key vehicle to gather much of the information generated from other processes, has been used extensively since its introduction in 2005 and resulted in more than two thousand planned actions, many of which have been reported to be completed. Visitor surveys show wide spread satisfaction with the quality and the availability of many specific components of the offer.

It is clear that the Agency's efforts to reverse the decline in the estimated number of reported person-visits have not yet been effective, although local gains in the estimated number of visits have been recorded at many sites since the establishment of baseline targets in 2009.

The Agency has developed a plausible theory of why visits are declining based on well attested social demographic changes in Canadian society. The relevance of these changes to the Agency is supported by the Agency's own research on current visitor characteristics and surveys of barriers to visiting. It is developing more detailed and comprehensive profiles of visitors that will allow better tracking of changes in visitor characteristics in the future to increase its understanding of trends in visiting.

On average, the on-site targets related to the percentage of visitors who rate their visit as enjoyable or who are satisfied with their overall visit are achieved. In the case of overall visit satisfaction, high levels of achievement have existed since at least 2000. The target for the percentage of visitors who report a place is meaningful has not been consistently achieved although the majority of visitors are positive (i.e., 70% +). The Agency has established a potential baseline for the percentage of Canadians who have a personal connection to PC administered places (i.e., 55%) through national public opinion polling conducted in 2009 but has not yet conducted a follow up poll to test progress against the target.

Economical and efficient operation of the VSO is demonstrated by both anecdotal reports of actions to achieve savings and the fact that managers use a number of flexibilities available to them in 1) the selection of inputs (i.e., staff mix, revenue generation strategies, competitive pricing and pricing flexibilities) and 2) where and how outputs are offered (e.g., minimal or no service offer at some sites, providing an offer consistent with seasonal demand, scaling the size of the offer at different sites represented by service level categories, and varying the availability of specific aspects of the offer within a season).

Quantitative analysis of inputs, outputs, reach and outcomes provided evidence from a limited sample of locations that NPs were relatively more efficient (expenditures are proportional to the extent of the service offer, recovery of costs through revenue) and economical (expenditures, and extent of service offer are more aligned to the number of visits) than the national historic sites or historic canals although the indicators of this are not always consistent. The quantity of VSO inputs or outputs is however clearly not related to the on-site outcomes (visitor satisfaction or enjoyment, reported meaningfulness of place).

The latter finding is accounted for in the Agency's program theory which emphasizes that the outcomes can be achieved with any level of inputs or outputs, as long as the available offer, including the nature of the site itself is consistent with visitors' prior expectations. The Agency has produced qualitative research that is supportive of the model and identifies many actions that management could take to influence the results achieved. Demonstrating the quantitative impacts of management action on the results is difficult both because individual actions are unlikely to have measurable impacts on macro evaluations of the visitor experience and because visitor ratings of many aspects of the experience are already very positive so there is little room to demonstrate the incremental impacts of management actions on the outcomes.

Quantitative research within the Agency to add clarity and depth to the program theory has been limited to date and has not demonstrated clear, consistent links between the visitor characteristics, and/or aspects of the VSO, and the outcomes.

Restructuring the ERVE functions has created a lack of clarity in some parts of the Agency with roles and responsibilities for delivering the VSO. The Agency introduced a number of mechanisms to promote improved communications among various levels of the Agency; however, Service Centre personnel involved in the VE program were still unsure of their roles relative to National Office at the time of data collection (summer 2010).

Potential negative consequences of providing a VSO are largely anticipated and addressed as part of normal operations although the important consequence of displacement or discontinuing use by existing visitors as a result of attracting either more or different types of visitors, are treated only indirectly in the Agency's VSO guiding documents.

There is clear evidence that the Agency has considered and engaged a variety of third party service providers to enhance the VSO and that interest exists both within the Agency and within the commercial sector in particular in extending these initiatives. The major barrier to delivering these potential opportunities continues to be the limits to the Agency flexibility to change in response to changing markets given government policy and directions.

In summary, the VSO program is clearly relevant to the Agency's mandate and government priorities. There is reasonable evidence of the large scale reach and use of PC administered places, although the data is not precise. The Agency has and continues to achieve, or be close to achieving, its on-site targets of visitor enjoyment, satisfaction, and meaningfulness of place. The key challenge with respect to performance continues to be the long-term decline in the estimated number of visits to PC administered places.

Since 2005, the decline in visits has prompted many significant and important changes in the overall VE Program Activity and in the sub-activities included within the scope of the evaluation. Many of these initiatives are on-going or just being launched. Collectively, they address in whole or part a number of issues or concerns raised during the evaluation. Our recommendations, therefore, focus on the issues for which we did not find evidence of on-going set of actions to address the identified problems or in a few cases where actions have been delayed or are incomplete. These issues involve clarifying overall governance (i.e., roles and responsibilities), the types and quality of the VSO information collected nationally to support understanding, accountability, investment, performance management and decision making, and development of specific tools and processes to improve consistent of analysis and planning to meet corporate targets.

Overall Management Response

The Vice-President of External Relations and Visitor Experience would like to thank the Office of Internal Audit and Evaluation for its comprehensive and thoughtful evaluation of the Visitor Service Offer for Parks Canada. Their statement that "It is striking how many of the issues and problems with the VSO identified over the course of the evaluation are already being addressed in whole or in part by on-going initiatives," is encouraging and reinforces our belief that Visitor Experience function is on the right track since the creation of the ERVE Directorate in 2005. Responses to the specific recommendations in the evaluation follow.

Recommendation 1: Overall Governance
The VP ERVE should review, clarify and communicate additional guidance on the respective roles and responsibilities of National Office, Service Center and field unit staff in the delivery of the VSO in the context of the on-going work related to sustainable planning in the Agency.

Management Response:
Agree. The VP ERVE will review clarify and communicate additional guidance on the roles and responsibilities of National Office, Service Centre and field unit VE staff by May 31, 2012.

Recommendation 2: Supply of Elements of the VSO
The VP ERVE should oversee the completion of the inventory of products and services offered by location and ensure, in collaboration with the VPs Operations, that all locations confirm a baseline inventory and update it annually or biannually.

Management Response
Agree. The VP ERVE will oversee the completion of the inventory of products and services offered by location and work with the VPs Operations to confirm the baseline and update the inventory annual. The field will be asked to validate the data gathered by the VP ERVE. This information provides the Agency with a clear and comparable picture of the service offer across the system. In addition, this information will be used to allow visitors to search the PC website based on desired activities and services and for PC to pro-actively provide visitor experience opportunities to different market segments of our visitors. This baseline will be completed by December 31, 2013.

The VSO evaluation also noted the limited availability of data regarding on-site use of various components of the VSO infrastructure, services and activities. Once the inventory is completed the VP Operations will evaluate the possibility of using this inventory to have individual sites evaluate sustainability of operations in regards to on-site use of infrastructure, services and activities.

In addition, the Office of Internal Audit and Evaluation noted that the Agency is preparing a request for proposals for a new reservation service for implementation in 2013. This service will include an inventory management system for front-country and back-country campsites. It will serve as the Agency standard system for campground management and allow for tracking of available inventory and occupancy rates.

Recommendation 3: Additional Information for Management of the VSO
The VP ERVE should develop a framework and guidance, for approval by Executive Management Committee (EMC), identifying what additional national and/or local information is required for adequate management of VSO-related infrastructure and facilities, as well as future investment decisions (e.g., based on criteria such as materiality of the offer, risks or introduction of new offer) and identify protocols and data quality standards required for various contexts (e.g., data quality requirements for utilization of an existing or new facility may vary depending on the size of the investment).

Management Response
Agree. Building on Management Response 2, the VP ERVE will develop a framework and guidance, for approval by EMC, identifying what additional national and/or local information is required for adequate management of VSO-related infrastructure and facilities. The framework will include protocols and data quality standards required for various types and investment-levels of facilities and types and levels of use. This work will be completed by December 31, 2013.

Recommendation 4: Strengthening VSO Planning
The VP ERVE should provide additional planning tools to support VE managers in annual planning related to the Agency's outputs targets for the VSO (i.e., sites will develop/renew at least three visitor experience opportunities targeting key market segments and Explore Quotient types every year for the next three years).

Management Response
Agree. The VP ERVE will evaluate the suite of VE Planning tools and renew a national approach to planning for VE. This work has started with input from the VE Manager Council. This renewal will look at existing tools and how they can be improved. It will also identify any gaps in planning and how they can be filled.

The Council's initial input identified the key elements of a VE site strategy. They included: an analysis of the current situation (similar to a VE Assessment), the definition of the essence of place, the identification of target markets, the generation of ideas for potential products, the creation of an action plan to develop specific products matched to specific markets, and ultimately the evaluation of the implementation of the VE site strategy. The VE site strategy will be a key tool to guide the field in achieving the output targets from the Performance Management Framework.

Recommendation 5:
The VP ERVE should provide direction on the expected types of analysis to support VSO planning (e.g., EQ, PRIZM, Postal Code and other related data) and additional training and guidance in the use of these nationally consistent tools for development or renewal of visitor experience opportunities.

Management Response
Agree. In 2007, the Agency introduced the Explorer Quotient (EQ) concept. In summer 2010, the Agency acquired an additional and more sophisticated segmentation tool, PRIZM-C2, also developed by Environics. PRIZM-C2 associates 12 life stages with information about its members such as market size, demographics, values, media habits, recreation and leisure patterns, travel motivations (by EQ type), etc. In 2012 the Agency will improve the collection of visitor information through the introduction of a new generation of point of sale cash registers. These cash registers will provide timely and reliable revenue data and information on visitor postal codes, party size, gender makeup, and approximate ages. Combined with EQ and PRIZM the Agency will be able to implement a common and consistent approach to segmentation.

The VE Branch is also launching market segmentation training for VE in January 2012. This training will provide guidance on the nationally consistent approach to market segmentation. It will help the field analyze and utilize EQ, PRIZM-C2, Postal Code and other related data to develop and promote new and more relevant visitor experiences to targeted market segments. The training will support the development of VE Site Strategies to guide the park or site in meeting VE output targets.

Recommendation 6: Person-Visits
The VP ERVE should in the near term develop a proposal for approval by EMC, outlining the suite of attendance statistics the Agency will collect, their strategic utility for Agency operations, and update national standards (e.g., upgrade periods, inclusions, documentation, target setting, accountability), where relevant, for clarity and user-friendly implementation.

Management Response:
Agree. The VP ERVE will develop a proposal for EMC for approval by December 31, 2012 outlining the suite of attendance statistics the Agency will collect, their strategic utility for Agency operations, and any necessary updates to national standards.

Recommendation 7: Visitor Information Program Surveys
The VP ERVE should propose and seek approval by EMC as required for the following:

a) A requirement that Visitor Information Program (VIP) survey sampling plans and records of implementation of the plans be documented in writing and deposited promptly in a central location (e.g., on the intranet or with the office of the Chief Social Scientist).
b) A requirement that site specific questions on VIP surveys be drawn from a standardized question databank to ensure that the information collected is maximally useful for the Agency as a whole.

Management Response
Agree. Aligned with response 3 (above), by December 31, 2012, the VP ERVE will seek approval by EMC for:

a) A requirement that VIP survey sampling plans and records of implementation of the plans be documented in writing and deposited promptly with the Office of the Chief Social Scientist.
b) The development of standard question approaches for similar issues, while retaining some possibility for site specific questions.

Recommendation 8: Visitor Information Program Surveys
The VP ERVE should oversee a review of the number of mandatory questions on the VIP surveys with a view of reducing the requirements to what is essential for management purposes. The object of the exercise should be to stream line the survey and not just replace national mandatory questions with additional site specific questions.

Management Response
Partially agree. By December 31, 2013, the VP ERVE will review the VIP surveys to maximize their effectiveness, including the number of mandatory questions, while ensuring

the survey fulfills its national and local role of measuring performance and understanding visitors. VIP surveys will continue to be linked to VE Planning tools.

Recommendation 9: Dispute Resolution Regarding Person-Visit and VIP Surveys
The VP ERVE should identify and propose for approval by EMC the position with authority to make a final decision when disputes arise on appropriate survey questions or issues of methodology for collecting visit statistics or conducting visitor surveys.

Management Response
Agree. The VP ERVE will confirm the role of the Chief Social Scientist as the authority when disputes arise on appropriate survey questions or issues of methodology for collecting visit statistics or conducting visitor surveys with EMC by June 30, 2012.

Recommendation 10: Personal Connection to PC Administered Places
The VP ERVE should ensure that additional analysis is conducted of the indicator of personal connection to PC administered places to identify and address the potential impacts of circular definitions prior to future public reporting of baseline performance and progress against the baseline.

Management Response
Agree. The VP ERVE will conduct additional analysis of personal connection to PC Administered places prior to the next public reporting of baseline performance, which is required by March 31, 2014 for the Departmental Performance Report.

Recommendation 11: Web Site Renewal
The VP ERVE should provide a revised and realistic timeline for the website renewal project taking into account the importance of this tool for addressing pre-visit information needs.

Management Response
Agree. The VP ERVE has formed a Web Renewal Steering Committee to provide direction on priorities for Web renewal. Precise timelines and milestones are being developed by the committee. Timelines will consider a number of factors including - Treasury Board's new Web Usability and Accessibility standards which impose strict timelines on Parks Canada to progress with renewal and meet the new standards by July 2013; External Relations and Visitor Experience priorities to improve visitor information, increase awareness and brand recognition; and alignment with the new Parks Canada Reservation system due to come online for the 2013 visitor season. The VP ERVE will approve these timelines and present them to EMC by June 30, 2012.

1 INTRODUCTION

Parks Canada's (PC) mandate is to:

> "Protect and present nationally significant examples of Canada's natural and cultural heritage, and foster public understanding, appreciation and enjoyment in ways that ensure the ecological and commemorative integrity of these places for present and future generations."

The Agency is responsible for three major heritage systems:

- 42 National Parks of Canada (NP)
- 167 National Historic Sites of Canada (NHS), administered by the Agency
- 4 National Marine Conservation Areas of Canada (NMCAs)

PC carries out its mandate through five program activities and twenty sub-activities. The major program activities are **heritage places establishment**, **heritage resources conservation**, **public appreciation and understanding**, **visitor experience** (VE), and the **townsite and throughway infrastructure program** (Appendix A).

This evaluation concurrently assesses four sub-activities of the Agency's VE program activity: the visitor service offers (VSO) for NPs, NHSs, and NMCAs, as well as some aspects of the Agency's market research and promotion sub-activity. PC conducted the evaluation as part of its commitment under the Treasury Board (TB) *Policy on Evaluation (2009)* to evaluate direct program spending over a five-year period.

The Agency identified the VSO as a high priority for evaluation in its 2010-2011 evaluation plan due to its materiality (the three VSO sub-activities represented about 31% of Agency expenditures in 2008-2009), its importance to the Agency's mandate, and because it has not been subject to previous comprehensive evaluation work.[2]

Of particular importance for the Agency's VSO is the fact that, with certain exceptions, the number of visits to PC heritage attractions is reported to be declining. The Agency has identified its competitive position (i.e., the threat of the offer losing relevance to Canadians or being less attractive compared to other parks, cultural attractions, and/or leisure activities) as a key corporate risk.

2 DESCRIPTION OF THE VISITOR SERVICE OFFER

From a visitor perspective, visiting a NP, NMCA, or NHS can be seen as moving through a sequence of steps (the VE cycle) starting with awareness of the offer and the desire to travel to a unique PC protected place, followed by planning and travelling to the site, arriving, visiting, departing and finally remembering the visit. This may in turn lead back to the start of the cycle with a renewed desire to visit the same or other sites in the system (see Appendix B for a description of each phase of the VE cycle). The sub-activities scoped into the evaluation cover many of the inputs, activities and outputs that support the VE cycle.

[2] Some elements of the market research and promotion sub-activity spending are not included as it is difficult to isolate costs for the elements included in the evaluation.

The VSO is different from heritage interpretation activities in the Agency's Program Activity Architecture (PAA). It includes basic infrastructure and services or activities that provide access to PC administered places or orient visitors on site (roads, parking lots, visitor centres), and a wide variety of specific services and/or activities often with a recreational focus. Heritage interpretation involves both personal programs (i.e., period or costumed animation or re-enactment, guided tours) and non-personal programs such as exhibits, publications and audio-visual presentations designed to communicate the meaning and importance of the natural and/or cultural resources. Although distinct in the PAA, heritage interpretation often represents a large portion of the active "offer of service", particularly at NHSs. As a result, the VSO is sometimes viewed as encompassing both the VSO and interpretation (i.e., the active offer of service includes both of these activities). For the purposes of the evaluation, we focused on the VSO as defined in the PAA. A separate evaluation of the interpretation sub-activities is scheduled in 2012-2013. However, we do present some data and information on inputs, such as the number of full-time equivalents (FTEs) and expenditures, related to interpretation and some analysis using this data to provide context.

2.1 Expected Results and Targets

The corporate hierarchy of outcomes and specific targets related directly or indirectly to visitors is shown in Table 1.

Table 1. Corporate Performance Expectations and Targets Directly and Indirectly Related to Visitors

Level	Expected Results	Performance Expectations
Agency Strategic Outcome	Canadians have a strong sense of connection, through meaningful experiences to their NPs, NHSs and NMCAs and these protected places are enjoyed in ways that leave them unimpaired for present and future generations	65% of Canadians report a personal connection to PC administered places by March 2014
Visitor Experience Program Activity	Visitors at surveyed locations feel a sense of personal connection to places visited.	On average, 85% of visitors at surveyed locations consider the place meaningful to them On average, 90% of visitors at surveyed locations are satisfied, and on average, 50% at surveyed locations are very satisfied with their visit.
Sub-Activities	Market Research and Promotion: Canadians visit PC administered places	22.4 million visits at PC administered places by March 2015
	Visitor Service Offer: Visitors at surveyed NPs, NHSs and NMCAs enjoyed their visit	On average 90% of visitors at surveyed NPs, NHSs and NMCAs enjoyed their visit
Note: The Agency's updated its performance expectation while the evaluation was underway. These expectations were drawn from the 2010-2011 Performance Management Framework.		

The strategic objective that Canadians as a whole (i.e., including both visitors and non-visitors) will have a sense of "personal connection" to PC administered places is closely associated with the program expectation that visitors to PC places will have a personal connection to the place visited and the specific target that 85% of visitors will consider a place they visited to be meaningful to them. A sense of personal connection and meaningfulness of place are both grounded in an extensive literature aimed at defining and measuring a "sense of place" or "place attachment" and determining its antecedents and consequences.[3] Sense of place as discussed in the literature may involve both cognitive assessments of place and associated experiences and emotional reactions and evaluations, although the Agency has stressed the emotional connection. It may arise through direct experience of a place but this is not required. At the strategic outcome level, personal connection of Canadians is measured by public opinion polling. The meaningfulness of a place for a visitor is measured by a single question on surveys of visitors.

The second program activity level target focuses on visitors' overall satisfaction with a visit. Visitor satisfaction is a common performance metric for parks organizations. The Agency defines overall visitor satisfaction as a cognitive assessment of the visit experience resulting from a visitor comparing the experience with their pre-existing expectations or standards based on factors such as previous visits, visits to similar locations, or the pre-visit information they consumed. Overall visit satisfaction is measured by a single question on visitor surveys. The current target of 90% satisfaction was established in 2010-2011 following many years in which the target was 85% satisfaction. The second target, that 50% of visitors will be very satisfied, is based on research conducted by the Agency during the 1990s which suggested very satisfied visitors were the most committed and engaged and could act as program ambassadors.

At the VSO sub-activity level, the expected result is that visitors enjoy their visit. Visitor enjoyment is also viewed as an emotion-based assessment of the visit experience which may or may not be related to pre-existing expectations and standards and may or may not be linked with an evaluation of overall visit satisfaction. It is thought to be more likely to be influenced by factors outside of the Agency's direct control (e.g., weather, group composition, a particular personal event/encounter, or the nature of the places themselves).

Although there are obvious similarities in the targeted areas of performance, particularly between the concepts of visitor satisfaction and visitor enjoyment, each of the outcomes is viewed as distinct and resulting from somewhat different cognitive or emotional assessments of the visit experience.

In September 2011, the Agency has also articulated output targets for the sub-activities of the VE program.[4] The targets state that 100% of southern NPs and 100% of NMCAs and NHSs will develop/renew at least three visitor experience opportunities (activities or interpretation) targeting key market segments and Explore Quotient types every year for the next three years. The intent is to create a future focus to the service offer rather than simply a renewal of the existing offer based on standardized approaches to segmenting and understanding visitors (i.e., the Explorer Quotient discussed below).

The other sub-activity scoped into the evaluation, market research and promotion, has a target to increase the collective number of visits to PC's places by approximately 10% from 20.8 M in 2008-2009 to 22.4 M visits by March 2015. In support of this target the Agency has specified

3 See Graham, Mason and Newman (June 2009), Farnum, Hall and Kruger (November 2005) for reviews.

4 The TBS is currently consulting on updates to the MRRS policy which may result in eliminating the requirement for output indicators and targets at the sub-activity level and introduce a focus on efficiency indicators (e.g., costs per visitor reached by particular VE opportunities).

visit targets for 32 field units (i.e., geographic groups of NPs and/or NHSs under the direction of a field unit superintendent). Within field units, targets for specific NPs and NHSs have been identified which aggregate to overall targets for the field units. Managers are accountable for attaining the field unit target, not for site-level visitor increases.

Although the evaluation is focused on the VSO and parts of the market research and promotion sub-activities, we reviewed performance data related to all the expected results and performance targets included in Table 1.

2.2 ACTIVITIES/OUTPUTS

The **market research and promotion** sub-activity involves four distinct sets of activities with the following sub-components:

- **Visitor and tourism research:** involves research and related social science to gain an enhanced understanding of PC's potential and actual visitor audiences (i.e., Visitor Information Program (VIP), communications evaluation, market potential assessments, situation analyses, product and media research, and other related audience research).
- **Pre-visit communication, marketing and tourism:**[5] involves the provision of information to visitors to assist pre-trip planning and information on the range of activities and services available to them (e.g., the website, publications, and the toll-free information system).
- **Promotional activities to attract visitors to a site:** involves the development, preparation and approval of marketing plans, publications and information materials, advertising, and marketing initiatives.
- **Relationship management activities:** involves managing relationships with members of the tourism industry, participating in committees, conducting media relations, participating in travel trade shows, and marketing to individuals for example through e-mails.

The first two sub-components for marketing research and promotion are covered in the evaluation while the latter two are not covered, largely to keep the scope manageable and the evaluation project within budget.

The **VSO sub-activities** include the provision of a wide variety of visitor-related infrastructure such as roads and parkways to provide access to and within sites, visitor reception and day use services and facilities, campgrounds and trail systems, recreational infrastructure (e.g., hot and cold pools, golf courses, tennis courts, warming huts for cross-country skiing, and facilities for boat launching), as well as activities to receive and orient visitors, collect fees, the provision of food and beverages, and support for many different types of recreational activities on site. Interactions with staff while on site also provide an important component of the offer, as do efforts to facilitate remembering the experience (e.g., gift shops allowing visitors to purchase souvenirs to remember their visit).

[5] Marketing and tourism as defined for the sub-activity are largely focused on marketing individual sites. The sub-activity Outreach Education and External Communications in PA 3 includes a variety of activities at a national level to brand the Agency and create a corporate image (e.g., national TV campaign). The exact boundaries of this sub-activity and the market research and promotion sub activity are not entirely clear. It is certain that activities within the general field of external communications will have some impact on local tourism and marketing.

2.3 EXPENDITURES AND REVENUES

Expenditures on the VSO and market research and promotion sub-activities for the last five fiscal years are shown in Table 2. Appendix C provides a detailed breakdown by regions and business units, and the split between O&M and capital expenditures. The table also shows the interpretation expenditures by year as a separate line. Interpretation expenditures represent approximately 20% to 25% of the yearly expenditures shown in the table.

Most of the Market Research, Promotion and VSO expenditures (65% over 5 years) are on goods, services, and salaries as opposed to capital investments. Capital investment in the VSO averaged approximately $36M per year from 2005-2006 to 2009-2010.

Table 2. Expenditures for Market Research & Promotion and Visitor Service Offer Sub-Activities

($)	2005-06	2006-07	2007-08	2008-09	2009-10
Market Research and Promotion	8,400,000	9,440,000	10,874,000	13,421,000	14,496,933
Visitor Service Offer	119,176,568	112,037,000	143,597,000	129,660,000	159,151,252
Total	**127,576,568**	**121,477,000**	**154,471,000**	**143,081,000**	**173,648,185**
Interpretation	34,741,000	39,194,000	39,054,000	40,526,000	48,089,000
Source: PAA Fund Centre Expenditure Worksheets from National Office Finance. This summary does not include Employee Benefits (EBP), Corporate Services and Revenue or amounts for Treasury Function.					

Expenditures are supported by appropriations, revenue from visitor-related fees (e.g., entry and recreational fees), and various special purposes funds (e.g., a portion of the funding received in Budget 2005 for investments in assets was directed to visitor service facilities and infrastructure). Budget 2009, Canada's Economic Action Plan, provided an additional $75M over two years for investment in visitor service assets.

The revenue associated with the VE Program Activity as a whole is shown in Table 3.

Table 3. Sources of Operational Revenue

($)	2005-06	2006-07	2007-08	2008-09	2009-10
Entry Fees	41,937,877	48,189,372	50,277,576	52,255,255	52,836,186
Camping Fees	14,772,304	15,315,643	16,711,304	16,598,771	17,633,259
Guided Tour Fees	741,892	792,696	772,141	738,505	713,842
Fees Mooring & Docking	742,414	844,010	921,737	897,398	945,021
Fees for Lockage	1,531,797	1,654,406	1,777,998	1,636,069	1,652,906
Fees for Hiking Trails	1,337,305	1,377,699	1,374,676	1,612,896	1,683,752
All Other Recreation Fees	436,168	378,620	268,668	256,636	331,473
Pools	3,863,014	3,688,086	4,059,967	3,911,192	3,795,494
Golf	1,315,494	1,313,119	1,379,714	1,126,130	1,160,888
Total	**66,678,265**	**73,553,652**	**77,543,781**	**79,032,850**	**80,752,821**
Percentage of Yearly Revenue	**65%**	**59%**	**68%**	**69%**	**71%**
Source: PC financial system, November 16, 2010					

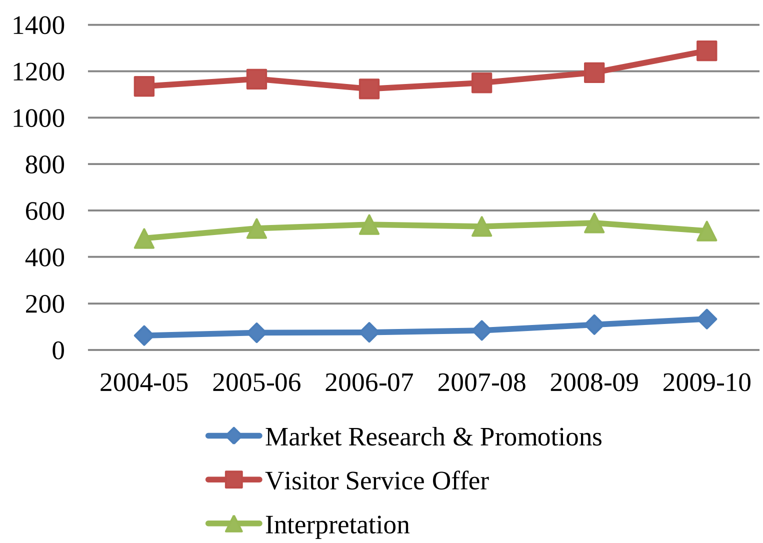
Revenue has ranged from approximately $66.6M to $80.7M and represents approximately 60% to 70% of all revenue per year for the Agency. Not all of this revenue is directly attributable to the VSO. Entry fees cover costs beyond the VSO for which it is difficult to charge separately, such as basic heritage interpretation programs and public safety services. In the table, guided tour fees are likely related to the provision of interpretation services rather than the VSO.

Park entry fees represent the majority of visitor-related fees, accounting for 46% of the Agency's total revenue generation for 2009-2010. Over the past five years, there have been steady increases in all areas of visitor-related revenue, with the exceptions of revenue from "other recreation," pools, and golf. Fees have been frozen since 2008 for the general public and in 2009 for commercial groups.

The fact that revenue has increased each year while visits have reportedly been declining appears inconsistent at first especially given fee freezes in the last few years. However, many visitors do not have to pay to access a site so trends in paying visits may be distinct from trends in overall 'person-visits'.

2.4 Human Resources, Roles, and Responsibilities

Figure 1. Trends in FTEs



The Agency has had a steady increase in its human resource capacity to deliver the VSO, similar to trends in other areas of VE. Figure 1 shows the estimated FTE positions associated with market research and promotion and the VSO sub-activities, as well as FTEs dedicated to interpretation, based on data from the Agency's salary management system.

As part of renewal, the Agency realigned its organizational structures to provide more consistency and to increase capacity in certain skill areas (e.g. promotions, product development). More details are provided in the evaluation findings related to program design.

2.4.1 Organizational Structures and Accountability

Business unit managers, mostly Field Unit Superintendents (FUS), have primary responsibility and accountability for the VSO.

Field units are supported by Service Centres and National Office. Service Centres deliver a variety of services and products to field units including support for planning, such as assisting with on-site visitor experience assessments (VEAs), social sciences (e.g., overseeing attendance and VIP activities, analysis and reporting), production of promotional materials, signs and exhibits, market research and promotions (e.g., tourism planning and promotion, web content) and partner engagement.

In National Office, the Vice-President (VP) of the External Relations and Visitor Experience (ERVE) Directorate is responsible for providing national **functional** leadership to the field units. Within the directorate several branches provide important direction and support for the VSO.

The Visitor Experience Branch (VEB) develops the overall policy, guidelines, frameworks, strategies, targets, tools, research and training for the VSO. It manages the distribution of special funds related to the program, conducts assessments of visitor services at the field level, and coordinates national initiatives such as Marketing NHSs, Xplorers, Learn-to-Camp and the Explorer Quotient program. VEB also provides some direct program management, including coordinating the day-to-day operation of the Campground Reservation and National Information Services.

Social Science Branch produces a variety of products (e.g. VIP surveys, audience research, national polling) used by the VE staff for understanding visitors and for planning, developing, promoting and delivering the VSO. There are also social scientists in Service Centres providing advice, guidance and/or management services to field units in collecting and processing certain kinds of data and who may conduct special studies on behalf of field unit clients. The Chief Social Scientist in National Office provides functional leadership for the social science community in the Agency but does not have line authority over their activities.

The Brand Experience Branch in National Office includes the Web Policy and Operations team, which coordinates the Agency's web renewal project. VEB staff participates on both the Advisory committee and in working groups to support the development of relevant website sections. Brand Experience is also PC's functional lead with respect to brand management, fees, signage, and marketing and promotion activities.

Outside the ERVE Directorate, important policy and direction related to asset management in general, including VSO assets, is provided by Director of Real Property in National Office, who in turn reports to the Agency Chief Administrative Officer. The Chief Financial Officer is responsible for accounting policies related to assets. Operational responsibility for assets is delegated to the VPs Operations, Eastern Canada and Western/Northern Canada and through them to business unit managers who are generally FUSs. The VPs are supported in their asset management responsibilities by asset advisors and small teams of technical experts.

Approval of overall policies and directions in the Agency is the responsibility of the Executive Management Committee (EMC), based in some cases on the recommendation of Operations Committee.

2.5 STAKEHOLDERS AND PARTNERS

Partners and stakeholders involved in the VSO include Aboriginal partners, businesses, tourism and business associations, and non-profit organizations (e.g. cooperating associations or friends groups). Specific additional examples include adjacent property owners, host communities, townsite staff, chambers of commerce, tour operators, and various special interest groups (i.e., historical societies, environmental groups such as CPAWS, and sports and nature groups).

The bulk of all Agency partnering arrangements are with the non-profit sector. For example, at the national level the Agency partners with the Tourism Industry Association of Canada, the Canadian Tourism Commission, and the International Mountain Biking Association (IMBA).

Businesses offer a range of services to visitors including restaurants, accommodations, retail stores, tours, the rental of recreational equipment and gear, and entertainment. Businesses are required to have a license to operate in PC administered places. In the 2008-2009, fiscal year there was a total of 2,470 active business licences in the NP system.

2.6 Visitor Service Offer Logic Model

A logic model showing the relationships between inputs (i.e., the assets, human resources, and expenditures), activities, outputs, reach, and outcomes is shown in Table 4. It provides a visual summary of the program description. In the logic model, we've overlaid the stages of the VE cycle to provide a reference of how each stage corresponds approximately with the Agency's activities and outputs. Some outputs may contribute to other areas of the VE cycle, either directly or indirectly; however, for the most part the Agency's activities and outputs correspond to different stages of the VE cycle.

Table 4. Logic Model for Visitor Service Offer

HOW? (Resources)		WHAT? (Products)		WHO? (Reach)	WHY? (Intended Results)		
Inputs	**Stages of the VE Cycle**	**Activities**	**Outputs**	**Reach**	**Immediate Outcomes**	**Intermediate Outcomes**	**Final Outcome**
PCA Staff (approximately 1400) **Financial Resources: (approximately $127M to $173M invested per year over last five years)** **Assets (Representing an estimated $4B in replacement Value)**		Conduct visitor and tourism research	Market research, information on attendance and visitor origins, needs, and connection to places.	Potential and current visitors	Staff have information to adequately plan and implement visitor experience program		Visitors at heritage sites feel a sense of personal connection to the places visited
		Plan for VSO	Visitor Experience Assessments. Analysis of service offer against goals and objectives.	Internal staff Partners/stakeholders			
	Wishing / Planning	Prepare and deliver pre-visit communications, promotions and tourism.	Publications and advertising	Potential visitors Partner and stakeholders including travel media and travel industry representatives	Awareness of PC heritage places, viewing them as worthwhile and interesting destinations, and having adequate information to plan and organize trips	Visits to PC protected heritage places increase	
			Website trip planning information, Toll-free National Information Service, PC Camping Reservation service	Potential visitors			
	Travelling	Develop and maintain signage Produce publications	Signage, publications, and other way finding	Visitors		Visitors consider the place visited as meaningful to them	
	Arriving	Welcoming, orientation & registration Fees collection	Signage, publications, applicable fees collected	Visitors			
	Visiting*	Construction, operation and maintenance of infrastructure (i.e. visitor centres, campgrounds, day use areas, trails, etc.) Provision of recreational activities (e.g., backpacking, cross-country skiing, mountaineering, boating, fishing, horse-back riding, diving, mountain biking, hiking, geo-caching, bird and wildlife watching, and swimming).	Operating facilities and infrastructures consistent with needs of program Recreational activities, programs, and services are available	Visitors Partners/stakeholders	Visitors are satisfied with and enjoy their visit		
	Departing / Remembering	Selling of merchandise or management of third party arrangements Post-trip info and support	Memorabilia and mementos	Visitors Partners/stakeholders			

Note: Interpretation is sometimes treated as an activity under visiting equivalent to provision of recreational activities. The replacement value is only for VSO assets.

3 EVALUATION DESIGN

3.1 Evaluation Purpose and Approach

The evaluation examined the relevance, performance (e.g. effectiveness, efficiency, and economy) and the design and delivery model of the VSO sub-activities consistent with the requirements of the *TB Policy on Evaluation* (2009). The scope includes the VSO for NPs, NHSs, and NMCAs in addition to some elements of the market research and promotion sub-activity.

PC evaluation staff, supported by contracted resources, conducted the majority of evaluation field work between July 2009 and December 2010, although additional relevant data continued to be gathered throughout the subsequent drafting of the report. A cross-sectional multiple mixed methods approach was used to address the evaluation questions. Contractors were engaged to assist with the majority of data collection (e.g. site visits, VE manager survey, key informant interviews, and a document and literature review). PC evaluators designed the evaluation approach, conducted additional data collection and analysis, and prepared the final report.

3.2 Questions, Methodology and Limitations

The evaluation's questions (n=10) and expectations (n=14) related to issues of relevance, performance, and program design were originally set out in the *Framework for the Evaluation of Visitor Experience* (2009). In the course of assembling the evaluation evidence we have modified and rearranged the specific questions to reduce redundancy and improve the clarity and conciseness of the presentation. The revised questions are shown in Table 5 and a detailed evaluation matrix, with the core issues, questions, expectations, indicators, and data sources, is provided in Appendix D.

Table 5. Evaluation Issues and Questions

Relevance	
1.	Is the program consistent with broader federal government priorities and with PCA mandate and priorities?
2.	To what extent do managers have the information and tools necessary to assess demand and make informed decisions about the service offer and to respond to changing needs and demands?
3.	What are the extent and dimensions of the demand being addressed in this program?
Performance	
4.	Is the program producing its desired outputs?
5.	Is the program effective in achieving its desired results for visitor satisfaction and enjoyment, meaningfulness of place and connectedness to place?
6.	Is the program efficient in producing outputs (services, facilities and activities) and economical with respect to the reach of its offer and producing targeted results?
7.	To what extent can the number of visits to PCA places, visitor enjoyment and satisfaction and connection to place be attributed to the PCA VSO?
Program Design	
8.	To what extent are roles, responsibilities and accountabilities for program delivery clear and effective?
9.	To what extent are potential unintended negative impacts of the program identified and managed?
10.	To what extent is the full range of program delivery options identified and utilized.

3.2.1 Methods

The principal data collection methods for the evaluation are summarized below:

Document and File Review A wide variety of documents including legislation, policy, plans, reports, and published literature were reviewed for the evaluation (see Appendix E for a list). Approximately 6000 pages of documents were reviewed.

Survey of VE Managers An online survey was administered in February 2010 to all VE managers, or other qualified respondents, for all PC protected places with an active VSO.[6] The survey had three modules covering:

- The perceived condition and adequacy of facilities, the demand for activities and services by site and whether demand was being met
- The partnerships currently in place for each site(s)
- Opinions on the extent to which the current offer addresses elements of the VE cycle, their use and satisfaction with various tools to make decisions about the service offer, and observed changes in visitor preferences.

Since a VE manager can be responsible for more than one site, each respondent completed the first two modules for each individual site they managed and the third section just once. We administered different surveys to NPs and NHSs due to differences in their respective offers. NMCAs were grouped with NPs given the similarity of the questions for both groups of sites. Survey response rates are shown below.

Location	Total Sites	# surveys sent (sites with active service offer)	# surveys completed	% coverage of sites with VSO
Modules 1 and 2 (VE managers completing a survey for each site)				
NPs	42	41	37	90%
NMCAs	4	3	2	67%
Townsite[7]	1	1	1	100%
Total NP/NMCA	47	45	40	89%
Total NHSs	167	73	63	86%
Module 3 (VE Managers)				
NP/NMCA	37	36[8]	34	94%
NHSs	49	49	41	84%

Interviews and observation at PC sites The evaluation team conducted 127 in-depth semi-structured interviews in addition to direct observation during visits to 16 NPs, 1 NMCA, and 17 NHSs/canals between June and September 2010 (see Appendix F for list of sites visited).

6 Some sites were excluded including newly established parks and those without a significant visitor service offer.

7 A survey response was received at the request of a VE manager for one townsite given the significance of its visitor service offer.

8 Torngat Mountains NP was not included as it was under development with no established VE offer.

Interviews (n=80) were conducted with PC staff including site superintendents, VE managers, VE team members (e.g., product development, marketing and events officers), other site staff (e.g., campground, assets, and interpretation staff). Additional interviews (n=47) were conducted with partners and stakeholders. A summary of the respondent groups by site is provided in Appendix G.

On-site observations followed a protocol guide prepared in advance; the evaluators observed elements of the site (e.g. signage, asset condition, and camping facilities and self-selected activities), in consultation with the VE manager, to gain a better understanding of the site's offer.

Interviews with National Office and Service Centre Staff

A total of **25 key informant interviews** were conducted with representatives from National Office (n=11) and the Service Centres (n=14).

From National Office we spoke with VP ERVE (n=1), staff from the VE (n=7), Brand Experience (N=1), and Social Science (N=1) branches in addition to a respondent from the Strategies and Plans Directorate (n=1). In the four Service Centres, we spoke with ERVE managers (n=3), Social Scientists (n=7), a Product Development Specialist (n=1), and Heritage Presentation Specialists (n=3).

The interviews explored staff's opinions on issues across all the evaluation's lines of inquiry.

Group interviews with stakeholders

The group interviews were intended to bring together the many parties that have a stake in what parks and sites are offering to visitors (e.g. members of local communities and the tourism industry), as well as those that we consider partners in facilitating the overall service offer (e.g. outfitters, IMBA, private contractors, cooperating associations).

We aimed to hold discussions with 8-10 participants in 4 urban locations representing a large catchment of different sites; however, due to practicalities in arranging the groups, the participants tended to be associated with a site or small number of sites close to the meeting locations, as indicated below.

Groups discussion location	Participants	Associated PC Site(s)
Victoria, BC	3	Gulf Islands NP Fort Rodd Hill NHS
Halifax, NS	4	Halifax Citadel NHS
Banff, AB	10	Cave and Basin NHS Banff Museum NHS Banff NP

Cost analysis and benchmarking

Cost analysis and benchmarking exercises were undertaken primarily to assist with assessing the efficiency and economy of the offer, assessing costs to users, attendance and usage trends, expenses and revenues, and user satisfaction.

Our approach consisted of the following analyses:

- Comparing costs and revenues for a sample of NPs

- Analysing financial information for front-country camping
- Benchmarking Jasper and La Mauricie NPs with similar parks from other jurisdictions

Park	Operator	Land Size	Front-country Camping (# of sites)	Hiking Trails (length)
Benchmarking Group 1 – Quebec				
Parc national de la Mauricie	PC	536 km^2	756	105 km
Parc national de la Jacques-Cartier	SÉPAQ	670 km^2	120	95 km
Parc national du Mont- Tremblant	SÉPAQ	1510 km^2	1112	82 km
Parc de la Gatineau	NCC	361 km^2	323	165 km
Benchmarking Group 2 – Rockies				
Jasper NP	PC	10,878 km^2	1858	1300 km/808 miles
Glacier NP	US NPS	4,102 km^2	1013	1200 km/746 miles

In addition we also assessed the appropriateness of pricing, revenue, and cost-recovery.

Analysis of other secondary data We analyzed secondary data from a number of Agency sources including attendance and camping statistics, VIP survey data, the Agency's Asset Management System (AMS), and the financial system (STAR). Some data was available through reports generated from Agency systems, while others, such as camping data, were collected directly from sites.

3.2.2 Strengths and Limitations

The evaluation benefited from an abundance of documents, giving us a good understanding of the nature and extent of the VSO, how it compares to other providers, and information for many of the evaluation questions. Within the document review, a broad range of social science documents, including studies and reports of surveys (i.e. of visitors, stakeholders and partners, and the Canadian public more broadly) strengthened the evaluation, allowing us to corroborate some of the primary data that was collected.

Input gained from PC staff through key informant interviews and the VE manager survey, was particularly strong. Given response rates and coverage of these data collection methods, the data obtained can be viewed as representative.

For stakeholders and partners we have more limited samples either from interviews on site or the group discussions; the views we obtained from stakeholders and partners cannot be considered representative of all stakeholders/partners. However, we were able to validate and corroborate findings from these interviews and discussions with other information collected, including results from the *Stakeholder and Partner Engagement Survey (2009)*, interviews with PC staff, and other documents reviewed (e.g. third party studies, academic literature, and other social science research). We therefore treated the stakeholder and partner comments as a credible representation of stakeholder and partner views more generally.

The secondary data available on inputs, outputs and outcomes, while useful, has some limitations. Financial data is most readily available for field units as a whole and less for specific protected areas (e.g., NPs, NHSs). We were able to compensate for this in part by obtaining site level data from the locations we visited. However, even at these locations, financial data is not always readily linked to particular elements of the VSO (i.e., particular products and services).

We also reviewed four additional sources of secondary data; general studies of market trends; Agency data on the supply of VSO infrastructure, services and activities, including asset data; data on visitor demand; and data on visitor characteristics and outcomes. The specific strengths and limitations of this data are reviewed extensively as part of the evaluation findings (Question 2). In general, we were not able to compensate for the specific weaknesses and instead simply note the limitations at various points in the report.

Finally, the sample of similar parks in other jurisdictions that we obtained for comparing costs and operations was too limited to serve as a standard for comparisons for the PC system in general. Instead, the comparison parks served as case studies providing understanding and insight into the costs and nature of operations in other systems. Quantitative analysis of efficiency and economy, therefore, rested on anecdotal reports of initiatives leading to cost savings or cost avoidance, information from the Agency showing the extent of management constraints and flexibilities in directing operations, and some comparisons between locations and systems with the Agency of relative costs, outputs and results achieved.

4 EVALUATION FINDINGS

4.1 RELEVANCE

4.1.1 VSO, Agency Mandate and Government Priorities

Question 1	Indicators
Is the program consistent with broader federal government priorities and with PCA mandate and priorities?	• Program aligns with federal government and PCA mandate and policy. • Other government jurisdictions are providing similar services and programs to support visitors at their protected places.

Expectation: Program is aligned with federal government and PCA strategic directions.

Since the founding of the first NP at the Hot Springs in Banff (1885), these places have been set aside not only for purposes of protection but for the use and enjoyment of Canadians.[9] NHSs are also set aside for public use; however, this is largely within the context of educational and presentation purposes in addition to the general enjoyment of Canadians. The emphasis on use and enjoyment continues to the present day and is reflected in the preamble of the *Parks Canada Agency Act* (1998), the *Canada National Parks Act* (2000), and the Agency's current vision, strategic outcome and performance expectations as outlined previously.

Facilitating use and enjoyment through a VSO is intended to help ensure the places remain relevant, meaningful and that they are unimpaired for present and future generations. In this view, the VSO contributes directly or indirectly to the Government of Canada's *Whole of Government Framework* outcomes of **a clean and healthy environment** and **a vibrant Canadian culture and heritage**.[10] By making the Agency's protected places available to Canadians to discover and enjoy, knowledge of Canadian culture, history and natural and cultural heritage is increased. Supporting visitor experiences in heritage places also contributes to the government's goal of **Strong Economic Growth**; visitation and visitor experiences at PC sites has economic benefits to local communities, supporting the tourism industries in all regions of Canada.[11]

Expectation: The VSO is consistent with government practices in other jurisdictions.

The nature and extent of the visitor service products and services to support the use, enjoyment and, ultimately, meaningful connections to PC places, is not mandated in legislation or policy (i.e., there are no requirements to provide a specific product or service such as camping in PC administered places, although some services or products may be specified in particular park establishment agreements). In the absence of specific requirements, the nature of the offer is dictated by what is logically required to create opportunities for enjoyment (e.g.,

9 *A Brief History of Canada's National Parks*, 1987, W.F. Lothian., p. 17; See also the *Rocky Mountain Parks Act*, 1887 and the *Canada National Parks Act,* 2000 for specific examples of wording dedicating parks to public use and enjoyment.

10 Noted in the *Parks Canada Agency Performance Report for the period ending March 30, 2010*.

11 See for example Canadian Parks and Wilderness Society Yukon Chapter, *Economic Impacts of National Parks: Yukon Territory and Northern BC* (2006) http://www.tc.gov.yk.ca/pdf/CPAWS_Yukon_national-parks-economic-impacts.pdf or Industry Canada, *Report on Federal Contributions to Canadian Tourism* (2008) http://dsp-psd.pwgsc.gc.ca/collections/collection_2010/ic/Iu185-5-2008-eng.pdf

roads to access a site), and public expectations/demands of what should be available at a park, historic site/canal, or marine conservation area.

The nature, scope and limits of these facilities, services and activities offered in PC sites are governed by specific policies and directives (e.g., PC's *Guiding Principles and Operating Policies* 1994), which set out parameters for ensuring "appropriate visitor activities" and "essential and basic services." Some activities will not be allowed in specific parks (e.g., snowmobiling) while others have specific policies or directives governing their use (e.g., geo-caching, traction kiting, and mountain biking). Where activities can occur in particular locations is also restricted (e.g., by zoning regulations in NPs and NMCAs).

We reviewed the types of offer in the US and Australian systems, various provincial systems, and Gatineau Park and found that the range and type of services in these systems is generally comparable to what is offered in the PC systems. While the nature of the offer is similar across jurisdictions, there are variations in how the offer is provided (e.g., use of third parties). This is explored in more detail in the section on program design.

4.1.2 Tools to Assess Demand and for Managing the VSO

Question 2	Indicators
To what extent do managers have the information and tools necessary to assess demand and make informed decisions about the service offer and respond to the changing needs and demands?	• Evidence of the existence of relevant, reliable sources for information and tools for monitoring demand and changing patterns of demand. • The perceived usefulness and relevance of the information and tools for planning and adjusting the VSO. • Evidence that changes or adjustments to the VSO are made as a result of the use of information and tools.

Expectation: The Agency continuously monitors the current and changing needs and demands of visitors and potential visitors.

In this section we review the various sources of information regarding visitors and non-visitors and tools for assessing the offer against visitor needs. Where relevant, we examined the extent to which the information being gathered is consistent with other protected area organizations and/or published guidelines, as well as VE managers' awareness, and rated usefulness of various information sources and tools. Finally, we identified limitations of the tools and suggestions for improving sources of information. The actual extent of demand for or use of, the VSO is reviewed under question 3.

The information available within the Agency is related either to general tourism or market trends (i.e., market size and whether the market is expected to increase or decrease in the future) or information related to use of PC administered place (demand), and characteristics of PC visitors (or non-visitors) and information on the nature and extent of the VSO and changes in the offer over time.

In addition to the formal tools developed by the Agency, VE managers reported using a number of other sources of information to plan, implement and adjust the VSO at sites which they manage. These include conversations with visitors, consultations with partners, a variety of external reports from government, input from academic or tourist organisations, specific pre- and post-trip surveys, and visitor comment cards. Comments on a few of these sources of information are included below.

4.1.2.1 General Tourism Trends

The Agency draws on a number of sources to understand the general tourism market and changes in markets over time. A key source has been Travel Activities and Motivation Surveys (TAMS) administered by Statistics Canada on behalf of several federal, provincial and territorial agencies responsible for tourism. The Canadian Tourism Commission has also conducted this type of analysis. The data is used to classify travellers according to their motivations and interests (e.g., cultural tourism enthusiasts) and describe markets for particular activities (e.g., camping, day hiking, climbing, backpacking, and cross-country skiing and snowshoeing). Management also reported additional sources of information: following trends in various kinds of equipment use and sales, using its networks to stay up-to-date within the tourism industry, and following trends in provincial parks organizations.

The various sources of data take a variety of perspectives to understand broader contextual tourism trends rather than PC's visitors specifically. While the information is generally seen as useful, local VE managers were more interested in obtaining information specific to the sites they manage and the local markets including profiles of non-visitors as well as visitors (e.g., social values and beliefs, motivations to travel, expectations, and sources of trip planning information).

Additional sources of information on use or demand include periodic public-opinion polls of Canadians (2002, 2005 and 2009), which pose questions on past use of PC locations and on the intent to visit a site over the next two years. The Agency has also undertaken periodic special studies such as the 2010 *Qualitative and Quantitative Research to Better Understand Urban Markets (Vancouver, Toronto, and Montreal)* which identified barriers to use of PC managed locations. These products form part of the general information base, similar to general tourism research, rather than providing site specific information.

Respondents from the ERVE Directorate expressed interest in having a PC-specific annual national outdoor recreation study of Canadians to track market demand in the general population, rather than travellers specifically, and trends in various activities in a standard, consistent manner.

4.1.2.2 On-site Use and Visitor Information Tools

Measuring Use or Demand: Measuring, and publicly reporting on, the use of parks and protected areas is wide spread. There are some published guidelines and generally accepted practices both on what to measure and how it should be done (Kajala et.al., 2007, Hornback and Eagles 1999).

Attendance monitoring in some form has existed in the Agency for more than three decades. Currently, attendance is measured at 37 NPs, 2 NMCAs, 82 NHSs and all nine historic canals.

Attendance may focus on the number of users of a site (reach) or the number of visits to a site (demand). A visit can be of any duration from less than an hour to extended stays of several days.

Person-Visits

A person-visit is counted each time a person enters the land or marine part of a reporting unit for recreational, educational or cultural purposes during business hours, excluding through, local, and commercial traffic. Same-day re-entries and re-entries by visitors staying overnight in the reporting unit do not constitute new person-visits. A visitor will be counted as multiple person-visits if they enter, leave and re-enter the location on separate days. For this reason, person-visit counts will always be greater than the number of unique visitors to a location in a given year. Total person-visits include both Canadian and international visitors.

Users or visits can be divided between those who enter a place for "purposes for which it was intended" (i.e., called a person-visit within the Agency) compared to other types of entrants (i.e., pass through traffic, employees or volunteers). Other standard metrics include the extent of over-night stays (visitor nights), the length of a visit (visitor hours and/or visitor days) or the types of products or services used while on site (e.g., patterns of visitor use). In the case of the Agency metrics related to length of stay for example these have been collected through the program of visitor surveys (see next section) rather than from attendance monitoring.

Another basic distinction is between paying and non-paying visitors. As noted, many locations have unrestricted points of access so that it is impractical to charge every visitor who enters the site. Paying visits are, therefore, for many locations a sub-set, sometimes small, of the overall number of visits.

At the national level, the Agency tracks person-visits (i.e., overall demand rather than unique users). Local statistics for other types of use/demand have been collected at some NPs/NMCAs (e.g., camping or trail use data, visitor nights or time on site).

An attendance statistic may be a precise count of use (e.g., the number of people entering a location where there is only one controlled point of access) or an **estimate** of number of visits (i.e., when there are many uncontrolled points of access). Estimating attendance requires some basic counting of traffic (i.e., persons, cars, boats) at various points within a location (i.e., entry gates, parking lots, campgrounds, on roads) and adjusting these counts based on periodic observational or survey studies that identify factors such as the average number of people travelling by vehicle, the reasons for visiting (i.e., so that pass through traffic can be excluded), and the number of people re-entering the site on the same day.

If the methods used to estimate the number of person-visits is not robust, the resulting estimate may not be a **valid** indicator of the number of person-visits as defined by the Agency (e.g., it may fail to properly identify and exclude pass through traffic, or it may not adequately capture visitors at all locations within a particular site). Methods which produce valid estimates at a particular point in time may lose validity over time for various reasons (e.g., shifting patterns of use) so that it is important to periodically review and update the methodology to ensure it continues to provide valid data.

Invalid measurement of a person-visit can lead to systemically over or underestimating the "true" number of visits to a location.[12] Past experience in the Agency has shown that systematic bias leading to invalid estimates can be significant. For example, the recalibration of the attendance methodology in the Mountain Parks in 2004 led to the Agency restating its total estimated person-visits downward by almost 4M for 2000-2001.[13] Other large changes in reported person-visits have also followed from changes in estimation methods. The Agency does not have a protocol on if and when these kinds of changes should lead to restating already public data or adjusting targets and expectations within the Agency.

A recent study commissioned by the Agency (2010) concluded that problems with the validity of the person-visit estimates are likely wide spread and suggested that "around 100 sites (will) require major methodological improvements, while the other sites will still need to preserve the quality of data they report by updating their methodology over the next five to 10 years." It has been estimated that it would cost the Agency between $7M to $10M over five to 10 years to ensure consistently valid estimates of person-visits for the attendance monitoring system as a whole.[14] Whether the investment is worthwhile, depends ultimately on the balance between managers' information needs, the uses of the data relative to the costs and the sustainability of the efforts required to produce it (Hornback and Eagles 1999). In the past, the Agency's then Finance Committee (October 2001) endorsed the importance of continuing to track person-visit data and specifically directed that the 20 sites with the most visits should improve their methodology, where necessary, to have at least a moderate level of confidence in its accuracy.

A valid estimate of person-visits will still have some inherent error due to its reliance on sampling. The extent of this kind of error can be calculated and reported, typically as a confidence interval around a precise estimate of the number of visits to a place. For example, it is reported that there were an estimated 3,151,751 person-visits to Banff NP in 2010-2011, implying a degree of precision in the estimate that is not warranted. If sampling error were included, the estimate could be 3,151,751visits, plus or minus 500,000 visits, so that the true number of estimated visits is between 2.7M and 3.6M, 19 times out of 20.[15] The Agency does not calculate or report confidence intervals for its visit data. Other parks systems attendance data are also publicly reported as precise numbers without reference to errors in the estimates. The use of confidence intervals for PC visit data has been suggested or recommend in the past (see July 1987 PC Bulletin on Attendance and subsequent guidelines; and 2004 Review of PC's Attendance Monitoring and Visitor Information Programs).

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12 Technically, a method that does not produce a valid estimate of a "person-visit" may be valid with respect to some other indicator. For example, if all visits are accurately estimated regardless of the purpose of the visit, then the method may produce a valid estimate of the "total number of visits" but an invalid estimate of person-visits.

13 The estimated methods in the mountain parks were recalibrated in 2003-2004 at which point it was concluded that the old method overestimated person-visits by 13% to 16% in the previous two years. This lead to restating the overall visit totals both for specific parks and for the Agency as a whole back to 2000-2001. The original estimated Agency total for 2000-2001 was approximately 27.7M person visits while the revised total was 23.8M a decline of almost 4M person-visits.

14 The study documented details of the methodology at about 50 locations where there are the greatest challenges in obtaining accurate estimates of visits and provides additional limited information for other locations. This is the first time details of the complete monitoring program have been available at the national level.

15 The example is for illustrative purposes and does not reflect the true error of estimate which we did not know.

Even if it is not clear that estimates of visits are accurately representing "person-visits", the data may still be useful for tracking trends over time. That is, comparing an estimate at time A to an estimate at time B, can provide an accurate indication of a trend, although it may be the trend in say overall visits rather than person-visits or a trend in a sub-set of person-visits rather than all person-visits. Being able to compare trends over time is premised on using the same method to estimate the visits at two points of time. If the method is changed or adjusted it will not be clear whether a trend (up or down) is due to a real change in visits or to the change in the method used to estimate visits. In the Agency, when to change and update location attendance monitoring programs is decided by local management and not managed nationally. It was reported that some monitoring programs have used the same methods for decades while others make changes or updates every year or two.[16]

The identification of trends in visits also needs to take account of sampling error. If hypothetically the true number of visits to Banff NP falls in the interval of 2.7M to 3.6M at time A, and the estimate at time B puts the range of visits at 2.5M to 3M, the intervals overlap and a clear trend independent of sampling error cannot be identified, although comparison of the precise estimates of visits at the two times would indicate a decline.

Although the potential bias and the existence of sampling error in estimates of person-visits is widely acknowledged, visit data is still used extensively both nationally (e.g., for identifying a trend of declining visits and setting national and field unit targets and measuring progress against the targets) and by local management for assessing demand and adjusting the offer (e.g., VE managers we surveyed were generally aware of attendance statistics for their sites, and report that the data is somewhat or very useful i.e., 91% for NPs, and 79% for NHS). Person-visits by location, system, and for the Agency as a whole, for a period of five years are routinely made available on the Agency's internet[17] and published in the Annual Performance Report.

Despite the many issues with "person-visit" data we have placed some reliance on the information throughout the evaluation. It is likely that the data provides at least order of magnitude estimates of the total number of "visits" to PC administered places, and the relative order of magnitude of visits between locations. We also concluded, consistent with the interpretation in the Agency, that "visits" are declining largely based on the consistency of the declines reported across many places over time. It is unlikely that this pattern of results would arise from purely methodological issues or failure to take account of sampling errors in the estimates. However, precise statements regarding overall attendance (i.e., there were 20,211, 253 visits in 2010-2011) or changes in visits (i.e., visits declined by 15% between time A and time B) need to be treated with caution.

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[16] An important question in this regard is whether changes or updates in estimation methods are correlated with changes in trends in visits. If updating estimation methods is consistently associated with a decline in visits, an obvious conclusion is that visits were being systematically overestimated in the past and therefore an apparent decline reflects more accurate measurement rather than a real underlying decline in visits. We did look at this issue for a sample of sites reporting changes in methodology and found no consistent association between changes in the methods and reported increases or declines in visits. In contrast, social scientists in National Office reported, using a different sample, that about 70% of the changes in methods were associated with a decline in visits.

[17] See http://www.pc.gc.ca/eng/docs/pc/attend/table3.aspx.

Information on Visitor Characteristics and Outcomes: The Agency's traditional source of information on visitor characteristics and outcomes is its VIP surveys. A total of 119 sites are required to conduct a visitor survey, consisting of standard national questions and questions specific to each site, at least once every five years. Visitor survey programs are generally considered an essential component of protected area management along with the use of statistics noted above (Kajala, et. al. 2007, Hornback and Eagles 1999). Many of the parks organizations we examined conduct visitor surveys of various types, setting targets for and publicly reporting on data derived from surveys, in particular for visitor satisfaction.

The PC VIP produces demographic information on visitors (e.g., age, country of origin, party size, whether it is a first visit), as well as data on the national outcome indicators: visit satisfaction and enjoyment, and meaningfulness of place. There are also a number of additional standard questions on the survey about various aspects of satisfaction (e.g., with pre-visit information, quality and availability of services and activities and with various dimensions of interactions with staff). In recent years, the visitor surveys have also included standard open-ended questions asking visitors to report on sources of information to plan their visit, what they enjoyed most about the visit and what could be done to make their next visit more enjoyable.

The site specific questions on the surveys are determined by local managers although the aspect of the visitor or the visit experience that is being assessed may be a common interest in a number of locations. It is reported that locally designed questions may sometimes overlap or duplicate the nationally mandated questions (e.g., assessing the perceived significance of the site as well as including the national question on the meaningfulness of the place). It was suggested that local managers' information needs could continue to be served, while improving the national utility of the information and removing duplication, if local managers were required to select their questions from a standardized question bank.[18]

Visitor surveys, like attendance data, can be subject to systematic bias and sampling error. We were told that sampling plans that are the basis for ensuring that the results of surveys are representative of all visitors to a site are not always documented (i.e., described in a report) and that information on the extent to which the plan was implemented on site as intended is also not routinely available. The absence of this information creates uncertainty in the validity of the results. Response rates to VIP surveys vary between sites and over time with an average rate of 44% reported for surveys administered in 2010. If non-responders to the survey differ systematically from visitors who respond, the results may have systematic biased.[19] Sampling error is identified and reported for the VIP surveys. In 2010 for example the average error for 19 sites where surveys were administered was +/- 5.5 (e.g., hypothetically 90% of visitors +/- 5.5% were satisfied).

[18] A similar suggestion was made with respect to visitor comment cards which are designed and collected locally. If the cards were standardized and information collected nationally, the Agency would have another source of qualitative data, similar to data for the open-ended questions on the VIP, for understanding visitors' experiences and concerns.

[19] The Agency does have some procedures to compensate for non-response bias, notably the use of tally sheets which collect data on visitors who decline to accept a survey so that adjustments can be made to final samples to more closely match the population of visitors.

Survey data is collected and processed nationally each year for surveys administered between the beginning of June and the end of September. Particular locations may also have data from surveys administered in May or October which would typically be added to the national data by social scientists in Service Centres for their field unit clients. As a result field units may have a national analysis of the data covering the June to September period and a second report prepared by a Service Centre with data from May to October including analysis of site specific questions. The reports can reach different conclusions although the results are typically not dramatically different (i.e., a few percentage points difference in the percentage of visitors who are satisfied with their visit). Small differences in survey results can however have implications for whether or not a location has met a corporate performance target (e.g., the target that 90% of visitors will be satisfied may or may not be met depending on the data that is included or excluded from the analysis).

A national report summarizing the data from the visitor surveys administered each operating season is produced each year (i.e., again based on the June through September data). It provides information on visitor characteristics and detailed survey results, as well as performance by surveyed units against relevant corporate targets. The quality and comprehensiveness of the reports has improved overtime (e.g., comparing the 2000 to 2010 reports).

Which locations conduct a survey each year is essentially a local decision although all 119 sites that are part of the program must conduct at least one survey every five years. Because the specific sites surveyed each year are different, the results are not used to track year to year trends in either visitor characteristics or outcomes since it is unclear to what extent yearly differences are due to changing the surveyed sites or to more general changes in visitors or outcomes. Recently, social scientists in National Office have organized the data in survey waves or cycles (e.g., all the surveys administered between 2000 and 2004, and 2005 though 2008) so that trends can be track based on complete and comparable data between waves.

Awareness of the VIP surveys as a tool for understanding visitors and visitor outcomes was wide spread in our survey of VE managers. The vast majority rated the VIP as very or somewhat useful, although it was more likely to be characterized as very useful at NPs/NMCAs compared to NHS (i.e., 72% vs. 50% of the respondents respectively).

Innovations in Visitor Segmentation: In the past five years the Agency has adopted two new approaches to better defining market segments and the motives, values and interests of visitors and non-visitors. In 2007, the Agency introduced the Explorer Quotient (EQ) concept. EQ was developed by the Canadian Tourism Commission in collaboration with Environics, a marketing and social science research firm. EQ clusters travellers into nine different groups based on their social values, exploration traits, travel lifestyles and interests, and the type of experiences they seek which are linked to key demographics. The premise is that the social values and lifestyles of travellers play the most significant role in influencing the desires and experiences pursued in travel. Traditional economic and demographic factors, while important, play a secondary role.

In summer 2010, the Agency acquired an additional and more sophisticated segmentation tool, PRIZM-C2, also developed by Environics. This system draws on a variety of pre-existing data to cluster Canadian neighbourhoods into one of 66 lifestyle types, providing insights into the behaviour and mindset of consumers (i.e. who they are, their preferences, where they shop, likes and dislikes, social values, etc.).[20] As implemented in the Agency, the tool can identify 12 life stages (e.g. empty nesters, starter nests, singles scene, etc.). Each life stage is associated with information about its members such as market size, demographics, likes and dislikes, values, media habits, recreation and leisure patterns, type of accommodation they prefer, community involvement, travel motivations (by EQ type), restaurant and retail habits. Appendix G provides brief descriptions of the EQ and PRIZM segments used by the Agency.

Use of both tools generally requires collecting the postal code of visitors either through VIP surveys, stand alone exercises specifically focused on collecting this information as was done at some sites in 2009 and 2010, or potentially from point of sale systems (see below for more on this latter point). The various segments are linked to neighbourhoods so that a visitor coming from a particular location is assumed to belong to a particular segment.

The tools can be used in several ways:

- Local, regional and national markets can be described using EQ/PRIZM segments. The Agency has developed *Profiles of Canadian Metropolitan Area (2010),* using 2006 census data which characterises 33 Census Metro Areas (CMAs) and 33 census agglomerations[21] by EQ and life stage segments. The Social Science Branch has also produced maps of the top CMAs showing breakdowns of new immigrant populations.
- The EQ/PRIZM profile of existing visitors can be documented and compared to either national or regional population data to identify particular segments that are over- or under-represented at specific sites or for the Agency overall. EQ and PRIZM profiles of visitors to 36 locations in the summer of 2010 have now been developed.
- Communications and promotion products can be designed to appeal to either existing or potential market segments. The Agency has guides and examples of EQ-based communication products available on its intranet.
- Visitors on-site can be asked to complete a short questionnaire and based on their responses be directed toward products and services that are most likely to appeal to their interests and motivations. Workshops have been offered at 21 locations to introduce this approach. EQ has been introduced at 16 locations since 2008.

It was also noted by respondents in National Office that the PRIZM tool could support the use of new social media tools to reach potential and actual visitors although this would require that the Agency purchase additional data showing social media use of PRIZM segments.

A majority of VE managers reported that the EQ tool was somewhat or very useful although the percentage reporting it as very useful was much higher in NHSs compared (63%) compared to NPs/NMCAs (38%). VE managers' ratings in our survey were made prior to their having access to EQ profiles of visitors to specific sites. The perceived utility of the PRIZM tool was not assessed given it was only being introduced during the course of the evaluation.

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20 See http://www.environicsanalytics.ca/data_consumer_segmentation.aspx?item=prizmc2.

21 A CMA has a population of at least 100,000, while census agglomerations have population of at least 50,000.

Segmentation of visitors into distinct groups is a common tool among VE managers for planning and implementing their VSO, as shown in Table 6.

The exact form of segmentation used by the respondents to our survey was not clear but could in principle range from simple demographic segmentation based on visitor origins or travel distance, to more complex segmentation based on the new EQ data. The lack of a standardized approach to segmentation was a concern expressed by representatives of the ERVE Directorate who would prefer a common and consistent segmentation based on EQ/PRIZM categories, as well as other common information to maximize the utility of the tools for the Agency as whole.

Table 6. Frequency of Use of Visitor Segmentation Profiles

	Always	Frequently	Sometimes	Rarely	Never
NP/NMCA (n=34)	8.8%	26.5%	44.1%	11.8%	8.8%
NHS (n=40)	5.0%	40.0%	37.5%	15.0%	2.5%

Improved Tools for Collecting Visitor Information: In support of better visitor data collection, the Agency is also introducing a new generation of **point of sale cash registers**. The new terminals improve the timeliness and reliability of revenue data and can be used to collect information on visitor postal codes, party size, gender makeup, and approximate ages. As a pay-based system, it will not capture information on all visitors since in some cases visitors are not required to pay to access a site (e.g., foot traffic along a national historic canal).

VE managers' ratings of the usefulness of the existing Point-of-Sale system (POS) were somewhat less positive than other tools with just over a third rating it as not very useful in NPs/NMCAs and 17% providing that rating for NHSs. This likely reflects the fact that existing POSs were designed primarily as a financial tool and not as a means of gathering information on visitor characteristics.

4.1.2.3 Information and Tools for Documenting and Improving the VSO

Supply of Infrastructure, Services, and Activities:

The VSO includes a large variety of on-site infrastructure and many specific services and activities as well as off-site services which support the VSO. Examples of the on-site infrastructure, services and activities available in at least some locations are shown in the accompanying side bar. Additional important elements of the VSO include the camping offer and associated products or services, as well as alternative forms of accommodation and trails, which are not included in the sidebar.

There are two principle sources of information about the **supply** of VSO infrastructure and services/activities. Infrastructure counts are available from the Agency's AMS and financial system (SAP). However, the counts of assets in the two systems do not agree for a variety of reasons. In addition, the quality of the management information (e.g., condition of the asset) is widely recognized to be imperfect and dated (see *Evaluation of Parks Canada's Asset Management Program, 2009*, for a more detailed discussion of problems). As a result, even basic information on the supply of core VSO infrastructure, such as the number and length of roads,

Examples of VSO Infrastructure, Services and Activities

General Assets and Infrastructure
- Roads and associated bridges
- Way finding signs
- Parking lots
- Visitor centres
- Washroom facilities
- Picnic areas
- Playgrounds
- Boat ramps/mooring facilities

General Services
- Convenience store
- Food services
- Gift shop
- Rental equipment
- Wireless internet access
- Lifeguard services

General Activities
- Guided activities (e.g., hikes, climbing, riding but excluding personal interpretation)
- Geo-caching
- Mountain/rock climbing/ Bouldering
- Golf/Mini-golf
- Horseback riding
- Waterfall Ice climbing
- Tennis
- Snowmobiling
- Ice fishing
- Dog sledding
- Rollerblading
- Volleyball
- Ice skating
- Bocce ball, shuffleboard
- Baseball
- Downhill skiing
- Caving

Water Based Activities
- Calm water boating (canoe./kayak /sea kayaking)
- Motor boating
- Fishing
- Swimming
- Sailing
- Scuba diving
- Surfing
- Waterskiing
- White-water canoe/kayaking, rafting
- Wind surfing/sailing

the number of visitor centres, parking lots and their capacity, or washrooms is not known with certainty. In response to the evaluation of asset management, the Agency made a number of commitments to improve information but progress has been slow and all the commitments will not be completed until 2016.

A second source of information about supply was developed in 2010 when the ERVE Directorate undertook to document the number of NPs/NMCAs and NHSs that offer particular products, services or activities. The intent was to provide a searchable on-line inventory to assist visitors with locating a particular service or activity within the systems. The data was compiled based on existing sources of site specific information (local web sites, marketing material) and was sent to field units for validation. At the time of the evaluation several locations had not responded to requests to validate the information so this inventory represents at best the minimal number of locations offering various VSO-related products at a specific point in time.[22]

Information is available nationally on the **use** of those components of the VSO that are managed centrally: the National Information Service (NIS) and the Parks Canada Camping Reservation Service (PCCRS) for reserving front-country campsites. National information regarding the on-site use of various components of the VSO infrastructure or the use of various services or activities is virtually non-existent. Some locations do collect use statistics for limited components of the offer (e.g., camping occupancy, trail use) although not necessarily consistently across or within sites or for every year.

Parks organizations we examined do not produce public statistics on the use of specific services or activities, with the exception of camping statistics (i.e., available for the Unites States NP Service

[22] As the compilation of the inventory was occurring at the time of the evaluation field work, we deliberately avoided collecting independent data on supply of infrastructure, services and activities to avoid possible duplication and confusion with the ERVE directed work.

(US NPS) as well as for eight provincial parks services in Canada). The nature of the metric involved is not always consistent between organizations (e.g., the number of overnight recreational stays, camping visits, occupied campsite nights, camping permit nights, and number of campers). Typically, the data is reported as absolute numbers without reference to the supply of the camping offer. An internal review within the Agency of literature on camping industry trends and information on camping in Canadian NPs (Murphy, 2007) concluded that there was value in collecting and storing this information nationally, but no action was taken.

The Agency, in conjunction with PWGSC, is currently preparing a request for proposals to acquire a new campground reservation system for implementation in 2013. This system is intended both for inventory management and reservations. It should include a complete inventory of the supply of campground and campsites regardless of whether a location chooses to offer reservations through the system. According to management, this will allow better tracking of the available inventory and usage.

Nationally, qualitative information on changing patterns of use or demands for particular services or activities is obtained indirectly from reviewing responses to open-ended question on VIP surveys particularly in response to the question "What the Agency could do to make a future visit more enjoyable?" As noted, local managers have access to comment cards; various consultations; and simply from talking to visitors or observing occupancy in camp grounds, which helps them develop a qualitative sense of demands and changing demands.

Expectation: Managers have sufficient information and tools to evaluate and plan the VSO.

Tools for Evaluating and Planning the VSO: In 2008, the Agency issued management bulletin (2.6.10) *Recreational Activity and Special Event Assessments* to help managers assess new or existing activities and events that present significant opportunities or areas of concern. An assessment typically involves a wide range of staff, partners and stakeholders and the output is a set of guidelines to follow for implementation. The assessment may be national or local in scope. Six national assessments have been undertaken since issuing the bulletin covering geo-caching; mountain biking; traction kiting; guided interpretive canopy walks, zip lines, via ferrata and aerial parks; non-motorized hang-gliding and paragliding; and community and collective gardening. National guidelines have been produced for all but non-motorized hang-gliding and paragliding. If a field unit deems that special circumstances exist in their park (i.e. no hang-gliding during certain months to protect the nesting of a particular species of bird), then a local assessment of the same activity would be done. Local assessments are also undertaken if there is a proposed activity in a local park/site that is not of national scope (e.g. creating a mini-golf operation).

In 2005, the Agency introduced **a structured VEA process** for use in the field in assessing a site's service offer against goals and objectives. The process involves a two-day workshop, bringing together a cross-functional team to examine the current state of VE opportunities from the perspective of the visitor. It incorporates information from the kinds of tools noted above (e.g., national and regional demographic and social trends that could affect visitation now and into the future and a review of past site-specific visitor studies). This is followed by a structured review of strengths and areas of improvement related to research and planning, staging experiences (i.e., essentially a review of the VE cycle as it applies to the site) and organizational capacity (i.e., staff, partners and capital assets).

A criticism of the VEA process is that it too focused on improving the current offer and does not pay sufficient attention to potential markets and new products or services.

In 2009 the VP Operations Eastern Canada initiated a Visitor Experience Opportunity Concept (VEOC) process as a planning exercise to generate ideas for new VE opportunities at a park or site based on the EQ tool. The VEOC process uses a workshop format with a cross-section of site staff as well as external stakeholders to generate potential new opportunities that the site could develop in the mid- to long-range. To date, five locations (Old Quebec NHS, Grosse Ile NHS, Gros Morne NP, Terra Nova NP, and Fundy NP) have used the tool. In 2011, the ERVE Directorate began integrating the process into the PC's suite of VE planning tools and tested an in-house delivery of the VEOC at Kejimkujik NP/NHS. The results are currently being evaluated and the process is being refined with the intention of making it available to all sites across the country. The process has the potential to support the output targets of for the VE program (i.e., yearly development of three new or renewed VE opportunities each year at most locations over the next three years as noted in section 5) as well as encouraging more consistent use of the core segmentation tools (e.g., EQ and PRIZM) in VE planning.

4.1.2.4 Summary of Results Regarding Information and Tools

It is clear that there is a wide range of formal and informal sources of information available to assist managers at various levels in describing general tourism trends, assessing demand and changes in demand, identifying visitor and non-visitor characteristics, assessing visitor outcomes, and assessing and evaluating the VSO. All of these sources of information and tools have some limitations, although the issues with respect to the validity of person-visit data and to a lesser extent VIP survey data are particularly important given the role these sources of data have for understanding trends, setting targets and holding managers to account within the organization.

Despite the limitations in various tools and information sources, PC staff from all parts of the organization we spoke with acknowledged the Agency is making significant progress in developing new approaches to gathering information and assessing the VSO. The majority of VE managers in the field are aware of the various tools and sources of information. Most made some use of these, finding them at least somewhat useful.

VE managers did, however, express the following concerns:

- Difficulties in finding and accessing relevant tools and information either on the intranet or in some cases from Service Centres.
- A need for more site-specific information on tourism markets, characteristics of existing and potential markets including their social values and beliefs, motivations to travel, expectations, and sources of trip planning information (i.e., as opposed to the TAMS type information that identifies general tourism trends and a national or regional level).
- A lack of time, resources or expertise to analyse and exploit the existing data to develop, market, and facilitate new and more relevant experiences.

Some of these concerns may have been addressed since the survey of VE managers was conducted (e.g., changes to the organization of the Intranet data and posting of EQ/PRIZM analysis of visitors for specific locations). Additional mechanisms for sharing information and tools are reviewed in the section on program design.

At National Office, the major areas identified for improvement focused on:

- Documenting and standardizing data collection across the Agency (e.g., when changes to person-visits methods are made, ensuring VIP survey sampling plans are recorded and complied with, developing question banks for local VIP survey questions, standardizing comment cards and collecting the information nationally)
- Expanding the range of data collected at the national level (e.g., occupancy rates of specific infrastructure such as camping or alternative accommodations, the number of paid entries and use of particular products such as national passes).
- Expertise in the field, echoing reports from VE managers, particularly with regard to the attendance monitoring system. We were told that management of the system is not formally assigned to specific individuals (e.g., embedded job descriptions) and that those who prepare and report the numbers sometimes do not understand what is being measured by the system (i.e., the validity of the data, the quality of the methods).

Some of these concerns may be addressed with the introduction of new point of sale systems and the new campground reservation system. In theory, these systems will be able to produce real time data on paid entry of various types as well as associated visitor characteristics and, in the case of the camp ground reservation system, occupancy rates for this type of facility.

Although not specifically identified by many respondents to our interviews and surveys, a major issue from our point of view continues to be a lack of reliable national inventories of the basic supply of infrastructure, activities and services that make up the VSO and the utilization of key aspects of the offer.

4.1.3 Extent and Nature of Use/Demand

Question 3	Indicators
What are the extent and dimensions of the demand being addressed in this program?	• Attendance data (PCA and other jurisdictions). • Inventories of supply and records of demand/use of particular products and services.

Expectation: There is evidence of a general demand for services and support for people to visit/enjoy protected heritage places.

This section reports on measured demand and changes in demand for the Agency's products and services either at the aggregate level or at the level of specific infrastructure, products or services.

Market Size: Research on **general tourism trends** tends to demonstrate the existence of sometimes sizable markets for the kinds of offer and experiences provided by PC. As noted, the existing research takes different perspectives on markets, segmenting life styles and motivations versus describing markets for particular activities.

For example, the Canadian Tourism Commission, using 2000 TAMS data, identified several segments of the tourism market relevant to the Agency's products and services including cultural tourism, soft outdoor adventure and hard-core adventure "enthusiasts."[23] The size of each of these segments is estimated at 2.2M, 5.3M and 1.6M adult Canadians respectively. All three markets are expected to increase within the next 25 years. Similar studies from the CTC indicate there are comparably large markets to draw from in the USA as well.

Studies of markets for particular activities, based on TAMS data, have covered camping (3.1M adults), day hiking (4.5M), wilderness hikers and backpackers (1.4M), cross-country skiers (1.1M) and snow-shoeing (0.8M). Markets are generally growing although the camping market is not expected to grow at the same rate as the growth of the adult population.

Aggregate Demand/Use: The Agency's aggregate person-visit data by the four major "systems" is shown in Table 7 for a nine year period.

Table 7. Estimated Number of Visits to PC Protected Heritage Places 2002/03 to 2010/11

	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
NPs	11,689,381	11,169,139	11,556,546	11,469,263	11,576,886	11,681,639	10,611,950	10,934,390	11,167,795
NMCAs	887,314	798,667	798,975	1,442,268	1,473,652	1,460,192	1,309,301	1,347,782	1,381,138
NHSs	6,713,947	6,073,523	5,382,260	4,900,263	4,406,100	4,598,689	4,784,484	4,773,735	4,357,089
Historic canals	4,478,280	4,031,718	3,699,538	4,331,247	4,328,848	4,362,250	4,072,322	3,610,753	3,305,231
TOTAL	**23,768,922**	**22,073,047**	**21,437,319**	**22,143,041**	**21,785,486**	**22,102,770**	**20,778,057**	**20,666,660**	**20,211,253**

Several points should be noted:

- The total number of visits to PC locations remained above 20M for the period.[24]
- The total number of recorded visits has declined between 2002-2003 and 2010-2011 by approximately 3.5M visits although we cannot be certain of the degree of accuracy of the figure. Reported visits are also declining across all of the systems except for NMCAs, which show an increase. The decline in visits is greatest for NHSs.
- Although the overall trend in most of the systems is a decrease in the estimated number of visits, the trend is not consistent from year to year (NPs increase in some year-to-year comparisons). There are also some noticeable discontinuities in the data (e.g., estimated

23 Cultural tourism enthusiasts are travelers who have taken leisure trips in Canada or to other countries which included cultural experiences at a minimum number of places such as historic sites, Aboriginal attractions, and historical replicas of towns or sites. Soft outdoor adventure enthusiasts have participated in at least two activities such as cycling, canoeing, hiking, cross-country skiing, horseback riding etc while on a leisure trip. Hard-core" adventure enthusiasts have taken an overnight trip in the past couple of years in order to experience adventure and excitement and have participated in at least one high energy outdoor activity such as mountain-biking, scuba diving, rock climbing, etc. while on trips.

24 Person-visit totals in the 1990's were higher than those reported in the table, averaging 24M to 26M, and peaking in 1999-2000 at 26.7 M (i.e., 10.4M at NHSs/Canals and 16.2 at NPs/NMCAs). However, this data likely overstates the true number of person visits given the problem with systematic bias and subsequent adjustments to person-visit data discussed previously.

visits at NMCAs are around 800K to 900K for the first three years of the series but them jump to approximately 1.4M to 1.5M for the last six years).[25]

- There are also variations within systems. Some NPs have reported relatively little or no decrease in visits while others have seen a significant increase (e.g., Banff, Yoho and Pacific Rim NPs have all reported more visits). Similarly, while most NHSs have had overall decreases in attendance over the eight year period, a few (Fort Langley and Banff Museum NHSs) have had reported increases.

Some but not all of the other park systems we examined also report declining visitation to their locations. For example, the US NPS reported a net decline of 3% in visits to NPs between 2000 and 2010. In contrast, attendance at national historic places[26] in the US NPS has increased by 5% from 2000 to the present. Other jurisdictions such as Japan, some state park systems in Australia, and some Canadian provincial park systems have also reported declining visits. However, the trend is not consistent. Some provincial park systems (i.e., Ontario, British Columbia, and Saskatchewan) report net increases in visits over the last 7 to 10 years. As always, there are limitations with the data, including differences in methodologies for counting visits, and increases in the number of administered sites in the systems over a given period, which may serve to mask declines at traditional sites.[27]

The decline in person-visits to PC administered places is widely accepted in the Agency. It is a key factor supporting the view reflected in many Agency documents that PC locations and programming have become less relevant to Canadians over time and was one of the primary drivers of the organizational changes starting in 2005 (i.e., with the creation of the ERVE Directorate in National Office) and the subsequent Agency-wide renewal activities beginning in 2007.

Unique Users: The estimated number of person-visits can be seen as an indicator of overall use/demand for the Agency's sites. This number is certainly greater than the number of unique users of the sites in any given period. The latter statistic provides an indication of the overall reach of the service offer (i.e., the number of persons who visit at least one PC location during a given period).

Reach can be estimated from the PC general population surveys of Canadians although the data is not without its limitations (e.g., retrospective self-reports of use may not be accurate). Results from the 2009 poll indicated that perhaps 30% of adult Canadians could be considered current visitors (i.e., visited a NP or NHS in the last three years, where they could correctly name a PC site they visited). In real terms this translates into approximately 7.3M unique Canadian adult visitors during the time period. On a yearly basis the estimated number of unique visitors varied widely with perhaps 1.3M to 4M unique Canadian adult visitors per year. While the data

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25 Only two NMCAs are included in this trend. The jump in overall numbers appears to be related to Saguenay St-Laurent NMCA revising their attendance monitoring program in 2005-2006.

26 We included national historic sites, historic parks, battlefields, battlefield parks, memorials and monuments.

27 For example, the increase in attendance at Ontario Parks may be, at least in part, a result of the increase in number of parks reporting visit statistics (i.e., 272 in 1998 to 330 in 2008). However, between 2002 and 2003, the year when the number of reporting sites increased by 30 from 284 to 314 there was an aggregated decrease in the reported number of visits.

provides at best a rough order of magnitude of the number of unique adult Canadian visitors, it does suggest that the reach of the Agency's offer is extensive within the Canadian population.

High Potential of Future Visit

High potential visitors are those who visited a NP or NHS in the past 3 years (but whose last visit was to a non-PC-administered place) **and** who have a special favourite park or site (PC-administered or not) **and** who definitely intend to visit a NP or NHS in the next two years.

The Agency has also estimated future demand based on responses to several questions in the poll. Those with a high potential for a future visit (see text box for definition) represent 17% of all respondents. This group excludes those who have visited a PC administered place in the recent past. When the percentage of recent visitors who definitively intend to visit a NP or NHS in the next two years are included, high potential visitors increases to 37% of respondents. Again, this represents several million adult Canadians who have a "high potential" of visiting NPs and/or NHSs in the near future.

Seasonality of Demand: Not surprisingly, demand for the Agency's offer is concentrated during certain parts of the year as illustrated in Figure 2, reflecting both availability of the offer (i.e., many sites are only open during certain parts of the year) and the demand for specific activities and services (i.e., demand for winter camping experiences is much less than for summer camping). At the aggregate level, 57% of person-visits are concentrated in the June, July and August period, and 84% between May and October.

Figure 2. 2010-2011 Person-Visits by Month and System

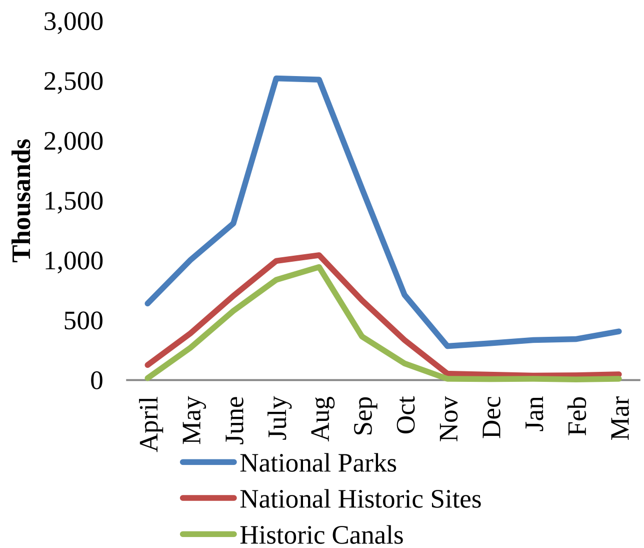

Table 8. Number of Locations by Range of Person-Visits (2010-2011)

Range	NP	NHS
+ 1M	3	2
500K to 1M	3	3
100K to 500K	16	8
50K to 100K	0	10
10K to 50	5	39
1K to 10K	3	25
Less than 1K	8	2
	38	89

Demand/Use by Location: The extent of demand as measured by person-visits varies considerably by location. Table 8 shows the number of locations falling in various person-visit ranges based on 2010-2011 data. The eight NPs with less than 1,000 person visits are all located in Northern Canada. More than 1M visits are recorded in Banff and Jasper NPs and Saguenay St. Lawrence Marine Park, all of which are close to major centres of population. Similarly, the least visited NHSs (i.e., York Factory and Fort Edward) are located in remote regions. The most visited NHSs include the major historic canals (i.e., Trent Severn Waterway, Rideau Canal, Lachine Canal) as well as the Fortifications of Quebec and the Halifax Citadel NHSs, all of which are located in or close to major population centres.

Collectively, approximately 78% of all person-visits in 2010-2011 were accounted for by the 20 most visited locations (i.e., 14 NPs and 6 NHSs).

Supply and Demand for Specific Products and Services: As illustrated in the text box on page 25 the on-site VSO includes a variety of infrastructure and many specific services and activities. Additional important elements of the VSO not shown in the text box include the camping offer and associated products or services, as well as alternative forms of accommodation and trails.

Expectation: A reasonable inventory exists of the supply of elements of VSO and demand is measured for key elements of the offer.

It is unreasonable and impractical for the Agency to collect quantitative data on the supply of and demand for all the facilities, services and activities included in the VSO. However, we did expect that the Agency would have quantitative information on the supply of and demand for at least some elements of the VSO (e.g., the most costly services to provide or the most heavily used elements of the offer, etc). In fact, the Agency has little quantitative information about particular aspects or elements of the service offer.

We know that the specifics of the offer vary by systems (e.g., NPs in general have a wider range of recreational type services and activities and camping is extensively available in NPs and only a small number of NHSs). The extent of the offer also varies by location as discussed in more detail in the section on efficiency and economy. We also know that some types of infrastructure and services are more common across the systems (e.g., visitor centres and camping in NPs, trails for NPs/NMCAs and NHSs).

In the absence of quantitative data, we asked VE managers to rate demand (high, moderate, low, none or don't know) for the infrastructure, services and activities at each of the locations they managed, as well as provide an indication (i.e., yes, no, don't know) of whether the demand was being met. More informally managers were asked to indicate if they had observed or been made aware of changes in visitor needs or preferences, and if there were new services or facilities that could be provided to better meet their visitors' needs.

Ratings of the extent of demand for various services or activities are of course subjective and not necessarily indicative of the presence or absence of an actual service offer at the location (i.e., managers could be aware of demand in the absence of an offer). In addition, they do not provide a clear indicator of the absolute size of market for a service or activity (i.e., high perceived demand might result from a small number of users consuming a limited supply of a product or service).

Survey results for many specific aspects of the offer are reported in Appendix H. Information from various sources on the supply and demand for camping, alternative accommodations and trails is presented below.

Camping: The camping offer consists of both physical infrastructure (e.g., campsites; kitchen shelters; washrooms; pit privies; showers; picnic tables; tent platforms; fireplaces; play structures; food storage; sewage dumping stations; and water, sewer, and electrical hook-ups) and services (e.g., sale of fire wood, garbage collection and removal). The financial system contains an inventory of 449 campground assets (i.e., not just campgrounds per se but also other types of associated infrastructure such as shelters and washrooms).

A basic distinction in the camping service offer is between front- and back-country camping. The front-country camping offer is generally understood to include parts of a location that are accessible by vehicle. The back-country offer consists of more remote areas accessed by foot, canoe, or horse. Most of the VSO in general and most of the camping offer is located in the front country.

Most of the camping offer, both front- and back-country, is found in NPs/NMCAs.[28] Within any one NP/NMCA or NHS with a camping offer, there can be one or more campgrounds, with a varying number of campsites which in turn differ in terms of the amenities and services that are available (e.g., some campsites can accommodate RVs and have electrical hook-ups and others do not). Back-country camping provides fewer amenities and services (i.e., usually a site, pit privies, food storage, and signage).

The Agency's internal review of camping trends (Murphy, 2007) identified 121 front-country campgrounds with 11,375 sites in 27 NPs, and a back-country camping offer in 30 NPs. The majority of the NP campsites at the time were un-serviced (i.e., no electricity or water hook ups) but with showers and flush toilets in a campground building (52%) or with flush toilets only in a campground building (18%). Only nine percent of the campsites are "three-way" (i.e., having water, sewage and electrical hook-ups). Nine percent of the sites are classified as primitive, meaning they were serviced only with pit privies. Ten of the sixteen NPs we visited provided data on the number of campsites in their offer for a total of approximately 8,700 campsites with a range of 39 to 2,469 campsites within these parks.

The Agency's campground reservation system recorded 103,677 and 108,279 front-country camping reservations (i.e., either by phone or on-line) for the 2009 and 2010 seasons. However this is an incomplete record of actual occupancy since not all campgrounds or campsites are available for reservation through the system and visitors who show up without a reservations are not captured in the data.

Ratings of demand by VE managers indicated moderate to high demand for vehicle accessible campsites at most locations (86%) with lower rates of moderate to high demand for pull through campsites[29], group campgrounds, and walk-in campsites (50% to 60%). Demand was reported to be met in a majority of locations for the various types of camping offer with the exception of pull through campsites where demand was only met in 25% of the locations. Demand for back-country camping in NPs/NMCAs was reported as moderate to high for 72% of the locations where it was rated (n=32). Demand was being meet at 76% of these locations.

Demand for camping at NHSs was rated for 27 sites. Only about 15% of locations reported a moderate to high demand. VE managers indicated that demand was not met at 46% of locations

[28] Five NHSs are known to have some camping offer based on the ERVE inventory. Two Historic Canals have some camping available at lock stations.

[29] A pull through camp site that only requires a driver to "pull-through" or "drive-through" to access and leave the location without having to back up or turn around. This is particularly useful for large vehicles and RVs.

with some demand. In about a quarter of the locations they were unsure if demand was being met.

Table 9 lists various types of infrastructure and services associated with front-country camping and the minimal number of NPs where the infrastructure or service is available. Demand was reported as moderate to high in a majority of locations that offered the product or services with the exception of ice and laundry services. The key area for which demand was not being met was the provision of sewage, electrical and/or water hook-ups (i.e., 68% of the respondents rating demand across 29 NP/NMCAs indicated demand was not met).

Table 9. Front-country Camping Infrastructure Reported For NPs' Campgrounds

Facility/service	Minimal # of parks
Firewood	26
Flush toilets	23
Common water tap	23
Kitchen shelter	23
Fire Pit on Site	23
Wheelchair accessible sites	22
Outhouses	20
Additional Parking	20
Showers	19
Dumping Station	18
Electrical hook-up	14
Heated washrooms	13
Water hook-up	11
Ice	11
Sewage hook-up	9
Laundry Facility	4

The Agency has partnered with Mountain Equipment Co-Op to introduce a "learn to camp program" to increase the use or demand for the camping offer, particularly among key target groups such as families with young children and new Canadians in urban areas. The program includes both a virtual component (i.e., on-line direction on where and how to camp and what to do while camping) and staged camping events either at a PC-administered place or off-site in major urban areas. On-site events involve visitors participating in "how to" workshops and camping overnight at a heritage place while taking part in other regular on-site programs and activities. Off-site events in major urban centres offer "how to" workshops as well as providing exposure to associated recreational and interpretive activities. There were reportedly more than 1,100 participants at 14 locations in the first year the program was offered.

Alternate Accommodations: Alternatives to traditional camping include rental cottages offered by private sector providers under contract, as well as various products supplied by the Agency such as cottage tents, yurts, tent trailers, tipi camping, and rental of traditional buildings (e.g., a historic Officer's Dwelling house, a period barracks). In at least one case the alternative accommodation is aimed at groups (i.e. rental of a period barracks) rather than small parties. Amenities provided at the different types of accommodations vary significantly, ranging from a basic living space with beds to compete packages including meals and tours.

According to data collected by the ERVE Directorate (December 2010), 14 locations (i.e., nine NPs and five NHSs) offer some form of alternative accommodations. The size of the alternative accommodations offer is very small relative to the traditional camping offer (i.e., perhaps between 40 and 60 alternative sites/spaces depending on how these are counted, compared to thousands of campsites of various kinds).

An alternative accommodation offer is reported to be common, and increasing, in many provincial park organizations consistent with previously noted theme that visitors are looking for more amenities and comfort. VE managers rated demand for these forms of accommodation as moderate to high at 47% of their locations. It was also reported that demand was only being met at 18% of the locations. At more than a quarter of the locations, VE managers were unable to say if demand was met.

The Agency has recently entered into a standing offer to provide three-or-four season canvas tents that sit on a platform. These tents are equipped with beds, a dining area, and a stove for heating if required. It is anticipated that up to 50 units will be deployed over the next few years at up to 10 sites across the country.

Trails: As with camping, there are front- and back-country trails. Again, there is no up-to-date information on the number of trails managed by the Agency or length of trail networks. Staff in the ERVE Directorate estimated there are more than 2,500 km of front-country trails across the country, and more than 4,200 km of back-country trails (principally in parks), and more than 1,400 km of mountain-biking trails. In the financial system, more than 1,000 trail assets are inventoried including major trail bridges.

Demand for front-country walking/hiking trails was rated moderate or high at 77% of the 40 NPs/NMCAs where it was rated, and was being met at 81% of these locations. Demand for walking/hiking was rated at 27 NHS, and reported as moderate or high at 85% of these locations and as met at 84% of the locations. Demand for back-country trails was reported to be moderate or high at 75% of the NPs/NMCAs where it was rated (n=40). Most locations (71%) with some demand report that it is being met.

Trails may be used for a variety of purposes other than walking or hiking including cross-country skiing, cycling, mountain biking, and snowshoeing. VE managers' subjective ratings of demand for these activities are shown in Table 10.

Table 10. Minimal Supply and Reported Demand for Selected Trail Activities

		Minimal # known to have	# for which demand was rated	% for which demand was moderate or high	% where demand is met
Cross-country Skiing	NP/NMCA	25	40	50%	68%
	NHS	7	27	18%	75%
Cycling	NP/NMCA	23	40	42%	33%
	NHS	10	27	37%	47%
Mountain Biking	NP/NMCA	21	40	45%	33%
	NHS	3	27	30%	25%
Snowshoeing	NP/NMCA	29	40	37%	57%
	NHS	7	27	7%	25%

All of these trail-based activities are relatively common in NPs/NMCAs and infrequent in NHSs. Demand in NPs/NMCAs is met at two thirds of the locations for cross-country skiing and more than half for snowshoeing but at less than half for the cycling-based activities.

Not surprisingly, only about a third of the NHSs with some demand for these activities, characterized it as moderate or high. Again, demand is most likely to be met for cross-country skiing (i.e., 75% of the locations). Demand for the other activities is being met in less than half of the locations.

An estimated 29 NPs collect some form of trail-use data although it is not always collected consistently and many parks do not record data for all the trails within their boundaries, or consistently over several years. Fifteen of the NPs visited during the course of the evaluation were able to provide some trail-use data, generally in the form of the estimated numbers of "uses" during a year.[30] Recorded uses range from approximately 6,000 per year in Pacific Rim NP to several hundred thousand in each of Banff and Jasper NPs.

Changes in Demands and Agency Responses: In our survey of VE managers, the vast majority (85% for NPs and 79% for NHSs) indicated they had observed or been made aware of changes in visitor needs or preferences with regards to services, activities and facilities at their locations. Similarly, at a majority of locations they identified at least some activities or services where demand is not being met or where new services or facilities could be provided to better meet their visitors' needs.

VE managers identified a wide range of specific services or activities where demand was not being met or new demands were emerging (e.g., horseback riding, zip lines, paragliding, hiking, cross-country skiing, snow shoeing, geo-caching, mountain biking) at the locations they managed. General trends in demand include the previously identified interest in more "comfortable" experiences such as more serviced and/or pull though campsites as well as more shower facilities and the increasing demand for alternative accommodations. There is also an increasing demand for technology (e.g., on-site internet access, and podcast-based tours), and more infrastructure or activities for families and children (e.g., play structures, picnic tables that can be moved to accommodate a large family group).

Other suggestions from the VE managers' survey closely mirror qualitative data from the VIP surveys which includes suggestions for improving the quality of an existing aspect of the offer (e.g., the condition of roads or highways, better maintenance of washrooms, or improved garbage collection) as well as suggestions pointing to unmet demands for:

1) Information (e.g., both prior to a visit and on site)
2) Interpretation (e.g., a desire for more tours, interpretative panels, costumed staff, more access to the historic structures)
3) Elements of the VSO proper (e.g., more or better signage, trails, showers, electrical services, food services/snacks/beverages, children's activities, picnic tables with sun umbrellas, changes in operations).

In general, it is reported that visitors have higher expectations in terms of value for their dollar. They want highly knowledgeable personnel that provide personalized service and more dynamic interactive programming, which requires staff with theatre and presentation skills. Visitors expect offers to respond to local tourism competitor offerings.

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[30] As with person-visit data, counters track "uses" and not unique "users".

Decisions on if, and how, to respond to demands for improvements to the VSO or for new or additional services and activities are made at the local level within parameters that are set nationally. This reflects the Agency's philosophy that local managers are best able to identify needed improvements to the existing VSO. As one respondent noted, a manager is well aware if the un-serviced campsites are under occupied while there is a line up for serviced sites.

There is some evidence of the application of these tools at the local level. For example, two local Recreational and Special Event Assessments are reported on the Agency's intranet (e.g., for bouldering in a NP and for the provision of a kitchen shelter facility in a NHS). The VEA tool has been used more extensively, with 93 locations completing the assessment since 2005. The Agency targets approximately 25 assessments per year with the timing sequenced to correspond to the site's management planning cycle.

Our analysis of VEAs conducted at 25 locations between 2005 and 2009 identified 2,073 action items or an average of 77 per site. The ERVE Directorate has been tracking implementation of action items and reported that on average about two thirds of the listed items have been completed or are well underway. The remaining third depend on funding or stakeholders to be completed. Action items cover all the elements of the VE cycle with emphasis on getting more specific social science data and more strategic thinking in planning and product development (Market Positioning, Interpretation and Activities), as well as responding to the issues in VIP surveys regarding things that could be done to improve enjoyment of the next visit. The planned changes tend to be incremental rather than wholesale (i.e., gradual change to more serviced campsites over time, gradual introduction of more diversified accommodation offer). In some cases they are supported by national actions such as the creation of a national standing offer to acquire three- or four-season canvas tents.

Characteristics of Visitors: Table 11 shows data from the VIP surveys over three cycles (i.e., a VIP cycle is typically five years). The last cycle shown has only two years of data.

The VIP data suggested that the portion of Canadian visitors relative to American visitors in particular is increasing over the last decade. The portion of visits from each group varies significantly by system and location (e.g., recent analysis based on postal code data showed the percentage of Canadian visitors to particular locations during 2010 varied from 34% at Banff NP to 99% at Prince Albert NP).

The average age of visitors is over 50, with about 40% of visitors in the last cycle 55 years or older. NPs are reported to attract younger visitors compared to NHSs. The average length of time visitors spend on site has increased from the first cycle. Roughly 85% of visitors in the current cycle spend an hour or more at the locations compared to 69% in the first cycle. The average party size is just under three people and only about 20% of the parties include children.

Public opinion polling found that those classified as current visitors[31] tended to be better educated, with higher incomes (Decima 2009). They are more likely to be born in Canada

[31] A current visitor was defined as someone who reported visiting a PC administered site he or she could identify in the approximately 26 months prior to conducting the poll.

compared to non-visitors, and if not born in Canada to be a resident in Canada for longer periods than non-visitors.

Table 11. Visitor and Visit Characteristics by VIP Survey Waves

(%)	2000-2004	2005-2008	2009-2010
Origins			
Can	73	78	80
US	18	13	11
Other	8	10	9
Age			
16 and under		18	14
17-34		16	15
35-44		15	12
45-54		19	19
55-64		19	23
65+		13	17
Visit Type			
First	70	64	64
Repeat	30	36	36
Visit Hours			
> 1	31	13	12
1-3	59	72	63
3+	10	14	25
Party* includes			
Children			20
Adults only			56
Seniors			23

*All parties including children are counted under children, seniors include parties with seniors only or adults and seniors mixed.

Analysis based on postal code data conducted during summer 2010 at 36 locations (i.e., those with at least 900 valid postal codes) found that collectively the Agency sites attract visitors from virtually all EQ and PRIZM segments, although some groups are over or underrepresented relative to the portion of the segment in the population. The details of which segments are over or under represented are shown in Appendix G. In general, this data serves to confirm and elaborate on the basic pattern evident from analysis of demographic characteristics of visitors (i.e., older, less ethnically diverse, etc).

Data from all of these sources provides a consistent picture of the Agency's current visitor base at the aggregate level. As noted, there will be variation in the profile of visitors between particular locations. The consistent pattern of results led the Agency to conclude that the core visitor base stems from the 1970s, but the children of these families (and new Canadians) have yet to return in large numbers to compensate for the aging visitor base.[32] In response the Agency is seeking to identify market segments with long-term potential of growth and in particular is giving special consideration to engaging new Canadians, young families, young adults (18 – 34) and school-aged children.

SUMMARY: RELEVANCE

Providing a VSO continues to be relevant. A VSO is consistent with the Agency's long standing mandate to manage its sites for the use and enjoyment of Canadians and supports ensuring the places remain relevant, meaningful and that they are unimpaired for present and future generations. The offer contributes to the Whole of Government Framework outcomes of a clean and healthy environment, a vibrant Canadian culture and heritage and indirectly to strong economic growth.

The nature and scope of the VSO is not prescribed in legislation or policy. Instead, the offer

[32] See Parks Canada, *On Target: A Strategic Focus for External Relations and Visitor Experience* (January 2011). The presumption that visitors were on average younger in the 1970s is a logical hypothesis but there is no data on visitors' characteristics from the period that could be used to confirm the point.

follows logically from what is necessary to visit the places (i.e., roads, parking lots), as well as public expectations and historical precedent of what should be available in NPs and NHSs. PC's VSO is similar in most respects with the offer in other comparable national and provincial park systems.

The Agency has developed a number of formal and informal sources of information to assist managers at various levels in understanding general tourism trends, assessing current and changing demand, identifying visitor and non-visitor characteristics and visitor outcomes, and assessing and evaluating the VSO. There is evidence managers are aware of and using various tools and sources of information to plan, implement and adjust the VSO and a general sense that progress is being made in assessing the VSO and addressing current and changing needs.

Although progress is being made, field-level managers were looking for improved access to information with specific relevance to the particular sites they manage and indicated a need for more time, resources and expertise to use the information available. At the national level there is a desire for more standardization and consistency in data collection, better planning of new and renewed offer based on consistent visitor segmentations, and in expanding the range of data available nationally. The Agency is continuing to introduce and update its systems (e.g., point of sale systems and an updated camping reservation system) which will address some of the current limitations.

Potential markets for the kinds of services, activities and experiences offered by the Agency likely number in the millions. Aggregate use of PC sites as measured either through public opinion polling or on-site monitoring continues to be high with an estimated 7.3M adult Canadian visitors between 2007 and 2009 and an order of magnitude estimate of more than 20M visits per year. It is reasonable to conclude that the number of visits has been declining over the last ten years, although the extent of the decline is impossible to quantify given various sources of error in the estimates. National analysis of visitor characteristics suggests the population of users is older relative to the Canadian population and that the offer is not attracting families or new Canadians consistent with the representation of these groups in the population at large. This is widely viewed in the Agency as evidence of the declining relevance of the offer which has in turn sparked many initiatives to reverse the trend. The Agency is focusing on how to better engage and attract new Canadians, young families, young adults (18 – 34) and school-aged children.

While it is unreasonable for the Agency to maintain quantitative data on the supply of, and the demand for, all specific facilities, services, activities that constitute the VSO, it is striking that there is virtually no reliable and complete national-level quantitative information on almost all specific aspects of the offer including, in our view, significant and continuing gaps in the inventory and utilization of the core VSO facilities.

Subjective estimates of demand by VE managers suggested at least moderate demand for many of the core products and services at the sites they manage. There is consensus on some areas where demand is not being met and/or where demand is increasing. Responding to changes in demand is generally the responsibility of local management based on a general framework of permitted activities and various kinds of structured assessment processes. There is evidence from the VEA process in particular that the service offer at many locations has been evaluated since 2005 and many specific actions have been undertaken to improve the offer. Actions tend to focus on gradual improvements and expansion rather than large scale change.

4.2 PERFORMANCE

This section of the report is sub-divided into three parts. The first focuses on aspects of performance related to activities and outputs. The second relates to the achievement of the corporate targets. The third section focuses on the efficiency and economy of the VSO and the related issue of whether and to what extent the various outcomes can be attributed to the Agency's efforts.

4.2.1 Activities and Outputs

Question 4	Indicators
Is the program producing its desired outputs?	• Key informants report that they have the right services, facilities and activities to meet client needs. • Visitors are satisfied with the availability and quality of services, facilities and activities. • Facilities are in good repair.

Expectation: Required services, facilities and activities are developed and operating as intended or there are reasonable plans in place to address gaps in requirements.

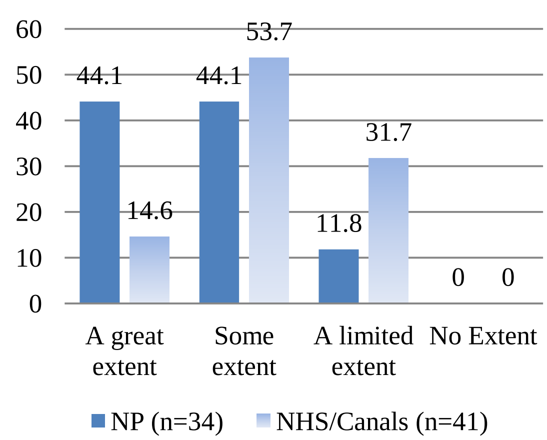
The assessment of outputs is structured based on the phases of the VE cycle. For each phase we review what we know about of the quantity, quality, and/or availability of outputs; key informant evaluations and visitor satisfaction with the outputs; and, evidence of plans or initiatives to address gaps.

4.2.1.1 Wishing and Planning

It is clear that the Agency is producing outputs that support wishing and planning, including publications and advertising, website trip planning information, and services to make trip planning easier (e.g., the toll-free national information service and the PC camping reservation service).

The Agency has asked visitors to indicate sources of information on the Agency and its locations. A national summary of this information (2009)[33] found that visitors typically use on average less than two sources. The most common sources were previous visits, and friends and family. This is followed by tourism information centres, travel books/brochures, PC website, other miscellaneous sources, other websites, and PC's toll free information line. Analysis of how useful different sources are suggests again that previous visits are most useful, followed by the PC website, family and friends, and tourism information centres. The results at individual locations vary somewhat from the overall pattern of results.

Figure 3. Perceived Extent of Visitors' Access to Trip Planning Information (%)



[33] VIP 2009: Sources of Information used to plan the visit to Parks Canada Locations –Summarized (June 2010) which summarized data from 14 participating locations and 16 surveys (e.g., visitors to the St Ours Canal in Quebec were divided into boat and land based visitors resulting in 16 separate analysis).

We asked VE managers to rate the extent to which they thought visitors have access to sufficient information and resources to plan their trip. The results are shown in Figure 3. Clearly, the extent of visitor access to information was rated more positively for NPs compared to NHSs. A majority of external stakeholders (n=30/44) interviewed throughout the evaluation were satisfied with the availability of pre-visit and promotional material.

Table 12. Percent Visitor Satisfaction with Availability of Pre-Visit Information

	2008	2009	2010
NPs/NMCAs	71	79	79
NHSs	74	80	78
Historic canals	75	75	n/a
NPs n=4,2,4;NHS n=10, 11,15, HC n=1,1,n/a, respectively for years shown			

Visitors' ratings of satisfaction with the availability of pre-visit information from VIP surveys for a three year period are shown in Table 12.

Although approximately 75% of visitors are satisfied or very satisfied with the availability of pre-visit information, it is worth noting that this percentage is relatively low compared to other ratings of satisfaction with outputs.

Key informants in National Office and Service Centres tended to believe that there was considerable room for improving pre-visit information in order to increase awareness of PC's sites. Advertizing and media campaigns are natural vehicles for raising awareness and increasing interest in travel to PC locations but as noted by management there are limitations in the government context on how much advertizing can be done as well as budget limitations within the Agency.

Almost all staff within the Agency identified the Agency's website as problematic (i.e., out of date and cumbersome to use) but also as a primary source of pre-visit planning information. In recognition of this issue, the Agency began a web renewal project which as of 2011 was in the process of developing a strategic plan and vision to redesign the site and setting up the governance of the project (i.e., a steering committee of cross-functional representatives). The target date for completion is scheduled for July 2012. However, the initial steps of this exercise are at this point delayed by approximately six months and it is unlikely that the original timelines will be met.

4.2.1.2 Travelling and Arriving

Traveling and arriving is supported by signage and publications. It ends when the visitor arrives at the location and in some cases pays a fee to enter the site. During the course of the evaluation no issues were identified with publications.

The extent of signage available, and its condition and utility are not well understood. A signage renewal program was launched in 2007 following the updating of the *Exterior Signage: Standards and Guidelines*. Responsibility for implementing signage renewal rests with the sites, with a signage planning team from National Office providing support. The asset inventory in the Agency's financial system lists 175 signs with an average age since recapitalization of 11 years (i.e., the youngest of any VSO asset category). However, this figure is misleading since it likely reports on groups or collections of signs rather than individual signs, and only records signs with an acquisition cost over $10K. ERVE staff estimate that the Agency owns, at minimum, about 70,000 signs.

On site key informants' views on the condition and quality of signage in creating a sense of arrival varied significantly by site. National Office key informants tend to believe there is a gap in signage and reception, feeling more could be done for guiding visitors to the site, providing more information on transportation options and, generally, improving signage to create a sense of welcome. The qualitative data from the VIP surveys suggests that improved signage is a common visitor concern among the minority of visitor who provide feedback.

We observed during site visits that entrance signage had typically been upgraded, making it easy to recognize that one is entering a site. However, there was substantial variation in the quality and newness of signage within the sites. In some parks, signs are small and difficult to read, even inaccurate, not having been updated for years. We also noted that in some locations it is particularly challenging to create a sense of arrival, despite the availability of signage (e.g., sites with no entrance kiosk generally and urban sites with unrestricted points of entry, such as sections of historic canals in urban areas and The Forks NHS in Winnipeg).

Table 13. Percent Satisfaction with Service Time at Entry

	2005	2006	2007
NPs	93	94	90
National Historic Sites	98	97	97
Historic Canals	89	n/a	86
NPs n=5,3,3;NHS n=12, 9,14, HC n=2,2,2, respectively for years shown			

Additional relevant data on arriving comes from the VIP, which in the past assessed visitors' satisfaction with wait times at entry. The data is shown in Table 13. The vast majority of visitors indicated they were satisfied with service time at entry. The slightly lower results for canals may reflect the fact that entry in this case means waiting for locks to open and close for a boat to transit the canal system and/or waterway.

4.2.1.3 On Site Outputs

On site outputs include the quality/condition of the infrastructure supporting the VSO, visitor perceptions of the quality of interactions with staff while they are on-site, quality of recreational activities available, and visitors' overall assessments of the quality of assets and services. Results relevant to the interpretation program, a part of the bigger "offer of service", are **not** reviewed.

Assets: As noted previously the Agency's asset information is far from perfect. We assembled the "best available" data recognizing that this may not accurately reflect the true state of VSO assets within the Agency. We drew on data from both the financial and asset management systems to create a general picture of VSO assets shown in Table 14. From the financial system we were able to identify the date on which assets were capitalized (i.e., the date on which amortization is applied for accounting purposes). We used this as a proxy indicator of the acquisition date of the assets and the likely age of the assets. The AMS system provided a profile of condition of the assets rated as good, fair or poor.[34]

[34] Assets with a "closed" rating or which do not have a condition rating were excluded from the table.

Table 14. Average Age and Condition Ratings for Classes of VSO Assets

		FROM SAP				FROM AMS			
Category	**Type**	**Count of Asset**	**Average of Capitalized Year**	**Average Age - Capitalization**	**Useful life In years**	**Count of Assets**	**Good**	**Fair**	**Poor**
Bridges	Major trail	142	1984	27	25-50	170	32%	42%	15%
	Road	209	1956	55		102	48%	26%	25%
Buildings	Public use[35]	2083	1964	47	25-50	1777	42%	44%	12%
Grounds, monuments and plaques, grounds,	Camping grounds	449	1969	42		615	28%	48%	6%
	Day-use grounds	542	1970	41		441	36%	50%	13%
	Golf course grounds	13	1967	44		7	14%	86%	0%
	Parking areas	304	1972	39		217	37%	56%	7%
	Signs	172	2000	11		69	32%	45%	17%
	Trails	893	1967	44		854	44%	40%	14%
Marine	Locks and marine rails	146	1908	103	25-80	17	71%	24%	6%
	Wharves and docks	249	1970	41		195	46%	46%	6%
Roads	Access roads	350	1966	45	40	274	41%	33%	25%
	Rural roads	158	1962	49		108	36%	31%	32%
	Urban roads	132	1962	49		18	22%	56%	22%
Total		**5,842**				**4,764**	**40%**	**44%**	**13%**
Average			**1966**	**45**					

With respect to the age of the assets, with some exceptions (i.e., trail bridges and signage, and locks and marine facilities) the majority of these VSO assets were acquired in the late 1960s and early 1970s (i.e., average acquisition date is 1966 and average age is 45 years).[36] On average, assets are at the latter part of their original useful life. This of course is not the whole story since many of the assets would have been subject to some form of recapitalization or repair to extend

35 The draft Agency Five-Year Investment Plan reports the condition profile of 1,927 public use buildings managed by the Agency and recorded in the Directory of Federal Real Property, as only available information regarding visitor facilities. The reported profile is 36% good condition, 47% fair condition, 13% poor condition and 3% closed. This is similar to, but not identical with the asset count and condition profile for these assets shown in the Table.

36 Removing the locks and marine facilities which were acquired on average more than a century ago, does not change the results significantly i.e., 1970 as average date of acquisition for remaining assets and 41 years for average age.

their life. Condition ratings can provide some indication of the current state of the assets although as noted this data is considered unreliable. The condition profile of the assets suggests 53% of the assets are in fair or poor condition with the portion of good, fair and poor assets varying by type of asset.

In addition to the system data, we asked VE managers to rate the condition of the VSO assets in their field units. Just over a quarter of the respondents (27%) rated their assets as being in good condition, 28% in fair condition, and 20% in poor condition. The remaining 26% were classified as a mix of good and fair, fair and poor, or good and poor. While not technical assessments of condition, these ratings do suggest that assets are seen to be in poorer condition than is suggested by the flawed data in the AMS.

The deterioration of assets of all kinds, as well as the visitor service assets, is widely seen as a problem by PC staff at all levels of the organization (i.e., in the Field Units, Service Centres and National Office). Staff in the field indicated that there is insufficient funding for infrastructure, with the latest large scale infrastructure renewal effort happening 20 or more years ago. This has created a culture of "patching up" instead of replacement and some infrastructure has been "left to go entirely." Some funding for assets has been made available recently (i.e., Economic Action Plan, Budget '05, Signage Renewal Program) but it is widely seen as insufficient relative to the demand for replacement and upgrading.

In contrast to perceptions within the Agency, visitors are generally satisfied or very satisfied with the condition of facilities they encounter on site. Relevant data from the VIP is shown in Table 15. Concern with the condition of various assets does emerge as a theme in open-ended comments to questions on the VIP surveys and it is reported that feedback from comment cards collected on site often flags the condition of assets (see *Evaluation of the Asset Management Program 2009*, pages 60-61). The qualitative feedback is of course provided by the sub-set of visitors who are motivated to provide comments and as such are less likely to be representative of visitors as a whole than the quantitative survey results which are in principle designed expressly to be representative.

Table 15. Percent Visitor Satisfaction with Condition of Facilities

	2008	2009	2010
NP/NMCA	78	85	86
NHSs	94	96	96
Canals	95	95	Na

NPs n=4,2,4;NHS n=10, 11,15, HC n=1,1,n/a, respectively for years shown

It is not certain why staff has a generally more negative view of the condition of the facilities than visitors although it appears reasonable to assume that staff evaluations represent a more informed view of the real condition of the assets (i.e., a behind the scenes perspective) compared to visitors.

In summary, facilities and other assets are central to the VSO. The Agency has limited and poor quality data on both the supply and condition of the majority of its assets. Subjective impressions of staff point to a major concern with the condition of the VSO assets in particular, although this is not necessarily shared by the majority of visitors. The Agency has recognized the importance of the asset base for its program delivery and has identified asset management as a key risk in its corporate risk profile. It has committed to a number of actions to address issues identified in a 2009 evaluation of the asset management program (i.e., with a revised and updated management response prepared in 2011) and continues to make slow and limited progress in addressing the identified issues. In the meantime, the Agency has been stressing the need to move away from "bricks and mortar" in its delivery of the VSO and focus on less expensive and more flexible approaches. Given the limited information on assets it is impossible to know if and to what extent the desired shift away from bricks and mortar in the VSO is occurring on the ground.

Staff: Staff interactions with visitors are key activities throughout the VSO. Results for a few example dimensions of staff service assessed through the VIP are shown in Table 16. Average ratings tend to be high for all dimensions. Ratings are highest for courtesy (close to 100% satisfied and very satisfied for all locations). The "very satisfied" ratings are higher for visitors to NHSs in all the categories and significantly so for knowledge. This may be due to several factors including differences in visitors between systems and/or the likely greater level of interaction with PCA staff at NHSs.

Table 16. Average Percentage Satisfaction With Dimensions of Staff Service

Staff Courtesy	2008	2009	2010
NPs	98	98	96
National Historic Sites	98	99	99
Historic Canals	97	98	n/a
Conveying Knowledge			
NPs	94	90	87
National Historic Sites	96	97	95
Historic Canals	96	93	n/a
Responding to complaints			
NPs	NA	88	88
National Historic Sites		98	98
Historic Canals		97	n/a
Demonstrating passion for the place			
NPs	NA	88	83
National Historic Sites		96	95
Historic Canals		91	n/a

Notes: Some variation in overall average levels of satisfaction by year is likely due to the fact that different sites administer the survey each year. In some cases as well the wording of particular questions may change (e.g., the 2009 question on staff knowledge compared to the question from the previous year)

NPs n=4,2,4;NHS n=10, 11,15, HC n=1,1,n/a, respectively for years shown

Overall Ratings of Availability and Quality of Service and Activities: As part of the VIP visitors have been asked to rate their satisfaction with the overall availability and quality of both services and activities. Ratings of these aspects tend to be highly correlated (r=.78 for availability and quality of service and r=.81 for availability and quality of activities) suggesting they may not be measuring distinct concepts. On average over the last five years the percent of visitors satisfied or very satisfied with the overall quality of service has ranged from 88% at NPs, to 95% at NHS.[37]

4.2.1.4 Departing and Remembering

Existing activities and outputs in this phase of the VE cycle largely consist of selling of merchandise, for the most part in gift shops run by third party organization (e.g. friends

37 A series of public opinion surveys examining service quality of municipal, provincial and national government services (Citizen First 1998, 2000, 2003, 2005 and 2008) have all found that parks type services (i.e., municipal park and recreation programs, provincial parks and campgrounds and NPs) all score well above the average government services on ratings of service quality (i.e., a scale of 1 to 100 where 100 equals highest quality) and in the case of NPs have scored in the top four federal services across surveys.

organizations). All of the National Office representatives and most representatives from Service Centres reported that little is done with respect to departure and remembering; a few noted that it is not even part of the planning process.

VE managers were asked to rate the extent to which a site adequately addressed visitors' departure and faciliated remembering the experience for the visitor. Results differ by system. For NPs about 32% of respondents thought the site adequately addressed departure and 42% thought it facilitated remembering the experiences for the visitor. In NHSs the comparable figures are 56% and 63% respectively.

According to respondents in National Office, the Agency is developing a merchandising program to develop a PC-branded line of souvenirs (gifts, clothing, etc.). It was felt that providing visitors with something to take away with them is an important aspect of service delivery and instils a sense of pride in visitors about where they have been.

4.2.2 Outcomes

Question 5	Indicators
Is the program effective in achieving its desired results for visitor satisfaction and enjoyment, meaningfulness of place, and connectedness to place?	• Estimated number of visits. • % of visitors who enjoy, are satisfied and find their visit meaningful. • Clarity and distinctiveness of outcomes.

In this section we review the extent to which corporate targets have been, or are likely to be, achieved based on available data collected by the Agency.

Person-Visits Targets: Targeting an increase in the number of visits is relatively common in heritage protection organizations (e.g., in the US NPS, and some provincial park organizations within Canada) although there are those who argue against focussing on the number of visits as an indicator of success.[38]

The Agency's target is to achieve 22.4 million visits at PC administered places by March 2015 compared to a baseline of approximately 20.8 M visits in 2008-2009 or about an 8% increase from the baseline. As noted 32 field units also have targets to increase visits in support of the overall corporate target. The field unit targets are in turn based on notional increases in visits at 127 locations (i.e., 40 NPs, 81 NHSs, and 7 Historic Canals).

Targeted increases in the number of person-visits across the field units range from 22 to more than 214,000 representing between 7% and 17% increases over the field units respective baseline attendance. Targeted increases by regions, field units or systems are proportional to the distribution of visits in the 2008-2009 baseline-year. That is, if a field unit, region or system accounted for a given percentage of total visits in the baseline year it also accounts for the same

38 Shultis and More (2011) for example argue that the focus on increasing the number of visits in both the US and Canadian parks system is driven largely by an interest within the bureaucracy of securing public and political support for the organizations (i.e., continued appropriations) and that potential benefits of fewer visits (i.e., preservation values) are systematically ignored in favour of a "neoliberal political" agenda of smaller government and more reliance of user fees.

percentage of the total number visits in the final target.[39] In effect, the field unit targets will result in growing the patterns of visits that existed in 2008-2009 rather than a change in the overall pattern of visits.

The target does not explicitly align with the strategic objective of attracting different types of visitors as reviewed in the section on existing visitor characteristics (i.e., younger visitors, families and children, new Canadians) although it is generally assumed in the Agency that growing the number of visits will mean attracting more visitors from underrepresented segments of the population and many of the Agency's strategies for increasing visits are aimed at expanding the base of visitors. At present though, any visit counts toward meeting the target regardless of the characteristics of the visitor.

The estimated total number of person-visits for several years was shown in Table 7. Between the 2008-2009 baseline year and 2010-2011, the most current year for which visit data is available, the total number of estimated person-visits declined by approximately 560,000. The results from 2010-2011 are the lowest for the last nine years, assuming the precise estimates are accurate.

Compared to the 2008-2009 baseline year we found that 22 of the 32 field units registered an increase in visits in 2010-2011 (i.e., ranging from increases of around 600 to over 81,000 person-visits). Eleven of the field units (33%) actually met their March 2015 target based on recorded attendance in 2010-2011. Two NHSs (i.e., Fortifications of Quebec and the Rideau Canal) collectively accounted for approximately 62% of the overall decline in visits relative to the baseline year with decreases in both cases exceeding 430,000.[40] Importantly, the significant decrease in estimated visits at the Rideau Canal NHS was associated with an updating of the methods of estimating visits, so as noted previously the significance of the change is unclear.

The overall pattern is therefore of many individual sites and field units increasing their estimated number of person-visits since 2008-2009. A continued overall decline in visits at the aggregate-level due in large part to significant declines in visits at some heavily used sites. In some cases it is unclear to what extent the decline reflects real change or an artefact of changing estimation methods. Given the uncertainty in the estimates it is simply too early to conclude to what extent the Agency will meet its March 2015 visit target.

Canadians Personal Connection to PC Administered Places: At the strategic outcome level of the PAA, the Agency has set a target that 65% of Canadians report a personal connection to PC administered places by March 2014. Personal connection is measured based on responses to several questions on public opinion surveys as shown in the text box below. If a person meets all the criteria in the definition they are classified as having a personal connection to PC administered places, so that by definition a person either has or does not have a personal connection. (i.e., there is no scale of the degree of connection).

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39 For example, visits in Eastern Canada accounted for 54% of the total visits in the baseline year, and targeted visits to Eastern Canada locations will account for 54% of the overall visit target.

40 A comparable analysis at for the 127 locations with notional targets showed 72 (57%) with increases in attendance in 2010-2011 compared to 2008-2009. A total of 41 (32%) met or exceeded their notional March 2015 targets in 2010-2011. The results should be treated cautiously given the various errors in the estimation noted previously.

The Agency first reported results relevant to the target in its 2010-2011 Departmental Performance Report where it was noted that approximately 55% of Canadians have a sense of connection with Canada's national heritage places. The 2009 poll result provides a baseline against which progress to achieving the overall corporate target can be measured. A follow-up poll is being considered for early 2012.

Personal Connection to PC Administered Places

A person is classified as having a connection if:

1. They have visited a PC site recently, **or** they have a special favourite PC park or historic site **or** they are definitely planning on visiting a NP and/or NHS in the next two years.
2. **And,** they agree or strongly agree they are interested in learning more about PC sites, **and** they strongly agree that they would miss NPs or NHSs if gone, **and** that the NP/NHSs are important to them even if they don't visit.

Enjoyment, Satisfaction, Meaningfulness of Place, and Personal Connection among Visitors:

Expectations:

- 90% of visitors enjoy their visit.
- 50% of visitors are very satisfied and 90% are satisfied or very satisfied.
- On average, 85% of visitors at surveyed locations consider the place meaningful to them.

The measurement of visitor satisfaction is common among heritage tourism providers (e.g., in the US NPS, in several Australian Parks jurisdictions, in New Zealand, and in other provincial parks jurisdictions in Canada including those in British Columbia, Alberta, Saskatchewan, Quebec and Ontario). In contrast, we did not identify other examples of organizations that measure enjoyment or meaningfulness of place as part of their public reporting programs.

The US NPS, some Australian state parks, and the Alberta parks system, all share the 90% visitor satisfaction target with the Agency. Public reports all show the targets are achieved or nearly achieved (i.e., 89% satisfaction) at the aggregate level over several years in these systems (individual location results vary from this average). Some jurisdictions, for example BC, do not report overall visit satisfaction but focus on specific aspects of the offer (i.e., satisfaction with grounds or with day use areas with targets in the +/- 70% range).

Performance in the Agency is judged based on the percentage of VIP survey respondents who report 1) they enjoyed their visit somewhat or a lot, 2) they were satisfied or very satisfied with the visit, and 3) who strongly or somewhat agree that the place visited is meaningful to them.

Conclusions about whether targets are achieved can be based on two types of analysis: the average percentage of visitors who enjoy or are satisfied across all sites, within a given year or across two or more years, or the percentage of sites surveyed in any one year that met the target. Obtaining an average rating across surveyed sites that meets or exceeds the targeted level (e.g., 90%) is more easily achieved than having all locations meet the target level (i.e., average rating can exceed 90% while one or more do not meet the target). The targets apply to all of the surveyed locations regardless of whether it is a NP, NHS or historic canal.

Table 17 shows the average ratings across the surveyed sites for three years.[41] Whether viewed across or within systems, average satisfaction and enjoyment has exceeded the current 90%

[41] As noted (page 2) there is a second target that 50% of the visitors will be "very" satisfied based on the assumption that these visitors were the most loyal users and could serve as program ambassadors. To simplify

target level in all but one case (i.e., NPs/NMCAs in 2008 when the target was still 85% satisfaction), although sometimes results at specific locations fall short of the target.

Table 17. Results of Outcome Indicators

	Percent of Visitors		
	2008	2009	2010
Who Enjoyed Their Visit			
NP/NMCA	91	93	92
NHS	94	96	97
Historic Canals	98	92	n/a
Who Are Satisfied With their Visit			
NP/NMCA	87	92	90
NHS	95	96	97
Historic Canals	98	95	n/a
Who Consider the Site Meaningful			
NP/NMCA	90	82	76
NHS	85	79	86
Historic Canals	87	70	n/a

The target for meaningfulness of place was introduced in 2008 and met in that year but has not been met since based on average ratings across surveyed sites. The wording of the question assessing meaningfulness of place changed between the 2008 and 2009 administrations of the visitor surveys with the new wording retained for the 2010 survey. Differences in results over years may reflect either/or both the changes in wording or the fact that different groups of sites participate in the survey each year.

Many locations (i.e. 9 NPs/NMCAs and 34 NHSs) have conducted more than one visitor survey between 2000 and 2009. Over survey administrations, the change in the percentage of respondents who are satisfied or very satisfied with their overall visit is minimal (i.e., +/- 3%) although there are exceptions ranging from an increase of 11% for an NHS to a decrease of 8% in a NP. In general, we concluded that ratings on this key outcome measure are stable over time.[42]

Clarity and Distinctiveness of Outcomes: During site visits, respondents expressed some confusion and frustration with the outcome measures, including the potential overlap between enjoyment and satisfaction and questioned whether concepts of "meaningfulness of place", or "personal connection" could really be measured quantitatively (i.e., the Agency was trying to measure the immeasurable).

Given this and the consistently high percentage of visitors who indicate enjoyment of and satisfaction with their visits and that the place is meaningful to them, it is reasonable to ask whether these indicators are measuring distinct results. To test this we merged the data for a sample of seven VIP Surveys from 2009, and examined the correlations between a variety of measures of overall enjoyment, satisfaction and meaningfulness of place as well as satisfaction with specific aspects of the infrastructure, products, services and staff. If enjoyment and satisfaction are distinct results we would expect them to be at best moderately correlated with each other and have a distinct pattern of correlations with other indicators. If this is not the case, we would conclude that the measures of the enjoyment and satisfaction are assessing different

the presentation we have not provided data on this target, which largely mirrors the results for the 90%/85% targets.

42 The Agency has produced similar results comparing the average percentage of overall visit satisfaction over three waves of the VIP program (i.e., 2000-2004, 2005-2008 and 2009-2010) and found that average satisfaction ratings across NPs and NHSs combined were identical at 95% for each wave the survey administration. Average ratings per cycle were slightly higher in NHSs (96% to 97%) compared to NPs (90% to 92%).

aspects of the visitor experience. The same reasoning applies to ratings of meaningfulness of place.

The observed correlations supported the claim that the indicator of meaningfulness of place is measuring something distinct from either enjoyment or satisfaction with a visit (i.e., r=.45 and .35 respectively). The correlation between ratings of enjoyment and satisfaction was higher (r=.66) although not high enough to reject the idea that they measure different aspects of the visitor experience. The pattern of correlations between the three outcomes and ratings of satisfaction with specific aspects of the VSO (facilities, staff, quantity or quality of services and activities) is also consistent with the claim that the outcomes are distinct (i.e., ratings of meaningfulness of places are only weakly related to ratings of specific aspects of the VSO, while ratings of overall visit satisfaction have the strongest associations with ratings of satisfaction with specific aspects of the VSO).

Based on the pattern of results in our sample, and some indirect confirmation from the Agency's own analysis of VIP data[43], we concluded that the outcomes are measuring distinct aspects of the visitor experience although given the size and pattern of correlations between rating of enjoyment and satisfaction, more rigorous analysis of a larger data set is warranted.

OVERALL FINDING: EFFECTIVENESS

There is considerable qualitative evidence from documents, observation and survey findings that relevant activities occur and outputs are produced. Quantification of the number and distribution of inputs, activities and outputs is mostly absent as discussed in the relevance section.

Evaluations of the availability and quality of the services and outputs vary somewhat between different sources although the majority of all types of respondents tend to be positive. Within the Agency, respondents tended to identify gaps in pre-visit information (wishing and planning), signage (travelling and arriving), the quality of infrastructure (visiting), and a lack of activities and outputs to support departing and remembering. Some of these issues are being actively addressed through web and signage renewal programs and the development of a merchandizing program.

The percentage of visitors expressing satisfaction with many dimensions of the Agency's services, activities or with Agency staff is very high across almost all dimensions assessed through the VIP. This includes the overall availability and quality of services/activities, wait times at entry, the condition of assets, and all aspects of staff service. The lowest levels of satisfaction (i.e., approximately 75% visitors satisfied) are reserved for the availability of pre-trip information.

On many, but not all, of these dimensions, the percentage of satisfied visitors tends to be consistently lower in NPs/NMCAs compared to NHS (i.e., the former achieve 85% to 90% satisfaction compared to 95% plus in NHSs). It is not clear why this should be the case although

43 Results from stepwise multiple regression analysis of predictors of the outcomes at 19 locations using 2009 VIP data imply the same underlying pattern of correlations within the outcome indicators and between these and ratings of specific aspects of the VSO. The relevance of this research for the distinctiveness of the outcomes was suggested by social scientists in National Office.

it was speculated that this may be due in part to visitors having less frequent staff contact at NPs compared to NHSs.

Staff and visitors differ in their views on the condition of facilities (assets). The vast majority of visitors (90% +) on average rate the condition of VSO assets as satisfactory, although asset issues are sometimes identified through qualitative feedback solicited from visitors. Agency staff on the other hand reports a variety of assets in poor or deteriorating condition, consistent with data on asset conditions and the average age of the assets relative to their normal life cycles. The Agency has clearly identified asset management as a key risk for the organization in its Corporate Risk Profile.

Regarding the corporate target to increase overall use of PC administered sites, we found that while many individual sites and field units have reported increased person-visits since 2008-2009, the aggregate number of visits continued to decline due in large part to significant declines in visits at some heavily used sites. At this point, it is simply too early to conclude to what extent the gains reported at various units since 2008-2009 can be sustained and the decreases at others reversed by March 2015 in order to meet the Agency's corporate target.

We concluded that the outcome indicators of overall satisfaction with visit, enjoyment of a visit, and meaningfulness of place are indeed separate and distinct outcomes, although more work is warranted to replicate and confirm these results, especially with respect to enjoyment and satisfaction. The corporate targets that 90% or more of visitors will enjoy and be satisfied with their visits are typically met averaged across surveyed locations; although individual locations do not always meet the target. The target that on average 85% of visitors to particular locations will rate the place as meaningful has not yet been met, although the average result over the last three years is approaching the targeted level.

4.2.3 Economy, Efficiency and Attribution of Results

A program is **efficient** to the extent a greater level of output is produced with the same level of input, or a lower level of input is used to produce the same level of output. The level of input and output could be increases or decreases in quantity, quality, or both. A program **is economical** to the extent the cost of resources used approximates the minimum amount needed to achieve expected outcomes (*TB Policy on Evaluation* 2009).

In the case of the VSO, inputs consist of the expenditures, staff and assets. Outputs include information, decisions, plans, as well as maintained and operated assets and delivered services and activities on the ground. Outcomes are the uptake of the service offer (visits) and visitor enjoyment, satisfaction and connection to place.

Attribution concerns the causes of, or influences on, a program's outcomes of interest and in particular the extent to which the outcomes can be attributed to the program's activities. Questions of attribution are logically related to the economy of a program since economy presumes a relationship between program inputs/outputs and outcomes.

Question 6	Indicators
Is the program efficient in producing outputs (services, facilities and activities) and economical with respect to the reach of its offer and producing targeted results?	• Extent management has used available flexibilities to encourage efficient or economical operation relative to demand and quality considerations. • Prices are comparable to other similar offers and satisfaction with "value for money" is high. • Extent to which level of expenditures (inputs) is proportional to others who provide similar levels of service (outputs), and extent to which inputs/outputs are proportional to others who achieve similar results.

Examples of Costs Saving or Cost Avoidance

Management is able to provide many examples of actions taken to either decrease or avoid costs in the VSO. For example, management reported the Agency saved millions from tapping into existing sources of market research (EQ, PRIZM) rather than conducting its own individual site-based research to identify who is visiting, barriers and interests.

The new point of sale system is explicitly intended to increase the efficiency of revenue management (i.e., by eliminating duplication of data entry and reconciliation) and to make the information on revenue timelier (the link between point of sale and SAP systems). It will also provide a more efficient way to collect visitor information on a continuous basis for marketing and planning the offer. A new Agency data standard will facilitate comparisons between local, regional, and national trends.

Changes to the operation of the call centre over time are another example of modifications to the program delivery driven largely by considerations of efficiency and economy of operations. In its initial configuration the call centre was contracted to a third party who provided both general information and camping reservations. Following a period of implementation, the Agency decided to take over the information provision aspect of the operations to ensure a better quality of service in both official languages, better trip planning information, as well as improved general information to better reflect the PC brand. Management reports that the call centre answers approximately 30% more calls for the same cost as the former third-party operator. The campground reservation aspect of the call centre was retained by the third party given their greater efficiency in hiring to meet peak period demands, and a lower overall cost compared to what the Agency could provide internally.

Management Flexibilities, Constraints and Decision-Making

Management has a variety of flexibilities and constraints in operating the VSO that contribute to or inhibit the economic and efficient operation of the program. These include:

- Whether or not to have a VSO at a particular location and on the nature and scope of the offer. In practice, the Agency identifies four service level categories (SLC) in NPs/NMCAs and five in NHS as set out in the Agency's *User Fees and Revenue Management Policy*.[44] Table 18 shows the profile of the number and percent of locations by level. For NPs level 1 is defined as a NP without a basic level of front-country visitor services (e.g., Nahanni National Park Reserve) while level four is a park with significant visitor use, offering multi-day visitor experiences with year-round road networks and visitor activities as well as extensive visitor services, heritage presentation and back-country opportunities (e.g., Banff NP). For NHSs, a level one site provides basic heritage presentation or visitor services (e.g., S.S. Klondike NHS) while a level five site has enhanced day-long heritage presentation experiences through tours and animation, with extensive historic grounds and built heritage (e.g., Fortress of Louisbourg NHS).

  Table 18. NPs and NHSs by Service Category Level

	NP		NHS	
	N	**%**	**N**	**%**
Level 5	N/A	N/A	2	1.2%
Level 4	5	11.9%	3	1.8%
Level 3	14	33.3%	17	10.2%
Level 2	7	16.7%	37	22.2%
Level 1	16	38.1%	108	64.7%
Total	**42**		**167**	

  Source: National Pricing Compendium, 2010

  Levels are linked to pricing so that higher levels are associated with higher entry fees. Levels were largely set at the time the revenue policy was put in place and have not changed since then. We were told a few NPs are interested in changing their level upward to generate more revenue.

- There is also some flexibility in structuring the operating season and the hours of operation of particular products and services. Table 19 shows the number of NPs/NMCAs and NHSs by different operating seasons. The majority of NPs/NMCAs are open year round while the majority of NHSs are only open from May to October.

  Table 19. Percentage of Sites by Season of Operation

	Year round	May to Aug	May to Oct	Other
NP/NMCA	60	5	23	14
NHS	16	13	65	6

  Source: Survey of VE Managers (2010)

[44] See Appendix J for a description of the service category levels.

- Within an operating season, management has flexibility over how assets are managed (e.g. opening certain campgrounds at specific times to meet high levels of demand or opening only certain loops within a larger campground to render camping operations more efficient). Management may also set hours of operation for services, visitor centres, gate booths, and for other products and services. There is no national level information on these variations on the offer within an operating season.

- Within limits set by collective agreements and the *Canada Labour Code*[45], there are flexibilities in the composition of the work force (i.e., the mix of full time, seasonal, term and student employees) to deliver the program. Table 20 shows the distribution of employees by type for one year.

Table 20. VSO and Interpretation FTEs by Type of Employee (2010-11)

Type	VSO	Interpretation
Indeterminate	438	170
Seasonal	482	165
Student	128	86
Term	269	98
Total	**1317**	**520**

Source: NO Finance Directorate (2011)

- Salaries and benefits are set in collective agreements or in the case of students by wage rates set out by TB. There is limited evidence from the case study comparing salaries for similar positions at La Maurice NP and provincial parks in the SÉPAQ that wage rates (salaries) are higher in PCA. For example, an employee working at the visitor centre will earn between $19.75 and $22.33 at PC and between $12.16 and $17.31 at SÉPAQ. We were unable to generate data for others jurisdictions with a similar service offer.

- The Agency has also made the choice to invest significantly in the quality of the program staff through training in quality visitor experience. In 2009 and 2010, 180 field staff trainers were trained who in turn provided training to over 4,600 staff in the field (i.e., this includes both VSO and other staff).

- There is flexibility in whether and how to continue to maintain existing infrastructure, facilities, programs or services. With respect to the asset base, the Agency's *Capital Planning Process Directive (2005)* specifies that assets are to be designed for typical rather than peak demand and in a manner that minimizes net increase in the asset inventory which in theory should contribute to efficiency and economy of operations. In addition, under the Parks Canada Asset Management Directive (2009) investments are to be based on an understanding of client needs i.e., demand and potential use.[46] In practice, it is difficult or impossible to know given the deficiencies in the Agency's asset management systems, and a lack of utilization data on particular assets or services, whether these are in fact designed for "typical use" and to what extent management has used its flexibilities to modify assets or dispose of unneeded assets due to lack of demand or other factors.

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45 For example, the Canada Labour Code and Canada Occupational Health and Safety Regulations specify minimum personnel requirements where there is a risk of drowning. http://laws-lois.justice.gc.ca/eng/regulations/SOR-86-304/index.html

46 Specifically, the directive requires that managers "Assess user/visitor needs and expectations for visitor facilities and educational assets through surveys, focus groups and other tools; determine how current facilities respond to current and anticipated future requirements of users/visitors; and if required, identify actions to adapt existing facilities to meet user/visitor requirements including removal if no longer required and replacement by new innovative facilities."

- The management of asset investments is constrained by the TB *Common Services Policy (2006)* which mandates PWGSC as the project manager for investments over a specified level. Managers often report that the PWGSC costs for project management are uneconomical compared to directly accessing services from the private sector.

Pricing and Revenue Generation

The VSO is supported by both parliamentary appropriations and revenue generated from fees paid by users of the offer.

Under the Agency's *User Fees and Revenue Management Policy*, prices are set and revenue recovered for products and services that are intended to provide personal and/or commercial benefit with a goal of recovering at least a part of the costs of providing these services. The policy states that "prices for personal benefit services will be set to recover as much of the associated costs as possible without curtailing use by a significant number of people or compromising policy objectives established by Executive Board." Prices are set based on three factors: value, comparability and cost of services. That is, the Agency is not aiming to be the lowest cost provider but to set a price taking into account both the quality of the experience offered and other factors. The majority of VSO services are subject to pricing with a goal of partial or full cost recovery (e.g., camping, fishing, firewood, golf, hot pools and swimming pools, mooring, parking, tennis).

Expectation: Prices will be comparable to other providers of similar services and not represent a barrier to the use of the service offer.

In addition to pricing of specific aspects of the VSO service offer, the Agency also charges entry fees which serve to cover costs of private benefits that are not easily captured at point of consumption (e.g., VSO day-use facilities; visitor reception, orientation and basic information; some basic heritage presentation programs; public safety; and public conveniences).

Consistent with the practices of other service providers, Agency management has established differential pricing within a product/service category (i.e., entry fees vary depending on the service level category of the place, camping fees vary with the level of services/amenities in the site). It also has implemented a variety of package prices (i.e., families) and discounts for specific groups (e.g., seniors). Fees have been frozen for the general public since the fiscal year 2008-2009 and will remain at the same level until April 1st, 2012 at the very least.

In government, management's ability to modify fees in response to changes in markets is typically constrained given requirements for consultation with affected groups, advance notice of changes, and a requirement to table fee changes in parliament. However, management did obtain delegated authority in June 2010 to offer price incentives for promotions, packaging, seasonal discounts and partnering price incentives, with a stated goal to increase park and site attendance. The delegation was piloted in the 2010 operating season, and is being broadly applied in the 2011 season. Under the instrument, the VPs Operations, Eastern Canada or Western and Northern Canada, have the authority to administratively approve **local and regional** price incentives and packages, and the CEO can administratively approve **national** price incentives and packages. Examples of the way the tool has been used include discounting prices on non-peak periods (i.e., to provide a promotional offer on Mondays and Tuesdays); package prices for entry, camping and firewood; reduced camping fees for extended stays; and reduced fees for entry to two NHSs when purchased together.

The Agency has also introduced new passes (e.g., My Parks Pass given to school age children, ambassador pass for local visitors when they bring paying family or friends) as well as making the existing national pass available for sale on line, to increase visits.

Table 21. Comparison of User Fees in Canadian Provincial and NPs

Location	Per Person Entry / Day Use	Camping – Unserviced	Camping – Serviced
Parks Canada	$6-10	$5-$22*	$25-$38*
BC	$0-$3	$16-24	$24-30
AB	$0	$5-23	$17-40
SK	$7	$13-17	$22-26
MB	$0 (until 2011)	$9.45-$16.80	$13.65- $24.15
ON	$10-18	$27.75-$37.75	$34.25-$42.75
QC	$3.50	$17-20	$20-38
NB	$7	$11-25	$20-$37
NS	$0-$5	$18	$24-31
PEI	$0	$23-25	$26-30
NL	$5	$0	$15-23

*Fees vary significantly from park to park
** US NPS Parks prices vary significantly; day use fees are generally on a per car basis.
Source: http://www.canadatrails.ca (recreational resource that has compiled lists of the various provincial and NP user fees)

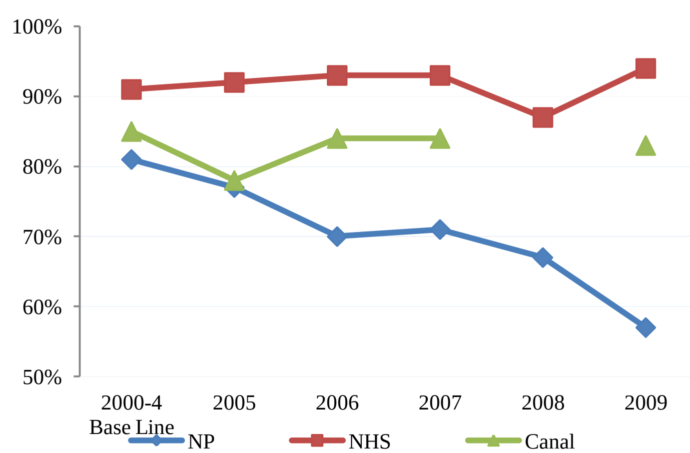
The range of entry and camping fees for the Agency's NPs and for Provincial Park systems are shown in Table 21. Many of the provincial park systems do not charge an entry fee, or charge only a nominal fee or parking fee. PC entry fees are on the higher end compared to those provincial parks which do charge a fee. Camping fees for PC campgrounds are comparable to Provincial Park camping fees.[47]

Perceived Value for Money

Expectation: Visitors are satisfied with "value for

Visitors' ratings of their satisfaction with the value for money of their entry and camping fees are routinely collected as part of the VIP surveys. Results from the surveys from 2005 through 2010 are shown by system in Figure 4.

Figure 4. Percent of Visitors Satisfied with Value for Entry Fee



As with other VIP results the percentage of the satisfied visitors tended to be high at least in 2004 at the start of the series

[47] We also examined the estimated costs for a family of two adults and two children to spend a weekend of two days and two nights camping in a park in our case studies (La Mauricie and Jasper NPs compared to Gatineau Park, two provincial parks in Quebec and Glacier NP in the US). The aggregated Parks Canada price in this scenario is about 35% higher than the average price in the other service providers (i.e., $81 vs. $63). Given the limited sample, the significance is this finding for the wider system is unclear.

(i.e., 81% for NPs, 91% for NHSs and 85% for Canals). For NHSs and canals the percentage of visitors satisfied with the value of entry fees has remained relatively stable over the period. However, for NPs the percentage has declined from 81% to 57% in 2009.[48]

The percentage of visitors to NPs reporting satisfaction with value for fees is typically 10% to 20% lower than the percentage reporting overall satisfaction with their visit. In contrast, in the comparison parks included in our cases studies, the variance between overall visit satisfaction and satisfaction with fees is less pronounced (i.e., 5% to 10% for the two Quebec provincial parks, and only 2% to 4% for Glacier NP in the US). This may simply reflect the fact that fees are lower in the comparison parks.

PCA staff generally thought the Agency’s pricing was reasonable, although staff at NHSs thought that the fees were low relative to the extent and quality of the product offered. They also reported that pricing complaints were often linked to camping costs, which are seen as too high particularly when added to entry fees. Visitors sometimes express the view that they should not pay fees to visit heritage areas managed by the Agency as they are paying income taxes. Fee reductions was also a theme identified in the analysis of responses to open-ended questions in the 2009 VIP surveys, more commonly in the two NPs in the sample compared to the NHSs. Price was also identified as a barrier to visiting a NP in one of the public opinion surveys conducted by the Agency.

It is tempting to link the decline in satisfaction with value for money, or qualitative feedback about high prices, to the decline in visits to PC administered places. However, declines in satisfaction with value for money are only evident in the NPs system which has had a relatively small decline in visits while the NHS system, which has the greatest decline in visits, has maintained steady ratings of satisfaction with value for money for several years. In addition, paid visits represent only a portion of all visits and it is unclear if paid visits are in fact declining (i.e., visitor based revenue is actually increasing despite price freezes as noted previously). Given these various inconsistencies, we are unable to determine if, and to what extent, price, or more likely relative price compared to others, is having on the observed trend in visits.

4.2.3.1 Quantitative Indicators of Economy and Efficiency

In this section we explore relationships between inputs (i.e., investments in the VE Program and/or the VSO and interpretation), outputs (i.e., service level category as a proxy for the extent of the outputs), reach of the service offer (i.e., number of visits), and outcomes (i.e., levels of overall satisfaction visit).

We focus on the **relative** efficiency and economy of the VSO within different parts of the Agency (i.e., between the NP, NHS or Historic Canal systems; between individual sites) since there are no objective criteria within the Agency for judging efficiency and economy and we did not have sufficient relevant data from other organizations to serve as a point of comparison.

The analysis is based on data from a sample of NPs, NHSs and Canals visited during the evaluation. The sites themselves may not be representative of all sites managed by the Agency. In addition, the analysis is based on only one year of data (2009-2010). Results may not be

48 Satisfaction with value for camping fees is also declining i.e., 72% satisfied in 2004 to 62% satisfied in 2009.

generalized beyond this sample for this particular year. In several cases, the small number of historic canals in the sample meant we could only compare NPs to NHS. For these reasons, the analysis should be seen as tentative and exploratory rather than definitive.

Drawing on the definition of efficiency and economy in the *TB Policy on Evaluation* we developed two criteria for assessing relative efficiency and three criteria for assessing relative economy.

Our criteria generally assume a linear or curvilinear relationships between inputs, outputs and outcomes (e.g., expenditures will be scaled to the size of the VSO; both expenditures and the size of the VSO will be scaled to the number of visits to a place, and, more controversially, that the magnitude of expenditures and the scale of the offer will be associated with visitor outcomes). However, many extraneous factors are not accounted for in this simple model. For example, costs of providing the VSO will vary based on the geographic location of the site (i.e., more remote locations have higher costs for the equivalent offer) and the mix of facilities, products and services on offer and how these are dispersed on site (i.e., a more dispersed offer likely entails higher costs per visitor). Similarly, the ability to generate revenue depends on being able to charge for a service. This is more difficult in places with many unrestricted points of access. The extreme example of this is historic canals where revenue is primarily collected from the small minority of visitors who travel by boat on the canal. Because of these unaccounted factors, we anticipated that the observed relationships between inputs, outputs and outcomes would deviate somewhat from the simply linear relations assumed in the criteria (i.e., expenditures will not be perfectly correlated with the size of the VSO as assumed in the criteria).

Criteria 1

An operation is **efficient** if expenditures (input) used to produce a given level of service offer (output) are proportional to what others with similar offers invest.

In practical terms, this criteria implies that expenditures on the VE program or its components (VSO, interpretation) should be proportional to service level categories of sites (i.e., SLC is a proxy for the size of the output). We found that overall VE expenditures were associated with SLCs for both NPs and NHSs in our sample (i.e., about 64% of the variance in expenditures accounted for in NPs and 77% in NHSs).[49] NP SLCs are associated with both VSO and interpretation expenditures when these are considered separately, whereas NHS SLCs are only associated with interpretation expenditures.

This data provides some modest evidence that inputs, at least in our samples, tend to be proportional to outputs. For NHSs, the key relationship between expenditures and the magnitude of the outputs is the investment in interpretation rather than the VSO per se.

Criteria 2

An operation is **efficient** if it recovers a greater portion of its costs through revenue.

In theory, this assumption implies that the most efficient operation is one that recovers 100% or more of its costs. In practice, as the Agency does not specify cost recovery targets or acceptable ranges of cost recovery,

[49] The analysis is based on identifying a trend line that best represents the relations between expenditures and SLC. The line may be linear, curvilinear with a slow increase in expenditures over low service level categories and a rapid increase in expenditures at higher SLCs, or polynomial where for example there is a drop in expenditures from category 1 to 2 and then a rapid increase in expenditures in categories 3 to 5.

we focused on the relative cost recovery within and between the groups of sites in our sample. The Agency's total cost for the VSO and associated VSO revenues were shown in Tables 2 and 3. Over the five year period VSO expenditures averaged $144M and revenues averaged $75M per year, so that 52% of VSO costs were recovered (i.e., includes the costs of marketing and promotion). If the cost of interpretation is included as well, the Agency recovers 43% of the expenditures.

The percentages of various expenditures recovered through revenue generation for three groups of sites in our sample are shown in Table 22.

Table 22. Percentage of Expenditures Recovered Through Revenue

	VSO Revenue As a % of Expenditures on		
	All VE	VSO and Interpretation	VSO
NP n=16	68%	80%	88%
NHS n=15	30%	36%	102%
Canal n=2	10%	10%	11%

It is clear that NPs are more likely to recover their total VE and combined VSO/interpretation costs compared to NHSs or Historic Canals. Interestingly, the NHSs are more likely to recovery the strictly VSO costs from revenue. However, this likely arises because VSO costs are a smaller portion of the total VE costs in NHS compared to the NPs or historic canals so it is easier to demonstrate cost recovery for this portion of the expenditures.[50]

Similar to the previous indicator, this data provides some modest evidence of the greater relative efficiency of the NP sites, compared to the NHSs based on the ability to recover costs. Historic canals are clearly much less efficient from the point of view of cost recovery of VE expenditures almost certainly due to the limited revenue generation opportunities associated with these operations.

Criteria 3

An operation is **economical** if a given level of expenditures (input) or a given level of service offer (output) attracts a similar level of use/demand as other with similar inputs or outputs).

The first part of the criteria implies that expenditures on the VE program or its component parts should correlate with the number of visits to a site. In our sample of NPs we found consistently high positive correlations between most categories of expenditures and the number of visits to a site (r=.75 to .82) although the correlation between expenditures on interpretation and visits was more moderate (r=.36).

In contrast, within the sample of NHSs we found weak or no correlation between the number of visits and expenditures on the VE program or its components (r=.17 to .20 or in one case 0). This latter finding may reflect a few anomalies in the data. For example, if the Fortress of Louisburg NHS is removed from the sample, the correlation between visits and VE expenditures and expenditures on interpretation both increase substantially (r=.51 and .64 respectively) although the correlations between the other expenditures components and the number of visits remain low.

50 There are significant variations within the systems as well. Within NPs, two sites—Banff and Jasper NPs—consistently recover more than 100% of their costs while other NPs recover from between 3% and 100% of VSO costs. Within NHSs, two sites (i.e., Green Gables NHS, A. Graham Bell NHS) recover more than their combined VSO and interpretation costs while the other NHSs only recover between 3% and 64% of their expenditures. In contrast, the two historic canals in our sample only recover a small portion of their costs whatever expenditure base is used. This is not surprising given their limited sources of revenue and high VSO expenditures.

Again, this provides modest evidence that inputs are scaled to the use of the VE in NPs. The relationship between VE inputs and use is somewhat less robust in NHSs.

The second part of the criteria implies that visits should increase with the SLC of a site (i.e., where SLC is a proxy for the extent of the service offer). We found that visits were moderately associated with SLCs of NPs (R^2=.60) but were only weakly related with the SLCs of NHSs (R^2=.13).[51] Removing certain obvious outliers from the analysis (e.g., Halifax Citadel NHS with very high level of visits relative to its SLC) provides only modest gains in the association between visits and SLCs. Therefore, on this criterion, we concluded NPs in our sample were relatively more economical to operate than the NHSs.

Criteria 4

An operation is **economical** if, relative to others if it's:

a) Cost per user are low, and/or
b) Revenue per user is high.

At the aggregate level, the average VSO expenditures per visit between 2005 and 2009, was $6.70 and the average revenue per visit was $3.51 (see tables 2, 3 and 7 for source data). Table 23 shows the equivalent ratios for the sites in our sample.

Table 23. Expenditures and Revenues per Visit (2009-2010)

System	Expense Per Visit ($)						Revenue per visit ($)	
	VE Total		Interpretation		VSO			
	Average	Range	Average	Range	Average	Range	Average	Range
NP n=16	16.33	2.20 to 49.63	1.21	0.71 to 2.63	11.09	.02 to 32.88	6.51	0.79 to 21.82
NHS n=15	17.68	2.50 to 55.88	10.40	0.48 to 48.64	5.76	0.06 to 23.16	3.61	0.08 to 10.01
Canal n=2	3.48	1.90 to 5.06	0.15	0.0 to 0.30	3.30	1.89 to 4.72	0.42	0.11 to 0.72

The two criteria (costs per visit, and revenue per visit) do not provide a consistent picture of which group of sites is more economical. Based on the criteria that economical operations should produce the most visits for the least cost, the historic canal system is clearly the most economical of the three groups. Total VE spending per visit in the sample of NPs and NHSs is roughly comparable, although they differ, consistent with expectation, in the portion of the expenditures per visit on interpretation and the VSO.

The amount of revenue generated per visit suggests that the NPs are on average more economical than the NHSs which are in turn more economical than the historic canals. This replicates the results of the analysis of cost-recovery by group largely because the number of visits to a site is moderately correlated with the amount of revenue generation.

Criteria 5

An operation is economical if a given level of investment (input) or serve offer (output) produces the equivalent results as others with similar investments/or levels of service.

The criteria implies that outcomes such as visitor satisfaction should increase, at least in part, in response to increases in either/or both the quantity of the investments in VE or its components or the level of service offer. In fact, it is unlikely this is the case given that the majority of visitors are satisfied at virtually all

[51] Historic Canals are not included in this analysis.

locations regardless of the sometimes substantial variations in expenditures on the VSO between sites, and within all SLCs for both NPs and NHSs.
For example, in 10 of the NPs in our sample, the range of satisfied visitors (based on the most recent VIP results available for each park) was 88% to 97%. VSO spending per visitor in these parks ranged from $2.20 to almost $50. Therefore, even at the lowest levels of spending per visitors, the vast majority of visitors are satisfied and substantial increases in expenditures per visitor could at best produce small gains in the percentage of satisfied visitors.

The results of the various tests are summarized in Table 24.

Table 24. Summary Quantitative Analysis of Efficiency and Economy

	Efficiency (Inputs and outputs)	Economy (Inputs/Outputs and Use)
NPs	A moderately strong link between expenditures and SLCs Best recovery of VSO/Interpretation costs	VE/VSO expenditures and SLCs were moderately strongly linked to # of visits High costs per visit and highest revenue per visit
NHSs	A moderate association between expenditures and SLCs Second best recovery of VSO/Interpretation costs	VE/Interpretation expenditures linked to # of visits but SLCs are not. High costs per visit and moderate revenue per visit
Canals	Weakest recovery of combined VSO/Interpretation costs	Lowest cost per visit and lowest revenue per visit

At a general level, the results reinforce the notion that we heard throughout the evaluation that interpretation is a critical element of the "offer of service" in NHS (i.e., interpretation is a larger portion of the expenditures in NHSs and is more strongly associated with the SLC of a site than are VSO expenditures; interpretation expenditures are more strongly related to the use of NHSs than are VSO expenditures).

The preponderance of the indicators shown in the table suggests that the NPs group was more efficient and economical than NHS or Historic canals groups although the results regarding expenditures per visit are an exception to this trend. There are likely several factors that account for this including the more recreational nature of NPs which allows for more revenue generation and on average more visits relative to expenditures. The concept of SLCs may also be inherently more aligned with the nature of NPs than NHSs. There are also unanswered questions about the direction of causation in these results (i.e., does increased spending and a bigger offer lead to more visits, or does increased demand drive an increasingly bigger offer).

The general pattern of greater efficiency and economy in NPs does not imply that NHSs or historic canals should adapt their operating model to more closely match the NPs model. This is both unreasonable given the different mandates of the systems and impractical given the operational realities of the different places. In fact, from a management perspective the more relevant focus may be on the individual differences on the indicators within and between the various groups rather than the group results. Key areas of inquiry might include a reasonable level of cost recovery for a site to ensure the future sustainability of operations or whether it is practical to sustain operations which spend $50 per visitor when others spend only pennies per visitor to achieve more or less the same results with respect to visitor outcomes.

Question 7	Indicators
To what extent can the number of visits to PCA places, and visitor enjoyment, satisfaction and connection to place be attributed to the PCA VSO?	• Evidence of a framework identifying the drivers or influences points for the desired outcomes. • Research showing how drivers or influence points under the Agency's control are affecting the outcomes.

In this section we focus on the kinds of factors the Agency has identified as drivers or influences on the outcomes, how it accounts for the trends over time (i.e., declining visits, consistently positive visitor outcomes) and the reasonableness of the various explanations.

Visits: The Agency has identified a number of social and economic factors beyond its direct control that are hypothesized to affect the number of visits to PC places.

Macro social changes thought to affect attendance include 1) an aging population, which is less able to travel and who are looking for more comfort when they do travel; 2) increased urbanization resulting in audiences being further away from PC administered places than was previously the case; 3) the changing ethnic profile of Canadians, resulting in a greater portion of the population (i.e., new Canadians) who don't have an understanding or tradition of using NPs or a connection to historic places; 4) more competition in the travel market;[52] 5) the rise of new travel demands/interests not traditionally served by the Agency's VSO (e.g., an increasing demand for adventure-based recreation such as mountain biking, geo-caching, and GPS based activities); 6) less interest in nature or outdoor activities in general particularly in urban youth (i.e., the nature deficit); and 7) less leisure time. The macro changes are not always consistent. For example, there is an aging population seeking more comfort while at the same time there is a segment of the overall market seeking new and different kinds of recreation such as mountain biking.

Transitory factors which vary over time but affect national or regional attendance in any given period include the following: 1) the state of the economy (e.g., employment levels and disposable income, price of gas, exchange rates); 2) weather patterns (i.e., wet, rainy summers reduce visits and conversely hot dry weather which can impact on traditional activities such as being able to have a camp fire may also reduce visits); and 3) health or safety concerns (e.g., terrorism incidents or pandemic alerts), which reduce travel in general or to particular PC sites. An additional type of transitory factor would be the existence of a special event (e.g., the Vancouver Olympics in 2010), which can boost regional tourism with spill over effects on PC locations particularly in the case where the Agency creates a presence at the event to create awareness of the offer.

The relevance of several of the macro social trends to the Agency's situation in particular have been supported in two studies (National Survey of Canadians, 2009; Decima Research, April

[52] In our interviews with stakeholders and parks staff the importance of increased competition in the tourism market and relative pricing (i.e., the availability and affordability of package tours to other destinations) was frequently mentioned as a cause of declining visits.

2010) on barriers to visiting PC locations. Identified barriers included a lack of time for visits, travel distance to sites (i.e., they are too far away) and competition (i.e., the desire to visit other places). Other barriers include lack of awareness of the offer and price.

The existing information on visitor characteristics (i.e., they are older, better educated, born in Canada or long-term residents, and looking for more creature comforts than in the past) is consistent with the general theme of an aging population.

The identification of macro social trends combined with Agency-specific information on visitor characteristics and barriers to visiting provides, in our view, a reasonable and plausible explanation for why visits are declining at PC administered places, although it does not account for the fact that visits are not declining in some similar systems in other jurisdictions. Management actions in response to this are also plausible responses to the situation (i.e., focusing on awareness building and marketing, continuously evaluating and adapting the offer at sites, introducing and supporting new types of offer, etc.).

The Agency's understanding of trends in the number of visits is likely to improve in the future now that it has started to define and profile visitors at a national level (i.e., both in terms of demographic characteristics and by tourism motivations and life stages).

Expectation: There is evidence that addressing visitor needs and desires is linked to increased satisfaction and enjoyment of PCA heritage places.

On-Site Visitor Outcomes: The Agency's basic model of the visit experience assumes that the "service offer" includes both recreational and learning opportunities as well as the special characteristics of each location (i.e., pristine nature, authentic history). Visitors have interests, desires and expectations. They self-select a location to visit based on a perceived match between the totality of the offer and their particular interests and desires. They make a visit in a social context that is predisposed to a positive experience (i.e., on vacation, or having a relaxing day out, travelling with friends or family). Management's role is to facilitate access to the experience of the site and deliver on the promise of specific activities or services that are expected.

In this model, any site can achieve strong visitor outcomes, whatever the scale of its VSO/interpretation, as long as the experience of being on site is consistent with prior expectations and needs. The fact that high levels of satisfaction, for example, have existed over many years implies that visitor expectations and on the ground experience have been and continue to be aligned over time. The generally high levels of satisfaction reported in other parks systems suggest that they too generally meet the expectations and desires of self selected visitors to specific locations.

The Agency has a few sources of qualitative data that provide support for the model and suggest how management could influence the outcomes. For example, responses to open-ended VIP survey questions suggest that enjoyment is influenced by the natural setting of a place, its beauty, seeing wildlife (in NPs), the peace/quiet/tranquility experienced, spending time with friends and family, and/or the opportunity to explore historic buildings and structures. Factors directly under management control include improving the conditions of assets (e.g., generally roads); providing more information both pre-visit and on-site; and improving, or adding to, many aspects of the interpretation programming, and/or amenities on site or the hours of operation.

The Agency's (2009) national poll identified respondents with a "special favourite" NP and/or NHS (i.e., closely related to meaningfulness of place and personal connection outcomes), and asked them what made it so special. The most frequently cited factors refer to general aspects of the place or the environment (i.e., environmental aesthetics, being close to nature, experiencing wildlife, diversity of ecosystem/landscape, the importance or significance of the historical monuments), past connections to the place (i.e., fond memories, grew up there, visited often), or the social setting in which the visit occurred (i.e. traveling with family/friends). References to specific aspects of the VSO under management control (i.e., recreational activities, camping, hiking, trails, site maintenance, cleanliness, a special event that occurred) are less frequent but do occur.

Quantification of the extent to which management actions influence the outcomes is challenging. First, the model implies that management actions even when they involve significant effort or costs by the Agency (i.e., a major investment in a road asset, extensive training of Agency staff in quality service delivery) will have a limited or perhaps undetectable impact on visitors' ratings of their overall experience since the intervention is one of many influences on the overall outcome (i.e., the inherent characteristics of the site, the social environment, the weather).[53]

A second significant practical issue is that ratings on almost all specific aspects of the VSO and on the three outcomes are generally quite high so that in many cases there is little room to demonstrate incremental impacts of management actions on the outcomes.

A few quantitative exploratory studies of predictors or group differences in outcomes have been conducted in the Agency. In one analysis (ERVE 2009) visitor rating of satisfaction with the components of the VSO (e.g., with assets, information, staff, etc.) were examined to see which were the best predictors of the three on-site outcomes.[54] Each of the outcomes was also allowed to be a predictor of the other outcomes. The results showed three outcomes to be among the strongest predictors of each other, although the relationships among them were somewhat different (e.g., enjoyment predicts satisfaction, both satisfaction and meaningfulness of place predict enjoyment and enjoyment predicts meaningfulness of place).

Additional predictive power for overall satisfaction is provided by ratings of various components of the VSO (e.g., quality of activities and services, condition of facilities, and meeting needs and

[53] It is sometimes argued that management interventions and actions serve to maintain visitor outcomes rather than create measurable improvements (i.e., if management had not continued to innovate and adapt in response to visitor feedback, ratings of visitor satisfaction would have decreased relative to past ratings). Arguments of this type (i.e., if X had **not** occurred, y would have resulted) cannot be tested empirically. In principle, ratings of a specific component of the VSO such as the condition of facilities should be more sensitive to specific management interventions. However, even here it might be anticipated that a particular intervention is too specific to impact on overall ratings of a component (e.g., the road improvement is too specific to be detected in ratings of satisfaction with the condition of facilities in general).

[54] The analysis was conducted separately on 2009 VIP survey results from 19 locations. The predictors of the outcomes are not identical for each location. We focused on the frequency with which a predictor was identified across the locations and to a lesser extent the strength of the relations between predictors and outcomes.

expectations). The results are useful in showing the interrelations among the outcomes and in the case of overall visit satisfaction pointing to some aspects of the VSO that may be related to the outcome. They do not, however, provide insight into what drives the outcomes independent of other outcomes or what drives ratings of satisfaction with components of the VSO.

A second analysis (ERVE 2010) focused on the differences in outcomes based on visitor origins (Canadian, American and International visitors) and first time versus repeat visitors to a site.[55] The results did not show consistent and robust differences between these groups over the sites, although some patterns are consistent with expectations derived from the literature on sense of place (i.e., repeat visitors are more likely to report a place is meaningful to them in several but not a majority of sites). Analysis of this type is not intended to identify the drivers of outcomes so much as identify particular types of visitors that management might focus on in the future in order to influence outcomes.

Another analysis of group differences focused on differences in visitor and non-visitor "sense of personal connection" to PC administered places (i.e., defined on page 50) using data from the 2009 National Public Opinion Poll. The analysis distinguishes between visitors (recent attendance at a PC administered site), high potential visitors (i.e., defined on page 35), low potential visitors (i.e., who indicated they have visited a NP/NHS at some point in their lives although not necessarily a PC administered place) and non-visitors (i.e., never visited a NP/NHS). The percentage of each group classified as having a sense of connection to PC administered places is shown in Table 25.

Table 25. Percentage of Visitors/Non-Visitors Who Have A Personal Connection To PC Administered Places

Non-Recent Visitors			Recent Visitor
Non Visitor	Low Future Potential	High Future Potential	
11%	38%	70%	88%

The portion of respondents who have a sense of connection with PC administered places increases consistently from the non-visitor to the group of recent visitors. This has been interpreted as showing the importance of visiting a PC administered place in creating a sense of connection and more indirectly as evidence that the VSO is contributing to the result since by inference the visitor consumed some parts of the offer either prior to or while on site. The results are certainly consistent with this interpretation although they do not provide unequivocal support for it.

It is clear, for example, that many respondents can have a sense of connection even when they have not visited a PC administered place at least recently (i.e., 43% of respondents who have not visited recently have a "sense of connection) and that a sense of connection can exist even among the small portion of those who have never visited and likely never will visit. This is consistent with the literature where it is clear that connection or attachment to place can occur

55 The analysis was conducted separately on 2010 VIP survey data from 20 locations (with two canals having separate data for boaters and land based visitors) using a Chi-square test of group differences. An example of an inconsistent result is that while some differences in percentage of satisfied visitors were found in some locations, there is no one group (Canadians, Americans, International visitors) that is consistently more satisfied than other groups. In 8 of 22 locations Canadians were more likely to rate a place as meaningfulness compared to US visitors, although not necessarily in comparison to international visitors.

without physically experiencing a place. As a result, there is some uncertainty in these results on the extent to which visits drive a sense of personal connection to PC administered places versus a sense of personal connections driving visits (i.e., uncertainty regarding the direction of causation).

There is also a potential circularity in these results given that the existence of a personal connection is determined in part by whether a person has visited a site or intends to visit a site in the future. In effect, responses on the survey used to define the groups of visitors, potential visitors and non-visitors, are also used to define whether a personal connection exists. The impact of this issue, if any, on the pattern of results shown in Table 25 is not known although in principle additional analysis of the polling data could serve to clarify the situation.

Additional exploration of possible predictors of, or group differences in, the outcomes based on VIP data in particular, should be possible but is hampered to some extent by the lack of standardization in some questions and the reliance on testing for patterns and relationships within data generated at each location rather than combining the information into a single national dataset. Combining data would provide bigger samples and more power for identifying possible relationships. Analysis of differences in outcomes based on EQ and PRIZM segmentation, which should be of particular interest, was only becoming possible at the close of the evaluation.

In conclusion, we noted that the lack of empirical association between the sizes of the VSO or its components and outcomes implies both challenges and opportunities for management. For example, management is challenged to demonstrate the value-added of particular interventions (e.g., investment in training many staff in quality service delivery every year, given that ratings of staff tend to positive both prior to and after the introduction of the training program). In suggesting this we are not disputing that staff and the quality of their interactions with visitors are important elements of the VSO, only that the benefits of the particular intervention for achieving the outcomes have not been demonstrated.

More generally, the fact that outcomes are achieved regardless of the scale of inputs or outputs suggests that management has some flexibility to achieve more efficient or economical operations in some or many places **as long as a potential visitor self selects to visit based on knowledge of the revised more efficient or economical offer.** Management flexibilities in this regard are not unlimited (e.g., dramatic changes at a particular site are unlikely to pass at least initially without reductions in achievement of outcomes, actions that improve the program economy with respect to visitor satisfaction may have unintended impacts on other goals such as increasing the number of visits). However, in pursuit of more efficiency and economy, especially in a time of fiscal restraint, management may be served by asking not what could be done to make a visit more satisfying or enjoyable but what is not essential for maintaining the already positive results. In this regard, we noted that field units are currently in the process of preparing long term “sustainability” plans which are intended in part to address precisely this issue.

OVERALL FINDING: ECONOMY, EFFICIENCY AND ATTRIBUTION

The evidence that the VSO program is managed economically and efficiently rests on both anecdotal examples of particular initiatives that resulted in increased efficiency or economy relative to alternatives and managers' use of a number of flexibilities in the selection of VSO inputs and over where and how outputs are offered.

Our quantitative analysis of the relationships between inputs (expenditures), outputs (SLCs), reach (visits) and outcomes (satisfaction) across five indicators lead us to conclude that, at least within our sample, NPs were relatively more efficient and economical (i.e., in the sense that inputs and outputs are better aligned to each other, and each of these is better aligned to the number of visits to the place) than NHSs or historic canals although there are exceptions to this trend. On-site outcomes (i.e., enjoyment, satisfaction and meaningfulness of place) are clearly not related to either the quantity of inputs or the extent of outputs. The results point to some general differences between "systems". From a management perspective, the more relevant focus may be on the individual differences across the whole range of PC sites and whether it is reasonable and practical to provide a VSO with very different cost recovery ratios and/or which spend vastly different amounts per visitor reached.

The Agency attributes the declining number of visits to PC administered places to a number of large-scale social demographic changes in society as well as more transitory or cyclic changes related to economic conditions or seasonal weather patterns. It has triangulated these social trends with some data on current visitor characteristics and surveys of barriers to visiting to provide a plausible explanation of the decline. On-going efforts to define and profile visitors at a national level will improve the Agency's ability to track changing patterns of visitors over time and provide more direct empirical evidence of what might account for increases or decreases in visits in the future.

Consistently positive visitor on-site outcomes are largely attributed to visitors self-selecting a particular location to visit based on knowledge or awareness of the site and management's ability to delivery on the promised offer. This model accounts for the fact that the qualities of inputs or outputs are not related to outcomes, since visitors can have a positive experience irrespective of the inputs or outputs if it meets their expectations. The Agency's basic model of the influences on the on-site outcomes is supported by qualitative data from various sources. The qualitative data also points to a variety of management actions that could potentially influence the outcomes.

Translating the qualitative insights into quantitative demonstrations of the effects of management actions on the outcomes is likely to be difficult. Specific management actions may have small impacts on overall evaluations of a visit and already highly positive ratings of the visit experience make it difficult to detect incremental improvements due to management actions. Efforts to quantify various influences on, or group differences in, results have been limited and exploratory to date and have not produced clear consistent evidence regarding the drivers of various results.

The lack of association between the VSO or its components and outcomes contains both challenges and opportunities. On the one hand management is challenged to show that particular interventions are worth the investment when they do not show any effect on relevant outcomes. On the other hand, management has opportunities to change the offer to achieve greater efficiencies or economy without impacting on the on-site outcomes, while balancing achievement of other outcomes (i.e., increasing visits).

4.3 PROGRAM DESIGN

In this section, we review three issues related to program design: restructuring of the program and associated issues of clarity of roles and responsibilities and effectiveness of communications, the extent to which there are unintended consequences of the program and how they are managed, and the use of alternative delivery mechanisms.

Question 8	Indicators
To what extent are roles, responsibilities and accountabilities for program delivery clear and effective?	• Self-reports of awareness and understanding of re-alignment, staff attitudes towards communication mechanisms and change.

In 2005, the Agency conducted a *Visitor Experience Situational Analysis* to understand the current state of VE (i.e., internal capacity). Several issues were identified including lack of national leadership, inconsistency across the system, no dedicated organizational capacity, a need for more research and planning, and more tools and training. As a result, the Agency created the ERVE Directorate in National Office.

In 2007, the Agency launched a series of organizational renewal initiatives one of which involved a complete analysis and reworking of organizational structures and positions for both the public appreciation and understanding and VE program activities at the field level. For the VE program activity, this involved the creation of 11 generic positions to be applied locally as appropriate to increase both the consistency and capacity of the program (i.e., includes the position of VE manager as well as various types of positions related to marketing, promotion, and product development).

Table 26 shows the status of this effort as of November 2010. The process has largely been completed during the course of the evaluation.

Table 26. Visitor Experience Staffing

	Planned	Staffed	In progress	% Complete
VE Managers	88	85	0	96%
Product Development Officers	59	44	15	75%
Promotion Officers	28.5	23	5.5	81%
Promotion & Non-personal Media Officers	7.5	4	3	53%
Stand Alone Prevention Officers	1	1	0	100%

Source: VPs East and West/North offices, November 2010

Expectation: Staff at all levels has a clear understanding of the changing organizational structures and their roles and responsibilities within the new structures.

Most of the data we gathered on the perceptions of the clarity of roles and responsibilities were obtained from interviews with staff between January and August 2010. It is not certain to what extent the issues have been addressed since that time.

Key themes from our interviews with respect to roles and responsibilities included some confusion over the respective roles of National Office and personnel in the Service Centres, particularly although not exclusively, within the Service Centre personnel themselves (i.e., their roles were often characterized by words like “uncertainty”, “overlap”, “undefined”, “inconsistencies”, “left in the middle of the ERVE reorganization”). Both National Office personnel and VE managers thought their own roles were clear, although other personnel at the field level were sometimes unclear on the role of National Office. There was also some confusion at the time, particularly at the site level, on the distinction between VE roles and responsibilities and external relations functions.

Ensuring consistent and complete communications is generally recognized as a challenge for a decentralized organization like PCA, with its 5,500 employees in approximately 200 sites. The challenge is compounded in the current situation involving large scale changes in structures, positions and staff.

As part of the realignment of structures and positions, the Agency put in place a number initiatives and tools to increase the effectiveness of communication initiatives to create networks and links between staff (e.g., a 'buddy system', which links one National Office staff member with the VE Managers of a small territory to provide them support), thematic teleconferences, newsletters, regular bulletins from National Office, workshops, community of interest sub-committees, and a regular VE Manager Forum.

At the time of our interviews there were mixed opinions regarding the adequacy of the mechanisms currently available. National Office personnel tended to report there had been significant improvements in communication as a result of the various initiatives. Service Centre and field unit personnel were more likely to identify areas of concern or subjects for improvement. Service Centre personnel concerns stemmed in part from their lack of clarity on their roles and responsibilities vis-a-via National Office. There was some feeling that communication depended more on "who you knew" (i.e., personal relationship and knowledge) rather than systematic sharing and exchange of information. Field level personnel reported generally limited communication with National Office, and characterized it as formal and unidirectional even at the managerial level. A common theme at the field level is the large volume of e-mailed information that they receive, making prioritization difficult, especially in the tourist season.

All groups view the Agency's intranet as a key means of ensuring good communication. The VE Toolkit, which is available on the intranet, was seen as both a great resource and as an effective communications tools for sharing current directions and expectations.

Question 9	**Indicators**
To what extent are potential unintended negative impacts of the program identified and managed?	• Existence of analysis and plans to address potential negative impacts (unintended or otherwise) of the VSO.

Expectation: Potential negative consequences of visitors (e.g., damage to heritage resources, crowding, and displacement of one type of visitor by another) are identified and risks are managed or mitigated in a transparent manner.

Negative impacts include those that are anticipated and accounted for in the design of a program as well as unintended impacts that were not anticipated and mitigated in the program design (e.g., increasing taxes on cigarettes with an aim of reducing smoking and increasing revenue may lead to increases in smuggling and lower government revenue while not effecting smoking rates). Foreseeable events associated with operation of the VSO, such as the fact that assets/infrastructure will deteriorate with use and eventually require replacement, or recapitalization, are not treated as a negative impact of the program but simply as a fact of program operations.

There are many potential negative consequences of having a VSO and simply encouraging people to visit PC administered sites. These are largely anticipated and addressed through various means as attested in a variety of Agency documents and in our interviews with staff. For example, simply having visitors on site implies some consequences such as litter and the need for garbage collection, which if not attended to, will result in damage to or deterioration of a site. Some portion of visitors will engage in activities that are disruptive to other visitors or present safety and security issues (e.g., excessive noise, drinking or drug use in campgrounds, and visitors vandalizing infrastructure). Visitors may engage in activities that threaten the cultural or natural resources that a site embodies (e.g., wandering off trails and damaging vegetation, removing artefacts or species from a site). The nature and extent of these negative consequences will vary by location. Efforts to address one type of consequence may involve tradeoffs that affect other outcomes (e.g., increasing security personnel may mean fewer resources for other aspects of the VSO).

In all these cases, the Agency has developed a variety of policies, directives, programs and processes to manage possible negative outcomes. Many of these have been referred to in previous sections of the evaluation. A representative but not exhaustive sample of the various instruments include:

- Regulations and policies are in place to guide the Agency in administering its protected places, and providing direction as to mitigating and preventing visitors' negative impacts (e.g. *Parks Canada Guiding Principles and Operational Policies (1994), Prevention Guidelines (2009)*);
- Tools and training available for staff (e.g., the VE toolkit, Sustainable Trails Solutions Workshops, etc.);
- Approval processes for new recreational activities, which typically include an analysis of environmental and health and safety concerns (e.g., *Management Bulletin #2.6.10 Recreational and Special Event Assessments (2008)*);
- Operational practices at the site level (e.g., varying operating hours to mitigate against vandalism, changing trail routes to minimize environmental damage, limiting drinking in campgrounds, providing law enforcement to increase visitor security and reduce the risk of people taking things from sites, etc.)

Potential unintended consequences that have received much attention in the literature on recreation and parks management is the possibility that management actions can displace existing visitors to other locations and/or cause them to discontinue use of a location altogether (e.g. Ormsby, Moscardo, Pearce & Foxlee, 2004; Schneider and Budruk 1999).[56] An obvious application of these concepts in the current context would be if efforts to attract more new or different types of visitors lead to displacement or discontinuance among existing visitors so that no overall gains in the number of visitors are realized. Various Agency documents such as management plans, the Agency's Guiding Principles and Operating Policies, and the Recreational Activities and Special Event Assessment management bulletin imply, but do not

[56] Displacement involves a visitor moving to new areas or sites due to perceived negative changes in the social, managerial or resource conditions of the recreation environment, and can be either intra-site (i.e., people use an alternative location within the same site), or inter-site (i.e., people leave an area presumably to participate in the same types of activities at a different site).

state, that issues of displacement or discontinuity were or should be considered in guiding decisions about the VSO. The Agency's ability to track potential displacement and discontinuity is improving as more information is developed on visitor characteristics over time relative to trends in "person-visits."

Question 10	Indicators
To what extent is the full range of program delivery options identified and utilized.	• Presence and reported effectiveness of partnerships. • Evidence that additional partnerships are needed. Successful third-party delivery models exist.

Expectation: Potential partnership and other service delivery options (e.g., third party delivery) have been identified and assessed for feasibility and are utilized when it is effective to do so.

Consistent with other jurisdictions, PC uses a variety of third-party organizations (e.g. friends organizations and businesses) to support visitors' experiences (i.e. to augment the service offer, such as providing guided tours, operating a gift shop, or providing private food services and lodging on the fringes of a NP or NHS).

The Agency has developed a *Corporate Engagement Policy*, and a *Parks Canada Partnering Guide* and *Toolkit*. The *Parks Canada Corporate Engagement Benefits Framework* outlines the benefits of partnering arrangements and benchmarks values based on industry comparables. With the *Parks Canada Partner Engagement Registry*, the Agency maintains an inventory of current, planned and past partnering arrangements with the for-profit sector. It runs a Partnering Network, consisting of a community of support staff involved in corporate engagement across the Agency with the goal of facilitating training and development opportunities, as well as creating a forum for the sharing of best practices.

Table 27. Percentage of Locations Having Third Partners Providing an Activity or Service

	NP/NMCA (n = 40)	NHS (n = 62)
Guided Recreational Activities	73%	N /A
Equipment rental	53%	N /A
Gift Shop	55%	60%
Food Services	40%	39%
Alternative Accommodations	33%	N /A
Recreational Activities	N /A	37%
Interpretation	N /A	68%
Special Events	N /A	94%
Other	65%	31%

Note: Questions posed to VE managers from NPs varied from those of NHSs (options not provided to each respective group are indicated by N/A).

VE managers reported at least some partnering arrangements in 40 NP/NMCA and all but one NHS. Examples of the kinds of service offer supported by third parties are shown in Table 27.

Related statistics on the number of business licenses in NPs (but not NHSs) by type of licence for one fiscal year are shown in Table 28. More than a quarter of these licences (28%) are for businesses operating in the Banff or Jasper Town Sites. Licenses across the Banff, Jasper and Lake Louise NPs account for 72% of the total. These NPs also have the highest visitor volumes in the system and are the most able to sustain a large number of third party service providers.

Reliance on third party service providers is greater in some jurisdictions. For example, the National Capital Commission manages Gatineau Park, which is the only federally owned park outside the Agency. Gatineau Park contracts out all of its operations and maintenance to one supplier through a competitive bidding process including fee collection, grounds maintenance, and campground reservations. Similar contracting arrangements are also seen in the US NPS, which also relies heavily on third parties to deliver aspects of its offer. The US NPS has approximately 600 concessionaires at more than 120 sites, providing food, lodging, transportation, shops, and other services.[57]

Table 28. Types and Numbers of Business Licenses in National Parks 2008-2009

Type	#
Community buildings/services	31
Entertainment	14
Food and beverage services	395
Guiding, outfitters, equip rental and skiing	168
Retail	354
Services	924
Visitor Accommodation	117
Other misc businesses	467
TOTAL	2470

Source: Infrastructure and Real Property Branch
Note: Data from one site if from 2006 –2007

VE managers were highly likely to identify a need to develop additional partnerships to support the VSO and improve visitor experiences (i.e., 95.0% for NPs and 87% for NHS). Potential partners include Aboriginal groups, locals, educational institutions, tourism sector groups, food services, guided tour groups, groups with specific expertise (e.g., campfire theatre, presentations), specific programming for key markets (i.e., new Canadians or youth), and high tech and facility partnerships.

The limitations of existing government instruments for effective partnering was identified as a key risk area in the Agency's 2010-11 Corporate Risk Profile. Many locations have attempted to implement their own "work-around" to avoid these restrictions based on informal rather than formal partnering arrangements.

Existing partners and stakeholders interviewed during the evaluation generally have favourable opinions of the PC staff with whom they interact at the site level.[58] Of the 44 stakeholders interviewed, 73% reported that their partnership is working well. Half reported they were adequately involved in decision-making compared to 30% who reported they were not involved enough in decision-making. Three stakeholders reported that they were not involved and did not feel the need to be involved at that level.

Benefits to partnerships identified by interviewees included further leveraging PC's ability to provide services, accessing resources to improve services, and opening up new markets. For example, partners are able to provide market intelligence, attract visitors and help organize special events. Additionally it was felt that partners can help deliver messages to the public and provide more effective exposure of PC sites.

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57 US NPS, *NPS Overview* (2009) http://www.nps.gov/pub_aff/refdesk/NPS_Overview.pdf

58 This is consistent with the results of the Agency's *Stakeholder and Partner Engagement Survey* that found 79% of stakeholders and partners have a positive overall impression of the Agency while approximately one-third (34%) said their impression is *very* positive.

Existing partners, particularly businesses, are interested in providing activities within parks, especially with regards to marketing and promotion (e.g., some partners feel that PC could do more to understand its existing and potential markets, and should be using their partners' resources in order to learn more about their visitors and improve visitor experience). Some group interview participants noted that compared to the Agency, they are more "nimble" in being able to change what they offer to visitors.

Finally, as with Agency respondents, we heard comments from partner/stakeholders on the slowness of the Agency in creating partnerships, which is not consistent with the dynamic nature of the tourism industry. A central complaint was that the Agency is very PC-focused in that it seems to operate predominantly from within its own parameters, perspectives, and policies; partners and stakeholders must then operate from this standpoint with somewhat limited give and take. This is similar to some of the messages from the external stakeholders we spoke with who view "rigid rules," "bureaucracy," and "approval processes" as impeding their enhanced involvement. This is again corroborated by the Agency's *Stakeholder and Partner Engagement Survey*, which found that the timeliness of the Agency's approval process was the most frequently cited obstacle in stakeholder and partner involvement with PC.[59]

OVERALL FINDING: PROGRAM DESIGN

The VE program activity has been the subject of large scale restructuring and reorganizing over the last three years. Much of the work to create, classify, and staff these new structures was just being completed during the course of the evaluation. In general, staff supports the re-organization and acknowledge the need for systematic renewal.

Through the restructuring, the Agency has also attempted to clarify roles and responsibilities and has introduced a number of mechanisms to promote improved communications among various levels of the Agency. While National Office personnel view their roles as clear and report communication has improved significantly, other levels of the organization have not always shared these views. In particular, Service Centre personnel involved in the VE program were still unsure of their roles relative to National Office and felt that communication is based too much on personal relationships and knowledge rather than the systematic sharing and exchange of information. Field level personnel reported generally limited communication with National Office, and characterized it as formal and unidirectional even at the managerial level. A common theme at the field level is the large volume of emailed information that they receive, making prioritization difficult, especially in the tourist season.

All groups view the Agency's intranet as a key means of ensuring good communication. The VE toolkit which is available on the intranet was seen as both a great resource and an effective communications tools for sharing current directions and expectations.

Potential negative consequences of having a VSO (e.g., damage to nature or cultural resources, conflict between visitors or between visitors and wildlife, and deterioration of assets) are largely

[59] Timeliness of the approval process was identified as either an obstacle (24%) or a major obstacle (16%) in the last two years in influencing stakeholder and partner involvement with the Agency. This was the highest rating for obstacles among the factors assessed.

anticipated. There are a variety of policies, programs and activities in place to manage these anticipated consequences. The issues of either deliberate or unintentional displacement of visitors or discontinuance of use by visitors as a result in particular of management decisions have received considerable attention in the literature on recreational and parks management but is treated only indirectly in the Agency's direction on planning and evaluating the VSO. Tools and capacity to track potential displacement or discontinuity in the future are improving.

Finally, it is clear that the Agency uses a variety of third party service providers to enhance the service offer available to visitors. These include guided recreational activities, equipment rental, gift shops, food services and alternative accommodations. Many of these activities or services were identified as having moderate or high demand (e.g., see section on relevance). There is some limited evidence that other parks systems place an even higher reliance on third-party providers of service. PC personnel interviewed for the evaluation expressed a clear interest in more partnerships to support the VSO. Stakeholders we spoke with, particularly from the commercial sector, expressed an interest in providing more services. A major barrier to delivering these potential opportunities continues to be the limited array of instruments available to Agency managers for engaging and working with stakeholders and partners.

5 CONCLUSIONS, ISSUES & RECOMMENDATIONS

The VSO sub-activities in the PAA are the biggest single cost in the Agency, accounting for appropriately 30% of all expenditures over from 2007-2008 to 2009-2010. Visitors to PC sites account for approximately 66% of Agency's total revenues, which exceeds $100M annually. Assets associated with the VE/VSO represented 40% of the estimated $10B in replacement value of the Agency's asset portfolio. If the VSO is not well managed it could result in a loss of revenue and visitors, harm to the natural and cultural resources that are at the core of the PC experience, limit the achievement of the mandate objective of public enjoyment of protected places and ultimately impact on the ability of the Agency to sustain protected heritage places for future generations. Given the materiality of the investment in the VSO and its importance for the Agency's mandate, it was identified as a high priority for evaluation in both the 2009-2010 and 2010-2011 Parks Canada Evaluation Plans.

The evaluation addressed:

1) **Relevance:** whether provision of the VSO was consistent with federal and Agency legislation, mandates, roles, and priorities; whether the Agency had in place the necessary information, guidance, tools and processes for understanding potential and actual demand and responding in a timely manner, and whether the extent of overall demand was sufficient to justify the offer and/or components of the offer.
2) **Effectiveness:** whether the Agency was meeting or was likely to meet its corporate and internal performance targets for the VSO.
3) **Cost-Effectiveness and Attribution:** whether the VSO was efficient and economical in producing outputs and achieving outcomes; and the extent to which achievement of outcomes could be attributed to the actions of the program.
4) **Design and Delivery:** whether and to what extent changes in the overall design of the program over the last several years were communicated, understood, and supported by Agency staff; whether potential negative consequences of the program were identified and managed; and whether and to what extent alternative delivery mechanism where considered and used to support program delivery.

Relevance: We concluded that providing a VSO was consistent with the Agency's mandate, overall government priorities, and public expectations. The offer available at PC locations is similar to that of many other parks systems. Certain components of the VSO are logically necessary for a service offer (i.e., roads, parking) and/or consistent with public expectations and, as a result, are common across the systems (e.g., visitor centres and camping in NPs, trails for both NPs/NMCAs and NHSs).

The Agency has both tools and processes in place for understanding visitor characterises, trends, needs and expectations, including the attendance monitoring system and the VIP, as well as newer visitor segmentation tools, and structured processes for evaluating and planning the VSO on site. All the sources of information and tools have some limitations although the issues with respect to the validity of person-visit data and to a lesser extent VIP survey data are particularly important given the role these sources of data play in understanding trends, setting targets and holding managers to account within the organization.

The existing tools are well known and seen to be useful, although perceived utility varies by system and the type of tool. VEAs in particular are the primary vehicle for bringing together various sources of information on the nature of visitors and changing demand, identifying needed improvements to the existing offer. The tool has been used extensively since its introduction in 2005 and resulted in hundreds of planned actions many of which have been reported to be completed. Other tools such as the Visitor Experience Opportunities concept are only beginning to be introduced with a specific focus on new product development.

While it is generally agreed that progress has been made in developing tools and techniques for understanding visitors and changing expectations and demands, managers at the local level were looking for improved access to information with specific relevance to the particular sites they manage and indicated a need for more time, resources and expertise to use the information available. At the national level there is a desire to further document and standardize data collection across the Agency to improve its quality and overall utility for the organization, to more consistently exploit standardized approaches for understanding and segmenting visitors, and to expand the range of data collected.

The order of magnitude of demand for PC places, as measured by person visits, or unique adult Canadian visitors, continues to be in the millions each year, although it is reasonable to conclude that visits are declining. The extent of the decline in person-visits is difficult to determine with any certainty given various sources of error in the estimates. Demand is seasonal and varies by systems (i.e., NPs, NHSs, and Historic Canals) and by locations with systems. In general, visitors to PC administered places are not representative of the Canadian population (e.g., they are older and less ethnically diverse). There is a general sense in the Agency that declining visits can only be reversed by appealing to segments of the population that are currently underrepresented in the Agency's visitor profile.

While it is unreasonable to expect the Agency to have quantitative data on demand for each of its specific VSO facilities, service or activities, we did expect that there would be at a minimum, an inventory of the extent to which various activities and services were available and a national understanding of the extent of use of a least some of the services or activities (e.g., tied to the most material or the highest risk aspects of the offer, or to new initiatives tracking use could provide valuable information for national planning and decision-making). With a few exceptions, the Agency lacks this kind of national level data for particular components of the VSO, although local data is collected in some cases (i.e., local campground occupancy statistics or trail use data).

Subjective estimates of demand for various services and activities suggested at least moderate demand for many of the core facilities and activities offered by the Agency. There is general consensus that demands are changing and that visitors in general are looking for more creature comforts, more technology based services, and a variety of improvements to either the quality of the existing offer or for expansion of the offer. There is also a sense that the market is fragmenting so that the service offer has to adapt through expanding the range of opportunities available in order to attract new types of visitors.

Effectiveness: Evidence from direct on-site observation and a wide variety of Agency documents attests to the existence of many activities and outputs associated with various aspects of the VE cycle. Key areas of weakness identified by PC personnel focused on the adequacy of pre-visit information (wishing and planning), signage (travelling and arriving), the quality of infrastructure (visiting), and a lack of activities and outputs to support the post visit experience (i.e., departing and remembering). Qualitative feedback from visitors identifies similar themes in some cases, although the quantitative results from visitor surveys suggest that the majority of visitors (i.e., 80% or more) tend to be satisfied or very satisfied with virtually all aspects of the activities, infrastructure and products on site, with the lowest percentage (i.e., 75%) reserved for pre-visit information.

While we concluded that the reported decline in "person-visits" is real and that the trend has yet to be reversed, our confidence in this conclusion is tempered by the many issues associated with the quality of person-visit data.

The on-site targets related to the percentage of visitors who rate their visit as enjoyable or who are satisfied with their overall visit are achieved on average. The target for the percentage of visitors who report a place is meaningful to them (85%) is not achieved on average or at most locations where it is measured, although the majority of visitors (i.e., 70% of more) do report that a place is meaningful. At the strategic outcome level, where the target is that 65% of Canadians have a personal connection to PC administered places, a baseline level of performance was established but the Agency has yet to repeat its national polling of Canadians to assess changes relative to the baseline.

Efficiency and Economy: Evidence that the VSO program is managed economically and efficiently comes from both anecdotal reports of initiatives providing for efficiency or economy of operations and the use by management of many flexibilities in the selection of inputs (i.e., staff mix, revenue generation strategies, competitive pricing and pricing flexibilities), and the provision of outputs (e.g., minimal or no service offer at some sites, providing an offer consistent with seasonal demand, scaling the size of the offer at different sites represented by service level categories, varying the availability of specific aspects of the offer within a season).

Quantitative analysis provided some limited tentative evidence of the relative economy and efficiency of a sample of NPs compared to NHSs and historic canals. Although the relative efficiency or economy of systems is interesting, likely the more important questions raised by this analysis pertain to differences between sites rather than systems and the extent to which it is reasonable and practical to operate sites with very different cost recovery ratios or which spend vastly different amounts to reach a visitor. There is some evidence that the issues have started to be addressed through the development of field unit sustainability plans in response to continued fiscal restraint across government.

Attribution of Outcomes: The Agency has developed a plausible and reasonable account for why visits to its places are declining (i.e., based on macro social demographic changes in society and changing tourism demands) and supported this with some internal reach in the Agency. It is developing tools that will allow it to directly track changes in visitor characteristics over time and provide more direct empirical evidence of what might account for increases or decreases in visits in the future.

The Agency's program theory for the on-site outcomes emphasizes that the outcomes can be achieved with any level of inputs or outputs as long as the available offer, including the nature of the site itself, is consistent with visitors' prior expectations. This model is consistent with literature reviewed for the evaluation and is supported by some qualitative data collected by the Agency.

Qualitative data also points to a variety of management actions that could potentially influence the outcomes. To date, efforts to identify quantitative predicators of outcomes and/or groups differences in the outcomes have been limited and do not provide clear evidence of the Agency's impacts on the outcomes. Quantification of program impacts on outcomes is challenging both because specific management actions are likely to have small impacts on visitors' overall evaluations of a visit and because already highly positive ratings of the visit experience by visitors make it difficult to detect incremental improvements due to management actions. Quantitative research on either predictors of outcomes or group differences in outcomes has been limited to date, and has not provided a clear and consistent picture of key drivers of the outcomes or the effects of particular management actions.

Program Design: Efforts to renew the VE Program Activity in general, and the VSO in particular, are largely supported in the Agency, although at the time of the evaluation additional clarification of roles and responsibilities associated with new organizational structures and improvements to communications were required. Potential negative consequences of providing a VSO are largely anticipated and addressed as part of normal operations, although the important issue of displacement of or discontinuing use, by existing visitors as a result of attracting more, or different types of visitors in the future, is treated only indirectly in the Agency's VSO guiding documents. Finally, the Agency has clearly considered and engaged a variety of third party service providers to enhance the service offer available to visitors covering a wide range of specific services or activities. Stakeholders, particularly from the commercial sector, expressed an interest in providing more services. A major barrier to delivering these potential opportunities continues to be the limited array of instruments available to Agency managers, in the government context, for engaging and working with stakeholders and partners.

Recommendations

It is striking how many of the issues and problems with the VSO identified over the course of the evaluation are already being addressed in whole or in part by on-going initiatives. A few examples include:

- A lack of local market information for VE managers in the field is being addressed through development of more detailed and sophisticated segmentation of on-site visitors, although concerns remain on the consistency in which information is used and capacity at the local level.
- Support for the Wishing and Planning and the Travelling and Arriving components of the visitor experience cycle is being addressed through a national web renewal project.

- The need to strengthen the departure phase of the VE cycle is being addressed through the development of a PC line of merchandise.
- The lack of good information on the inventory, condition or use of VSO facilities and infrastructure is being addressed through the response to the 2009 evaluation of the general asset management program, and through the development of new corporate investment plan and project management standards consistent with new TB Polices.
- National Office interest in collecting new types of information (e.g., paid visits, use of specific types of park passes, campground occupancy rates) is being addressed through the introduction of a new generation of point of sales systems, which will collect visitor as well as revenue data, and the acquisition and implementation of a new campground reservation system.

Our recommendations, therefore, focus on the issues for which we did not find evidence of an on-going set of actions to address the identified problems or in a few cases where actions have been delayed or are incomplete. These issues involve, clarifying overall governance (i.e., roles and responsibilities), the types and quality of the VSO information collected nationally to support understanding, accountability, investment, performance management and decision making, and development of specific tools and processes to improve the consistency of analysis and planning to meet corporate targets.

Overall Governance:
It is clear that at the time of the evaluation there was some confusion on roles and responsibilities, particularly at the level of Service Centres in the delivery of the VSO program.

> **Recommendation 1:**
> The VP ERVE should review, clarify and communicate additional guidance on the respective roles and responsibilities of National Office, Service Center and field unit staff in the delivery of the VSO in the context of the on-going work related to sustainable planning in the Agency.
>
> **Management Response:**
> **Agree.** The VP ERVE will review clarify and communicate additional guidance on the roles and responsibilities of National Office, Service Centre and field unit VE staff by May 31, 2012.

Supply of Elements of the VSO
At a minimum, the Agency should in our view be able to document by location where various VSO infrastructure, services and activities exist.

> **Recommendation 2:**
> The VP ERVE should oversee the completion of the inventory of products and services offered by location and ensure, in collaboration with the VPs Operations, that all locations confirm a baseline inventory and update it annually or biannually.

Management Response
Agree. The VP ERVE will oversee the completion of the inventory of products and services offered by location and work with the VPs Operations to confirm the baseline and update the inventory annual. The field will be asked to validate the data gathered by the VP ERVE. This information provides the Agency with a clear and comparable picture of the service offer across the system. In addition, this information will be used to allow visitors to search the PC website based on desired activities and services and for PC to pro-actively provide visitor experience opportunities to different market segments of our visitors. This baseline will be completed by December 31, 2013.

The VSO evaluation also noted the limited availability of data regarding on-site use of various components of the VSO infrastructure, services and activities. Once the inventory is completed the VP Operations will evaluate the possibility of using this inventory to have individual sites evaluate sustainability of operations in regards to on-site use of infrastructure, services and activities.

In addition, the Office of Internal Audit and Evaluation noted that the Agency is preparing a request for proposals for a new reservation service for implementation in 2013. This service will include an inventory management system for front-country and back-country campsites. It will serve as the Agency standard system for campground management and allow for tracking of available inventory and occupancy rates.

Additional Information for Management of the VSO
The Agency has taken measures to acquire national information on the supply and utilization of the camping service offer component of the VSO but lacks a framework specifying what other information should be collected either nationally or locally, with a given degree of data quality, to support planning of, and investment in, the VSO.

Recommendation 3:
The VP ERVE should develop a framework and guidance, for approval by EMC, identifying what additional national and/or local information is required for adequate management of VSO-related infrastructure and facilities, as well as future investment decisions (e.g., based on criteria such as materiality of the offer, risks or introduction of new offer) and identify protocols and data quality standards required for various contexts (e.g., data quality requirements for utilization of an existing or new facility may vary depending on the size of the investment).

Management Response
Agree. Building on Management Response 2, the VP ERVE will develop a framework and guidance, for approval by EMC, identifying what additional national and/or local information is required for adequate management of VSO-related infrastructure and facilities. The framework will include protocols and data quality standards required for various types and investment-levels of facilities and types and levels of use. This work will be completed by December 31, 2013.

Strengthening VSO Planning

The Agency has introduced tools to assist in the evaluation and planning of the VSO (i.e., notably the VEA process). However, the existing tools are likely inadequate to address the recently articulated outputs targets related to developing new or renewed components of the VSO each year based on standardized approaches to segmentation of visitors. At the same time local visitor experience managers have indicated difficulties in accessing tools and information, a need for more site specific information and a lack of expertise in utilization of the existing tools and information.

> **Recommendation 4:**
> The VP ERVE should provide additional planning tools to support VE managers in annual planning related to the Agency's outputs targets for the VSO (i.e., sites will develop/renew at least three visitor experience opportunities targeting key market segments and Explore Quotient types every year for the next three years).
>
> **Management Response**
> **Agree.** The VP ERVE will evaluate the suite of VE Planning tools and renew a national approach to planning for VE. This work has started with input from the VE Manager Council. This renewal will look at existing tools and how they can be improved. It will also identify any gaps in planning and how they can be filled.
>
> The Council's initial input identified the key elements of a VE site strategy. They included: an analysis of the current situation (similar to a VE Assessment), the definition of the essence of place, the identification of target markets, the generation of ideas for potential products, the creation of an action plan to develop specific products matched to specific markets, and ultimately the evaluation of the implementation of the VE site strategy. The VE site strategy will be a key tool to guide the field in achieving the output targets from the Performance Management Framework.
>
> **Recommendation 5:**
> The VP ERVE should provide direction on the expected types of analysis to support VSO planning (e.g., EQ, PRIZM, Postal Code and other related data) and additional training and guidance in the use of these nationally consistent tools for development or renewal of visitor experience opportunities.
>
> **Management Response**
> **Agree.** In 2007, the Agency introduced the Explorer Quotient (EQ) concept. In summer 2010, the Agency acquired an additional and more sophisticated segmentation tool, PRIZM-C2, also developed by Environics. PRIZM-C2 associates 12 life stages with information about its members such as market size, demographics, values, media habits, recreation and leisure patterns, travel motivations (by EQ type), etc. In 2012 the Agency will improve the collection of visitor information through the introduction of a new generation of point of sale cash registers. These cash registers will provide timely and reliable revenue data and information on visitor postal codes, party size, gender makeup, and approximate ages. Combined with EQ and PRIZM the Agency will be able to implement a common and consistent approach to segmentation.

The VE Branch is also launching market segmentation training for VE in January 2012. This training will provide guidance on the nationally consistent approach to market segmentation. It will help the field analyze and utilize EQ, PRIZM-C2, Postal Code and other related data to develop and promote new and more relevant visitor experiences to targeted market segments. The training will support the development of VE Site Strategies to guide the park or site in meeting VE output targets.

Person-Visits

Person-visit statistics are a key metric for all aspects of the VE program activity, including target setting, performance measurement and a basis for holding both the Agency and individual managers to account. Yet the existing data has many limitations both in how it is collected and how it is managed and reported. In principle, the quality of the data should be aligned with managers' needs and what is affordable and reasonable given its intended uses. In our view, this is not currently the case.

The Agency has several options with respect to person-visit data including but not limited to, abandoning the metric given the costs and complexity involved in obtaining valid and reliable data, revising the definition of visit to make data collection easier and less costly (e.g., count all visits without having to identify and exclude through traffic from the estimates) and having differential quantity standards for different sites (e.g., focusing high quality methods on the 20 to 30 most visited sites which account for 80% to 90% of recorded visits). The latter option is consistent with Agency direction dating from 2000.

Recommendation 6:

The VP ERVE should in the near term develop a proposal for approval by EMC, outlining the suite of attendance statistics the Agency will collect, their strategic utility for Agency operations, and update national standards (e.g., upgrade periods, inclusions, documentation, target setting, accountability), where relevant, for clarity and user-friendly implementation.

Management Response:

Agree. The VP ERVE will develop a proposal for EMC for approval by December 31, 2012 outlining the suite of attendance statistics the Agency will collect, their strategic utility for Agency operations, and any necessary updates to national standards.

Visitor Information Program Surveys

The VIP surveys provide the most useful of the other key metrics for assessing performance in the VE program, and for the VSO in particular. Issues with the quality of this data are not as significant as for the person-visit data; however, there are some outstanding issues with the collection and management of this data as well.

Recommendation 7:

The VP ERVE should propose and seek approval by EMC as required for the following:

a) A requirement that VIP survey sampling plans and records of implementation of the plans be documented in writing and deposited promptly in a central location (e.g., on the intranet or with the office of the Chief Social Scientist).
b) A requirement that site specific questions on VIP surveys be drawn from a standardized question databank to ensure that the information collected is maximally useful for the Agency as a whole.

Management Response
Agree. Aligned with response 3 (above), by December 31, 2012, the VP ERVE will seek approval by EMC for:
a) A requirement that VIP survey sampling plans and records of implementation of the plans be documented in writing and deposited promptly with the Office of the Chief Social Scientist.
b) The development of standard question approaches for similar issues, while retaining some possibility for site specific questions.

The current VIP includes many mandatory questions asking visitors to rate satisfaction with specific aspects of the VSO (e.g., information, facilities, staff, services and activities). Given that results on these questions typically show that most visitors are satisfied or very satisfied, the utility of requiring that this data be collected on an on-going basis is suspect.

Recommendation 8:
The VP ERVE should oversee a review of the number of mandatory questions on the VIP surveys with a view of reducing the requirements to what is essential for management purposes. The object of the exercise should be to stream line the survey and not just replace national mandatory questions with additional site specific questions.

Management Response
Partially agree. By December 31, 2013, the VP ERVE will review the VIP surveys to maximize their effectiveness, including the number of mandatory questions, while ensuring the survey fulfills its national and local role of measuring performance and understanding visitors. VIP surveys will continue to be linked to VE Planning tools.

Dispute Resolution Regarding Person-Visits and VIP Surveys
It is clear that in some cases that disagreements arise between National Office, Service Centre and field personnel on what questions to ask on surveys or how best to estimate visits or conduct visitor surveys. At present there is no clearly identified authority with the power to decide on a course of action when disputes arise.

Recommendation 9:
The VP ERVE should identify and propose for approval by EMC the position with authority to make a final decision when disputes arise on appropriate survey questions or issues of methodology for collecting visit statistics or conducting visitor surveys.

Management Response
Agree. The VP ERVE will confirm the role of the Chief Social Scientist as the authority when disputes arise on appropriate survey questions or issues of methodology for collecting visit statistics or conducting visitor surveys with EMC by June 30, 2012.

Personal Connection to PC Administered Places

The evaluation identified a potential issue with how the indicator of personal connection to PC administered places is constructed and analyzed, particularly when using it to demonstrate the importance of a visit to a PC administered place in fostering a sense of personal connection (i.e., potential circularity in the definition of visitors, and potential visitors and the definition of personal connection).

Recommendation 10:
The VP ERVE should ensure that additional analysis is conducted of the indicator of personal connection to PC administered places to identify and address the potential impacts of circular definitions prior to future public reporting of baseline performance and progress against the baseline.

Management Response
Agree. The VP ERVE will conduct additional analysis of personal connection to PC Administered places prior to the next public reporting of baseline performance, which is required by March 31, 2014 for the Departmental Performance Report.

Web Site Renewal

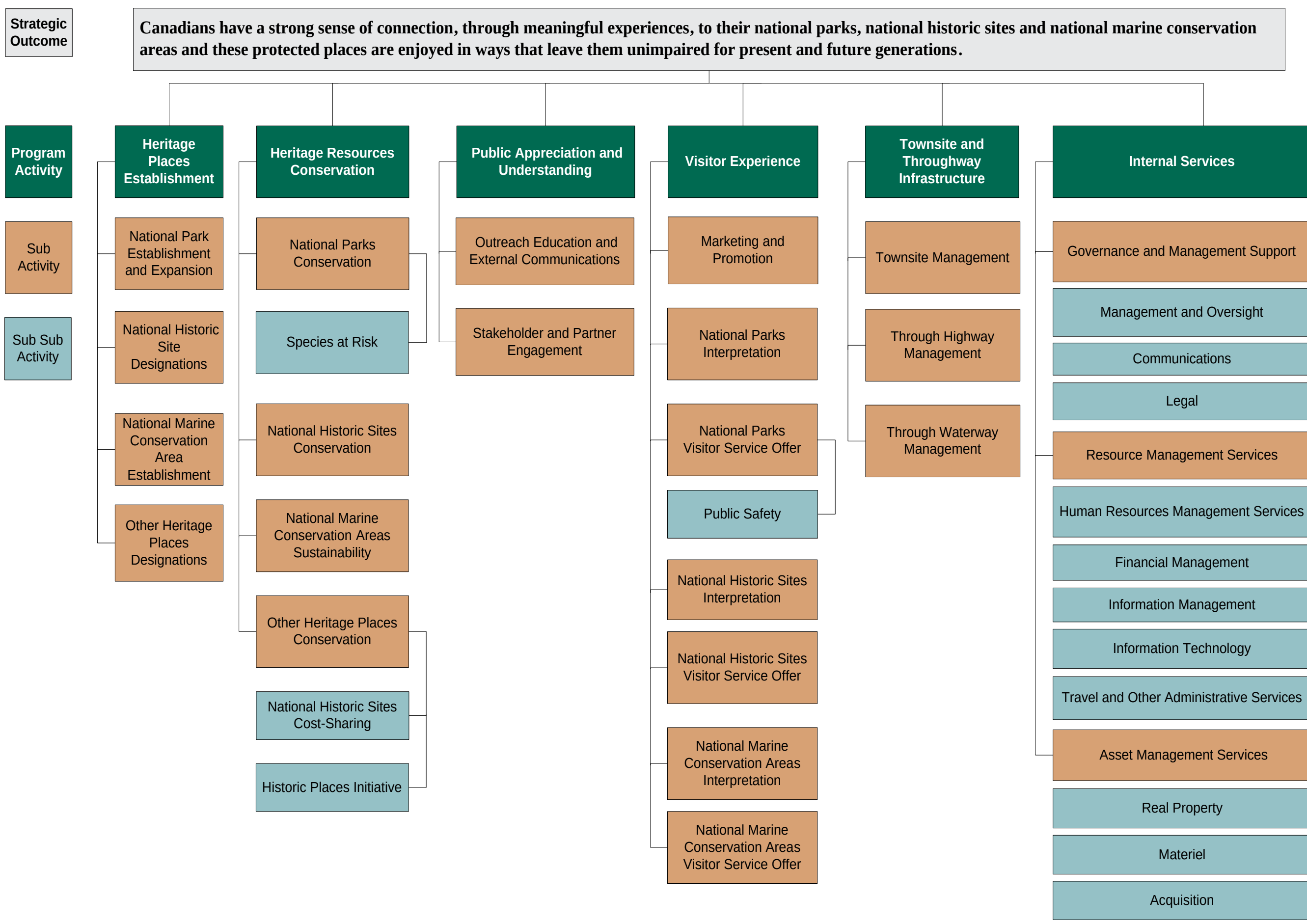
The Agency's website is widely viewed as a key tool for providing accurate, accessible pre-visit information. It is also an area where there is relatively weak visitor satisfaction and almost all the VSO personal we spoke to identified a need for improvement. The VP ERVE has the overall lead for this project.

Recommendation 11:
The VP ERVE should provide a revised and realistic timeline for the website renewal project taking account of the importance of this tool for addressing pre-visit information needs.

Management Response
Agree. The VP ERVE has formed a Web Renewal Steering Committee to provide direction on priorities for Web renewal. Precise timelines and milestones are being developed by the committee. Timelines will consider a number of factors including - Treasury Board's new Web Usability and Accessibility standards which impose strict timelines on Parks Canada to progress with renewal and meet the new standards by July 2013; External Relations and Visitor Experience priorities to improve visitor information, increase awareness and brand recognition; and alignment with the new Parks Canada Reservation system due to come online for the 2013 visitor season. The VP ERVE will approve these timelines and present them to EMC by June 30, 2012.

Appendix A. Parks Canada's Strategic Outcome And Program Activity Architecture

Parks Canada Agency Strategic Outcome and Program Activity Architecture 2009/2010



Appendix B. STAGES OF THE VISITOR EXPERIENCE CYCLE

Wishing	The potential visitor is aware of and wants to experience NPs, NHSs or NMCAs, the opportunities available at those places and the resulting experiences they may enjoy. PC needs to understand the potential visitor and promote awareness of opportunities for visitor experiences.
Planning	The potential visitor is deciding on the destination that best meets their interests, needs and expectations. To help this decision making, the visitor must have access to full details surrounding the potential visit to a park, site or marine area.
Travelling	The potential visitor is on their way to a destination, an area, a park, site or marine area. Their way there 'Wayfinding' needs to be as straight forward and clear as possible.
Arriving	The visitor enters the NP, NHS or NMCA. They are welcomed and receive orientation information and further details of the opportunities available.
Visiting	The visitor participates in, enjoys and learns from the products, programs and services offered.
Departing	The visitor has had an enjoyable, meaningful, satisfying, safe and fun visit.
Remembering	The visitor recalls and shares the details of their visit, perhaps on the way home or perhaps several weeks or months later. Their memories are full of positive recollections of the park, site or marine area.

Appendix C. Expenditures on the VSO and Research and Promotion by Business Unit

Business Unit	2005-06	2006-07	2007-08	2008 - 09	2009-10
Mainland Nova Scotia	2,039,284	1,977,170	1,920,885	2,426,832	2,318,230
Nfld. West & Labrador	2,465,171	2,260,131	2,693,548	2,820,876	3,098,321
Newfoundland East	1,937,119	2,180,565	2,797,462	2,148,389	3,135,124
Cape Breton Islands	5,578,009	5,509,835	6,228,135	6,329,914	5,924,547
Southern New Brunswick	3,023,864	2,821,962	3,600,102	3,078,102	4,307,525
Northern New Brunswick	1,914,963	1,700,457	1,774,334	1,586,059	1,883,842
Prince Edward Island	3,334,141	4,569,293	7,533,367	5,333,134	6,291,779
Atlantic / Halifax Service Centre	366,229	438,243	338,730	488,036	576,584
VP Parks Canada East	64,696	92	0	1,206	0
Mingan	2,068,267	1,752,438	1,310,790	1,340,336	1,880,746
Gaspésie	2,448,164	2,545,559	2,954,209	3,059,931	3,873,054
Ville De Québec	5,150,663	9,084,707	20,686,179	5,819,113	3,609,205
La Mauricie	2,527,698	2,610,309	3,002,087	3,115,911	4,456,186
Ouest De Québec	6,680,098	6,515,063	6,992,992	8,010,163	11,295,571
Centre De Services De Québec	1,122,763	1,144,028	1,361,081	1,399,571	1,419,738
Saguenay	497,329	667,394	1,326,240	770,892	937,101
Ontario East	6,484,827	5,631,096	6,385,907	6,589,123	8,533,994
Central Ontario	10,889,166	8,868,373	8,664,171	9,957,773	12,185,809
Southwest Ontario	7,699,599	4,569,453	3,783,732	3,415,605	4,284,794
Ontario North	1,541,995	1,486,308	1,430,146	1,569,458	1,702,807
Ontario Service Centre	334,195	366,506	467,518	378,982	408,916
Total East	**68,168,240**	**66,698,981**	**85,251,615**	**69,639,404**	**82,123,871**
Manitoba	2,175,232	914,978	854,213	1,327,623	1,996,619
Riding Mountain	2,287,831	2,816,581	1,844,478	1,614,610	1,704,901
Northern Prairies	3,331,034	4,134,434	7,733,182	3,945,152	5,861,330
Saskatchewan South	2,282,125	861,677	851,799	970,724	1,558,702
Southern NWT	632,512	1,399,744	973,294	2,263,116	2,880,067
Nunavut	993,937	1,199,256	1,324,713	1,590,657	1,824,186
Western Arctic	386,926	322,607	510,158	602,139	729,368
Western Service Centre	367,001	615,156	909,760	714,599	802,065
Banff	7,500,317	10,326,357	8,436,518	8,599,783	11,991,984
Jasper	6,011,660	5,869,960	6,586,139	10,127,631	9,158,559
Kootenay / Yoho	6,499,024	8,504,489	10,073,431	8,930,842	11,830,664
Waterton / Bar U	2,032,586	2,242,034	2,265,508	2,805,551	3,169,108
Mt. Revelstoke / Glacier	1,388,213	1,801,016	1,373,377	1,671,091	2,484,938
Western Asset Management Service Centre	872,255	449,547	666,195	1,421,560	2,424,080
VP Parks Canada West	74,889	370	0		0
Hot Springs	3,834,273	5,056,152	3,682,721	3,451,678	4,824,610
Coastal B.C.	3,759,495	4,099,393	4,466,791	4,372,481	8,188,018
Gwaii Haanas	495,872	582,944	560,905	945,718	693,431
Yukon	1,962,814	1,741,430	1,866,837	1,682,294	2,229,742
Mountain Block Dist	0	51,545	36,032	207	100
Total West/North	**46,887,996**	**52,989,671**	**55,016,051**	**57,037,455**	**74,352,473**
National Office	**12,034,138**	**1,125**	**11,553,107**	**12,043,432**	**12,537,357**
ERVE	**486,327**	**1,786,770**	**2,650,748**	**4,362,027**	**4,634,484**
Total Spending	**127,576,701**	**121,476,547**	**154,471,521**	**143,082,319**	**173,648,185**

Source: PAA Fund Centre Expenditure Worksheets from National Office Finance. This summary does not include Employee Benefits (EBP), Corporate Services and Revenue or amounts for Treasury Function.

Expenditures on VSO by O&M and Capital (000s)

	2005-2006		2006-2007		2007-2008		2008-2009		2009-2010	
	O&M	Capital	O&M	Capital	O&M	Capital	O&M	Capital	O&M	Capital
East	55,014	13,154	52,723	13,976	62,645	22,607	58,888	10,752	62,115	20,009
West/North	38,866	8,021	39,463	13,527	41,392	13,624	44,969	12,068	48,324	26,028
National Office	12,034	0	1	0	11,553	0	12,043	0	12,537	0
ERVE	486	0	1,787	0	2,651	0	4,362	0	4,634	0
TOTALS	**106,401**	**21,176**	**93,974**	**27,502**	**118,241**	**36,230**	**120,262**	**22,820**	**127,611**	**46,037**

This summary does not include amounts for Treasury Function, Corporate Services, Revenue or Employee Benefit Program (EBP).

Appendix D. EVALUATION MATRIX

Issue / Question	Expectation(s)	Indicators	Data Sources
Relevance			
1. Is the program consistent with broader federal government priorities and with PCA mandate and priorities?	Program is aligned with federal government and PCA strategic directions. The VSO is consistent with government practices in other jurisdictions.	Program aligns with federal government and PCA mandate and policy. Other government jurisdictions are providing similar services and programs to support visitors at their protected places	Document and file review Key informant interviews
2. To what extent do managers have the information and tools necessary to assess demand and make informed decisions about the service offer and respond to the changing needs and demands	The Agency continuously monitors to understand current and changing needs and demands of visitors and potential visitors. Managers have sufficient information and tools to evaluate and plan the VSO	Evidence of a the existence of relevant, reliable sources for information and tools for monitoring demand and changing patterns of demand The perceived usefulness and relevant of the tools information and tools for VSO planning and adjusting the offer Evidence that changes or adjustments to the VSO are made as a result of use of information and tools	Key informant interviews VE manager survey Document and file review
3. What are the extent and dimensions of the demand being addressed in this program?	There is evidence of a general demand for services and support for people to visit/enjoy protected heritage places. A reasonable inventory exists of the supply of elements of VSO and demand is measured for key elements of the offer.	Attendance data (PCA and other jurisdictions). Inventories of supply and records of demand/use of particular products and services.	Document and file review Key informant interviews VE manager survey Analysis of other secondary data
Performance			
4. Is the program producing its desired outputs?	Required services, facilities and activities are developed and operating as intended or there are reasonable plans in place to address gaps in requirements.	Key informants report that they have the right services, facilities and activities to meet client needs. Visitors are satisfied with the availability and quality of services, facilities and activities. Facilities are in good repair.	Document and file review Key informant interviews VE manager survey Analysis of other secondary data
5. Is the program effective in achieving its desired results for visitor satisfaction and enjoyment, meaningfulness of place, and connectedness to place?	90% of visitors enjoy their visit. 50% of visitors are very satisfied and 90% are satisfied or very satisfied. On average, 85% of visitors at surveyed locations consider the place meaningful to them	Estimated number of visits % of visitors who enjoy, are satisfied and find their visit meaningful. Clarity and distinctiveness of outcomes	Document and file review Key informant interviews VE manager survey Analysis of other secondary data
6. Is the program efficient in producing outputs (services, facilities and activities) and economical with respect to the reach of its offer and	Prices will be comparable to other providers of similar services and not represent a barrier to the use of the service offer. Visitors are satisfied with "value for money"	Extent management has used available flexibilities to encourage efficient or economical operation relative to demand and quality considerations. Prices are comparable to other similar offers and satisfaction with "value for money" is high.	Document and file review Key informant interviews Cost analysis and benchmarking Analysis of

producing targeted results?		Extent to which level of expenditures (inputs) is proportional to others who provide similar levels of service (outputs), and extent to which inputs/outputs are proportional to others who achieve similar results.	other secondary data
7. To what extent can the number of visits to PCA places, visitor enjoyment and satisfaction and connection to place be attributed to the PCA VSO?	There is evidence that addressing visitor needs and desires is linked to increased satisfaction and enjoyment of PCA heritage places.	Evidence of a framework identifying the drivers or influences points for the desired outcomes Research showing how drivers or influences points are affecting the outcomes	Document and file review Key informant interviews Analysis of other secondary data
Program Design			
8. To what extent are roles, responsibilities and accountabilities for program delivery clear and effective?	Staff at all levels has a clear understanding of the changing organizational structures and their roles and responsibilities within the new structures.	Self-reports of awareness and understanding of re-alignment, staff attitudes towards communication mechanisms and change	Key informant interviews
9. To what extent are potential unintended negative impacts of program identified and managed?	Potential negative consequences of visitors (e.g., damage to heritage resources, crowding, and displacement of one type of visitor by another) are identified and risks are managed or mitigated in a transparent manner.	Existence of analysis and plans to address potential negative impacts (unintended or otherwise) of the VSO	Document and file review Key informant interviews
10. To what extent is the full range of program delivery options identified and utilized.	Potential partnership and other service delivery options (e.g., third party delivery) have been identified and assessed for feasibility and are utilized when it is effective to do so.	Presence and reported effectiveness of partnerships. Evidence that additional partnerships are needed. Successful third-party delivery models exist.	Document and file review Key informant interviews

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Appendix F. SITES VISITED

National Historic Sites

1. Fort Langley
2. Fort Rodd Hill/Fisgard Lighthouse
3. Chilkoot Trail
4. SS Klondike
5. Cave And Basin/Banff Park Museum
6. Batoche, Fort Battleford
7. The Forks
8. Lower Fort Garry
9. Rideau Canal
10. Woodside
11. Lachine Canal
12. Green Gables
13. Province House
14. Halifax Citadel
15. Fortress Of Louisbourg
16. Alexander Graham Bell
17. L'Anse aux Meadows

NPs and NP Reserves

1. Gulf Islands
2. Pacific Rim
3. Kluane
4. Banff
5. Jasper
6. Prince Albert
7. Grasslands
8. Riding Mountain
9. St Lawrence Islands
10. Bruce Peninsula
11. La Mauricie
12. Fundy
13. Prince Edward Island
14. Kejimikujik
15. Cape Breton Highlands
16. Gros Morne

National Marine Conservation Areas

1. Fathom Five

Appendix G. Summary of Site Visit Interview Respondents

Site	Superint-endents	VE/Site Managers	VE Team Members	Other Site Staff	Partners/ Stakeholders	Total
Yukon						
Chilcoot/SS Klondike NHS	0	1	0	0	2	3
Kluane NP	1	1	0	0	1	3
BC						
Pacific Rim NPR	0	1	1	1	2	5
Fort Rodd Hill NHS	0	1	1	0	0	2
Gulf Islands NPR	0	1	1	1	0	3
Fort Langley NHS	1	1	1	0	1	4
Alberta						
Cave & Basin/ Banff Museum NHS	0	1	1	0	0	2
Banff NP	0	1	1	1	0	3
Jasper NP	0	1	1	1	4	7
Saskatchewan						
Prince Albert NP	0	1	1	1	1	4
Grasslands NP	1	1	0	0	3	5
Fort Battleford NHS	0	1	1	0	1	3
Batoche NHS	0	1	0	1	2	4
Manitoba						
Riding Mountain NP	0	1	2	1	2	6
Lower Fort Garry NHS	0	1	1	0	1	3
The Forks NHS	0	1	1	0	0	2
Ontario						
Bruce Peninsula NP	0	1	2	0	2	5
Rideau Canal NHS	0	1	1	1	2	5
Woodside NHS	0	1	1	2	3	7
St. Lawrence Islands NP	0	1	1	1	2	5
Quebec						
La Mauricie NP	0	2	1	0	2	5
Lachine Canal NHS	0	1	2	0	0	3
Newfoundland			.			
Gros Morne NP	0	1	1	0	2	4
L’Anse aux Meadows NHS	0	1	1	0	2	4
New Brunswick / PEI						
Fundy NP	0	1	2	0	2	5
PEI NP/NHSs	1	2	1	0	3	7
Nova Scotia						
Kejimkujik NP	0	1	1	0	2	4
Citadel NHS	0	1	1	0	0	2
Cape Breton Highlands NP	1	1	0	0	2	4
Alexander G. Bell NHS	0	1	1	0	2	4
Fortress Louisbourg NHS	0	1	1	1	1	4
TOTAL	**5**	**33**	**30**	**12**	**47**	**127**

Appendix H. Summary of EQ and PRIZM Segments

EQ Types (highlighted segments are over or under represented in PC administered places based on data from 36 locations collected in 2010)

Type	Description
Authentic Experiencer	Appreciates the beauty of natural and cultural environments, enjoys using all of senses when exploring a chosen destination, wants to really get to know the places visited, quickly adapts to personal challenges and risks, easily figures out how to make the most of every situation, wants to be fully immersed in travel experiences and tends to stay away from group tours and rigid plans. Most likely to be seen at nature reserves, world heritage sites, hiking trails, museums
Cultural Explorer	**Over Represented** Seeks constant opportunities to embrace, discover, and immerse themselves in the entire experience of the culture, people and settings of the places visited. Not content to just visit historic sites and watch from the sidelines, they want to participate in the modern-day culture as well. They often attempt to converse with locals, attend local cultural festivals, or go off the beaten track to discover how people truly live. Most likely to be seen a heritage sites. cultural events, museums, festivals
Cultural History Buff	**Over Represented especially at NHS** Travel in pursuit of a personal interest or hobby, making the experience more intrinsically rewarding. They strive to go beyond their own roots to understand the history and culture of others. Travelling alone or in small groups, they seek the freedom to observe, absorb and learn at their own pace, unhurried by others or driven by rigid schedules. Most likely to be seen at galleries, heritage sites and festivals
Personal History Explorer	They travel to gain a deeper understanding of their ancestry and heritage. Travel tends to be a shared experience, both during and after the trip. They feel safer when staying at branded hotels and like to travel in style, comfort and security. They like to visit all of the important landmarks, so a carefully planned schedule, often as part of a guided tour, ensures experiences of a lifetime. Most likely to be seen at branded hotels, top restaurants, main attractions, guided groups
Free Spirit	**Under Represented Except in Quebec** Thrill-seekers, travel satisfies needs for the exciting and the exotic. They like the best of everything and want to be with others who feel the same way. They have a lot of energy and want to see and do everything. The focus is on fun. Young, or young-at-heart, they travel for the thrill and emotional charge of doing things. Most likely to be seen at luxury hotel, tourism hot spot, top restaurants, night clubs
Gentle Explorer	**Under Represented** They like returning to past destinations and enjoy the security of familiar surroundings. They seek the most comfortable and serene places when they get away and avoid the unknown. Well-organized travel packages and guided tours that take care of all the details appeal to them- travel should be fun, not extra work! And if it's fun, chances are you'll be back. Most likely to be seen at branded hotels, spa, cottage, organized tour
No Hassle Traveller	Escapist, they search for relaxation and simplicity when getting away. They prefer worry-free travel and spending time travelling with family and friends. Short breaks and getaways are preferred to long-distance travel. After planning the basics of the trip (accommodations, transportation), they like to fill in the details as you go. Along the way, they hope to see and expose their family or travel companions to the beauty of natural scenery and different cultures. Most like to be seen at festivals, theatres, museums, guided tours
Rejuvenator	**Under Represented** Travel is a chance to totally disconnect and just "get away from it all." All they want to do is escape, recharge and renew. They usually take short vacations to familiar destinations, often for family visits and celebrations. While they might seek out destinations with a few interesting things to see and do, they don't want overly-hectic schedules of events. Travel is meant to be relaxing, not extra work! Most likely to be seen at family resorts, spas, hotel restaurants, tourist hot spots
Virtual Traveller	**Under Represented** Tending not to travel very often, they prefer the comforts of home to the uncertainties of new places or cultures. Often very active locally, they usually find enough to satisfy their sense of exploration within their community. Rather than being restricted to the confines of pre-packaged tours, they prefer the flexibility of being able to decide what they want or don't want to do on their own. Their trips tend to be shorter, closer to home and centred on family events. Most likely to be seen at motels, family events, cottage, casinos

PRIZM Life Stages (Over and underrepresented segments are highlighted)

	Life stage	Description	Market Size
Young Adults	**Singles Scene**	**Under Represented** Young, ethnically diverse singles and some couples, free-spirited, they like to be involved in the decision-making that affects their lives and want to be well informed about the products and services they buy. They enjoy activities that challenge them physically and mentally: as much as they enjoy a snowboarding, white water rafting or mountain biking, they look forward to time spent at historical sites, cultural centres and art galleries. Looking for variety in their activities, trips that enrich their perspective on life, renew personal connections, are physically challenging and intellectually stimulating. Heavy magazine and internet users, always on the lookout for and interesting new opportunities, products, shows and adventures.	6.1% of Households (822,133) 4.5% of Population (1,531,173)
	Starter Nests	**Under Represented** A younger, liberal ethnically diverse, couples starting families, single parents and some singles, who live and breathe the pulse of the city that they live in. Spent time at cultural centres, art galleries, and concerts –and steal away to the nightclub when they can find a babysitter. They tend to not be adventurous when it comes to the outdoors, prefer indoor adventures to nature experiences, perhaps because they do not own a lot of the equipment and have limited access (public transit) or exposure to nature places. Looking for activities that are fun and allow them to learn and to learn about themselves; enjoy trips that enrich their perspective on life and are intellectually stimulating, but do not break the bank. Moderate magazine and heavy newspaper and internet users, they love keeping up to date of urban happenings, urban activities, things to do with friends, and the latest trends.	7.1% of Households (959,869) 6.0% of Population (2,028,801)
Families	**Young Metro**	**Under Represented** Young, ethnically diverse, families with young children, mainly upper-middle class and some lower income newcomers. Live in cities and rapidly growing suburbs, with busy lifestyles of trying to balance work and family life, they look for breaks from their day-to-day responsibilities. When travelling they look for ways to relax and de-stress but at the same time have activities that will keep the kids entertained. They want to create lasting memories for their families and strengthen their family bond while on vacation. Looking for activities that will promote a fit and healthy lifestyle. They have a strong national pride and celebrate Canada’s diversity by incorporating influences from other cultures into their lives.	12.2% of Households (1,640,616) 14.2% of Population (4,794,952)
	Fledgling Families	**Over Represented** Younger than average families and single parents with high concentrations of children under the age of 15., with their midscale incomes. They pursue active and outdoorsy lifestyles and own a lot of outdoor and sports equipment, including campers and boats, to support their activities and have the tools to move it around. They are balancing the obligations of family, yet still have their youthful impulses. They like kid-friendly attractions, such as zoos and aquariums, but when they can, will head out to the night club for some alone time. Less interested in cultural activities and community, tending to shy away from learning about the world around them. They tend to be weak media consumers, especially news/ current affairs, When planning a trip, they tend to book their favourite campground and packs the marshmallows.	9.7% of Households (1,312,216) 10.8 % of Population (3,663,726)
	Family Traditions	Conservative, middle age couples and families with school-aged children, comfortable with who and what they already know. They tend to feel connected to their family and values and the familiarity of the traditions of their province or region, and avoid learning about and integrating the perspectives of other cultures into their own lives. Tradition tends to play an important role in most aspects of their lives. Enjoy the outdoors and playing sports, owning a plethora of sports/outdoor equipment to support their recreational pursuits, and tending to go back to the same places year after year. Culturally, they like small town activities -bingo halls, country music and dinner theatres. Discriminating consumers, but tending to place a high priority on convenience over price, with a desire to express and improve their social standing, which can lead to consumerism.	11.2% of Households (1,515,025) 11.6% of Population (3,921,205)
	Middle-aged Achievers	**Over Represented** Affluent couples in their 40sand 50swith school aged children who are living in major urban areas, with busy lifestyles trying to balance the duties of work and family, and looking for breaks from their day-to-day responsibilities. Locally, they head to the museum, the zoo, movies or the hockey game to relax with their kids. When planning a trip, they look for ways to relax and de-stress but at the same time have activities that will enrich their family bonds. Looking to stay fit and youthful by jogging, playing golf and tennis, and hitting the slopes..They can afford a range of gadgets and travel experiences, but also use their material success to support a range of charities. They are avid users of print and Internet media, staying informed and looking for opportunities for their next getaway.	11.5% of Households (1,546,146) 13.3% of Population (4,516,449)
	Prosperous Parents	**Over Represented** Mainly older married couples with teenagers and adult-age children., concentrated in the suburbs around	4.1% of Households

		larger cities that have benefitted from ethnic influences over the last 30 years, a wealthier segment with the financial means to lead a comfortable lifestyle —travel when they want, buy what they want, do what they want. Likes luxury and activities that are intellectually stimulating and culturally infused, but they will also steal away to the cottage for some fun. At home, they are heavy consumers of cultural activities, patronize high end stores, and attend pro-sport games. They are very well informed, and typically use print, online and social media to stay up to date on the investments that support their lifestyle, and to seek opportunities that will continue to set them apart and one step ahead of others.	(554,706) 4.6% of Population (1,561,518)
	Maturing Diversity	**Under Represented** Middle-aged and older couples and families who settled in Canada over the last 40 years, with roots in China, Italy, Portugal and Asia, this ethnically rich group has achieved middle class status in Canada through hard work and perseverance. Deeply connected to their families and heritage, this group wants to feel connected to Canada –the country that is their adopted home. Avid shoppers and discriminating consumers, keeping abreast of the latest trends, with high rates of going to professional sports games, film festivals and auto shows, and the performing arts. They like to travel abroad and book it online, often using travel packages, but travel less frequently in Canada. They may visit parks, but would be watching wildlife and not camping. At home, their radios often are tuned to multicultural programming and the news; sports events are usually on the TV.	4.3% of households (574,069) 4.8% of Population (1,633,231)
Mature Years	**Emptying Nesters**	**Over Represented** Older couples and mature families with teenagers or adult children who are leaving home are transitioning to new phases of their lives in their suburban communities. Easy going and trying to stay fit well into their retirement years they enjoy the outdoors, often escaping the daily grind to recharge their batteries in natural settings. They enjoy going to the theatre, casinos and country music concerts. When planning a trip, they seek familiarity. They are likely to be snowbirds, packing up and heading south in the winter. Like to be involved in the decision-making that affects their lives and want to be well informed about what they buy; above average users of most media to stay informed and keep abreast of their interests. They are proud to call themselves Canadian, and are seeking ways to ensure they leave a legacy after their long and fulfilling careers.	7.3% of Households (985,319) 7.1% of Population (2,409,923)
	Later Years	Older couples and adults (many widowed),in their retirement years, whose children have mostly moved out they pursue laid-back lifestyles, although their incomes are relatively low and supplemented by pensions and savings. They enjoy camping, curling and fishing, and going out to dinner theatres, country music concerts and the occasional casino. This patriotic group is closely tied to the traditions and people in their regions. They participate in local events and support a range of organizations. When they plan a trip, they stay close to home in Canada or strike out to the sunny south to the snowbird community. Not big fans of social media and technology, they are generally best reached through traditional media outlets—TV and radio.	10.3% of Households (1,390,226) 8.6% of Population (2,904,755)
	Country Seniors	Empty-nesting couples and retirees living predominately in exurban communities and pursuing the quiet traditional country lifestyle. They like to garden, do wood working and bake up a prized apple pie for the fair. Cultural activities of interest include bingo and the country music festival. Living in more rural areas they pursue a range of traditional nature-based activities such as hunting, fishing and snowmobiling. They tend to travel to familiar places and often with the tent trailer or RV. They are closely tied to the traditions and people in their region and seek to preserve their way of life for future generations. This group loves their TV, so broadcasts tend to be one of the best ways to reach them.	5.4% of Households (734,190) 5.3% of Population (1,802,902)
Mixed	**Young & Old**	People in various stages of life living mainly in low rise rental apartments and duplexes in urban areas. This eclectic mix of younger adults, single parents and seniors is often dependent on the ebb and flow of service and/or traditional industries, and tends to struggle with and/or be constrained financially. While venturing to the store to shop can often provide a momentary distraction from fiscal realities, this group often looks for meaning through other opportunities that perhaps finances limit. Lead a passive lifestyle, connected to their neighbourhoods –they tend to hang out at the local movie theatre, the local pub or the bowling alley, frequent users of public transit to get around. They tend to stay close to home, often using the home of friends and family as the jumping off point for travel. Media use is varied, again reflecting the bimodal nature of the group. Magazines vary from teen to senior publications, and campus papers tend to be common.	10.8% of Households (1,459,971) 9.0% of population (3,080,719)

Appendix I. SUPPLY OF, AND VE MANAGERS' RATINGS OF DEMAND FOR, SPECIFIC INFRASTRUCTURE, SERVICES AND ACTIVITIES:

Types of infrastructure, activities or services within categories are arranged from high to low based on the minimum availability of the offer as determined by the ERVE inventory. Areas where the percentage of met demand is less than 50% are highlighted in grey.

Category	Type	NP/NMCA				NHS			
		Minimal # of places reporting the offer	# for Which demand was rated	% of for which demand was moderate or high	% where demand is met	Minimal # know to have	# for Which demand was rated	% of for which demand was moderate or high	% where demand is met
Assets	Picnic Areas Tables	30	40	73%	81%	84	63	75%	53%
	Visitor Centres	29	40	83%	77%	46			
	Wheel Chair Accessible Washrooms	27	40	70%	81%	82	63	86%	72%
	Playgrounds	18	40	50%	35%	4	63	27%	15%
General Activities and Services	Guided Activities (e.g., hikes, climbing, riding but excluding personal interpretation)	34	40	58%	62%				
	Interpretive theatre	21							
	Geo-caching	19	40	33%	50%	7	27	41%	44%
	Food Services	17	40	50%	33%	26	63	45%	30%
	Rental equipment	15							
	Gift Shops/	14	40	58%	64%	59	63	71%	56%
	Mountain/Rock Climbing/ Bouldering	12	40	48%	59%				
	Golf/Mini-Golf	11	40	13%	78%	2	27	4%	67%
	Horseback riding	10	40	50%	43%				
	Waterfall Ice Climbing	9	36	33%	50%				
	Tennis	8	40	13%	67%				
	Snowmobiling	8	36	39%	24%				
	Ice Fishing	8	36	31%	67%				
	Dog Sledding	6	36	45%	44%				
	Rollerblading	5	40	25%	55%	6	27	22%	71%
	Volleyball	5	40	13%	17%				
	Ice Skating	5	36	39%	50%				
	Internet	4	40	45%	8%	1	63	27%	0%
	Bocce Ball, Shuffleboard	3	40	18%	86%				
	Baseball	3	40	15%	50%				
	Caving	1	40	18%	25%				
	Wilderness Fly-In		40	23%	67%				
	Lifeguard services		40	20%	39%				

Category	Type	NP/NMCA				NHS			
		Minimal # of places reporting the offer	# for Which demand was rated	% of for which demand was moderate or high	% where demand is met	Minimal # know to have	# for Which demand was rated	% of for which demand was moderate or high	% where demand is met
Camping Amenities	Firewood	26	29	93%	93%				
	Flush toilets	23	29	86%	74%				
	Kitchen shelter	23	29	72%	72%				
	Showers	19	29	83%	50%				
	Dumping Station	18	29	83%	72%				
	Sewage, Electrical and/or Water Hook-ups	Sewage hook-up 9; electrical 14; water 11	29	72%	23%				
	Ice	11	29	38%	60%				
	Laundry Facility	4	29	38%	39%				
Trails and Trail Based Activities	Cross-country Skiing Activity	34	36	61%	82%	7	27	19%	12%
	Walking / Hiking Activity					47	27	56%	91%
	Day Hiking Activity					47	27	56%	91%
	Multiple Day Hiking Activity					1	27	4%	33%
	Multipurpose Trails		40	48%	57%				
	Back-country Skiing Activity	29	36	28%	88%				
Water Based Activities and Services	Calm Water boating (canoe./ kayak / sea kayaking	36	29	86%	79%	11	12	33%	83%
	Motor Boating	21	29	45%	53%	8	12	33%	75%
	Fly Fishing/ Rod and Reel Fishing	25	29	59%	63%	12	12	33%	100%
	Swimming	25	29	62%	73%	7	12	33%	50%
	Sailing	14	29	35%	67%	2	12	33%	50%
	Scuba Diving	14	29	38%	92%				
	Surfing	2	29	35%	50%				
	Waterskiing	0	29	21%	75%				
	White-water canoe/kayaking	13	29	31%	67%				
	White-water rafting	7	29	14%	25%				
	Wind surfing/sailing	13	29	35%	50%				
	Swimming pools	6	40	25%	27%				

Appendix J. Service Category Levels

NPs	NHSs
Level 4: Large NPs with significant visitor use, offering multi-day visitor experiences with year-round road networks and visitor activities as well as extensive visitor services, heritage presentation and back-country opportunities. (e.g., Banff NP) Level 3: NPs with significant visitor use, year-round vehicle access and extensive seasonal visitor services and heritage presentation opportunities.(e.g., La Mauricie NP) Level 2: NPs with basic seasonal visitor services and heritage presentation opportunities and limited use during the shoulder seasons. (e.g., Kejimkujik NP) Level 1: NPs without a basic level of front- country visitor services (e.g., Nahanni NPR)	Level 5: Large NHSs with enhanced day-long heritage presentation experiences through tours and animation, with extensive historic grounds and built heritage. (e.g., Fortress of Louisbourg NHS) Level 4: NHSs usually with multiple structures or extensive grounds that provide visitors with heritage experiences and learning opportunities through visits of roughly one-half day. (e.g.,) L'Anse aux Meadows NHS) Level 3: NHSs usually with multiple structures or extensive grounds that provide visitors with heritage experiences and learning opportunities through visits of roughly two to four hours. (e.g., Green Gables House NHS) Level 2: NHSs with basic heritage presentation and visitor services that support visits of up to two hours. (e.g., The Forks NHS) Level 1: NHSs without basic heritage presentation or visitor services. (e.g., S.S.Klondike NHS)
Source: National Pricing Compendium	