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Understanding the Potential Tourist Market
In the National Capital Region

By

Debasree Banerji, M.A.

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A thesis submitted to the Faculty of Graduate Studies
and Research in partial fulfilment of the requirements
for the degree of
Master of Arts in Geography

Department of Geography

Carleton University

Ottawa, Ontario

September 12, 1984

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"UNDERSTANDING THE POTENTIAL TOURIST MARKET IN THE NATIONAL
CAPITAL REGION"

submitted by Debasree Banerji, B.A., M.A.

in partial fulfilment of the requirements for
the degree of Master of Arts.

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ABSTRACT

This thesis analyses the market development opportunities for the future tourism industry in the National Capital Region (NCR). The trends and trip characteristics of the present tourists to the NCR have been reviewed and examined.

The attitudes and perceptions of the potential visitors reflect on their vacation desires as well as influence their choice of a destination. This thesis investigates the demand structure of the potential visitors to the NCR, focussing on their vacation expectations and their attitudes and images of the region's tourism product. Furthermore, the tourism resources of the NCR have been analysed and evaluated.

Ultimately, a number of future market development opportunities have been identified as the end product of this thesis. These opportunities could be used as guidelines to improve the region's image and at the same time to increase the number of visitors to the NCR in future.

PREFACE

There are a number of existing studies on the tourist market of the National Capital Region (NCR). The surveys used for this thesis in the market analysis all have focused on the trip characteristics and trip profiles of the tourists in the NCR. None of them have used those data for evaluation or assessment of the tourists' attitudes and perceptions towards the NCR as a desired vacation destination. Thus an opportunity existed to interpret and integrate these studies, along with attitudinal data, in an analysis of the potential tourist market.

There are many persons who must be thanked for their help and guidance, and without whom this thesis would never have come to completion.

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TABLE OF CONTENTS

ABSTRACT	ii
PREFACE	iii
TABLE OF CONTENTS	iv
LIST OF TABLES	vi
LIST OF MAP	vi
LIST OF ABBREVIATIONS	vii

CHAPTER I - INTRODUCTION

1.1	Geography and Tourism	1
	1.1.1. Developing Geographical Interest in Tourism	3
	1.1.2. Framework for the Study of Geography of Tourism	4
1.2	Purpose and Objective of the Study	7
1.3	Study Area	9
1.4	Research Model	13
1.5	Methodology	17
1.6	Definition of Terms	18

CHAPTER II - MARKET ANALYSIS

2.1	Definition of Tourist	21
2.2	Tourist Market	22
2.3	Market Analysis	24
2.5	Visitors To The National Capital Region	27
	2.5.1. Resident Travellers	27
	2.5.2. Non-Resident Travellers	32
	2.5.2(1) Summer Visitors	32
	2.5.2(2) Winterlude Visitors	41
2.6	Summary and Conclusions	43

Table of Contents (cont'd.)

CHAPTER III ATTITUDES OF THE MARKETS

3.1	Market Segmentation	45
3.1.1	Identification of the Potential Market Segments	46
3.2	Attitudes and Motivations	52
3.2.1	The Resident Travellers	54
3.2.2	The Non-Resident Travellers	56
3.2.2(A)	U.S.A.	56
3.2.2(B)	The Overseas Market	60
3.3	Summary	69
3.4	Significant To The NCR	76

CHAPTER IV OPPORTUNITIES FOR TOURISM DEVELOPMENT

4.1	Evaluation of the NCR Tourism Resources	80
4.2	Identification of the Potential Tourist Market for NCR	84
4.3	Opportunity Identification	88
4.4	Comment	101
4.5	Summary	103

CHAPTER V SUMMARY AND CONCLUSIONS

5.1	Restatement of Purpose	104
5.2	Market---Attitude---Opportunities	106
5.3	Future Research	112
5.4	Conclusions	113

LIST OF TABLES

<u>Tables</u>	<u>Page</u>
1.1.2 Tourism Research Frame-Of-Reference . . .	5
1.4.1 Research Model	16
2.5.1 Canadian Visitors To Ottawa-Hull, 1980. .	28
2.5.2 Distribution Of Visitors By Country Of Origin	33
2.5.3 Origin Of Visitors.	34
2.5.4 Visitors - Characteristics Based On Place Of Origin	36
2.5.5 Cultural Sites And Points Of Interest Most Visited	39
2.5.6 Visitors' Impressions Of The Capital. . .	40
3.1.1 Characteristics Of The Market Segments - Canadian Travellers.	47
3.1.2 Vacation Benefit Segments - Main Characteristics	50
3.1.3 Things Enjoyed On Past Equivalent Distance Trips By Benefits Segments . . .	51
3.2.1(1) Image: Canada vs. U.S.A.	55
3.2.1(2) Overall Ratings Of Activities	57
3.2.2(1) Comparison Of Canada To Other Vacation Places By Benefit Segments	59
3.3.1 General Demand For Vacation Destinations Among The Visitors To Canada	70
3.3.2 Image Of Canada Held By The Primary Markets On Selected Characteristics Positive and Negative	71
3.4.1 Perception Of The NCR	78
4.1.1 Categorization Of The National Capital's Tourism Resources	82
4.1.2 Evaluation Of The Tourist Attractions In The National Capital Region.	85
4.2.1 Season Length.	97

LIST OF MAP

Map No. 1 National Capital Region	11
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LIST OF ABBREVIATIONS

NCR - National Capital Region

NCC - National Capital Commission

CGOT - Canadian Government Office Of Tourism
(Now known as Tourism Canada)

CCVCB - Canada's Capital Visitors And Convention Bureau

NAC - National Arts Centre

MFC - Market Facts of Canada

VFR - Visiting Friends And Relatives

CHAPTER 1

INTRODUCTION

1.1 Geography And Tourism

Travel, from the very early history, has fascinated man: the desire to explore new, unknown places, the urge for adventure and the seeking of new environments was ever present. Travel, for pleasure and curiosity, is not new, but tourism as it is understood today, is relatively of recent origin. The mass movement of people annually from their home to some other temporary locale, for a few days or weeks, grew largely in the period following World War II.

Holidays and recreation in some form or other, are common to all civilizations but the concept of an annual holiday is essentially a product of the West. Mass leisure travel and the idea of "going abroad" is relatively a recent development. Until about a century ago, only the well-to-do could afford to take an extensive holiday journey. Most resorts were, therefore small, and in the main part provided highclass accommodation. Their functions were those of either centres of fashion and privilege or therapeutic facilities (spas) (Robinson, 1976; Burkart and Meldik, 1975; Seth, 1975; Matley, 1976, etc.):

Since the late 1940's, there has been a spectacular growth in tourism and travel in North America, as well as in Europe. Tourism has become an important part of our lifestyle, as people have become more affluent and now have more leisure time. Increased mobility has facilitated more and easier world travel. The vacation trip has become an integral part of our lifestyle and an important component of many national economies. Tourism Canada (formerly Canadian Government Office of Tourism) has estimated that the tourist industry in Canada generated \$16.5 billion dollars in 1982, accounting for over 5% of Canada's Gross National Product (CGOT, 1982).

The growth of tourism has created a great deal of interest in research of the travel industry, both by geographers and non-geographers. The same subject matter; travel, landscapes, functions, facilities and institutions etc., are being examined by all the social scientists, but the geographer offers a unique point of view. It is based on a trilogy of perceptions pertaining to place, environment and relationships. Geographic tourism studies are concerned for example, with the migrations of people, changes in transport, increased accessibility, changes in land uses, urban development, cultural diffusion, social impacts etc. (i.e. the concept of place, environment and relations) (Mitchell, 1979).

1.1.1 Developing Geographical Interest In Tourism

Early American geographers saw tourism as a distinct and significant form of land use (McMurray 1930, Brown 1935). During the period of 1930's to 1950's studies tended to concentrate on the economic aspects of tourism, although it was recognized that tourism often modified the existing landscape and gave rise to new and different urban forms (Jones, 1933; Eiselen, 1945). Geographers also recognized that the tourist trade utilized areas which would otherwise not contribute to the land's total wealth (Selke, 1936).

Since the early 1960's geographers have become increasingly concerned with the nature and place of tourism geography. That different views exist is not surprising, given a multitude of geographic approaches and the varied definitions of tourism. Geographers generally agreed that the geography of tourism was mainly concerned with the "spatial differentiation of tourism and the recognition of general regularities in its occurrence" (Pearce, 1979). This involved an examination of both the ways in which the location and distribution of tourism was influenced by different physical and cultural factors and of the manner in which the landscape was modified by tourist development (ibid, 1979).

Some geographers have sought to define the place of

the study of tourism in the field of economic geography (McMurray, 1954; Wolfe, 1964; Matley, 1976; Robinson, 1976; Singh, 1976). As the number and range of studies increased, however, the writers saw tourism research extend beyond the bounds of economic geography to embrace aspects of virtually every systematic branch of the discipline. Today, research in tourism geography includes physical, population, transport, settlement and urban geographies (Pearce, 1979). Tourism research, clearly, involves most geographic sub-fields and to quote Matley, "there are few branches of geography which do not have some contribution to make to the study of the phenomenon of tourism" (Matley, 1976).

1.1.2 Framework For The Study Of Geography Of Tourism

As demonstrated above, the discipline of geography can make an important contribution to the investigation of Tourism. Lisle Mitchell has developed a paradigm intended to organize and channel productive research efforts. The use of this conceptual frame of reference is an attempt to enable the discipline to make more significant contributions to the investigation of tourism. The suggested scheme is based on two trichotomies placed in a three by three matrix - i) demand, supply and linkage; and ii) Purpose, structure and distribution. This concept is summarized in Table 1.1.2

Table 1.1.2 Tourism Research Frame Of Reference

<u>CONCEPTS</u>	<u>DEMAND</u>	<u>SUPPLY</u>	<u>LINKAGE</u>	<u>VECTORS</u>
<u>PURPOSE</u>	1	2	3	Ideology Values
<u>STRUCTURE</u>	4	5	6	Institutions Facilities Activities
<u>DISTRIBUTION</u>	7	8	9	Physical Geometry
<u>VECTORS</u>	Behaviour	Management Impact Environment	Transportation Interaction Participation	

Source: Mitchell, 1979.

This paradigm appears to be comprehensive, internally consistent, logical, and flexible enough to be used as a description of the present state of tourism geography.

These trichotomies may be utilized in a variety of ways to generate insights into the study of tourism. While individual cells (1-9) serve as foci for research concentration, it is also possible to view combinations of rows or columns at a second level of application. For example, the column labelled "Demand", including cells 1,4,7 may be thought of as having a behavioural thrust; the row entitled "Purpose", including cells 1,2,3, makes an ideological or value system contribution etc. (Mitchell, 1979).

This thesis has been formulated in an attempt to understand the demand structure of the tourism industry in Canada's National Capital Region. It will focus on the

present user's characteristics, as well as the attitudes and expectations of the tourists. These factors are fundamental to the ideological and/or value systems which are the basis of the rationale in decision making and planning. This thesis is also concerned with the organization of individuals and/or groups of tourists on the basis of socio-economic or other criteria in order to match their characteristics with the most appropriate facility or activity available. The behavioural and attitudinal value system, however, will have impact on future managerial planning. This thesis, therefore, is concerned with three above mentioned vectors: Ideological values (1,2,3), Behavioural (1,4,7) and Management Impact (2,5,8).

The column entitled Behavioural vector (Table 1.1.2) including the cells (1,4,7) can provide the picture of the tourists' trip characteristics -- the purpose of visit, socio-demography and also the different facilities and resources that attract the visitors most. The purpose of travel and the attraction of the structure of the tourist industry together contribute to the decision of the tourists in choosing a particular tourist region as a vacation destination. The study of the behavioural characteristics of the present tourists to the National Capital Region is important in order to estimate and plan for the potential visitors in future.

The ideological values (cells 1,2,3) of the tourists, is also crucial for this study. Understanding of the physical,

social or emotional needs and expectations of the tourists is important, as they would be helpful for the tourism planners to determine what facilities or attractions would appeal to them most. Gaps always exist between what the tourists expect or want to enjoy (i.e. the demand) and what is available (i.e. the supply) to satisfy their needs. These gaps have been identified in this study as the development "opportunities" for the future tourist industry in Canada's National Capital Region.

The identification of the opportunities as well as developing their possible solutions could have definite impact on future management policies (cells 2,5,8). Future managerial plans will decide the priorities of which facilities, functions, personnel and institutional arrangements and developments are necessary to provide recreational opportunities to satisfy the different needs and expectations of the potential tourists in the National Capital Region.

Mitchell's paradigm has been used for this study, as a device to examine the validity of research questions (i.e. the purpose and objective of study) in a conceptual frame and also as a guide to develop this research effort within that frame. Moreover, this paradigm provides strength to the strategic approach of the thesis in the field of geography of tourism.

1.2 Purpose And Objective Of The Study

The primary purpose of this study is to examine the potential tourist market in the Canada's National Capital

Region (NCR). Specifically, the study has been carried out in order to provide an assessment of tourist expectations, desires and interests towards vacationing and also to determine the opportunities that the study area can provide to satisfy these needs. The main objective is, therefore, to analyze the demand structure of the various tourist market segments attracted to the NCR.

It was important to develop an understanding of the range of attitudes towards tourist activities and vacation interests that might be found among different types of people. Further, hypotheses had to be developed about what underlying factors contributed toward vacation satisfaction and travel expectations and how these constraints might be realized in a vacation.

To fulfill above purposes, three objectives were formulated:

- i) to analyze the present tourist market for the NCR;
- ii) to analyze the various vacation needs and benefits sought by different market segments, specifically the perceptions and attitudes of the primary tourist markets towards the NCR; and,
- iii) to develop and identify different possible opportunities to encourage the increased number of visits by potential buyers (tourists).

The analysis of tourist markets serves to identify the range of existing opportunities. The tourism industry in the NCR appears to have good potential for growth. It

cannot be assumed that growth will occur, to the benefit of, both the buyers and sellers of the travel goods and services, unless the industry is prepared to adopt and adjust to changes occurring among the travelling people (i.e. the socio-economic status, demography, mobility etc.). It is necessary to know a good deal more about the visitors, to know who is being served and why.

Market segmentation is the division of the tourist markets into small groups having similar interests and expectations. In this report the market has been segmented, based on the needs and benefits sought by the customers. This market segmentation study should help the understanding of the visitors' different interests and expectations for a vacation.

The analysis of the attitudes and desires of different tourist markets towards the NCR as a tourist destination was the most important objective of this study. This objective can be achieved by examining the perceptions of potential visitors about the NCR's tourist attractions, as well as through a study of the visitors' impressions and vacation experiences during their stay in the NCR.

The third objective was to attempt to identify different future market opportunities in the National Capital Region.

1.3 Study Area

The National Capital Region (NCR) has been chosen as

the study area for a number of reasons. The Region is one of Canada's principal tourist attractions, drawing 2.7 million person-trips alone in 1981 (Canada's Capital Visitor And Convention Bureau [CCVCB], 1981). According to the National Capital Commission (NCC), tourism is the second largest industry in the NCR, preceded by federal government. Finally, there are a number of existing studies available which provide a broad data base for this report.

The National Capital Region, as identified by the NCC, includes municipalities on both sides of the Ottawa River - Cities of Ottawa and Hull and their surrounding areas (Map 1.2.1 shows the boundary of the NCR). The region covers an area of 4,662 sq kilometers and is populated by 717,978 people (1981 census). The NCR is inhabited by different ethnic groups - 46% English, 40% French and 14% other groups of people (1981 census). English is the mother tongue of about 56% of the total population, while 35% speak French and 9% speak other languages (1981 census).

The choice of location of Canada's Capital in Ottawa in the year of 1858 was not a simple one. It was only settled by royal intervention after much inter-city rivalry (Knight, 1977). The choice appears to have been more due to military considerations and for the avoidance of domination by one or the other Canada's founding people than for any particular aesthetic or cultural virtues of the northern terminus of Colonel By's Rideau canal. Later, the cities of Ottawa and Hull, together with their surrounding areas, were

recognized by the Federal Government as the present Canada's National Capital Region. Its setting along the Ottawa, Rideau and Gatineau Rivers and the Rideau Canal gives this region a national historic significance. The NCR differs from many Canadian metropolitan centres, not only because it is the Capital of the country, but also due to the French influence.

Large concentrations of major tourist attractions and events in the National Capital Region can be categorized in a variety of themes: Historical (Museums, Parliament Buildings, etc.), Cultural (National Arts Centre, National Art Gallery of Canada), Educational (National Museum of Man and National Museum of Natural Sciences, Universities and Colleges), Agricultural (Experimental Farms) and Recreational (Rideau Canal, Winterlude, Changing of the Guard, etc.). These, in conjunction with the existence of diversity of shopping, dining, entertainment and winter recreational opportunities, give this region a year-round appeal to the tourists.

Gatineau Park, as an additional resource, with its 35,600 hectares of green space, lakes and forests on the Quebec side of the NCR, offers peace and quiet natural beauty and a place for year-round outdoor recreational activities. Visitors can go to the Park at any time of the year, to enjoy the sun and beaches in summer or participate in a number of winter sports. In Spring and Fall, the Park is an ideal place to observe the changing seasons or simply to

relax in a healthy environment of wide open spaces and fresh air.

Different sources used in this report have mentioned the Canada's National Capital in different terms, eg. Tourism Canada used the name Ottawa-Hull area. The National Capital Commission identified the Capital as the National Capital Region. Although they did not cover precisely the same area, in this report the term National Capital Region includes both the Tourism Canada and the NCC identification.

1.4 Research Model

Every research effort should have a strategic model or framework within which the study can operate in an organized fashion to reach the main objective. The following two particular studies served as guidelines for organizing a systematic approach of this research. The first study was "Tourism Development in Ontario, a framework for opportunity" - (Balmer, Crapo and Ass. Inc., 1976), for the Ontario Ministry of Industry and Tourism.

Ottawa was selected as one of the important tourism zones by the Ministry of Industry and Tourism of the Province of Ontario.

The desirability of a structured approach to tourism development in Ontario encouraged the Ministry to undertake a provincial tourism study. The purpose was to provide guidance concerning potentially profitable investment opportunities which were in harmony with the Province's broad social goals (Balmer, Crapo and Ass., 1976).

The study involved careful analysis of tourism resources, both natural and man-made, tourism markets and tourism activities. It considered both the current picture and possible future trends.

The specific goals were i) to increase the volume and diversity of tourism opportunities throughout Ontario; ii) to increase the quality of the tourism experiences in Ontario.

The project was conducted in six major steps (ibid, 1976). The first step examined the resource components (supply) of the tourism industry; the second step analyzed the tourist market (demand); the third step examined the different tourist activities; the fourth step outlined a series of general development guidelines; the fifth step described the "zone" approach to tourism development; and the final step suggested means to implement the suggestions in the study.

The "...framework for opportunity" served as the research model for the initial stages of this thesis. The scope and objectives of the "Framework for Opportunity" was very broad. The time and resource limitations of a graduate student did not permit duplication of the complete scope of that study. The purpose, aim and goal of this report have, as a result, been narrowed to focus on the second, third and fourth steps particularly (as mentioned above), although a brief description of the study areas' tourism

resources has also been prepared.

The second and third steps mainly provided information on the present 'tourists' profiles and trip characteristics - Who they were? Where did they come from? What was their socio-demographic status? What did they enjoy during their stay or what kinds of activities did they participate in etc.? As far as the fourth step is concerned this thesis has outlined a series of possible development opportunities to attract more visitors and to make the study area more attractive tourist destination.

The second study, which helped to develop the research model was, titled "Designing Products For The Leisure Travel Market From Market Definition To Product Information". (Paul Burak, 1975).

In 1975, Paul Burak, Vice-President of Market Facts of Canada Ltd., published a report presented at the annual conference of the Travel and Tourism Research Association (TTRA, 1975). The report was designed to identify the market for Air Canada. Burak developed a research model for the studies in the leisure travel market. He postulated that a person's general attitude, interests and outlook toward life would relate to his or her attitudes toward different kinds of vacation experiences and to the kinds of things that he or she would want to do on a vacation. That hypothesis, he thought, would influence the ways in which the different kinds of potential customers could be targeted.

Table 1.4.1 Research Model* for Identifying Potential Market Opportunities

*This model is based primarily on Burak's 1975 Research Model and also on Balmer, Crapo and Assoc. Inc., 1976 report.

The second hypothesis was that the kinds of vacation experiences people wanted would relate to the kinds of vacation packages that would appeal to them. Moreover, the relationship between the desired kinds of vacation experiences and the vacation packages which people would find appealing were influenced by their perceptions of different places, activities, accommodation, etc. Understanding the buyers' perceptions of the destination would, therefore, be at the centre of any market research plan. Socio-demographic considerations such as household income, age, occupation etc., would act as constraints to people's ability to realize their vacation plans (Burak, 1975).

Burak's research model served the purpose of organizing this thesis within a structural framework. In addition to Burak's above mentioned two hypotheses, it was considered necessary to examine the existing tourism resources of the NCR. Inventory of tourist attractions and services of the NCR is not the objective of this thesis, but the knowledge of the actual product availability along with tourists' attitudes and perceptions of desirable vacation experiences and the present market characteristics would help to identify the possible future market opportunities and constraints for future tourism development. For this reason a research model (Table 1.4.1) has been developed to organize the study in a logical manner. This model approximates with Burak's model with some modifications. Detailed analysis of the model will be discussed in the following section.

1.5 Methodology

This thesis involved three stages of research work. The first stage was investigation into the geography of tourism. Book by H. Robinson (Robinson, 1976) and an article by D. Pearce (Pearce, 1979) were more valuable than other available literature. L. Mitchell's conceptual paradigm (Mitchell, 1979) has been used to organize and channel this research in the field of geography of tourism. ○

At the next stage the study concentrated on reviewing published literature on tourism development and more specifically, how to assess, evaluate and analyze the future tourist market of a destination. Two particular studies (Balmer, Crapo and Inc., 1976; Burak, 1975) aided the development of a research model for identifying the potential market opportunities of a destination.

The third and final stage of study followed the research model (Table 1.4.1) in detail, in order to achieve the main purpose of this thesis. Following the above model it is suggested that the socio-demographic considerations of the visitors influence their attitudes and outlook towards travel and kinds of desired vacation experiences. Therefore, the choice of a destination depends on the tourist's interest in expected qualitative vacation characteristics (which have been developed from their attitudes and perceptions toward travel and desired vacation experiences). It is also important to assess the actual product availability of the destination, the "tourism product" (attractions, services, facilities, etc.), in order to examine the visitors' expectations. The quality of the "tourism product" of the destination, along with the vacation desires and perceptions of the visitors toward that destination, all have combined influence in identifying the different opportunities and constraints for the potential tourist markets, as well as in identifying new market opportunities.

In the final stage several further steps have been developed from the research model (Table 1.4.1): (1) "Market Analysis" (Chapter II); (2) "Attitude Study" (Chapter III); (3) "Opportunity Identification" (Chapter IV).

This thesis is largely based on the evaluation of a number of existing studies, surveys and reports, i.e., secondary sources. These resources will be discussed in greater detail in following chapters.

1.6 Definition of Terms

Tourist - The definition of a 'tourist' is very controversial. Different studies and surveys by different tourism agencies

used different tourist definitions. In this particular study, a tourist has been recognized as a person who has travelled at least 80 km or more to visit Canada's National Capital Region (This definition is explained further at the beginning of Chapter II).

Tourist Market - The term "market" is used in a variety of ways. It may be employed to designate the place where transactions between buyers and sellers of goods or services take place or it may be applied to all actual or potential buyers of a good or service. It may be used in connection with a particular type of service or product.

A "Tourist Market" as defined for this report is - "the totality of actual and/or potential buyers of a given product or service in a specified geographical location at a given point of time or during a given period of time" (Schmoll, 1977) (The term is further elaborated in Chapter II).

Market Segmentation - The tourist market can be segmented into groups of tourists having similar vacation demands. The markets can be segmented by the trip purpose, trip characteristics, socio-economic status, behaviour, benefits or similar characteristics of the tourists (Burkart and Meldik, 1974).

Tourist Product - A product is a "bundle of physical, service and symbolical particulars expected to yield satisfaction of benefits to the buyer" (Schmoll, 1977). Merely providing a physical artifact or performing a certain activity is not sufficient; more important even is the capacity to give the satisfaction of a need desired by a customer; "it is the benefits that are the product" (ibid, 1977).

The benefits and satisfactions provided by tourism are determined by primary tourism resources (physical and man-made, i.e., landscapes, climate, flora, fauna etc. and cities, historical, cultural sites etc.) and by the different tourist services (transport, accommodation, food, entertainment etc.). Together these elements constitute the

✓
"tourist product".

Person-Trip - is the term commonly used to give full weight to each person on a trip. A person-trip equals number of people times trips, for example, a person going on a trip alone represents one person-trip, while a family of five would represent five person-trips, (The Tourism Research Planning Committee, TRPC, 1975).

Visiting Friends/Relatives (VFR) - This segment of the tourism market travels primarily to visit friends and relatives. They represent one of the largest vacation travel groups.

Pleasure and Personal Travellers - These people are traveling for the express purpose of pleasure or recreation. It may include sightseeing and touring, attending cultural or sporting events, health reasons, shopping for personal goods and possessions, visiting friends and relatives or accompanying someone on a business trip. These people are classically referred to as "true" tourists, as contrasted to the business related tourists.

Market Opportunity - Market opportunity can be defined as unsatisfied demand and also as the gap between what potential customers want and what is available to them. This gap might exist between what they were getting during the vacation and something that could offer them greater satisfaction, in which case the resolution would be a redistribution of market share. On the other hand, the gap might exist in terms of what customers want but could not obtain, in that case the solution would be market expansion (Market Facts, 1973).

2

CHAPTER II

MARKET ANALYSIS

2.1 Definition Of Tourist

The World Tourism Organization (WTO), formerly the International Union of Official Travel Organizations (IUOTO), at their Conference on International Travel and Tourism in 1963, defined a "tourist" as a temporary visitor staying at least 24 hours in a country visited, when the purpose of journey can be classified under one of the following headings:

- a. Leisure - recreation, holiday, health, study, religion and sports.
- b. Business - family, mission, meetings.

Travellers staying less than 24 hours according to WTO are classed as excursionists. The above definition serves as a basic classification of a "tourist".

However, the different surveys and studies used in this report defined a tourist in a different manner. For example, the National Capital Commission's (NCC) Survey of Visitors To The National Capital Region, Summer 1979 and 1981, considered a person to be a tourist, if he/she lived beyond a 60 mile radius of Parliament Hill and was eighteen years of age or older. The Canada Government Office of Tourism (CGOT) in their annual quarterly survey, counted tourists as those Canadians who travelled 80 km or more from their homes. This was the same distance criterion used by the NCC Winter-lude study (1982). This survey was conducted by Statistics Canada for CGOT.

In this study tourist will be recognized as those who have travelled at least 80 km or more to visit Canada's National Capital Region. Alternative terms used in this report are "traveller", "visitor", "guest".

2.2 Tourist Market

The tourist market is made up of three major elements; recreational travellers, business travellers, and travellers for purposes other than pure recreation or business (Robinson, 1976).

Recreational travellers, for the most important part, travel for holiday or pleasure purposes. In recreation travel, the choice of destination lies in the hands of the traveller, subject to certain contingencies and restrictions, (i.e. availability of time). The costs involved in transportation to and within the destination are borne by the individual. The amount of the discretionary income, the amount of time at the traveller's disposal coupled with the length of paid holiday, and the socio-economic background of the travellers all influence the choice of destination. This is the most significant tourist market in the National Capital Region; for example 75% of all the summer visitors in 1981 came for recreation purpose (NCC, 1982).

Business travel differs from recreational travel in three principal ways. The destination of the business traveller is predetermined for him and is not normally influenced by personal considerations. The costs incurred in the business trip are borne by the company or firm. Business travel, which is regarded as an essential part of the business process, is not greatly affected by travel costs. In contrast to the recreational component of the travel market, the business component is usually considered as being relatively price-elastic. Reductions in the cost of travel are unlikely to affect material increases in business travel. Any increase in the volume of business travel would be

related essentially to expanding trade relationships. Business travel is generally considered as a significant part of the travel industry, as the business traveller is considered to be a higher spender than the holidayer. An aspect of business travel which is enjoying rapid growth is the conference/convention market (Citizen, March 12, 1983). The National Capital Region, with its newly built Congress Centre, in addition to other convention/conference facilities, would appear to have a potential to attract more business travellers.

The third sector of the travel market is comprised of those who travelled for reasons other than purely pleasure or business. Into this category falls those who travel to visit friends or relatives (VFR), for personal health reasons, for educational purposes, or to attend international conferences (when the cost was borne by the individual). This group can be categorized as "other" purposes travellers (Robinson, 1976).

The tourist market can further be divided into Resident Travellers and the Non-Resident Travellers. The Tourism Research Planning Committee (TRPC) has defined the Resident Travellers as those who live in the area (it may be a country, province, region or city) under study and the Non-Resident Travellers are those who live elsewhere, but travel into the area under study (TRPC, 1975). In this report, all the Canadians who travelled 80 km or more from their home to visit the NCR were regarded as Resident Travellers and the Non-Resident Travellers were those who came to visit the NCR from all other countries outside Canada.

The National Capital Region has received both the Recreational and "Other" travellers as well as the business travellers. According to the NCC, 1981 Summer Survey the two most important reasons given for visits (by both the Resident and Non-Resident Travellers) were touring and visiting tourist attractions i.e. Recreational Purpose (75% of the visitors) and visiting family or friends i.e. "Other" purpose

(32% of the visitors) (NCC, 1982). On the other hand, the NCR as a seat of government attracted visitors (12%) who identified themselves as Business Travellers (the percentage do not total 100% because of multiple answers) (ibid, 1982). This thesis considered the recreation/pleasure travellers and the travellers with "other" purposes only as the "tourist markets" for the NCR. The choice of a destination is largely influenced by the visitor's trip purpose, image and perceptions of that destination's tourists attractions. Thus the future of any tourist region very much depend in understanding these tourist markets. Detailed examination of the business travellers in the NCR has been excluded from this report.

2.3 Market Analysis

Market analysis serves to identify the range of existing opportunities and possibilities for the tourist industry in the NCR. Tourism development is, in essence, the identification of a marketing strategy - the matching of tourism resources of an area with the market demands. The objective of this market analysis is to gain insight into potential markets for tourism development by examining the characteristics and preferences exhibited by present users.

In this Chapter the characteristics of both resident and non-resident travellers are examined. The information provided in the following discussion was derived primarily from four major surveys - namely, the Survey of Visitors to the National Capital Region, Summer 1979 and 1981 by the National Capital Commission (NCC, 1980 and 1982); Study of Users and Economic Impacts of Winterlude (NCC, 1982); and the Canadian Residents who Visited Ottawa-Hull in 1980 by the Canadian Government Office of Tourism (CGOT, 1982.). The information on the Resident Travellers to the NCR was solely derived from CGOT report and the NCC surveys

provided information for Non-Resident Travellers.

2.4 Interpretation of Survey Data

The market analysis was largely derived from interpretation of existing studies, so it is necessary to comment on the purpose of those studies, the degree of reliance which can be placed on them, and the problems faced in sorting the statistics etc. All the surveys used different survey techniques, different kinds of questionnaires and different sampling size. Because of these differences, it is dangerous to compare the studies directly or even year to year since they only represent the survey population and not the total tourism scene in Ottawa. However, it is suggested that the information gathered from the surveys provides the basis for a general picture of the tourist market of the NCR.

Since 1972, tourism in the National Capital Region has received considerable attention. There have been several other major studies and surveys conducted on the visitors to the NCR.

In the summer of 1972, Market Facts of Canada Ltd. (MFC) conducted a survey on the visitors to Ottawa. Through personal interview techniques, MFC identified who visited Ottawa, what they did and how much they liked the city.

In 1976, 1979 and 1981 three more summer visitor surveys were done using personal interview techniques, to seek information about similar questions. In 1976, the survey was run by the Carleton University School of Commerce, while the 1979 and 1981 surveys were conducted by the National Capital Commission (NCC).

In 1980, as part of their quarterly study, Canadian Government Office of Tourism (CGOT) compiled quantitative information about Canadian residents visiting Ottawa-Hull.

Further, there have been two other recent studies focussed on specific categories of the market. R. McKercher

(M.A., Carleton University, 1983) examined visitors' accommodation preferences and patterns in the summer of 1982 and the NCC conducted a visitor's survey during Winterlude in February, 1982..

This report has focussed chiefly on four of the above mentioned surveys. Information of the Resident Travellers were gathered solely from the CGOT 1980 survey, whereas the three NCC surveys (1979, 1981 and 1982) provided data on the Non-Resident Travellers of the NCR.

Tourism Canada (formerly CGOT) provided a survey report on the trips of the Canadian residents who have travelled 80 km or more to visit the NCR in 1980. The figures represented only the person-trips for which the Capital (NCR) was the main destination and excluded the visits by Canadians en route to and from other destination. The survey also did not isolate the summer visitors. Because of the methodology (personal interview) and the numbers of the visitors (2.5 million person-trips) this survey provided more accurate figures on the resident travellers than the other surveys.

The information on the Non-Resident Travellers was principally derived from the three NCC surveys: Survey of Visitors to the National Capital Region, Summer 1979 and 1981; and the Study of the Users' and Economic Impacts of Winterlude, 1982. The surveys provided information on the socio-economic status of visitors, their trip characteristics and general profiles of the visitors of the NCR.

One major problem with the NCC surveys was that they provided data on only summer visitors (1979 and 1981 surveys) or winter visitors (Winterlude, 1982). Further, due to the sampling technique employed, no attempt was made to acquire a truly random sample of the population. Thus, the results could only be interpreted as being generally representative of the characteristics of those visitors who were surveyed and not the travelling public, as a whole (NCC, 1981).

Nonetheless, they are valuable documents as they represent the most current quantitative data sources available, about visitors to the NCR.

The Winterlude survey was designed in response to the growing trend of winter tourism to Ottawa, focussed around this major event. Although Winterlude was first initiated in 1979, largely for the local residents, it has attracted a large number of non-local visitors (including the Non-Resident Travellers). Unfortunately, the survey did not isolate the information on the non-resident travellers from the resident travellers. Thus, it was difficult frequently to differentiate the statistics on the resident and non-resident travellers. The percentages used in this report were often combined with non-local visitors.

2.5 The Visitors to the National Capital Region

2.5.1 Resident Travellers

Canadian residents made an estimated 2,511,000 person-trips to the census metropolitan area of Ottawa-Hull during the year 1980 (CGOT, 1982). Table 2.5.1 presents an overall picture of the Canadian visitors to the NCR, as derived from the CGOT survey. The salient aspects of the study are summarized below.

In 1980, the Ottawa-Hull area (or NCR) received visitors from every Canadian province. Québec and Ontario, however, represented the main markets and, in fact, accounted for 93% of all person-trips. In Québec, the Montreal-Laurentians area was the main source of tourists, with Montreal being the single most important market. Ontario visitors originated mostly from Eastern Ontario and the Toronto area. The survey did not exclude the same day visits, a possibility explaining the higher percentage of the Montreal and Eastern Ontario visitors, as well as their proximity to the NCR.

Canadians who, in 1980, reported Ottawa-Hull as the main destination of their trips spent an average of 3.7 nights per person-trip away from their home, excluding the same day visits, not all of them

Table 2.5.1

CANADIAN VISITORS TO OTTAWA-HULL, 1980MARKET CHARACTERISTICS

<u>Province Of Origin</u>	<u>Total Person-Trips</u> (000)	<u>% Of Total</u> <u>Person-Trips</u>
Atlantic Provinces	57	2
Quebec	977	39
Ontario	1,356	54
Western Provinces	121	5
	<u>2,511</u>	<u>100</u>
<u>Origin By Economic</u> <u>Regions</u>		
<u>Quebec</u>		
Montréal-Laurentians	746	30
Outaouais	124	5
<u>Ontario</u>		
Eastern Ontario	693	28
Toronto	328	13
<u>Duration Of Stay</u>		
0 Night	918	37
1 Night or More	1,593	63
	<u>2,511</u>	<u>100</u>
<u>Purpose Of Visit</u>		
Business	681	27
Visiting Friends/Relatives (VFR)	805	32
Pleasure	784	31
Personal	225	9
Not Stated	16	1
	<u>2,511</u>	<u>100</u>

Table 2.5.1 (cont'd.)

29

	<u>Total Person-Trips</u> (000)	<u>% Of Total</u> <u>Person-Trips</u>
<u>Main Mode Of Transport</u>		
Automobile	2,018	80
Plane	220	9
Bus	194	8
Other	79	3
	<hr/> 2,511	<hr/> 100
<u>Accommodation</u>		
Hotel	282	11
Motel	114	5
Camping/Trailer	45	2
Home of Friends/Relatives	855	34
Cottage	189	7
Other (not stated)	1,026	41
	<hr/> 2,511	<hr/> 100
<u>Season</u>		
Quarter 1 (Jan-Mar) Winter	593	24
Quarter 2 (Apr-June) Spring	582	23
Quarter 3 (July-Sept) Summer	766	30
Quarter 4 (Oct-Dec) Fall	570	23
	<hr/> 2,511	<hr/> 100
<u>Sex</u>		
Male	1,254	50
Female	863	34
Children (Under 15)	394	16
	<hr/> 2,511	<hr/> 100

Table 2.5.1 (cont'd.)

30

	<u>Total Person-Trips</u> (000)	<u>% Of Total</u> <u>Person-Trips</u>
<u>Age</u>		
Under 15	395	16
15-24	454	18
25-34	526	21
35-44	410	16
45-54	333	13
55-64	269	11
Above 65	124	5
	<hr/> 2,511	<hr/> 100
<u>Occupation</u>		
Managerial/Professional	479	19
Teaching/Medicine	203	9
Clerical/Sales	432	17
Service	235	9
Primary Sector	52	2
Secondary Sector/Mining	276	11
Transport/Distribution	108	4
Not Employed(Included Childs)	531	21
No Answer	195	8
	<hr/> 2,511	<hr/> 100
<u>Household Income</u>		
Under 9,000	295	12
\$9,000 - \$14,999	249	10
15,000 - \$19,999	332	13
20,000 - \$24,999	429	17
25,000 - \$29,999	282	11
30,000 - \$34,999	197	8
35,000 and over	475	19
Refused	252	10
	<hr/> 2,511	<hr/> 100

Source: Canadian Residents Who Visited Ottawa-Hull in
1980, CGOT, 1982.

necessarily in the NCR. About 63% or 1,593,000 person-trips involved over-night stay, the rest, a same-day return trip.

"Visiting Friends and Relatives" (32%) and "Pleasure" (Recreational) travel (75%) were given as the main purposes for coming to the NCR. The region also attracted a large number of business travellers (27%). The proportion was significantly higher than the national average (Business trips represented about 17% of all person-trips made by Canadians in Canada in 1980 (CGOT, 1982)). This helps to explain the lack of seasonality in travel to Ottawa-Hull. There is not a substantial decline in visits during the winter months when recreation/pleasure travel generally reaches its lowest level. About 9% of the visitors reported that they came to the NCR for their own "personal" reason.

In 1980, the automobile was used as the main mode of transportation by about 80% of the person-trips to the area. A significant proportion 20%, compared to the national average of 10%, reported using public transport (bus, plane, train), an increase from 17% in 1978 (ibid, 1982). This may also reflect the business component.

The visitors who came for VFR purpose, preferred to stay with their friends and relatives. Because of the importance of business travel in the NCR, the use of commercial accommodation (hotels/motels) represented 20% of all person-trips. This was higher than the national average. (15%) (CGOT, 1980). The percentage of "Other" was unusually higher because it includes both who refused to answer or the type of accommodation they used does not fall under the list (e.g., bed and breakfast places, residences, etc.).

As mentioned earlier, the Region's tourism industry experiences less of a problem with seasonality than many other areas. Summer visits represented 30% of the total, while visits during the other seasons are surprisingly stable (Winter 24%; Spring 23%; and Fall 23%). The impact of government related business travel may have a bearing on this stability.

Male visitors accounted for 50% of all visitors, aged 15 years and over. The largest age group of visitors (37%) were between 25-44 years, although the region experienced quite a large proportion of older clientele (over 45) (29%). Managerial/Professional and Clerical/Sales occupations were the two main occupational groups of travellers, and were responsible for 19% and 17% respectively of all the person-trips to the area. The dominance of Managerial/Professional group again may reflect the importance of the business-market in the NCR.

The visitors could be classified into three broad categories in terms of their household income. Those with under \$20,000 accounted for 35%, those between \$20,000 - \$30,000 (28%) and those with an income of \$30,000 or more reported 27% of all the person-trips to the area.

2.5.2 Non-Resident Travellers

In NCC surveys the Non-Resident Travellers were defined as visitors coming to the National Capital Region (NCR) from outside of Canada. In 1979, visitors came from a total of thirty-two countries (NCC, 1979). The NCC categorized them into three groups, those originating from: i) U.S.A.; ii) Europe (including U.K., West Germany, France, Holland, Belgium, Switzerland, Sweden, Poland, Austria, Italy, Greece, Hungary, Luxembourg, and Spain); and iii) other Nations (including Mexico, Australia, Japan, Columbia, Morocco, New Zealand, Peru, Venezuela, Tanzania, Algeria, Lebanon, Honduras, Egypt, Iran, Jamaica and Cyprus). Table 2.5.2 gives a detailed break down of the distribution of respondents by country of origin (ibid, 1979).

2.5.2 (1) Trip Characteristics

Summer Visitors

In the summer of 1981, an estimated 1,116 persons were interviewed in a survey done by the National Capital Commission (NCC, 1981). Although this survey did not

Table 2.5.2

DISTRIBUTION OF VISITORS BY COUNTRY OF ORIGIN, 1979.

<u>Country</u>	<u>Number of Respondents</u>	<u>Percentage of Respondents</u>
Canada	785	62.80%
U.S.A.	257	20.56
British Isles	76	6.08
West Germany	32	2.56
France	22	1.76
Holland	13	1.04
Belgium	11	.88
Mexico	8	.64
Switzerland	7	.56
Australia	6	.48
Sweden	3	.24
Japan	3	.24
Colombia	3	.24
Poland	2	.16
Austria	2	.16
Morocco	2	.16
Italy	2	.16
New Zealand	2	.16
Greece	1	.08
Peru	1	.08
Hungary	1	.08
Venezuela	1	.08
Tanzania	1	.08
Algeria	1	.08
Lebanon	1	.08
Honduras	1	.08
Egypt	1	.08
Luxembourg	1	.08
Iran	1	.08
Spain	1	.08
Jamaica	1	.08
Cyprus	1	.08
Total	1,250	100.00

Source: Survey Of Visitors To The National Capital Region.
Summer, 1979.

represent an exact and accurate profile of all visitors to the Capital, the data does provide suggestive information on the characteristics of those who had visited the Capital during the summer.

Table 2.5.3

ORIGIN OF VISITORS

<u>Place</u>	<u>1981</u>		<u>1979</u>	
	<u>Number</u>	<u>Percentage</u>	<u>Number</u>	<u>Percentage</u>
Canada	599	53.7 %	785	62.8 %
U.S.A.	315	28.2	257	20.6
Europe	149	13.4	174	13.9
Other Markets	53	4.7	34	2.7
	<u>1,116</u>	<u>100.0</u>	<u>1,250</u>	<u>100.0</u>

Source: Survey Of Visitors To The National Capital Region
NCC, Summer, 1981.

According to the data (Table 2.5.3) the main sources of Non-Resident Travellers were from the U.S.A. and Europe. Americans alone accounted for 28% of all the visitors, an increase from 20% in 1979. The NCC 1979 study (Table 2.5.2) suggested that after the U.S.A., U.K. (6%), West Germany (3%), France (2%), Netherlands (3%) and Japan were the most important non-resident markets for the Capital. Japan has been included because it is the only Asian country who visited NCR more than the Others.

In 1981, approximately 46% of the total respondents were non-resident travellers. Unfortunately, individual information on country of origin was not available. Table 2.5.4 summarizes the visitors' characteristics based on their area of origin. More than 50% of them were in the 15 - 44 age group. The NCR received quite a higher percentage (13%) of older clientele (over 65 years). 88% had

a family income in excess of \$ 15,000, with more than 40% of visitors reporting their occupation as senior Executive or Professional group. Again, this may be explained that as a National Capital, the NCR attracted a substantial proportion of the business - convention/conference visitors. A significant percentage of students (9.5% from U.S.A., 9.4% from Other Nations and 3.3% from Europe) also visited the NCR during summer 1981.

The visitors were grouped into two categories, based on their purpose of visit -- the business related visits and the vacation/pleasure travellers. Among the business group, about 23% from U.S.A., 30% from Europe and 14% from the Other Nations came to attend some convention or conference held in the region, while more than 25% of the visitors from all the three markets had some non-government business purposes for travelling to the Nation's Capital.

Among the vacation/pleasure travellers sightseeing was the most important purpose (more than 64%) of all the visitors to visit the NCR. Visiting a friend or relative was placed as the second most important reasons to them.

For 61% of the visitors to the NCR in the year of 1981, this was their first visit to the Capital; 39% had been here before. About 62% of the repeat visitors made their last trip to NCR in the Summer and 15% in the Spring (NCC, 1982). Although the NCR experiences less problem in seasonality still for the pleasure/recreation travellers summer and spring seemed to be a much more preferable period to visit the region. For 50% of the respondents, the NCR was the main destination for the vacation. The average length of stay (including same-day trips) was 3.6 nights (ibid., 1982).

Automobile remained the main mode of transport. For example in the summer of 1981, the percentage of visitors travelling by car was 55%, while bus/train/plane, i.e., use of public mass mode

Visitors - Characteristics Based On Place Of Origin, 1981.

	<u>USA</u>	<u>Europe</u>	<u>Other</u>
<u>Age</u>			
Under 25	10.1%	35.6%	17.0%
25-44	42.3	33.6	60.4
45-64	34.6	20.8	22.6
Over 65	13.0	10.0	0
<u>Family Income</u>			
Under \$15,000	6.3%	12.9%	11.8%
\$15,000 - \$30,000	44.2	44.3	45.1
\$30,000 and over	49.5	42.8	43.1
<u>Occupation</u>			
Senior Executive- Professional	48.9%	41.6%	50.9%
Factory Worker- Labourer	8.5	9.4	7.6
Office Employee- Salesman	2.9	2.0	7.6
Craftsman- Semi-skilled	10.2	7.4	13.7
Homemaker	7.0	24.8	11.3
Student	9.5	3.3	9.4
Retired	11.7	10.1	0
Unemployed	0.3	0.7	0
Other	1.0	0.7	0
<u>Purpose Of Visit</u>			
<u>Business</u>			
Convention/Conference	23.1%	30.0%	14.3%
Government Business	15.4	10.0	57.1
Non- Government Business	34.6	50.0	28.6
Accompanying Someone	26.9	10.0	0

Contd...

Table 2.5.4 (cont'd.)

37

	<u>USA</u>	<u>Europe</u>	<u>Other</u>
<u>Vacation/Pleasure</u>			
Visiting Friends/ Relatives	18.0%	32.6%	20.0%
Sightseeing	73.8	64.2	74.5
Shopping	2.7	1.7	1.8
Cultural or Sports Events	3.0	1.0	1.8
Outdoor Recreation	1.4	0	0
Other	1.1	0.5	0

Source : Survey Of Visitors To The National Capital Region, 1981.

of transport was for about 36% of the sample (NCC, 1982). Increase in the price of gasoline in Canada may be an explanation of the more use of mass mode of transportation. Because of the small sampling size (1,250 persons in 1979 survey and 1,116 persons in 1981 survey) no comment or conclusion can be made on the future trends in the mode of transportation of visitors to Ottawa.

Concerning accommodation arrangements, more than 75% of the visitors chose to stay in hotels/motels or at their friends'/relatives' houses. About 9% of the total sample preferred campsites as their accommodation during their stay in the NCR. Some characteristics of the visitors, however, have been identified in the NCC, 1981 survey. As the family income increased, the use of commercial accommodation increased, eg. the visitors who had a family income in excess of \$ 30,000 stayed more in hotels/motels (40%). When the purpose of visit to the NCR came to the question of VFR, of course, the percentage of visitors staying with their friends and relatives increased, (NCC, 1982). About 70% of the hostel and university resident users had a family income between \$ 15,000 to \$ 30,000. Again, no accurate conclusions can be made about the characteristics of the total visitors.

Regarding the activities of the visitors, 48% of the respondents (including the Canadians) spent their time sightseeing, 17% enjoyed dining out and dancing, 18% attended concerts/theatres shows and 8% went to nightclubs (NCC, 1982).

Table 2.5.5 illustrates the cultural sites and points of interest most often visited by the tourists. Parliament Hill was almost always at the top of the list for every

Table 2.5.5

CULTURAL SITES AND POINTS OF INTEREST MOST VISITED

	<u>Number</u>	<u>Percentage</u>
Parliament Hill	858	76.9
National museums	546	48.9
Rideau Canal and locks	265	23.7
Changing of the Guard	159	14.2
National Gallery	145	13.0
National Arts Centre	136	12.2
The Mint	122	10.9
Boat tours	103	9.2
Sussex Street North	83	7.5
Bus Tours	82	7.3
Sparks Street Mall	80	7.2
Byward Market	67	6.0
Gatineau Park	59	5.3
Downtown Hull	34	3.0
Experimental Farm	29	2.6
National Aeronautical Collection	10	0.9
Mont Cascades	1	0.1
Other*	204	18.3

* Of this total: 65%: Various points and sites

35%: Super Ex, The Supreme Court, the
Astrolab, Nepean Point and the
Château Laurier

** These percentages are based on the total number of
visitors interviewed, i.e.: 1,116 persons.

Source : Survey Of Visitors To The NCR, Summer, 1981.

Table 2.5.6

VISITORS' IMPRESSIONS OF THE CAPITAL

	<u>Number</u>	<u>Percentage</u>
<u>POSITIVE IMPRESSIONS</u>		
Physical aspect	1,008	34.7
Friendliness	589	20.3
Cultural and Historical sites and activities	540	18.6
Adequate tourist services	250	8.6
Activities and leisure	231	7.9
Adequate public services	229	7.9
Other	58	2.0
	<u>2,905</u>	<u>100.0</u>
<u>NEGATIVE IMPRESSIONS</u>		
Inadequate public services	38	15.3
Lack of activities and recreation	30	12.1
Inadequate tourist services	14	5.6
Unfriendliness of people	6	2.4
Other*	160	64.6
	<u>248</u>	<u>100.0</u>

Source : Survey Of Visitors To The NCR, Summer, 1981.

visitor. About 77% of the tourists visited the Parliament Hill, 49% the National Museums while only 5.3% visited Gatineau Park. Most of the sites of interest were centred around the Parliament Hill and as sightseeing was the main purpose of visit, visitors were busy in the downtown area and a very few of them had gone beyond that. Shorter length of stay was another factor for low visitation to the Gatineau Park (NCC, 1982).

Table 2.5.6 summarizes the visitors' impressions of the NCR. The positive comments related for the most part to physical aspects (35%, architecture, landscaping, cleanliness etc.), the friendliness of the people (20%) and the cultural and historical sites and activities (19%). Visitors expressed negative impressions about the public services, lack of activities in the region, unfriendliness, inadequate tourist services etc.

2.5.2 (2) Winterlude Visitors

The National Capital Region attracts visitors during all four seasons. Winter travel to the city is primarily business oriented, however, during the last few years Winterlude has begun to attract more recreation/pleasure travellers to the region, stimulating winter outdoor recreation (NCC, 1982). Winterlude is a 10 day celebration of winter focussed on the Rideau Canal, the world's largest skating rink. Because of its popularity the NCC felt it was necessary to conduct a survey of Winterlude visitors. A summary of the survey is presented below.

A minimum estimate for the total number of visits to Winterlude in 1982 was 392,000, out of this number, 40,000 (10.3%) were estimated to have come further than 80 km, and 22,000 (6.1%) visitors came from the United States. This figure was larger than the number of visitors from all other provinces of Canada (3.6%) other than Ontario and Quebec, because the U.S. visitors were more likely to have been from up-state New York which is much closer than the other provinces.

More than 80% of the non-local visitors cited Winterlude as being of some importance in deciding to visit the NCR. For 47% (19,000 people), Winterlude was identified as being very important or extremely important in their decision to visit NCR. Thus, one can conclude that Winterlude is a significant influence in bringing tourists to the Capital in Winter.

Pleasure trips, primarily recreation oriented trips, were the reasons why 63% of non-local visitors came to the NCR and 26% reported personal purposes (including visiting Friends/Relatives, Shopping, Medical Appointments etc.). Only 8% of the Winterlude respondents had come to the NCR for business.

The majority (68%) of the non-local visitors arrived by car with approximately 22% used public transportation as a mode of travel. Because of the dominance of the short-distance travellers from Ontario and Quebec the number of plane users were very low (3.2%).

68% of the non-local visitors stayed with their friends and/or relatives. An additional 30% visitors, stayed in hotels or motels.

In addition to Winterlude, visitors participated in various kinds of activities while in the National Capital Region. About 66% enjoyed a free outdoor sports event, such as cross-country skiing. Significant numbers (20%) also enjoyed taking part in various paid sports activities, such as downhill skiing, bowling or squash. An estimated 29% of the non-local visitors went to bars/nightclubs and over 60% dined at a licensed restaurant, usually more than once.

About 60% of the visitors were in the age group of 25 - 44. The under 25 group was strangely under-represented (mainly because of the survey techniques). Elderly people also were not attracted to Winterlude in proportion to their numbers in the population.

It was clear from the survey that the levels of satisfaction with Winterlude were very high (88%), both for the Winterlude as a whole and for specific events. Respondents were in favour of keeping Winterlude as is, in scheduling and location.

2.6 Summary and Conclusion

The main objective of this Chapter was to examine the general profiles and trip purpose, characteristics and origins of the travellers who visited the NCR.

Despite the differences between the surveys and reports examined in this Chapter, their survey techniques, sampling sizes, survey periods, etc., provide a general picture of all the tourists in the NCR during the period of 1980-82. The following is the summary of that picture as gathered from the above surveys.

The visitors represented an affluent market, possessing higher education, income (50% of the visitors reported family income in excess of \$20,000) as well a greater proportion of professional/managerial jobs (19% of all visitors) than the national average. The main tourist markets were the Ontario (54%) and Quebec (39%) visitors, among the Resident Travellers and U.S.A. (28%) and Europe (13%) (specially U.K. and Germany) among the Non-Resident Travellers. They stayed in Ottawa for a short duration, 3-4 nights. More than 75% of the visitors preferred to stay either in hotels/motels or at their friends or relatives homes. As the family income increases so does the use of commercial accommodation (40% of the hotel/motel users had a family income in excess of \$ 30,000). Visitors most often arrived in the NCR by car, primarily for pleasure purposes, to vacation or to visit friends/relatives. The youth market, aged between 16 and 24 years were apparently under represented in the surveys. Approximately 40% of all the visitors to the Region were mature adults, in the age group of 25 - 44 years. However, the Region also attracted a large proportion of older visitors, 55 years

and above (16%). In general, the visitors were favourably impressed by the tourism plant of the Capital. Positive impressions were stated about the physical aspects, friendliness of the people, different historical and cultural sites and attractions of the NCR. Some negative impressions were expressed by the visitors towards different tourist services in the NCR.

Following the Research Model (Table 1.4.1), "Market Analysis" was the first step to reach the main purpose of this thesis. Socio-demographic status of the visitors has a definite influence on their vacation desires and preferences in choosing a destination. The quantitative information on the visitors derived from recent surveys allows the synthesis of a general picture of the recent users' trip profiles and characteristics. This socio-demographic information, however, will serve as a background for identifying the characteristics of the potential visitors.

CHAPTER III

ATTITUDES OF THE MARKET

3.1 Market Segmentation

A considerable amount of research has been conducted by agencies such as Tourism Canada, Market Facts of Canada Ltd. etc., during the last two decades, investigating the motivations, objectives and subjective reasons for travelling, and about the way travellers choose from the many potential travel destinations. Market Facts of Canada Ltd. (sponsored by Tourism Canada) has conducted several surveys aimed at understanding the different market segments of the potential Canadian tourist markets. One example is the "Study Of The Potential Pleasure Travel Market For Canada In The U.S.", prepared for CGOT by Market Facts of Canada in March, 1982.

Previously, the tourist markets have been classified according to their socio-demographic status (i.e. Age, Sex, Income, Occupation, Place of origin etc., NCC, 1979, 1981; CGOT, 1982 etc.) in order to examine and compare their trip characteristics.

All types of tourists do not need or expect the same kind of vacation experience nor do they participate in the same types of activities at the same destination. For example, the tourists who want to enjoy city environment would expect to participate in different types of city-life entertainments, whereas a touring segment might expect to enjoy the ~~out~~ of way places, natural environment etc. These kinds of differences have led to the identification

of the various market segments, as defined by the division of a market into groups of tourists having broadly similar preferences and demands. In this report markets have been segmented on the basis of vacation needs and benefits sought by the travellers. Knowledge of market segments helps to identify possible opportunities for future tourism development.

3.1.1 Identification Of The Potential Market Segments

The NCC (1980) survey identified thirty-two different countries as the source of summer visitors in the NCR in 1979. The primary markets, in terms of number of visitors, were identified as Canada (63%) and the U.S.A. (21%). Since Canadian and American travellers accounted for such a dominant proportion (i.e. 84% of all visitors), this section has concentrated on identifying the potential market segments, specifically, for these two markets.

In 1980 a study was designed by the Travel Industry Association Of Canada in an effort to understand the needs of Canadian vacationers and how Canada might address these needs better in competing with other countries for vacation trips and future travel market developments.

On the basis of response to attitudinal statements, four market segments were identified:

- Sun Lovers;
- The Security Conscious;
- The Action Seeker; and
- The Off-The-Beaten-Track Types (CGOT, 1981).

Table 3.1.1 shows the characteristics of these market segments as well their travel habits. From the table it is also clear that these segments were "buying" the product to match their "needs". For example, the "Sun Lovers" would choose a vacation spot providing a warm, seaside atmosphere and outdoor activities. They reported visiting the vacation spots (43%) and enjoying the outdoor activities

Table 3.1.1.1

Characteristics Of The Market Segments — Canadian Travellers-

Sun Lovers		Security Conscious	Action Seeker	Off-The-Beaten-Track
<u>Vacationer</u>	-warm weather -outdoor activity with seaside holiday -choose a vacation spot based on its merits -less loyal to Canada	-familiar destination -been before, specially for VFR -not keen to take "foreign trips" for adventure -peace and quiet place -planned vacation well in advance -more loyal to Canada	-big cities or developed resorts -least interest in outdoor activity or "peace and quiet while I travel"	-more loyal to Canada -out of way places -less developed resorts -tend to avoid first class accommodation -more interest in outdoor activity
<u>Need</u>				
<u>Trip</u>				
<u>Purpose*</u>				
VFR	33%	67%	43%	46%
Vacation Spot	43	15	29	27
Urban Sightsee	18	11	23	18
Rural Sightsee	13	5	13	19
Outdoor Activity	12	6	6	16
Camping	7	5	6	9
Shopping	7	10	12	7
Other	24	25	27	25
<u>Where*</u>				
Canada	64%	80%	65%	77%
USA	46	25	47	31
Offshore	16	9	17	16
<u>On Package Tour</u>	36%	15%	34%	20%
<u>Used Travel Agent</u>	26	12	32	22

*The percentages do not add to 100 because of multiple answers.

Source: Accumulated from Vacation Travel by Canadians, CGOT, 1980.

(12%) as two of their main trip purposes. Although 64% took a vacation trip within Canada, 62% of them also vacationed outside Canada (46% in U.S.A. and 16% in Off-Shore areas), which reflects that they choose a vacation destination based on its merits, i.e., where they can enjoy a warm weather holiday.

Security Conscious people in general expect familiar destinations, and have likely been there before. They like to visit friends and relatives, have peace and quiet place, and are not keen on adventure. Visiting friends and relatives (VFR) was their main trip purpose (67%). 80% of them took vacation trips within Canada; 15% of them were on a package tour.

Action Seekers were interested in a big city atmosphere or in developed resorts. They were least interested in outdoor activity, or seeking peace and quiet atmosphere during their travel. Their important trip purposes were as follows - VFR (43%), vacation spot (29%), Shopping (12%), urban sightseeing (23%) etc. Although 65% took vacations within Canada, 64% of them also went outside Canada for their vacation.

The Off-The-Beaten-Track types were more loyal to Canada; 77% of them took vacations within Canada. They like to visit out-of-way places in less developed areas. They were interested in outdoor recreational adventure in their vacation, generally avoiding first class accommodation and resorts. Their trip purposes included VFR (46%), sightseeing (37%), Outdoor Activity (16%), and Camping (9%).

As with the Canadian tourist market, the U.S.A. travel market also is not homogeneous. Market Facts Of Canada in March 1982, published a study of the potential pleasure travel market for Canada in the U.S. In the report, the U.S. travel market was divided into four segments based on differences in the benefits each group

wanted on their vacation. Each segment were given a name which broadly characterized the vacation benefits of each segments described as important.

The different vacation benefit segments as well as their main characteristics has been summarized in Table 3.1.2 (Market Facts, 1982). Table 3.1.2 explains that although the names assigned to the four U.S. market segments (Urban, Resort, Touring and Outdoor) are different, the characteristics of their different vacation benefits are very much similar to the four Canadian market segments. For example, the Urban segment's vacation characteristics are very much similar with the Action seekers of the Canadian tourists as they both prefer big city atmosphere, with lots of things to see and do, eg., sightseeing, shopping, visiting vacation spots etc. Touring Segments' characteristics sometimes match with the security conscious groups, as they both prefer a planned vacation to get good service, first class hotels etc. Outdoor segments are somewhat similar to the Off-The-Beaten-Track groups and Resort segments match sometimes with the characteristics of the Canadian Sun Lover and Action Seeker segments.

Table 3.1.3 provides the quantitative information on the things enjoyed on past equivalent distant trips by these four benefit segments. The analysis of their preferred activities will help to identify possible future trends. The activities participated in and enjoyed by each segment define their characteristics, or in other words, each segment was buying products to match their needs. Although these past equivalent trips were not necessarily within Canada they are helpful for comparison purposes. (For example, Urban Segments enjoyed sightseeing (61%), dining out (31%), shopping (37%), visiting friends and relatives (26%), attending theatre/plays/concerts/opera etc. (25%), visiting museums (21%) during their past vacations, as expected.)

Vacation Benefit Segments - Main CharacteristicsSegment SizeCharacteristicsUrban

(17%)

Big city atmosphere, with lots of things to see and do, eg., cultural activities, visiting historical buildings, good shopping facilities, visit friends and relatives. On the other hand they were less interested in oceanside, mountains, wilderness, first class hotels and high quality restaurants in choosing a vacation area.

Resort

(31%)

Good service, high quality restaurants, first class hotels, Resort areas, nightlife and entertainment. The attributes which were proportionately lesser importance included, wilderness, lakes, parks, forests etc., countryside holidays.

Touring

(20%)

Good service, high quality restaurants, first class hotels, countryside, cultural activities, historic building, camping facilities, a treat for children, exciting, enriching experience.

They were not interested in the nightlife/entertainment in their vacation place.

Outdoor

(32%)

Wilderness, National/Provincial Parks, Lakes and streams, camping facility, clean air, quiet and beautiful scenery, a treat for children while first class hotels and restaurants were lesser importance for their desire in a vacation area.

THINGS ENJOYED ON PAST EQUIVALENT DISTANCE TRIPS
BY BENEFIT SEGMENTS

(MAIN MENTIONS)

	WEIGHTED	URBAN	BENEFIT SEGMENTS		OUTDOOR
	TOTAL		RESORT	TOURING	
TOTAL RESPONDENTS	2,001	346	628	405	620
	%	%	%	%	%
SIGHTSEEING	57	61	56	57	54
SWIMMING	36	33	45	29	34
RESTAURANTS/DINING	31	31	38	34	23
OUT/FOOD					
SHOPPING/WINDOW	29	37	32	29	22
SHOPPING					
BEING AWAY/GETTING AWAY/ CHANGE OF PACE	24	19	28	22	24
VISIT FRIENDS AND RELATIVES	23	26	19	27	21
RELAXING/LEISURE TIME	17	13	22	14	17
FISHING	16	8	11	15	27
NIGHTLIFE/ENTERTAINMENT*	15	14	24	7	11
THEATRE/PLAYS/CONCERTS/ OPERA*	15	25	4	13	11
POINTS OF INTEREST	14	18	9	16	15
HIKING/BACKPACKING/ CLIMBING	14	14	5	10	25
MUSEUMS	13	21	8	14	13
SCENERY/COUNTRYSIDE	12	8	9	15	15
AVERAGE NUMBER OF MENTIONS, PER RESPONDENT	5.4	5.4	5.5	5.2	5.4

* BASED ON A GROUPING OF SIMILAR CODES

Source: Study Of The Potential Pleasure Travel Market For Canada
In The U.S. CGOT 1982.

3.2 Attitudes And Motivations

Over the past decade or more, the rapid pace of social, economic and industrial change has had a significant effect on the leisure market. The gradual replacement of the work ethic by an emerging leisure ethic has reflected the increasing valuation placed on leisure time and activities. Because the determinants of leisure demand are largely psychological in nature, analysis and description of potential market segments must rely heavily on consumer behaviour, attitudes and perceptions (Market Facts, 1973).

Dr. John D. Hunt, Chairman of the Institute for the study of Outdoor Recreation and Tourism, published an article, "Image as a factor in tourism development" in 1975. The paper was designed to examine the phenomenon of image and perceptions as it might relate to tourism. Hunt explained that the perceptions held by potential visitors about an area might have significant influences upon the viability of that area as a tourist recreation region. What these potential customers thought about the natural environment, climate, people and different tourist products of a region might shape images that could detract from or contribute to successful development. Although a region might contain a wide spectrum and high quality of tourist recreation resources, a negative image might detract from realization of the potential use.

The decisions made by tourists as regards to the choice of destinations are very strongly influenced by personal knowledge and experience, reports and advice from friends and acquaintances and other information (both correct and otherwise), which has been gained directly or indirectly from the mass media, advertising or from travel intermediaries. Elaborating on this interpretation,

Schmoll identified three components of "image" (Schmoll, 1977):

- the 'information' possessed - or thought to be possessed about a travel destination (awareness);
- the 'beliefs', assumptions and feelings held about it, whether they are supported by facts or not (attitudes);
- the 'gratifications' or benefits derived or hoped to be derived from it (expectations).

Schmoll further explained that once a person has arrived at the decision to travel for pleasure, he or she will attempt to determine which of the many destinations available to him will best suit the motivations he or she considers important. The various images the individual has formed about destinations in his or her mind are compared with the travel motivations considered relevant in a conscious or unconscious process of elimination, until only those destinations or services are left whose image "fits" these basic motivations.

This selection process will then continue with other considerations - cost, time available, advice from others, information from news or advertising media, recommendations by travel agents (ibid, 1977). This attitude and image dimension is considered to be very important and offers potential for sharper definition of new market opportunities and possible development opportunities for target markets.

As noted earlier, none of the studies done on tourism in the National Capital Region included the attitude (and behavioural characteristics of the tourists in the National Capital. This study, therefore, draws on several recent CGOT (presently Tourism Canada) reports that were designed to examine and understand the attitudes and perceptions of the visitors (both Resident and Non-Resident) towards taking a vacation trip to Canada. These studies appear to be the only available references. During

surveys the visitors were asked about their attitudes toward all Canadian destinations. These attitudes can be related to the National Capital Region.

3.2.1 The Resident Travellers

During the annual 1981 survey of the vacation patterns of the Canadian travellers, CGOT decided to study the attitudinal perceptions of Canada compared to the U.S., among the Canadian travellers (CGOT, 1982). The travellers surveyed were provided with a list of ten vacation attributes (Table 3.2.1(1)) and asked whether each of them were better provided in Canada, in the U.S. or if both countries were equal. Canada was overwhelmingly perceived as a place with quiet countryside, and a place for rest and relaxation and with a range of outdoor activities during winter. Attending local celebrations was perceived as another attraction that was much better than in U.S.A.

This country was also perceived (in 1981) as being better than the U.S. on the basis of overall value received for money spent, especially when travelling by car (because of the lower gas price (then) in Canada). The attitudes of the vacationers were split, however, on the money spent particularly for accommodation (hotels/motels); accommodation cost was considered higher than the U.S.A. U.S.A. was also perceived as having more interesting cities to visit and "lots of things" to do and see during a vacation than in Canada.

In 1978, a tracking study was prepared for the CGOT, to understand the attitudes of the Residents of Canada towards vacation travel activities. The visitors were provided with a list of twenty different vacation activities and were asked to rank them in the order of what they expected most to enjoy in a vacation.

The overall ratings for each of those twenty activities.

Table 3.2.1(1)Image: Canada versus U.S.A. As A Vacation Destination

Attribute	Percent Among Vacationers (In Past 2 Years)	
	Better In Canada	Better In U.S.
	%	%
A place with quiet countryside	70	3
Outdoor activities during winter	59	8
Attending local celebrations	53	9
Gives you value for money when you travel by car	47	18
A place for rest and relaxation	43	17
Overall value for money for a vacation	44	23
Courtesy shown to tourists	36	17
A lot to see and do during a vacation there	28	29
Value for money in hotels and motels	29	33
Interesting cities to visit	23	31

• Source : The Vacation Travel By Canadians, 1981.

have been illustrated in Table 3.2.1(2). Each activity was scored by using a number from one through ten, wherein one represented no importance at all and ten represented a great deal of importance. The results are expressed in terms of a 10 point scale, as well as an average or mean rating for each statement. 9-10 are considered as high scores and 1-2 as low scores (CGOT, 1978). The most important vacation requirements were "visiting a city where it is safe to walk around" (8.02), "Eating at good restaurants" (7.76), "Exploring the countryside" (7.36) etc. Activities ranked below the tenth ranking tend to have an equal proportion of respondents giving them either a 9-10 rating or a 1-2 rating. The activities that are rated below the tenth ranking, such as nightlife, camping and trailoring, attending spectator sports etc. are activities that have a limited appeal i.e. - they are attractive only to a limited proportion of the population.

3.2.2 The Non-Resident Travellers

3.2.2 (A) United States Of America

Travel is an important aspect in the lifestyles of a large portion of the American population. Travellers tend to be better educated, more affluent and more active in a wide range of outdoor recreational activities than the average U.S. residents (CGOT, 1982).

In March 1982, Market Facts Of Canada Ltd. (MFC) published the report "Study of the potential pleasure travel Market for Canada in the U.S.". The main objective was to identify the potential pleasure travel market for Canada among the U.S. residents - to analyze the attitudes and awareness of Canada as a travel destination.

According to the MFC study, during the past vacations U.S. travellers enjoyed mainly the Canadian scenery (48%), meeting nice and friendly people (35%), visiting points of interest and attractions (17%), clean cities of Canada

Table 3.2.1(2) OVERALL RATING OF ACTIVITIES

<u>Activities</u>	<u>Rank</u>	<u>Mean</u>	<u>9-10 Score</u>	<u>1-2 Score</u>
1. Visiting a city where it is safe to walk around	1	8.02	56%	5%
2. Eating at good restaurants	2	7.76	46	4
3. Exploring the countryside	3	7.36	38	6
4. Meeting and talking with local people	4	7.30	35	5
5. Going to the beach	5	7.25	42	9
6. Visiting historical areas	6	6.28	27	8
7. Visiting friends and relatives	7	6.50	35	15
8. City sightseeing on your own	8	6.33	24	11
9. Shopping	9	6.07	24	14
10. Taking part in other outdoor activities	10	6.05	24	18
11. Attending local celebrations	11	5.87	19	15
12. Nightlife	12	5.87	26	21
13. Taking part in summer water sports	13	5.31	22	28
14. Camping/trailoring	14	5.17	27	35
15. Attending spectator sports	15	5.12	18	27
16. Going to art galleries/museums	16	5.07	15	25
17. Taking part in winter sports	17	4.99	19	32
18. Going to the theatre	15	4.87	14	28
19. Fishing	19	4.64	20	39
20. Guided City Sightseeing	20	4.26	12	37

Source: Attitudes Towards Vacation Travel Among Residents of Canada, Tracking Study, CGOT, 1978.

(16%), and participating in wilderness activities (12%). On the other hand, they considered Canadian vacation would be costly (in terms of accommodation) (12%) and the weak image on the reliability of weather (6%) were ~~some~~ of the negative attitudes towards Canadian vacation.

The study also compared the attitudes towards Canada versus other travel destinations. Table 3.2.2(1) summarizes Canada's performance for all segments. The Table rates how Canada is perceived as a destination, summarizes the percent of respondents rating various attributes as being at least somewhat important over other destinations.

It appears that Canada is considered to be at least as attractive as other destinations, on the four basic benefits sought by all four U.S. market segment to Canada (Table 3.2.2(1)). "Friendliness of the local people", "getting good service", "having many things to see and do" and the "value for your vacation dollar", were of primary importance to more than nine-tenths of the U.S. market (Market Facts, 1982). The table also summarizes how each segment compared the different vacation attributes from the point of their own characteristics.

- The "Outdoor" segment considered that Canada ranked very well in terms of its countryside, lakes and streams, mountains, national parks or forests, and wilderness.
- The "Touring" segment considered that Canada ranked very well in terms of getting good service, higher quality restaurants, first class hotels, smaller towns, countryside, cultural activities and historic buildings.
- The "Resort" segment considered that Canada ranked very well in terms of getting good service, high quality restaurants, first class hotels, resort areas, nightlife and entertainment.
- The "Urban" segment considered that Canada ranked very well in terms of cultural activities, historic buildings, cosmopolitan atmosphere, shopping and big cities.

Table 3.2.2(1)

Comparison of Canada to Other Vacation Places by Benefit Segments

Segment	Key attributes	% Considering Benefit Very or Somewhat Important		
		and Canada better	and Canada same	and Canada better or same
<u>For all four segments</u>	Friendliness of local people	21	58	79
	Getting good service	26	52	78
	Having many things to see and do	21	53	74
	Value for your vacation dollar	34	35	69
<u>Outdoors</u>	Countryside	40	48	88
	Lakes and streams	50	38	88
	Wilderness	53	31	84
	Mountains	38	42	80
	National parks or forests	30	47	77
<u>Touring</u>	Countryside	40	45	85
	First class hotels	17	57	74
	High quality restaurants	20	53	73
	Smaller towns	23	48	71
	Historic buildings	22	48	70
	Cultural activities	20	46	66
	National parks or forests*	40	42	82
	Lakes and streams*	41	39	80
	Mountains*	25	34	56
<u>Urban</u>	Cultural activities	20	46	66
	Historic buildings	21	42	63
	Shopping	17	43	60
	Big cities	12	38	50
	Cosmopolitan atmosphere	23	47	30
	Countryside*	33	38	71
	Smaller towns*	14	43	57
	National parks or forests*	21	31	52
	Oceanside*	27	27	30
<u>Resort</u>	Getting good service	22	61	83
	First class hotels	16	58	74
	High quality restaurants	21	51	72
	Nightlife and entertainment	11	52	63
	Resort area	14	43	57
	Lakes and streams*	26	3	29

*Additional benefits which are of importance to particular segments, but which do not differentiate among the segments.

Source: Study of the potential pleasure travel market for Canada In the U.S., CGOT, 1982. Attitude Study.

60

Overall Canada is seen to be strong in scenery and outdoors products/experiences, and relatively weak in selected urban products/experiences..

COMMENT

A thoughtful market understanding of the vacation benefits sought by potential U.S. travellers provides insights into the examination of the importance of vacation benefits in conjunction with the perception of Canada vis-a-vis other vacation destinations on these same benefits. Simultaneous consideration of both perspectives suggests different market implications across the various vacations benefits. For instance, Canada has been rated as better than other destinations on certain benefits also rated as important by the U.S. traveller. If this situation held across a number of benefits, Canada would be a definite vacation destination this traveller would likely choose. Alternatively, Canada has been rated the same as other destinations on important benefits. Table 3.2.2(1) shows, except for wilderness and lakes and streams of Canada, the percentages given by all four U.S. segments on the vacation attributes rated as same as other destinations. This certainly implies that the choice of Canada would be a chance occurrence with the many other competing destinations.

3.2.2 (B) The Overseas Market

In addition to the Canadian and U.S. tourist market the NCR also attracted different overseas tourist markets (16% of the total sample, NCC, 1980). Among them the important markets for the NCR were U.K. (6%); West Germany (3%); France (2%); Netherlands (2%); Japan (1%) (NCC, 1980). Since the overseas markets in total constitute a significant proportion (16%) of the total number of tourists to the NCR it is felt necessary to examine and understand the attitudes and perceptions of these visitors towards a Canadian vacation. The CGOT (presently Tourism Canada) has made efforts to understand the needs and expectations of the different

overseas markets from time to time. The CGOT reports were the only available resources identified for this information.

3.2.2(B)1) United Kingdom

According to the NCC 1981 survey, the United Kingdom is the most important overseas market, and also the third largest tourist market (6% of the total sample) for the National Capital Region (NCC, 1982). From the results of the NCC survey it was established that the visitors from U.K. enjoyed different city based activities in addition to the NCR's outstanding outdoor recreation opportunities (ibid, 1982). In order to develop a marketing strategy, it is necessary to understand the attitudes and images of the British visitors, what brings them to Canada and of course what attracts them to the National Capital Region.

The CGOT's attitude studies provides considerable information. One such study is "The Attitudes of Residents of the United Kingdom to Canada as a Holiday Destination". The Canadian Government Office of Tourism (CGOT) in late 1981, commissioned Research Services Ltd., of London, England to undertake an in-depth study of the attitudes of residents of the U.K. to Canada as a holiday destination. Britons were asked to compare Canada with a number of other destinations to see how this country ranked with other countries.

From the CGOT study two aspects emerged as being particularly important to enjoying a long-haul holiday. These were a pleasant and relatively uncrowded outdoor environment, and a high degree of intrinsic interest in the holiday destination. The first attribute includes such features as plenty of space to get away from the crowds; outstanding scenery; and a quiet and unspoilt environment, while the second incorporates places which would be interesting to talk about when you get home, the opportunity to meet new people; and interesting cities to tour.

In image or perception terms, Canada competes with the U.S.A. far more closely than with any other long-haul destination. Among the majority group for whom America best satisfied their requirements, as many as 80% placed Canada in second place (CGOT, March 1983).

There are number of factors that favourably influenced the choice of Canada as a destination. Canada was rated first for having a stable political situation and for having simple entry formalities for U.K. visitors. Other high priority requirements for which Canada achieved the highest ranking were outstanding scenery; a quiet and unspoilt atmosphere, and plenty of outdoor activities. Attributes for which Canada was rated second included - plenty of space to get away from the crowds; interesting cities to look around; a country which you can see easily; good shopping facilities, excursions and sightseeing easy to arrange; plenty of night life; and a country which caters to all tourists. The weakest images about Canada concerned reliable weather; good beaches; lots of historical and cultural interest; interesting local people and an exotic and exciting atmosphere (CGOT, 1983).

When the visitors were asked to describe the type of holiday they would expect in Canada, the answer reflected their spontaneous impression of the country (i.e. a wide range of outdoor activities such as fishing, walking, winter sports, sightseeing, touring, camping etc.; while city based activities were far less strongly associated with Canadian holidays). Those who have previously visited Canada for a holiday, however, were more likely to list city based activities.

The share of the British market coming to Canada in 1982 had approximately remained the same (15%), compared to 1977 (17%). Though there has been a slight drop in the proportion of holidays which were VFR related, these still

accounted for the overwhelming majority (87%) of British holiday visits to Canada.

COMMENT

Canada has not succeeded in attracting a large share of the British non-VFR market. The British visitors perceived that Canadian vacations could also be good for recreation/pleasure purposes.

A gap exists between the perceived image of Canada as a vacation destination and the actual impression after their visit to NCR. This would suggest that opportunities exist to improve the image and expand this market.

3.2.2 (B)ii) West Germany

Among the European nations, Germans were the second most important market (3%) following U.K. for the National Capital Region (NCC, 1980). The demand for travel by Germans apparently has expanded from the search for sun and beach recreations to a desire to gather new impressions, meet new people and gain new experiences. There was a new trend towards skill-improving vacations such as tennis, sailing, scuba diving, horse riding, etc. (CGOT, 1981/82).

In 1982, CGOT commissioned a survey on the attitudes of West Germans to Canada (CGOT, June, 1982). Attitudes towards Canada as holiday destinations were:

- the desire to get to know a completely new country.
- to gather new experience.
- contact with the local people,
- fun and entertainment.
- a holiday that is unusual and different from others.
- visit the sightseeing attractions.

Two hypothetical conclusions were drawn, in the above CGOT survey, regarding the German's attitude to travel to Canada -

- i) The improbable hypothesis was that journeys to Canada would in fact increase rapidly during 1982 and 1983:

ii) The probable hypothesis was that Canada would remain a country for prospective journeys for some time to come. It was a country which was often included in the list of the destination choices, but which could easily be crossed off when the actual time would come to choose a final destination.

Outstanding scenery, plenty of room to get away from the crowds, a quiet unspoiled atmosphere, lots of wildlife, a country which you can see easily, and simple entry formalities for visitors, were the important vacation attributes, that were rated in favour of Canada. On the other hand, Germans perceived Canada as lacking the following important holiday features: a different culture; a lot of historical or cultural items of interest; a good typical local cuisine; good beaches and cheap travel. (ibid, 1982).

Considering the general motives of the German overseas travellers and the opinion on the important vacation attributes in favour and against Canada as a vacation destination, the following features could be regarded as strengths and weaknesses of Canada as a holiday destination. (ibid, 1982).

A. Strengths

1. Contact with Canadians and thus improve language capability;
2. Strong family ties;
3. Prospect of gathering a multitude of impressions;
4. To experience something exciting;
5. To let chance and spontaneity be a guide; and
6. To test oneself physically.

B. Weaknesses

1. Not a place that has to be seen;
2. Not a place for which one has always dreamed;
3. Not rich in sightseeing attractions; and
4. Not offering fun and entertainment.

Strong family ties exist between Canada and Germany due to a high post-war immigration, so VFR trips were the main purpose of visit to Canada (51%) while pleasure travel was the next important purpose (33%) (CGOT, 1981/82).

A vacation in Canada was still perceived to be expensive by West German travellers. They had difficulty in believing that some holiday expenses, such as food and hotel costs, were actually lower in Canada than in Germany.

COMMENT

Although West Germany was one of the primary overseas market for Canada, the attitudes and perceptions held by the German respondents showed lack of awareness of Canadian vacation. From the above discussion it seemed that the Germans had a very poor image of Canada as a desired vacation place, especially for cultural attractions, fun and excitement etc.

3.2.2(B)iii) The Netherlands

The visitors from the Netherlands constituted 2% of all the visitors to the NCR (NCC, 1980).

After the World War II, the Netherlands sent to Canada thousands of emigrants, who have maintained close family ties. Visiting friends or relatives, therefore, is the main reason (68%) of the Dutch visits to Canada (CGOT, 1981/82). The Dutch have a greater disposable income than the other European travellers. Although summer was the main season for overseas vacation, there had been a marked shift in taking winter vacation trips in search of a winter sport destination.

North America and Middle-East seemed to be the most popular long-haul holiday destinations (Ibid, 1981/82). Visitors who had been to Canada differed from those who had visited the United States, and from all long-haul destinations because more upper class and lower class people

showed up in Canada than in the other two (Ibid, 1981/82).

Sports-oriented winter vacation in Canada had become an attraction to the Dutch travellers. Skiing particularly was the main attraction and a ski vacation package in Canada was perceived as in the same price range as in France or Austria or Switzerland.

The exchange rate, one important vacation attribute, was in favour of Canada. Canada was still considered relatively expensive, especially compared to the U.S., in terms of transportation and other vacation related costs. Because of the small size of Netherlands, Canada was often viewed as vast, open land and too large for tourism. The country was perceived as similar to the U.S.A. in many ways. The general public in the Netherlands were not very aware of Canadian vacation attributes nor did they consider Canada as a vacation destination. The cold weather with lack of sunshine was seen as another drawback for Canada.

COMMENT

Lack of awareness about the Canadian vacation attributes has contributed to an unattractive image of Canada among the general Dutch public.

3.2.2(B)iv) France

Although the proportion of long-haul French vacations was comparatively low, as a percentage of all vacations to Canada (10%), the size of the expenditure by the French travelling public (20% of expenditure of all the visitors to Canada) was significant. (CGOT, 1981/82).

French people generally travel in the summer season, as 50% of their visitation to Canada was in summer, however 43% preferred to visit Canada during the shoulder seasons (Spring and Fall).

French and Canadian have

CGOT 1981/82 study it was found that 38% of travellers came to Canada to visit their friends or relatives. 43% of all the French travellers to Canada responded that pleasure travel was their main purpose.

For a holiday destination the French travellers would consider the following features as important vacation requirements (CGOT, 1980/81) -

- Sun
- Excellent First Class Accommodation
- Medium Priced Quality Hotels
- Healthy, Active Outdoor Vacation
- "Get-Away-From-It-All"
- Dine Out in Good Restaurants
- Nightlife.

The overall image of Canada was mainly positive, in terms of its tourist attractions, friendly and expansive people, a vacation for new adventures in a wealthy environment with safety and security. Although Canada had all these positive images, the actual number of French visitors were not so high. This discrepancy occurred because Canada was still perceived as being far away, too large, expensive, dull and lacking sunshine. Cultural attractions were not perceived as unique in Canada and there were many other destinations to compete with that. In North America, U.S.A. was the strongest competitor, with high images, for Canadian destinations. (CGOT, 1981/82).

The French travellers preferred independent travel but group travel among them is increasing.

COMMENT

Awareness among the French travellers about the Canadian vacation attributes could be the most important issue to attract more French travellers.

3.2.2 (B)V) Japan

Although the 1979 NCC survey showed only 1% (of the total sample) Japanese visited the capital during summer, it is the most important Asian Market. Moreover, Japan is seen as an important emerging market by the CGOT marketing branch. In 1981, according to the CGOT survey forecast, an estimated 228,200 Japanese visited Canada, an increase of 20% from the previous year (190,200 Japanese visited Canada in 1980) (CGOT, 1981/82).

There has been a developing change in the Japanese national consciousness with regard to work and leisure. The Japanese government white paper on national life indicated that an important change has taken place in the national consciousness regarding attitudes to lifestyles (Ibid, 1981/82). The survey revealed a significant reduction in those who give primary concern to work, while those giving primary concern to enjoying leisure time has increased dramatically. At the same time interest in overseas travel has increased greatly.

The Japanese would like to choose a vacation destination where they could enjoy sightseeing, shopping, lots of outdoor activities, local cuisine and a place which would be clean and safe with beautiful scenery (Ibid, 1981/82).

With these vacation needs, presently Canada could be viewed as a reliable destination. It has good value and offers an overall excellent vacation experience. Canada has many positive factors and is viewed by the Japanese as being an uncrowded, clean, safe and action-oriented destination with vast nature, beautiful scenery and friendly people.

Promoting Canada in Japan would be much easier than other overseas markets since about 95% of all international travel arrangements, in Japan, were made through travel agents. They also preferred group travel and in fact, 80%

of pleasure travellers travelled in groups usually with a common affinity element, eg., single ladies, honeymooners, school teachers, etc. (Ibid, 1981/82). Because of the higher percentage use of travel agents, the consumers could easily be reached through vast network of retail travel outlets.

Sports events and the opportunity to participate in them, appealed to the Japanese visitors, especially golfing, camping, fishing and skiing (Canada was the leading overseas ski destination for Japanese during the 1978/79 season - approximately 4,000 - 5,000 skiers (Ibid, 1981/82).

COMMENT

The overall image of Canadian vacation was positive. Research by Look Tours into future tour destination demand has revealed that Canada rates highest for their clients' next choice in a destination (Ibid, 1981/82). The Japanese travel trade has accepted Canada as a good destination, a favourable opportunity for Canada, as travel agents handle 95% of all Japanese travel. Canada is the leading overseas ski destination for Japanese skiers so there is ample opportunity to expand their market. Japan has a good access to Western Canada, especially B.C. Good ground transportation is needed to increase visitation in Central and Eastern Canada.

3.3 Summary

This chapter has identified, from existing recent CGOT studies, the kinds of attitudes and perceptions held by the visitors from various markets towards Canadian vacation experiences, as well as their desired vacation expectations.

In order to summarize and relate the perceptions and attitudes towards Canada as a tourist destination, that have been identified in these recent surveys, Tables 3.3.1 and 3.3.2 have been prepared. Table 3.3.1 is a summary of the general vacation demand patterns, based on the visitors' preferred vacation expectations, among all the primary markets of Canada towards any vacation destination.

Table 3.3.1 General Demand For Vacation Destinations Among The Visitors To Canada

<u>Canada</u>	<u>U.S.A.</u>	<u>U.K.</u>	<u>Germany</u>
-A quiet countryside;	-Beautiful scenery;	-Foreigness;	-Sightseeing;
-Sightseeing;	-Lots to see and do;	-Need for concrete symbols;	-Rest and relaxation;
-Outdoor Activities;	-Outdoor Activities;	-Cleanliness;	-Uncrowdedness;
-Rest and Relaxation;	-Big City Atmosphere;	-Friendliness;	-Sports, physical
-Friendliness;	-Friendliness;	-VFR;	Activities;
-Value For Money;	-Family vacation;	-Sea and Sun holiday;	-Friendliness;
-VFR;	-VFR;	-Security;	-VFR;
-Attending Events;	-Sea and sun holiday;	<u>Japan</u>	-Sea and sun holiday;
-Security;	-Security;	-Sightseeing;	
-Sea and Sun holiday;	<u>France</u>	-Outdoor Activities;	
<u>The Netherlands</u>	-Scenic beauty;	-Cleanliness;	
-Foreigness;	-Outdoor Activities;	-Sports, physical activities;	
-Sports Oriented;	-Good Food and Wine;	-Shopping;	
-VFR;	-Friendliness;	-Friendliness;	
-Security	-VFR;	-Cleanliness;	
	-Modernity;		
	-Sea and sun holiday;		

- Sources:
1. Vacation Travel By Canadian, CGOT, 1981.
 2. Overseas Situation Report, CGOT, 1980/82.
 3. A Market Segmentation Study of U.S. Vacation Travellers, CGOT, 1973.

Table 3.3.2

Image of Canada Held By The Potential Markets On Selected Characteristics.

Positive and Negative Tabulation For Comparison.

Topic	Canada	USA	UK	Germany	France	Netherlands	Japan
Scenery-	Impressive	Impressive	Secondary factor, not very aware	Beautiful but not for rest & relax	A prime factor or in attraction	Unspoiled wide open spaces	Impressive
Climate-	US is better for sea and sun holiday	Unreliable	Unreliable	Cold, lacking sunshine	No emphasis	Cold, lacking sunshine	No emphasis
Culture-	Impressive	Low Image	Lacks culture	No emphasis	Little interest or knowledge	No emphasis	Impressive
Friendliness-	Impressive	Moderate image	Not aware	Not aware	Not aware	No emphasis	Impressive
Distance-	Distance between the attractions are too large	No emphasis	Good place to live but not to visit because of distance	Too far	No emphasis	No emphasis	No emphasis
Size-	No emphasis	No emphasis	Vastness, unmanageable	Too large	Too large for tourism	Too large	Vast open land
Expense-	Overall impressive	Expensive in terms of accommodation and transportation	Ignorant of true cost & thought to be expensive accommodation	Expensive	Not worried to spend money	Large spender but is expensive	No emphasis
Variety-	US has more to do and see	Impressive	US has more	US has more	Lacks nightlife and excitement	No emphasis	Impressive action oriented

Topic	Canada	USA	UK	Germany	France	Netherlands	Japan
<u>Sports and entertainment</u>	Impressive	Impressive, specially the winter sports	No emphasis on sports Not aware of Canadian entertainment	Good for hunting and fishing	No emphasis	Not aware	Impressive, variety of activities
<u>Cleanliness</u>	No emphasis	Impressive, clean & fresh	Fresh and clean	No emphasis	Healthy environment	No emphasis	Clean and beautiful
<u>Americani- sation</u>	US is modern	Moderate impression	Image of Canada dominated by US	US is modern	Image of US overwhelming but Canada perceived as relief from over modernisation	No emphasis	No emphasis

- Sources : 1. A comparative analysis of the UK, French and West German markets for travel to Canada- CGTB, 1970.
2. Vacation travel by Canadians, CGOT, 1981.
3. Overseas situation report, CGOT, 1981/82.
4. A market segmentation study of US vacation travellers, CGTB, 1973.

There are some common characteristics in the vacation demand patterns among these seven primary markets. Five of the seven primary markets expressed sightseeing as one of their important vacation demands. Only the British and Dutch visitors did not express sightseeing as their preferred vacation experience. Except for the British visitors, outdoor activity, especially sports oriented activities was another very common vacation expectation among the six other markets. Approximately five of the seven markets expressed the desire to meet local friendly people, a clean and safe place to visit, and to enjoy a warm weather type holiday that is associated with sea and beach activities. The Japanese travellers alone could be considered as purely pleasure travellers, because except for this market the visitors from the other six markets expressed visiting their friends and relatives (VFR) as one of the important vacation desires during a vacation.

There were also some special vacation expectations among only certain markets. For example, the Canadian travellers expressed preference for attendance at local events and celebrations during a vacation. The British and Dutch visitors would expect to experience some foreignness, i.e., some speciality of the destination. The American travellers would very much prefer to enjoy a destination with a big city atmosphere and also a destination where they can experience a variety of recreational opportunities.

Table 3.3.2 is a synthesis of the images and perceptions, both positive and negative, held by the visitors from the seven primary markets towards Canadian vacations, as identified in the surveys discussed. The characteristics have been selected based on the most common perceptions of the visitors towards Canada. The images of the markets can be compared based on these characteristics.

From the table it seems that only scenery and cleanliness were the two topics on which most of the markets had a good

impression. For example, "scenery" was considered as impressive by three markets (Canada, U.S.A. and Japan), and as "beautiful", "prime factor", etc. by three other markets. Only the U.K. market did not express a positive reaction to scenery. Regarding "cleanliness" five markets (Canada, U.S.A., U.K., France and Japan) expressed their images either as "impressive" or "fresh and clean" or "healthy environment", etc. Only the German and Dutch markets did not give any emphasis on this particular topic.

"Climate" was the single characteristic on which none of these seven markets had any positive impression. It was considered as "unreliable", "cold, lacking sunshine", "U.S. is better", etc.

Canadian and the Japanese market perceived Canadian "culture" as impressive, otherwise it was expressed as "low image", "lacks culture", etc. by the five other markets. The Canadian and Japanese market also agreed on the "friendliness" of the local people as impressive, the U.S.A. market had at least moderate image. Four other markets were not aware or did not express a positive reaction to this characteristic.

All five overseas markets considered the "size" of Canada as too large and unmanageable for tourism. Only Canada expressed the overall value for money spent, i.e., the "vacation expense" as impressive, otherwise it was considered as expensive by other markets. The French and Dutch visitors, although perceived Canadian vacation as expensive, but these two markets were relatively large spenders and not worried to spend money.

The U.S.A. and Japan market expressed the "variety" of Canadian vacation attractions as impressive or in other words, they considered that there are a variety of things to see and do during a vacation in Canada. Other markets including the Canadian market, perceived U.S.A. has more facilities and attractions to offer.

Regarding "sports and entertainment" facilities, Canada was perceived as impressive by four markets (Canada, U.S.A., Japan, Germany), otherwise it had very poor knowledge among other markets. Image of Canada was very much dominated by the U.S. as more modern destination among most of the markets (Canada, U.K., Germany, France). Only the Dutch and Japanese market did not give any emphasis on that.

The above comparison helps to make a list of these characteristics as strong, moderate and weak images. Strong images are considered as those characteristics on which at least four markets out of seven had positive impressions. Medium images are those on which at least three markets had positive impressions, less than that has been listed as weak images.

Strong Images

Scenery - Canada, U.S.A., Germany, France, Netherlands
Japan

Cleanliness - Canada, U.S.A., U.K., France, Japan.

Sports and Entertainment - Canada, U.S.A., Germany, Japan

Moderate Images

Friendliness - Canada, U.S.A., Japan

Weak Images

Climate - No markets had positive image.

Culture - Canada, Japan

Size - No markets had positive image

Expense - Canada, France

Variety - U.S.A., Japan

Americanisation - U.S.A.

The visitors who came to Canada have certain demands or preferences to experience a desirable vacation. The visitors also have some positive and negative images about Canadian tourist products before coming to Canada. As mentioned, choosing a vacation destination follows the research model (Table 1.4.1) hypothesis, the more positive the images are on their preferred vacation expectations, the more the chances of choosing Canada as a vacation destination among many other countries. Canada has presumably hosted the visitors who had more positive impression on the above mentioned vacation characteristics.

3.4 Significance to the NCR

The previous discussion in this Chapter has examined and attempted to interpret the various demands and expectations of visitors towards a destination as well as their attitudes and perception towards the tourist products of Canadian destination. This interpretation is crucial to the attempt of identifying possible opportunities for future tourism development in the NCR.

Because of the lack of specific information on the visitors' expectations and perceptions towards the NCR, references were drawn from various CGOT reports, applied to all Canadian destinations.

However, in 1976 an attitude survey of visitors to the NCR was carried out by the Carleton University, School of Commerce. The general purpose of The Ottawa Tourism Study was to produce information to generate and increase tourism activity in the National Capital Region. The information from the survey provided a general picture about the perceptions of the NCR of all the visitors. It should be remembered that the information is not updated (1976) and concerns summer visitors only. Despite all these drawbacks the survey results can relate to the CGOT studies and reflect their impact and significance to the NCR.

Table 3.4.1 identifies twelve questions dealt with visitors' attitudes to and perceptions of the NCR. The survey result depicts that the respondents agreed with most of the statements about the Region. They were in high agreement that the NCR has interesting cultural places to visit (99%), that the NCR has plenty of sights to see (95%), beautiful scenery (98%), good transportation facilities (91%), well equipped parks and camping grounds (93%), and good sports facilities (94%). This high agreement rate could be the result of two reasons: i) an "actual" high rate and ii) a "politeness bias" on the part of the visitors. Thus this data should be examined in relative terms. (Bourgeois, 1976).

Less than half of the respondents felt the NCR has a big city atmosphere. About 20% of the visitors disagreed with the statement that NCR has good entertainment facilities. The statements "the NCR has signs easily understood" (15%) and the "NCR has reasonable accommodation rates" (14%) were also disagreed with by a relatively large percentage

Table 3.4.1Perception Of The NCR

	AGREE	DISAGREE
1. NCR has interesting cultural places to visit	98.8%	1.2%
2. NCR has reasonable accommodation rates	85.7%	14.3%
3. NCR has plenty of sights to see without travelling too far	95.7%	4.3%
4. NCR has beautiful scenery	98.4%	1.6%
5. NCR has good roads and highways going to it and around it	91.3%	8.7%
6. NCR has signs easily understood	84.9%	15.1%
7. NCR has well-equipped parks and camping grounds	93.3%	6.7%
8. NCR has good sports facilities	94.7%	5.3%
9. NCR has a big city atmosphere	48.5%	51.5%
10. NCR has good transportation facilities	95.4%	4.6%
11. NCR has good entertainment	80.6%	19.7%
12. You can find out a lot of information about the city before coming	81.5%	18.5%

Source: Ottawa Tourism Study, July 1976.
Carleton University.

of visitors. Although the majority of people had no complaints about these statements, the dissatisfied portion was significant enough to warrant some concern.

The survey result shows an important reflection of the perception of the "actual" visitors and the "potential" visitors. Although the statements in Table 3.4.1 depict exceptionally high agreement rate, still the results suggest that the actual visitors were highly impressed with the NCR for having interesting cultural places to visit, reasonable accommodation rates, plenty of sights to see, beautiful scenery, good transportation, good sports facilities, good entertainment facilities, etc. Looking back to Table 3.3.2, with the exception of appreciation of "beautiful scenery", most of the potential markets seemed to have either low image or to be unaware of the Canadian tourist products. Only the Canadian and Japanese tourist markets were favourably impressed with many of the characteristics which coincides with the perceptions of the actual visitors of the NCR (Table 3.4.1). The potential American tourist market was also impressed with the beautiful scenery of Canada, variety of things to see and do, sports and especially winter sports, and it is seen as a clean and safe country to visit. Lack of knowledge and ignorance about the Canadian tourist product has resulted in lower image and negative impression about the Canadian destinations among many potential markets especially overseas markets. This is very significant to the future tourism in the NCR as these lower images or negative impressions often appear to offer opportunity to increase the number of visitations by improving the knowledge of the potential visitors.

CHAPTER IV

OPPORTUNITIES FOR TOURISM DEVELOPMENT

The purpose of this Chapter is to attempt identification of feasible tourism development opportunities for the National Capital Region. Potential markets have been identified insofar as existing studies permit, and attitudes and perceptions towards expected vacation experiences have been examined. These two dimensions are helpful in defining potential market segments for the NCR as well as different development opportunities and constraints for future tourism. The understanding of present users' (tourists') trip characteristics also aids prediction of what potential visitors would most enjoy. The opportunities have to be defined in relation to the present tourism resource capability of the NCR. It is thus necessary to identify the general nature of the tourism resources (the product) available in the region, although a detailed inventory of tourism resources and attractions was not an objective of this thesis. Nonetheless, the National Capital's tourism product can be categorized in a useful manner.

4.1 Evaluation Of The NCR Tourism Resources

The NCR's tourism potential is varied. Products can be offered in appealing combinations to match the potential travellers expectations. As a general overview, the NCR does provide a variety of opportunities for tourists.

For example, swimming, windsurfing, sailing, camping, canoeing are some of the outdoor activities which attract visitors having an outdoor activity type of vacation in mind.

Winter, Spring, Summer and Fall, the Capital's recreational activities are pleasurable the year round. The region has golfing facilities, along with tennis, fishing, cycling, snowshoeing, snowmobiling, cross-country skiing etc. The Gatineau Park (a National Capital Region park) and the Rideau Canal (heritage Canal, managed by Parks Canada) also offer a variety of recreational and tourist services.

Museums, Art Galleries, the National Arts Centre etc. are some of the cultural attractions in the NCR. The NCR also reflects and accommodates the bilingual and multi-cultural character of the nation.

The Capital's cultural heritage is manifest in the broad spectrum of restaurants catering to specific ethnic fare that have developed in the last decade.

The NCR has potential to accommodate visitors in a range of high priced good-quality four-season hotels, medium priced quality hotels/motels, guest homes, bed and breakfast places, and camp sites.

Identification of tourist resources in an area can be developed from existing sources (guidebooks, directories, tourist literature, map sources and other current publications) (Ferrario, 1980). The method used by Ferrario in evaluating the tourist resources of South Africa, simply involves the acquisition of information, then the organization of the tourist resources into manageable but meaningful categories, determined to some extent by personal judgement and experience. Each of the criteria derived is then rated qualitatively as high, medium or low;

Table 4.1.1

Categorization Of The National Capital's Tourism Resources

A. Sun and Beaches

Bathing Beaches

Beach Activities

B. Outdoor Activity Areas

Camping Sites

Picnic and Recreational Sites

i) Sport Facilities

Skiing, Snowmobiling, cross-country ski trails

Hiking trails

Horse Riding

Cycling trails

Swimming

Boating, Sailing, Waterskiing

Fishing, Canoeing

C. Sports Amenities

Golf Courses

Swimming Pools

Other Major Sport Facilities

D. Hunting Small GameE. Scenery and LandscapePanoramic Scenery

Scenic Drives

Natural Beauty

Change of Season Observation

F. Wildlife and Natural Resources

Natural Forest

Provincial Park

Birdlife

Small Animals

G. Historical Sites

Museums

Art Galleries and Collections

Libraries and Archives

Public Buildings

H. City Visits and Shopping

Urban Characteristics

City Environment

Parks, Parkways, Playgrounds

Special Shopping Opportunities

Hotels/Motels

Restaurants

Fast Food Services

Sightseeing And Tour Facilities

Guided Sightseeing

Sightsee on your own

Other City Characteristics

I. Participation in Local Life

Public Events

Special Cuisines

Meeting Resident People

Traditional Events

J. Entertainment

Theatres, Concerts, Other Performances

Movies

Night life

Spectator Sports

based on observation and the author's assessment.

The tourist attractions of the National Capital Region have been categorized with the following sub-divisions which follows Ferrario's method with some changes. The categories selected are applicable for the NCR's tourist product. These categories are shown in Table 4.1.1.

Following Ferrario's method, the resources and attractions of the study area were then ranked into three categories, based on the author's assessment of availability, frequency and quality, derived from literature and consultation with regional tourism representatives. This ranking is presented in Table 4.1.2.

The ratings of the criteria shown in Table 4.1.2 follows the categories identified in Table 4.4.1. The evaluation of the criteria suggests that the NCR has the potential to be a desirable destination particularly in regards to the following categories - city visits and shopping, entertainment, participation in local life, scenery and landscape, sports and outdoor activity area categories. More specifically, it seems that the present tourism resources of the NCR are of very high quality in regards to the criteria such as, visiting museums, cultural attractions, a variety of entertainment facilities, attending local festivals/events, dining out in good restaurants, for sightseeing and beautiful scenery and a place for rest and relaxation in the fresh and clean environment. Different sports facilities, particularly winter sports and various outdoor activities are also significant attractions to the region. Therefore, the evaluation gives the impression about the NCR as an attractive destination for various urban associated characteristics with good sightseeing, sports and outdoor activity facilities.

The NCR possesses a low capability for warm weather, sea and beach associated holidays, developed resorts, wilderness type of vacation. The climate or the natural environment of a region cannot be changed so it seems obvious that the NCR can never be a destination for true sun lovers or wilderness lover visitors.

4.2 Identification of the Potential Tourist Market for NCR

The characteristics of the different market segments of both Canadian and U.S. travellers, plus their trip

Table 4.1.2Evaluation Of Tourist Attractions In The National Capital.

Criteria	<u>Region</u>		
	Quality		
Resources, Attractions, Events	High	Medium	Low
Museums	X		
Cultural Attractions	X		
Historical Attractions		X	
Entertainment	X		
Nightlife Entertainment			X
City Atmosphere		X	
Festivals/Events	X		✓
Restaurants	X		
Hotels/Motels		X	
Sightseeing Tours	X		
Natural Beauty	X		
Rest and Relaxing	X		
Cleanliness	X		

Criteria

Quality

Resources, Attractions, Events	High	Medium	Low
Outdoor Activities	X		
Sports Facilities	X		
Winter Sports	X		
Winter Tourism	X		
Camping		X	
Visiting Friends/Relatives		X	
Shopping		X	
Warm Weather Holiday			X
Sea and Sun Holiday			X
Resort			X
Wilderness			X
Value for Money		X	

2

OF/DE

2

MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS
STANDARD REFERENCE MATERIAL 1010a
(ANSI and ISO TEST CHART No. 2)

characteristics, have been identified in the preceding chapter. Considering the characteristics of Resident Travellers (3.1.1) and the tourist attractions in the NCR (Table 4.1.2), it seems that the "Security Conscious" and "Action Seekers" groups of visitors may comprise the two tourist segments with the most potential for the NCR. The clean and safe city atmosphere, on top of good cultural attractions, sightseeing and shopping facilities and the familiarity of the place for visitors, spending a vacation with their friends and relatives - all these factors could attract the "Security Conscious" group more to the NCR in future since most of these criterion have been evaluated as either high or medium quality tourist attractions. The "trip purposes" expressed also explain the potential of this group in constituting an important future tourist market for the NCR (VFR 67%, Sightseeing 16%, Visiting the Vacation Spot 15%, Shopping 10% etc.) (Table 3.1.1).

The NCR is not a large metropolitan centre such as Toronto or Montreal but the region's urban atmosphere and urban related activities (considered as medium to high quality) should be able to attract more "Action Seekers" to this destination. The "trip purposes" expressed by the visitors of this segment also suggest that this could be another important future tourist market for the NCR, as 43% said VFR as the main trip purpose, sightseeing 36% and visiting the vacation spot 29%. This segment is more interested in shopping facilities (12%) than the other segments.

Considering the different demand characteristics (Table 3.1.2) and the past vacation behaviour of each of the four U.S. tourist segments (Table 3.1.3), it can be hypothesized that the "Urban" and "Touring" segments demonstrate the greatest potential market for the NCR. The urban segment would seek to benefit from city atmosphere.

During their past vacations they appeared to enjoy sight-seeing, shopping, visiting friends/relatives, attending theatre/concerts/plays etc., visiting the museums and different points of interest (Table 3.1.3). It is worth re-emphasizing that, these criterion have been evaluated as medium or high quality tourist attractions in the NCR. Touring segments would prefer to get good service, dining out in good restaurants and above all to experience a family type vacation associated with sightseeing, VFR, shopping, camping, visiting cultural and recreational attractions etc. For these criteria the NCR's tourist attractions have been assessed as of good quality.

The above discussion does not mean that the other two segments (of Residents as well as U.S. travellers) would not be attracted to the NCR. The needs of these segments might not be satisfied at the NCR at present but the number of potential visitors from these segments could be increased through development and promotion of some new facilities. The following section will discuss in detail future development opportunities which could potentially attract more visitors to the NCR.

4.3 Opportunity Identification

Identification of the different development opportunities for the potential tourist markets of the National Capital Region is the ultimate goal of this thesis. As suggested in the Research Model (Table 1.4.1) the knowledge of market characteristics of the present visitors relates to the attitudes of the different market segments towards different kinds of vacation experiences which, in turn, influence the kinds of vacation packages that appeal to them. Therefore, the attitudes and perceptions of the potential visitors towards a destination offer possible market opportunities as well as constraints for future tourism development in that region. In this section the

visitors or tourists will be considered as only those who are potential visitors, unless otherwise stated.

Some basic vacation demand criteria have been identified among all the potential tourist markets of the NCR. Almost all visitors preferred their vacation to be associated with sightseeing; cultural activities, visiting friends and relatives, outdoor recreational activities, shopping, rest and relaxation, dining out etc. Different market segments also have some particular expectations to satisfy their own vacation needs (eg. Sun Lovers will be more interested in warm weather holidays, sun and beach activities especially) along with above mentioned vacation expectations.

As suggested in Chapter III, a marketing plan for future tourism industry development in the NCR should mainly focus on the market segments which appear to offer greatest potential (ie. which have positive images about the NCR).

The remainder of this Chapter focusses on how the NCR might provide a good market opportunity for basic demands. The NCR's characteristics will also be discussed, given their attractiveness to specific market segments.

The perceptions of potential visitors toward Canadian vacation destinations have been examined-some are positive impressions, others negative.

Positive images held by visitors can be defined as the existing opportunities or "immediate opportunities" liable to attract more visitors. Negative images, on the other hand, may provide market planners the scope to identify possible new development opportunities for future tourism. As mentioned earlier, negative impressions expressed by visitors sometimes resulted from lack of awareness and ignorance about the NCR's tourist product. These incorrect negative attitudes (presumably based on misinformation)

can, in theory, be improved through more promotion, advertising, public relations etc. promoting the NCR as a desired vacation destination. We can refer to these as "development opportunities". Plans could be developed to cope with the problems and take advantage of future opportunities open to the industry. There are also some negative images which accurately apply to the NCR's tourist product and for specific reasons (physical, social or economic) there is little that can be done to improve the image, eg, the NCR can never offer a purely wilderness or sun lover type of vacation destination (physical). In such cases, it can be said there is "no opportunity".

The opportunities have been identified by relating the various vacation demands and expectations of all the target markets (Table 3.4.1) and the positive and negative images and impressions of the visitors (Table 3.4.2). The opportunities which are suggested in this discussion are mainly from the author's appraisal, although some recommendations from tourist agencies have also been included. The agencies or government departments whose analysis and recommendations are included in this report are the National Capital Commission (NCC), the Canadian Government Office of Tourism (CGOT), Ontario Ministry of Industry and Tourism (OMIT), and Canada's Capital Visitors' Convention Bureau (CCVCB). These suggestions are presented as general guidelines for future tourism development strategies..

A Immediate or Priority Opportunities

Based on the foregoing, the "immediate opportunities" have been defined as those vacation demands and expectations from which visitors arrive at a positive image of the NCR's tourist product, and products which attracted the visitors to see NCR in the past.

Sightseeing and touring are the most common demands of visitors to the Capital. The outstanding natural beauty associated with the city has attracted many visitors in the past. For pleasure trip travellers sightseeing would be the most important vacation activity. Wide open space and the natural environment of Gatineau Park, the Ottawa River and the Rideau Canal Waterways in close proximity to the modern urban environment of the cities of Ottawa-Hull, are a very special characteristic of the National Capital Region. In addition to viewing the natural landscape, visitors can enjoy the sun and beaches of Gatineau Park's lakes, or hiking and cycling in the summer. Furthermore, they can participate in different winter sports eg. down hill skiing, cross-country skiing, skating or they can simply cherish the fresh air experience. Sightseeing is the single criterion identified by all visitors which characterized the NCR as being a very attractive destination. Consequently, emphasis might be placed on this particular criterion in all promotional campaigns targeted at each and everyone of the potential markets. This type of promotional advertising should, in theory, increase the number of visitors.

The political stability of Canada should enhance the positive impression relating to the safety of Canadian destinations. Moreover, the well maintained urban appearance of the NCR would attract more visitors who expect a "clean and safe city to walk around", a highly desirable vacation expectation among all the U.S. travellers. (Market Facts, 1982).

Visiting friends and relatives is still one of the important motives for all the markets, or in other words, the NCR has not yet succeeded in attracting a large share of the non-VFR market. The NCR today is becoming a cosmopolitan urban area. Ethnic ties exist between different nationals especially, Britons, Germans, French, Italians,

Dutch etc. By exploiting this pre-motivated market segment there would seem to be a ready-made opportunity to increase visitations. The duration of visits could be prolonged by introducing novel holiday activities such as attending theatres, operas etc., visiting museums, going on camping with friends/relatives or participating in various recreational activities.

It has been determined that the average length of stay of visitors in the NCR is only 3.7 nights (NCC, 1982). Several suggestions have been advanced to increase the length of stay (CCVCB's Conference, 1982). Packages with a variety of activities, particularly free ones, should be promoted. More variety of accommodation may be needed. Tourists could be presented with books of coupons for events, thus encouraging them to stay longer to see it all. Such books should include free passes, discount coupons and current lists of events and attractions within the National Capital Region (one such book is "What's On, Ottawa-Hull" published by Capital Guide Publishers, and which claims circulation averages 25,000 copies monthly.)

Sports, in general, and winter sports in particular attract many potential segments to the NCR. Winter recreation in the Capital provides many attractions eg. "the longest skating rink in the world" (8 km); six/seven ski resorts; cross-country ski trails. It is a highly unusual characteristic to have good ski facilities within an urban region. Winterlude is a ten day winter festival which revolves around the Rideau Canal, advertised as the World's largest skating rink. Although 90% of Winterlude visitors are local residents the remaining 10% come from beyond a radius of 80 km. (Winterlude, NCC, 1982). Other than Ontario and Quebec visitors, the number of other Canadian winter visitors is very low (3.6%) and is outnumbered by those from U.S.A. (6.1%). While it is obviously desirable to have visitors from outside Canada, greater efforts might be made to promote participation from

"other Canadian" areas.

Among the overseas markets, Dutch and Japanese travellers might be considered as the most important target market, since sports-oriented winter vacations appeal to them. Dutch and Japanese skiers perceive Canada to be an attractive winter destination. For example, ski vacation packages to Canada were perceived to be in the same price range as in France, Austria or Switzerland by Dutch travellers (CGOT, 1981/82). Travel agents and tour operators might be made aware of this opportunity given that these two markets prefer to make travel arrangements through travel agents.

Although attendance at Winterlude has increased, there is still a lack of awareness about it among the travelling public at large. The tourist potential of the Winterlude has not been fully exploited (NCC, Winterlude, 1982). Only lately has there been some effort to promote winter as an ideal season to visit the NCR. Co-operation is needed in all levels of government, in addition to the private sector, to make this event successful in attracting more visitors from outside the region. Single destination trips require activities for all members of a group of family. Hence, the development opportunities relies upon the attractiveness of a set of possibilities rather than upon a single outstanding facility or event. Thus, promotional advertising might include both ski facilities and other NCR winter attractions. The facilities and attractions already exist but could receive more publicity. The promotional packages, for example, might include; skiing, skating, toboggan slide, iceflow races, dog sled races, snowmobile rides and January film festivals, supplemented by visits to museums, the NAC's winter cultural program, shopping etc.

"Meeting friendly locals" is another common vacation

expectation expressed by all the potential markets. Only resident travellers found the NCR's population to be friendly. The image of non-Resident travellers, with the exception of Japan, regarding the friendliness of the local people was either very poor or in other cases (British, Germans and French) there was a lack of awareness about this. Although tourism is the second largest industry in the NCR, there appears to be little feeling among the general population and the retail sector concerning the economic importance of tourism to the region (The Citizen, March 2, 1981). Same issue of "Meet the People" campaign could involve local citizens meeting tourists, thereby providing person to person hospitality. The increase of bed and breakfast facilities might be another way to encourage to come close to the local, friendly people.

Dining out in good restaurants is attractive to all pleasure trip travellers. Ottawa can provide good reason to bring satisfaction with a wide range of restaurants, from fast food services to elegant dinner dancing in four-season hotels. The visitors can also enjoy an increasing number of ethnic cuisines. Guide books should highlight the availability, quality and specialty of these cuisines.

Shopping is a popular, universal tourist activity which makes an enormous contribution to the local economy.

Although the NCR's general shopping facilities have been rated only in the medium category (Table 4.1.2), visitors have an added bonus in the old fashioned way of shopping in the Byward Market. Further, the Sparks Street Mall in summer, offers visitors live entertainment. The newly built Rideau Centre with modern indoor shopping facilities is also expected to attract more visitors.

B Development Opportunities

Enjoyment of cultural attractions in any destination is considered a basic vacation attribute sought by all

potential markets. The overall perception of prospective visitors towards Canadian culture was shown to be either "not very impressive" or visitors showed little awareness of it. This impression is very different for actual visitors whose perception of the NCR was very impressive thanks to the interesting cultural places to visit and the good entertainment facilities. According to the National Museum of Natural Sciences, Ottawa is Canada's busiest centre for cultural activities in museums (CCVCB, 1982). All Museums (Man, Natural Sciences, Science and Technology, National Gallery, War, Aeronautical, Postal, Currency, Canadian Ski Museum and Bytown) are located in the NCR. The museums and cultural attractions of the NCR have been evaluated as very high quality tourist attractions (Table 4.1.2). The National Arts Centre (NAC) with its diversified programs, theatre, opera, concerts, dances etc. offers cultural attractions. But more awareness of these resources through promotion must be directed to the local people and visitors alike. The percentage of VFR traffic to the NCR is quite high (32%, NCC, 1982), therefore, local people might be the best means of promoting cultural attractions of the region to friends or relatives.

There is also potential for co-operation between the arts and tourism. John Goldsmith, NAC, has commented in regards to tourism, stating "for the arts, there would be people in seats; for the tourist industry, visitors would extend their stay" (CCVCB, 1982). Cultural attractions, it bears underlining, are one of the basic vacation demands regardless of the market segment. Tourists will then take home good impressions thus promoting additional visits by those in contact with them. Advance planning and promotion of packages which include cultural attractions, improved hotel and restaurant facilities, should help to attract more visitors. A further by-product should be the extended duration of their stay in the National Capital

Region.

According to the Carleton University survey of the visitors to Ottawa in the summer of 1976, 80% of the visitors perceived the Capital as having exciting entertainment facilities. Still, 20% disagreed and this points out that there is room for expansion of facilities to attract the visitors who had negative impressions. The media might be utilized more often to give more space and air time to cultural institutions. The possibility of a daily column or program devoted to tourists has been suggested by Loise Leclaire of the National Museum of Natural Sciences, a panelist in the CCVCB's January 1981 conference (CCVCB, 1982).

In the National Capital Region the most visited cultural sites and points of interest are centred around Parliament Hill. As visitors spend only 3.7 nights (average) in the NCR, one might deduce they are busy visiting the downtown area and only a few of them go beyond that. For example, while 76% of 1981 summer tourists visited Parliament Hill, only 5% of the respondents visited Gatineau Park. Better identification of "Things to do", particularly for families with children should help to increase the duration of stay.

The children's market is very much under represented in all the previous surveys. It remains little exploited even today. In addition to the museums, attractions such as a zoo and an aquarium could prove inviting to visitors with children if they were established. Visitors would be more inclined to extend their stay. Cheaper accommodation geared towards families would also be significant in encouraging this trend.

The weakest image of Canada, in general, held by non-Residents, appears to be the unreliability of weather.

Visitors (especially from Germany and the Netherlands) perceive Canada to be a very cold place lacking sunshine. Even resident travellers (all segments) express their perception that the U.S. is much better for warm weather holidays, especially sun and beach activities. Granted, the climate of a place cannot be changed and it is also true that NCR cannot offer real opportunity for warm weather holidays. Nonetheless, the very negative attitude citing cold, lack of sunshine and no beach activities, might be ameliorated. During the summer season in the NCR, visitors can experience sunny days and enjoy varied outdoor activities. The Parks and Recreation Branch of the Ministry of Natural Resources of Ontario made an analysis of the outdoor recreational supply inventory of Southern Ontario in 1980, and developed a table of the average number of days per year on which a particular activity could be enjoyed.

Table 4.2.1

	<u>Season Length</u>			
	<u>Number of Days</u>			
	<u>Swim</u>	<u>Passive Activities</u>	<u>Vigorous Activities</u>	<u>Skiing and Snowmobiling</u>
Ottawa	45	140	150	75

* Days of reliable snow cover

- 1, Passive Activities include boating, camping, picnicing and golfing
- 2, Vigorous Activities include hiking, horse back riding, bicycling, trail biking.

Source: Ministry of Natural Resources, April 1980.

The lakes and beaches of the Gatineau Park, in addition to beaches along the Ottawa and Rideau Rivers could satisfy a substantial number of visitors with the fun and excitement associated with picnics, swimming, sailing, windsurfing etc.

The positive side to the cold and snow cover perception of potential visitors can be considered an opportunity to promote winter recreation in the NCR. The region can be perceived as a major winter recreation area, a desirable destination point. This potential is expressed in a quote from the NCC stating, ". . . there is nowhere else in the world where winter has become an integral part of the life and enjoyment of the city (NCC, 1980-81).

One of the most powerful impressions held by all the potential tourist markets, including the resident travellers, was that of the overwhelming Americanisation of Canadian destinations. Many visitors perceive it would be better to go to U.S.A. than take a vacation here. This might be overcome by convincing visitors of the unique characteristics of Canadian destinations and also the differences between Canadian and American culture. The bilingual culture of the NCR could be emphasized upon as a different type of experience.

One major negative impression visitors have towards the NCR is a lack of airline flights to Ottawa, particularly flights originating in the United States and other international departure points. This limited access makes the selling of the NCR more difficult. Mirabel is the nearest port of entry for overseas air travellers. The increase in air accessibility to the NCR is a political matter which unfortunately requires a longterm solution. The present situation is expected to improve in future because of the governments' air traffic de-regulation program. Wardair has direct flights from Ottawa to England in the summer. Very recently (1983) a direct airline connection has been

made between Ottawa and New York (Pilgrim airlines). The NCR is also connected with direct flights with the many important Canadian cities. There are connecting bus (Voyageur) and air (First Air, Air Canada) services from Toronto and Montreal airports. Considering the present tourism situation of the NCR it is recommended that the frequency of these services be increased. The Capital has good access opportunity for ground transportation from various directions. Many of the potential visitors (especially non-resident travellers) have a poor impression of the ground transportation facilities. They might be favourably impressed with information to the effect that the NCR is linked with many Canadian cities and U.S. cities with bus routes and by VIA rail. Because of the recent increase in gasoline prices, the use of mass transportation (bus, train, etc.) among visitors to the NCR has considerably increased (from 29% in 1979 to 36% in 1981 (NCC, 1982)). The aforementioned coupon books might also include bus and train schedules to and from the NCR from connecting cities, as well as information about transportation services within the Region (eg. sightseeing, bus and boat tours etc.). The automobile is still the main mode of transit travel to Ottawa. Better sign-posting of attractions and information centres is needed at points of entry to the NCR. Better liaison between the Ontario Ministry of Tourism and the Ontario Ministry of Transport and Communications might aid in upgrading this service.

The accommodation rates for the hotels/motels are often perceived as high by many visitors in the NCR. There is also a demand for medium priced hotels (eg. among the French travellers). A more diversified range of tourist accommodation within or near the core area might be encouraged and particular attention might be given for providing and promoting medium budget family tourist

accommodation in this area.

Bed and breakfast places are rapidly becoming popular in Canada (Pantel, 1983). They are for some, an attractive alternative to staying in hotels. These private homes offer a short-term overnight stay in comfortable, cosy and friendly surroundings. Generally they are close to chosen travel routes and places of interest. They are appropriate for the type of traveller interested in getting to know people and places through personal contact. In the NCR and nearby areas a significant number (76 homes) of these bed and breakfast places now exist (Ibid, 1983). Because of the increasing demand the number of these places might be expected to increase. The bed and breakfast facilities should also be encouraged for a "Meet the Local People" campaign.

The availability of Youth hostels and the University residence (especially during the summer season) might be given a higher profile to attract more of the youth market (possibly the most important future market). If the youth market can be attracted and more individuals experience an enjoyable vacation here, they might be expected to return later in life, perhaps with their families.

C. No Opportunity

There were some negative perceptions held by the visitors which accurately apply to the NCR's tourist product. Most of these impressions apply to a certain product expected by specific segments. For example, the Sun Lover segment of the Resident travellers would choose a vacation spot judging only on the merit of that destination, i.e., where they could experience real warm weather holidays, associated with sea and beach activities. There is little hope to attract these visitors to the NCR, as the Nation's Capital is unlikely to become a true Sun Lover's destination, nor a resort place. Similarly it cannot attract travellers who

expect a complete wilderness vacation. In these above mentioned cases there is little or no hope to attract those specific market segments.

4.4 Comment

The preceding discussion of the possible tourism opportunities that exist within the National Capital Region raises the following questions as to how to best augment visitation:

- i) Do these opportunities have the capability to make the NCR a favourable destination?
- ii) What should be done for the various markets?
- iii) Should specific market segments be sought or should present markets remain the prime target?
- iv) Does the physical product need changing or does the information about, and organization of, the product need improving?

Undoubtedly, tourism in the National Capital Region has a very good growth potential. An estimated total of 2.7 million persons visited the NCR in 1981. According to the CGOT survey an estimated 2.5 million person-trips were made in the Ottawa-Hull area in 1980 (CGOT, 1982). The region attracts visitors from all the provinces of Canada, from the U.S.A. and from almost thirty different overseas markets (NCC, 1982). The NCR has not yet been able to overcome to attract the more non-VFR visitors, especially from overseas market. Based on the analysis in this chapter, some suggestions are made in the following discussion.

Regarding the first question, Canada is still a new vacation place to most foreign markets, in particular for recreation/pleasure travel. Visitors have some knowledge about the country's big cities like Toronto, Montreal or Vancouver but Ottawa-Hull is not a familiar destination. On the other hand, it is also true that people are travelling more now than ever before. If the opportunities identified in this chapter can be realized through effective promotional advertising, it

may be assumed that the results could definitely be beneficial.

In regard to Canadian travellers there are definite chances to make the NCR a favourable destination by improving the product appeal as well as increasing awareness. Canadians are expected to travel more within Canada than before. Inflation, increase in gasoline prices, lower value for Canadian dollar, etc. would influence the choice of destination abroad, among the Canadian travellers. Promotions might entice Canadians to visit their nation's capital, in keeping with programmes to encourage Canadians to travel more in their homeland. About the non-resident travellers the planners might pursue the immediate opportunities previously mentioned.

The potential market segments identified among the Canadian (Security conscious and Action Seekers) and American (Urban and Touring) travellers appears to be satisfied with the Capital's tourism resources. Again, promotion to these market segments might increase the awareness and improve the NCR's product appeal to them. Considering the present tourism situation in the NCR, it might be worthwhile for planners to concentrate on these present potential markets rather than identifying new markets.

When the tourism resources of the NCR have been evaluated it becomes apparent that the region possesses high quality tourist products related in particular to sightseeing, cultural activities, sports and camping facilities, winter recreation, etc.

These products have satisfied the visitors who visited the NCR in past and these products can also attract the potential visitors as these vacation attributes are often perceived as impressive (Table 3.1.2) by them. However, regarding the fourth question the study suggests that the NCR's tourism industry should focus on its present resources. Promotional advertising needs to be upgraded to improve the product appeal to its potential visitors. More information of the products,

like cultural activities, sports facilities, etc. may also serve to increase visitation.

4.5 Summary

The NCR with its current tourism resources clearly could attract and accommodate more visitors year round, than it does presently. Definitely, it may be appealing to all potential visitors, especially to its potential markets which seek varied vacation benefits. There are opportunities to expand the industry in several directions. Positive impressions of the NCR's certain tourist products offer immediate growth opportunities as these are the main attractions to visit the NCR at present. Some of the negative impressions, on the other hand, offer development opportunities where these negative impressions result from lack of awareness. However, some negative impressions apply accurately to the NCR's tourism resources and do not offer realistic potentials.

Actual visitors to the NCR have been much impressed with the region's tourist products and services, which may perhaps be the most important asset to promote. Lack of awareness amongst potential visitors appears to be a primary reason that the NCR possesses a low profile as a vacation destination. More effort is needed to promote the tourist industry of the NCR to all the potential markets. Campaigns might be directed to all the Canadian travellers as well as selected non-resident travellers. Instead of searching for new tourist markets for the NCR, the present tourism situation suggests that market planners might do well to concentrate on exploiting every possible existing opportunity to communicate with the present markets and selected segments.

CHAPTER V

CONCLUSIONS

5.1 Restatement of Purpose

The growth of tourism in the National Capital Region has prompted increasing research and analysis in this field and a number of studies and surveys have been conducted in the last decade. Tourism Canada (formerly CGOT), as part of its national quarterly survey, provided quantitative information about Canadian residents visiting Ottawa-Hull in 1980. The National Capital Commission conducted two surveys during the summer of 1979 and 1981 in order to provide much the same kind of information but including non-resident travellers as well. The NCC also conducted a visitors' survey during Winterlude in February 1982. These studies provided information on the trip profiles and trip characteristics of the present visitors to the NCR and some of them also provided visitors' impressions about the Capital during their stay.

None of the previous studies focussed primarily on assessment of the demand side relating to potential visitors to the Region, nor did they consider possible attitudes and perceptions of visitors towards taking a vacation in the Nation's Capital, nor how a location such as the NCR might be perceived as a desired vacation destination. These omissions begged the question "what market opportunities might be developed in order to better satisfy tourist demands and expectations in the NCR"?

The primary purpose of this thesis was to focus on the

present and potential tourist market for the NCR, in order to generate an assessment of tourists' attitudes towards vacationing and to determine the possible development opportunities within the Capital for satisfying their demands. In this particular study the tourist market referred only those visitors whose purposes might be classified as "pleasure" and "personal" trips.

A Research Model (Table 1.4.1) was developed as a guideline for organizing a systematic approach to the subject. The model was designed based on the hypothesis that visitors' socio-demographic characteristics reflect their attitudes and outlook towards travel and the kinds of vacation experiences they desire. The choice of a destination depends on the visitors' perceptions in qualitative vacation characteristics. Finally, these perceived strengths and weaknesses (the positive and negative impressions of the visitors) were perceived as being helpful in identifying possible tourist market development opportunities for the future. Several steps were identified from the Research Model to fulfil the primary purpose of this thesis.

First, the market characteristics of the present visitors and their trip profiles, as identified in the existing studies (CGOT, 1982; NCC, 1980 1982 and Winterlude, 1982) were examined, to determine the buying capacity of the present tourist market. Moreover, this market analysis also identified the different primary and target markets (or the potential markets) for the NCR.

Second, the NCR has attracted different markets from all over the world (NCC, 1982). Studies identify that different tourist markets, including the resident travellers, often have quite different attitudes and perceptions towards the Canadian vacation experience. The surveys by Market Facts of Canada Ltd., 1982, (sponsored by Tourism Canada), and the Travel Industry Association of Canada in 1980, along with

CGOT's annual 'Overseas Markets' Situation Reports 1981/82, were all analysed for identifying the motivations as well as the demands of the potential visitors travelling to various Canadian destinations. The results can be considered applicable to the NCR, one of the significant tourist destinations in Canada.

Finally, the attitudes and perceptions of the visitors as well as their vacation demands and expectations and the present tourism resource availability of the NCR have led this study, as suggested in the research model, to the final goal of this thesis, the identification of possible development opportunities likely to attract more visitors to the NCR in future.

5.2 Tourists --- Attitudes --- Opportunities

Because of the lack of primary sources for this particular study, references were drawn from various secondary sources. Although the purpose and objective of these secondary sources are related (to some extent) to this study, their reliability and dependency for this thesis are variable.

The information on the present tourist market of the NCR was gathered from the CGOT 1980 survey and NCC 1979, 1981 and 1982 surveys. Because of the differences in sample size, time of surveys and survey techniques, it was not possible to make any direct comparison between these surveys. However, they seemed useful for present market analysis. For this thesis, the CGOT 1980 survey was useful for statistics on NCR's resident travellers, the NCC 1979 and 1981 surveys provided data for summer non-resident travellers and the Winterlude 1982 survey on winter non-resident travellers to the NCR. A synthesis of these surveys can be interpreted as follows.

The survey results suggested that most of the visitors to the NCR in 1980-81 originated in Canada (54%) and United

States (28%); 13% came from different European countries and less than 5% originated elsewhere. Among resident travellers Ontario and Quebec represented 93% of all the visitors to the NCR.

The visitors represented an affluent market and tended towards the upper socio-economic strata; 50% of the visitors reported family income in excess of \$20,000. There was a dominance of professional/managerial persons visiting the region.

The youth market especially 16 to 24 year olds was very much under represented in all the surveys. Approximately 40% of all the visitors to the capital were mature adults aged 25-44 years old; however, the NCR also hosted a significant proportion (16%) of the older clientele aged 55 years or over.

The average duration of stay of a visitor was only 3.6 nights. Visitors who stayed in the University Residences or with friends and relatives averaged a longer stay of 7.7 nights and 6.0 nights, respectively.

Although the automobile remained the primary means of transport to the Capital (55-60%), there was a great increase in the use of public transport (bus, plane, etc.) from 25% in 1979 to 37% in 1981. Auto travellers and those journeying by bus or train principally stayed with friends or relatives. The second most popular choice of accommodation was hotels, motels, etc. Air travellers opted for commercial accommodation rather than staying with friends or relatives. Hotel and motel usage declined as the total length of stay increased. Conversely, the length of stay was longer for those going to friends and relatives, University Residences or using cottages and campgrounds. It was also discovered that higher income visitors were more likely to stay in commercial facilities.

Visiting friends and relatives (VFR) remained an important purpose of visits to the Capital. The percentage

of VFR traffic from European countries (33%) and other nations (20%) was higher than amongst resident travellers and American visitors. This was so because of the ongoing ties resulting from large scale immigration to Ottawa that took place after World War II. Among the non-VFR travellers, sightseeing was reported as the most important reason for coming to the NCR.

In general, visitors expressed favourable impressions of the Capital's tourist attractions. Positive impressions mainly related to the physical layout, the friendliness of the people, the different historical and cultural sites and the varieties of entertainment facilities. Some negative impressions were expressed concerning inadequate public services, lack of activities and recreation, inadequate tourist services, etc. (e.g., lack of adequate sign-posting, lack of public washrooms, etc.).

The NCR received visitors from thirty-two different countries. The primary markets identified were Canada and the U.S.A. In addition to the primary markets, the U.K., Germany, Japan, the Netherlands and France together constituted 16% of all visitors. These are considered as the major target markets.

An attempt was made to examine the two primary markets in more details. In response to the different attitudinal statements different market segments were identified among the Canadian as well as American travellers, on the basis of vacation needs and benefits sought by travellers. Information was gathered from two different sources. The Travel Industry Association of Canada in 1980 prepared a study for the CGOT suggesting how Canada might compete with other countries in meeting those needs, and the study has identified four segments - Sun Lovers, Security Conscious, Action Seekers and Off-The-Beaten-Track segments. The Market Facts of Canada Ltd. in 1982, published a study on potential American travellers to Canada and this study also identified four American segments

- Resort, Urban, Touring and Outdoor.

The examination of these two reports suggests that the characteristics of the four Canadian and American segments often match with each other. For example, the needs of the Resort segments often match with the Sun Lover segments, the Urban segments with the Action Seekers, the Touring segments sometimes seem comparable with the Security Conscious segment and Outdoor segments with the Off-The-Beaten-Track segments.

Because of the lack of primary sources, these two surveys, although conducted to examine the potential market segments among the American and Canadian visitors to Canada, in general, were also seemed applicable to the NCR. Interpreting the characteristics of Resident and American segments, it seems that the "Security Conscious" and "Action Seekers" among the Canadian travellers and "Urban" and "Touring" segments among the American travellers demonstrate the greatest potential market segments for the NCR.

The image and perceptions held by the potential visitors (primary and target markets) can be expected to have significant influence upon the tourist industry of the NCR. Again, because of the lack of any specific research identifying specific demands and perceptions of the visitors toward the NCR, references have been drawn from various CGOT market attitude studies. The CGOT has commissioned several surveys from time to time to examine attitudes of the various markets, including the Resident Travellers, towards all the Canadian tourist destinations. The studies examined in this thesis are as follows - "Vacation Travel By Canadians in 1981", "Attitude Tracking Study in 1978", "Overseas Market Development Plans, Situation Reports and Guidelines for marketing objectives and strategies 1981/82 and 1982/83". Market Facts of Canada published a report "Study of the potential pleasure travel market for Canada in the United States" to analyse the

attitudes and awareness of Canada as a travel destination. These studies were designed to examine the visitors' images and perceptions towards Canadian vacation destinations in general, and can thus reasonably be applied to the NCR.

Based on the results of all the above attitude studies and reports one can summarize as follows. Almost all potential visitors studies anticipated a vacation in Canada would be particularly good for sightseeing, beautiful scenery, outdoor sports facilities, especially winter sports, a place to visit friends and relatives, etc. On the other hand, many potential visitors (especially the Overseas markets) perceived that Canada (or the NCR) was a cold place and not appropriate for warm weather holidays, that it lacked cultural/historical interests, excitement and that the cost of vacations was high in terms of accommodation and ground transportation. Negative attitudes held by potential visitors often appear to be the result of a lack of information and a lack of awareness of the vacation possibilities in the Capital. For example, the actual visitors expressed good impression on the cultural attractions of the NCR (NCC, 1982), moreover, they also perceived that NCR has good transportation network and the accommodation rates are reasonable (Bourgeois, 1976).

General vacation demands exhibited by all the potential markets have been summarized in Tables 3.3.1 and 3.3.2. Canada's image as perceived by the potential markets in regards to selected characteristics was presented. Briefly, Canadians expect a quiet countryside, outdoor activities, rest and relaxation, value for money, friendliness from local people, stimulating cultural events, security, warm weather holidays and VFR as their vacation experience. Except for the warm weather holiday aspect and the variety of cultural attractions, Canadians were otherwise satisfied with the country's tourist product.

According to the Market Facts of Canada, the American

travellers seek to enjoy a vacation where there is lots to see and do, beautiful scenery, visit friends/relatives, outdoor activities, a big city atmosphere, warm weather holidays, friendliness from locals and a safe place to visit. They have favourable impressions of the Canadian scenery, variety of things to enjoy, sports and entertainment facilities and the cleanliness and safety factors.

Among the overseas markets, Britons seek to experience foreign settings, warm weather holidays.

The tourism resources of the NCR were evaluated qualitatively as high, medium and low based largely on the researcher's assessment. This evaluation was necessary for the identification of various developmental opportunities. It was considered that the resources which were rated as high or medium quality would probably have more opportunity to attract the potential tourists than the low quality resources. The museums, cultural attractions, various entertainment facilities, local festivals/events, cleanliness, and good restaurants might attract more Action Seekers and Urban segments, on the other hand, sightseeing, rest and relaxing vacation with clean and safe urban region, in addition to visit friends/relatives might attract more Touring and Security Conscious visitors.

The NCR is considered to have low capability for warm weather holidays, especially those associated with beach and sun activities, resort and wilderness vacations and also for nightlife entertainment.

The final objective of the research model was the identification of tentative development opportunities for future tourism in the NCR. Essentially, this represents the main purpose of the thesis. The opportunities have been identified by analysing the vacation demands and perceptions of potential visitors, in juxtaposition to the tourism resources of the NCR.

There are some criteria about which visitors have positive impressions, which have been evaluated as of high quality. Logically these can be considered as "existing" or "immediate opportunities", e.g., sightseeing, entertainment, friendliness, VFR, sports, especially winter sports, etc.

There were some negative impressions held by the potential visitors which had been evaluated as of high or medium quality resource and that seemed to be the result of lack of awareness and ignorance. These could be seen as offering "development opportunity", e.g., low image on the cultural attractions, high accommodation rates, lack of transportation, etc. Finally, included in the negative impressions some criteria often appear to have probably "no opportunity" for future development, e.g., warm weather holiday site, or a resort-place or a wilderness destination.

Several suggestions have been made in Chapter IV that the tourism developers and planners might do well to concentrate on immediate opportunities through more effective promotion and advertising to attract potential visitors to the NCR. Canadians should be encouraged to travel more within Canada, especially to visit the nation's Capital. The Capital's different appeals might be promoted in order to attract different segments of visitors with different vacation demands.

5.3 Future Research

This thesis has provided some insight into the demand structure of the tourist markets in the National Capital Region. However, it has also raised some interesting areas that invite further investigation. One such area is the business sector of the tourist market. In its role as a seat of government, the NCR has attracted many business travellers. It would be useful to determine the market for business travel. One could investigate whether or not business travel types in the NCR are the same as those to Toronto or Montreal.

As assessment of the economic side of the tourism industry has not been included in this study, the question arises as to what are the economic spin-offs of tourism in the capital? How important is the tourism industry to the Region's economic well being? What are the expenditure patterns among different segments of visitors? Is there any similarity between Ottawa and other cities of Canada in terms of visitors' expenditures?

Another possible avenue for future research is to conduct a more involved study of the tourism resources of the Capital. During this project it was felt that a detailed inventory of resources and their attractive characteristics would provide more opportunity to attract visitors.

The youth and student markets have been very much under-represented in studies, although they present the most potential for future markets. Further research on these two markets, their demands and attitudes, would be worthwhile in light of comparisons that could be made with mature tourists' demands.

One last question to be raised is, does the NCR as the Nation's Capital influence visitors to come here? Similarly, do other cities in Canada receive the same types of visitors or do their visitors express differing attitudes from those visiting the NCR?

5.4 Summary

This thesis has examined, reviewed and analysed various studies and surveys as secondary sources of information. The reliability, dependency and usefulness of these sources have been discussed. The final interpretation, application and developing conclusions and suggestions from these data were mainly from the point of researcher's personal assessment.

The thesis has illustrated the present market characteristics, has identified the primary and target markets (potential markets) for the future tourist industry in the NCR. The

attitudes and perceptions of these potential markets have been examined, in addition to their various vacation needs and preferences. An attempt has been made to assess the quality of tourism resources of the NCR. Finally, all these findings have helped in identifying a series of possible opportunities to attract more visitors to NCR in future.

However, some "immediate" or priority opportunities have been identified based on the positive images and preferences of the visitors about the high quality tourist attractions of the NCR. It should be remembered that Canada is still a new destination for pleasure trip travellers, especially those from overseas markets. Likewise is the NCR. Increasing awareness and desirability of the NCR for a recreation/pleasure purpose, through more promotion and advertising, may be the most appropriate manner to attract more non-VFR tourists or pleasure trip travellers in the future. The study suggested that priority might be given to the promotion of positive images already held by potential visitors, playing up the strengths of the high quality tourism resources of the region. Ultimately, this might result in more visitation, the outcome sought by the implementation of the proposals of this thesis.

In conclusion, the priority opportunities identified might be restated here in brief. Identification of these opportunities are a major end product of this thesis. Suggestions have been made to the tourism planners and developers that they might give these opportunities more priority than the other ones.

- Sightseeing and touring facilities, both guided and individual;
- More emphasis on the tourist potentiality of the Winterlude;
- Encourage the VFR travellers to stay longer and enjoy and participate in various tourist attractions in the Region;
- More awareness is needed for the various winter tourism facilities, especially the winter sports, to the

- overseas markets - Dutch, Japanese travelers.
- More awareness is needed among all the potential markets about the high quality tourist attraction facilities that already exist within the NCR.
 - Aware the visitors about the NCR as a safe and clean urban area to visit.
 - Improve and increase the number of sports facilities and outdoor activity areas.
 - Increase the "meet the people" campaign.
 - More promotion is needed for advertising the shopping facilities.
 - More promotion is needed to increase the awareness of the cultural/historical attractions of the NCR, e.g., the Museums, the NAC programmes, etc.
 - Promote more children programmes to encourage the family type vacation.

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