

COMMERCIAL ACCOMMODATION PREFERENCES IN OTTAWA, SUMMER 1982

by
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ABSTRACT

Visitors to Ottawa enjoy the choice of a wide variety of different qualities of commercial accommodations. They can select simple, spartan hostels and campgrounds or full service, luxury hotels and motels, and all qualities of facilities in between. Each attracts its own clientele. This thesis investigates the users of the different qualities of commercial accommodation available to summer visitors in Ottawa, focussing on their demographic characteristics, reservation habits, travel and expenditure patterns. Furthermore, the guests' attitudes concerning the price/value relationship are studied. The guests of 15 different hostelries were surveyed during the summer of 1982.

Ultimately, a profile of a typical guest of each type of facility was drawn based on the results of the survey.

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PREFACE

Since the late 1940's there has been a spectacular growth in tourism and travel. As North American and European societies became more affluent, there was a resultant increase in discretionary income, as well as in leisure time. Also, more people now seem to have a heightened interest in seeing the world. Indeed, Canadians now consider a vacation trip as being an integral part of their lifestyle. Travel and tourism is no longer the domain of the affluent.

The impacts of travel and tourism have been well documented by numerous researchers, both geographers and non-geographers. Space limitations do not permit a detailed bibliography of some of the work being included. They have, however, studied the changes in the infrastructure, physical alterations to the environment, economic impacts, both positive and negative, and social and cultural impacts resulting from Tourism. Furthermore, some researchers have charted the evolution of tourist resorts and establishments such as Atlantic City, N.J..

Social science research into tourism concerns itself with landscapes, functions, facilities or institutions. Geographic tourism, based on place, environment and interrelationships of concepts, offers a unique perspective. L.S. Mitchell wrote "the characteristic perspective (of the Geography of tourism) is seen in the context of a matrix based on 2 trichotomies (1979, 235)". The first trichotomy deals with economic and spatial interactions, demand, supply and linkages. The second pertains to the purpose, structure and distribution of tourist related phenomena. Combined they form the following table.

Conceptual Frame of Reference of Geographic Tourism

	Demand	Supply	Linkage	
Purpose	1	2	3	Ideology, Values
Structure	4	5	6	Institutions, Facilities, Activities
Distribution	7	8	9	Physical Geometry
	Behaviour	Management Impact Environment	Transport Interactive Participation	

L.S. Mitchell, 1979, 239.

In his work, Mitchell illustrates that each cell in the matrix can be used either as a description of the present state of geography, a method of classifying literature or as a focus to formulate research effects. The rows and columns, moreover, offer a second level of interest, synthesizing four interrelated concepts under one broad heading. Thus, for example, the "Demand" row (1,4,7) offers the researcher a behavioural thrust, incorporating purpose of the phenomena (physical, emotional, social), its structure (stratified versus categorized) and the pattern and method of distribution of the component parts (concentrated, random, uniform). Combined, they offer the researcher a behavioural attitude, reflecting a pertinent geographical bias.

This thesis concerns itself with three such vectors; Behavioural (1,4,7), Management Impact (2,5,8), and Ideological Values (1,2,3). The following paper studies consumers' behaviour patterns and characteristics in a stratified commercial accommodation market in an effort to describe differences evident among the clientele, as well as understanding some of the emotional rationale behind the accommodation selection process, resulting in an assessment of the impact of tourism on future management practices.

TABLE OF CONTENTS

ABSTRACT	ii
ACKNOWLEDGEMENTS	iii
PREFACE	v
TABLE OF CONTENTS	viii
LIST OF TABLES	x
LIST OF MAPS	xii
CHAPTER	
1 INTRODUCTION, STATEMENT OF OBJECTIVES	1
2 LITERATURE REVIEW	9
2.1 CGOT Studies	9
2.2 Visitors to Ottawa	13
2.3 User Characteristics	19
2.4 Accommodation Preferences	21
2.5 Overview of the Commercial Hostelry Industry in Ottawa	28
2.6 Summary	31
3 SURVEY METHODOLOGY	32
3.1 Introduction	32
3.2 Rating Systems	32
3.3 Sampling Methodology	40
3.4 Questionnaire Development and Distribution ..	42
4 DATA ACQUISITION AND ANALYSIS TECHNIQUES	46
4.1 Response Rate	46
4.2 Sample Techniques	49
4.3 Statistical Analysis Methodology	50
5 DEMOGRAPHIC, TRAVEL AND EXPENDITURE PATTERNS	54
5.1 Introduction - General Trends	54
5.2 Demographic Characteristics	59
5.2.1 No Frills (1*) Accommodations	60
5.2.2 Moderate (2*) Accommodations	62
5.2.3 Quality (3*) Accommodations	64
5.2.4 Luxury (4*) Accommodations	66
5.2.5 Summation	69

5.3	Travel Patterns	74
5.4	Expenditure Patterns	91
5.5	Conclusions	97
6	ACCOMMODATION PREFERENCES	100
6.1	Introduction	100
6.2	Booking Practices, Satisfaction Levels	100
6.3	Psychology of Choice	106
6.3.1	No Frills (1*) Accommodations	108
6.3.2	Moderate (2*) Accommodations	112
6.3.3	Quality (3*) Accommodations	117
6.3.4	Luxury (4*) Accommodations	121
6.4	Impact of Chains	123
6.5	Conclusions	126
7	CONCLUSIONS	131
7.1	Restatement of Purpose	131
7.2	Research Design	132
7.3	Visitor Profiles and Preferences	134
7.4	Future Research	139
7.5	Summation	140
APPENDICES		
1	QUESTIONNAIRE	142
2	POINT OF ORIGIN	148
BIBLIOGRAPHY		152

LIST OF TABLES

Table 2.4.1	Relative Importance of Motel-Choice Variables	23
Table 2.4.2	Customer Preferences	23
Table 2.4.3	Ranking of Attributes Important to the Selection of a Motel/Hotel	24
Table 2.5.1	Monthly Occupancy Rates and Average Room Rates Charged	29
Table 3.2.1	Ratings of Participating Hotes, Motels, Campground and Hostel	36,37
Table 3.2.2	Hostelry Rating	39
Table 4.1.1	Number of Completed Questionnaires Per Establishment	47
Table 4.1.2	Number of Responses By Star Rating	48
Table 4.2.1	Distribution of Questionnaires Received Compared to Total Potential Sample Size ...	49
Table 5.1.1	Point of Origin	56
Table 5.1.2	Ottawa as Main Destination Compared to Total Trip Duration	57
Table 5.1.3	Ottawa as Main Destination Vs Trip Distance .	58
Table 5.2.1	Visitors' Demographics	68
Table 5.2.2	Point of Origin Compared to Quality of Lodging Selected	70
Table 5.2.3	Ages of Members of Total Travel Party	72
Table 5.2.4	Travel Party Income Vs Accommodation Choice .	73
Table 5.3.1	Distance Travelled	74
Table 5.3.2	Accommodation Selected Vs Total Trip Duration	75
Table 5.3.3	Average Trip Duration	77
Table 5.3.4	Total Trip Duration Vs Distance Travelled ...	78
Table 5.3.5	Average Length of Stay in Ottawa	79
Table 5.3.6	Length of Stay in Ottawa	79
Table 5.3.7	Ottawa As Main Destination	80
Table 5.3.8	Was This The First Visit to Ottawa?	81
Table 5.3.9	Ottawa As Main Destination Vs First Visit To the City	82
Table 5.3.10	Mode of Transportation	83
Table 5.3.11	Mode of Transportation Vs Distance Travelled.	86
Table 5.3.12A	Trip Purpose	87
Table 5.3.12B	Business Travel	87
Table 5.3.13	Travel Patterns	89
Table 5.4.1	Anticipated Daily Expenditures	92
Table 5.4.2	Credit Card Vs Travellers Cheque Usage	94
Table 5.4.3	Expense Account Use Vs Trip Purpose	96
Table 6.2.1	Booking Procedure	101

Table 6.2.2	Was This Your First Choice of Accommodation?.	103
Table 6.2.3	Did You Spend More or Less Than Expected For Accommodation?	104
Table 6.2.4	Are You Satisfied With This Facility?	106
Table 6.3.1	Factors Affecting the Choice of One Star Accommodations	108
Table 6.3.2	Factors Affecting the Choice of Two Star Accommodations	112
Table 6.3.3	Factors Affecting the Choice of Three Star Accommodations	117
Table 6.3.4	Factors Affecting the Choice of Four Star Accommodations	121
Table 6.4.1	Importance of Staying at a Chain Type Hostelry	124
Table 6.5.1	Summary of Median Scores	125
Table 6.5.2	Modal Scores	129

LIST OF MAPS

Map 1 Location of Participating Hostelries 6

CHAPTER 1

INTRODUCTION, STATEMENT OF OBJECTIVES

Tourism is Ontario's second largest industry, directly or indirectly employing over 700,000 people, generating in excess of \$7.5 billion of business revenues and more than \$1 billion of tax revenue annually (Tourism, the Renewable Resource, 1981, 15). It is estimated that in the Regional Municipality of Ottawa-Carleton alone, 17,000 jobs can be directly attributed to tourism and that visitors to the area generate about \$300 million of business (CCVCB, 1982). The commercial accommodation industry accounts for much of this revenue, offering visitors a broad range of lodging experiences at a variety of prices.

Knowing that various types and levels of commercial accommodation exist, what then prompts people to select certain types of facilities? It is not price alone, for if this was the case then inexpensive motels and hostels would continually be full while the more expensive hotels and motor hotels would lie empty. Indeed, it seems that users of commercial accommodation, like all consumers, base their selections on the perceived value they will get in comparison to the price paid. Those who consider their room as simply a place to sleep do not want all the amenities that come with full service hostelrys and will, therefore, avoid them. On the other hand, there are those who want all the luxuries they can find to complete their total vacation experience and will, as a result, seek facilities that offer full services.

Do certain types of travellers want certain types of accommodation? For example, how important is workspace, a colour television or an in-house restaurant to a businessman? How highly do families rate swimming pools? How does the companionship offered by an international youth hostel affect the single, itinerant traveller? Very little research has been completed investigating habits of users of different qualities of accommodation and the reasons behind the differences in accommodation selection. Such information, were it available, would have many practical applications for both the operators involved and the varying governmental/tourism agencies. For example, a better understanding of the local tourist market would enable operators to more effectively co-ordinate and plan future marketing strategies. The facilities involved would get first hand data about their customers, where they come from, what their station in life is and most importantly why they choose that facility. The data would ultimately make them more competitive in their sector of the lucrative travel market. Finally, such a study would make a significant contribution to the scant library of knowledge that exists in this field. While there has been a great deal of research conducted into the nature of tourism in general there has been very little published information, of any type, studying the habits, patterns and preferences of people using commercial accommodations.

Research conducted in the Ottawa area is typical of this phenomenon. Since 1972, five major studies have been conducted investigating summer visitors. Each sought to determine who visits the city, what they do once here and what their impressions of the nation's capital are. This work has resulted in the creation of a large data base of visitors' habits, traits and patterns that has greatly assisted tourism planning. All of these studies have, however, given accommodation selection only cursory examinations, and

have done little or nothing to study the segment of the travelling population that has the greatest economic impact, those choosing commercial lodging.

Yet, in 1981, according to Canada's Capital Visitor and Convention Bureau (CCVCB), 2.7 million person-trips were made to the National Capital Region. (This figure includes those travelling on public or private sector business trips, pleasure travellers, visiting friends and relatives or for conducting personal business.) Approximately 20 percent of these visits involved the use of commercial accommodation (CGOT, 1982, 3). Surveys of summer visitors reveal that up to 60 percent of all visitors stay at commercially operated establishments (NCC, 1982, 25).

In an effort to bridge this information gap a study was conducted in Ottawa, during the summer of 1982, to investigate the characteristics of users of varying qualities of accommodation and the rationale behind the selection process. The intent of this study was to compare and contrast the profiles and habits of users of a variety of accommodation types, to describe typical guests of each class, and to explain the differences, if any, between each stratum. Further, the researcher wished to investigate why certain people, who have basically the same background, selected different qualities of accommodation.

This thesis presents the results of a study of the characteristics of the users of various qualities of commercially operated hostelries in an urban market during the peak tourist season. A survey was distributed to guests staying at a broad range of hotels, motels, campgrounds and hostels throughout the city. They were questioned about their demographic characteristics, their travel, expenditure and reservation patterns and also about the decision-making process undertaken in the selection of a specific hostelry.

Ottawa was selected as the locus for this project for a number of reasons. It is one of Canada's principal tourist attractions, drawing 2.7 million person-trips alone in 1981 (CCVCB, 1982). All types of travellers could be studied during the summer months, those here on government related business, private business or for pleasure purposes. Further, the visitor has the choice of virtually every type of lodging experience. It would, therefore, be possible to stratify the study according to the quality of accommodation available and to acquire a varied sample of guests from each stratum. Finally, there are a number of existing studies on summer visitors to Ottawa which provide a broad data base for comparative purposes.

In the spring of 1982 the government of Ontario published a hotel/motel guide, in which over 50 individual hotels, motels, motor inns and lodges were listed for Ottawa-Carleton (OMTR, 1982, 103-105). This list does not include publicly or privately operated campgrounds, tourist homes, hostels or residences. Indeed, when these are included, the visitor has well over 70 different establishments to choose from when selecting his accommodation.

This range of hostelries enables the traveller to make his accommodation decision based not only on the type of facility desired (i.e. hotel or motel) but also on the various qualities of accommodation within each class type (modest to luxury class). Further, the guest generally has the choice of many facilities within each class type.

The visitor can also select the type of lodging that best meets his financial requirements. He can pay as little as \$3 per night per person at the National Capital Commission's Camping Lebreton or as much as \$110 per night, single occupancy, at the Four Seasons Hotel. In accordance with the rates charged, the lodger enjoys a similar variety of services available to him. For example, a person who stays

at the Nicholas Street Youth Hostel expects little more than a bunk bed to sleep on, while those staying at better quality hotels and motels can savour a variety of dining and recreational experiences, valet service, entertainment and room decors. These services are generally, though not entirely, reflected in the price of the room. In short, the hospitality industry in Ottawa provides a wide range of accommodation experiences, catering to the wishes of all types of travellers in the National Capital Region.

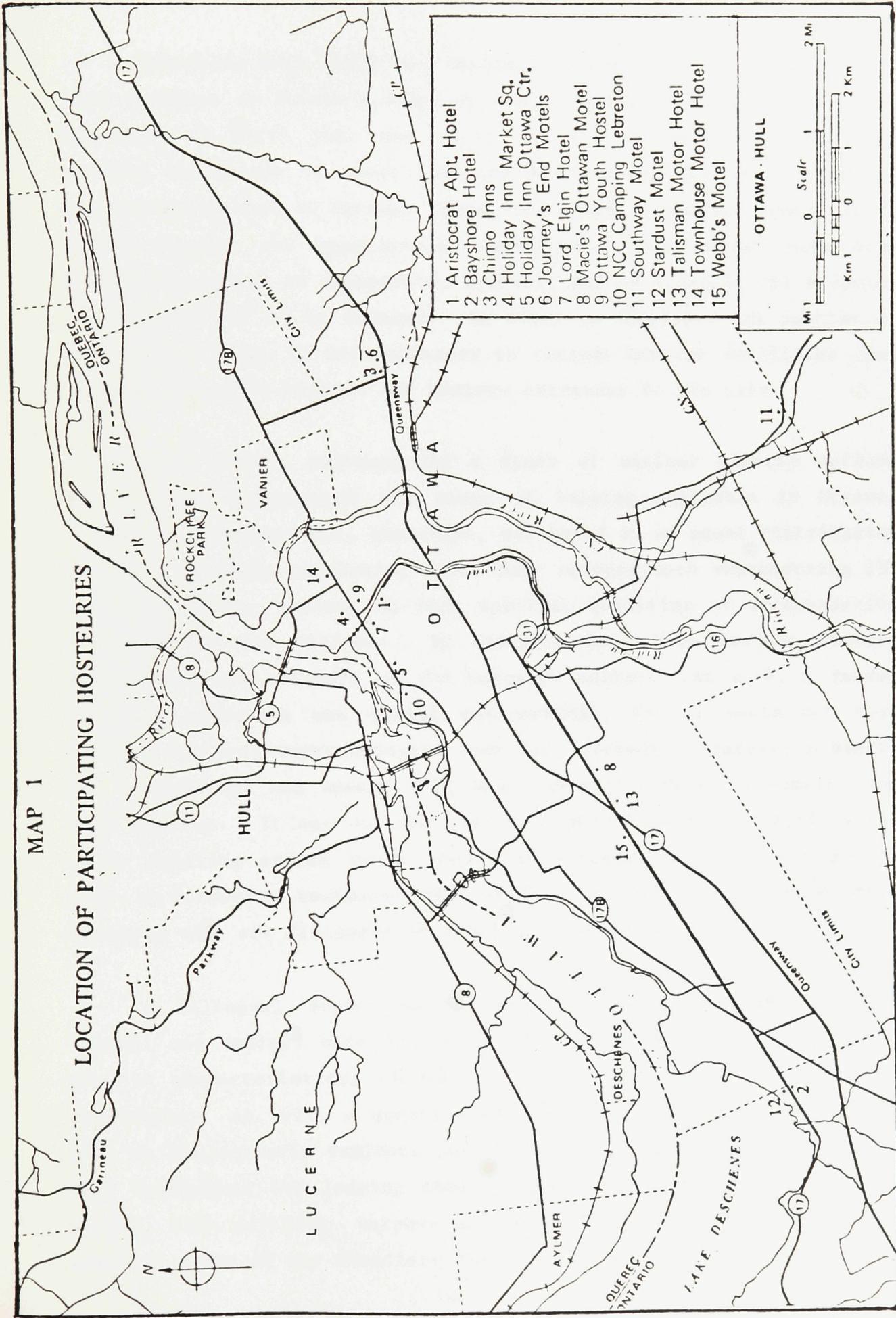
A total of 15 operations participated in this study, representing four qualities of accommodation. These were:

1. Aristocrat Apartment Hotel (3*)
2. Bayshore Hotel (2*)
3. Chimo Inns (4*)
4. Holiday Inn Market Square (Dalhousie) (3*)
5. Holiday Inn Ottawa Centre (Kent St.) (4*)
6. Journeys End Motels (3*)
7. Lord Elgin Hotel (3*)
8. Macies Ottawan Flag Inn (3*)
9. Ottawa Youth Hostel (1*)
10. NCC Camping Lebreton (1*)
11. Southway Motel (2*)
12. Stardust Motel (2*)
13. Talisman Motor Hotel (4*)
14. Townhouse Motor Hotel (2*)
15. Webb's Motel (4*)

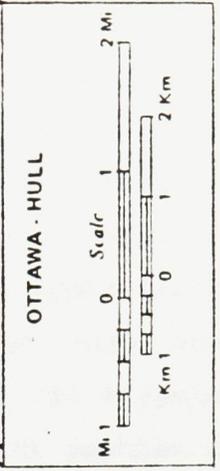
Map 1 indicates the location of each facility. The core area as well as the eastern and western approaches to the city are all represented by this sample group. A complete discussion of the rationale behind the assignment of the quality codes, as well as a brief description of each facility is found in Chapter 3.

MAP 1

LOCATION OF PARTICIPATING HOSTELRIES



- 1 Aristocrat Apt. Hotel
- 2 Bayshore Hotel
- 3 Chimo Inns
- 4 Holiday Inn Market Sq.
- 5 Holiday Inn Ottawa Ctr.
- 6 Journey's End Motels
- 7 Lord Elgin Hotel
- 8 Macie's Ottoman Motel
- 9 Ottawa Youth Hostel
- 10 NCC Camping Lebreton
- 11 Southway Motel
- 12 Stardust Motel
- 13 Talisman Motor Hotel
- 14 Townhouse Motor Hotel
- 15 Webb's Motel



Initially this study was designed to investigate the accommodation industry in Ottawa's downtown core, thereby eliminating the bias of point of entry into the city. Core area facilities would be equally attractive to those arriving from either the east, south or western approaches to Ottawa. Thus, the sample selection would not be skewed in any one geographical direction. Not enough core area hostelrys agreed to co-operate, however, and as a result the scope of the project had to be widened. In order to eliminate the problem of directional bias, it was necessary to include similar facilities from each of the major eastern and western entrances to the city.

This project pre-supposed a study of various clearly defined strata that represented the range of lodging available in Ottawa. This stratification was, therefore, not based on an equal distribution of the travelling population (i.e. four sectors each representing 25% of the market), rather, on four specific qualities of accommodation available to the visitor. By design, then, this project studied disproportionate sectors of the hostelry market. As such, a random sampling technique was deemed unacceptable, for it would not have assured adequate representation from each segment. Instead, a sampling methodology was needed that would garner a suitable sample from each stratum. It was decided that a disproportionate stratification quota sampling system would yield the optimum results. The use of such a surveying technique has certain drawbacks and limitations, however, that are discussed in detail in Chapters 3 and 4.

A bilingual questionnaire was developed to gather specific nominal and ordinal data in four broad areas; the traveller's demographic characteristics, travel and expenditure patterns and booking procedures. As well, a question was included that asked the respondent to subjectively evaluate the importance of a number of variables that influenced the lodging choice. Data were acquired on point of origin, trip duration, purpose and mode of transportation, the size, ages and sexes of the immediate travel party, the respondent's income,

education, occupation and method of payment, and on assessing the acceptability of the hostelry. The complete questionnaire and covering letter appear in Appendix 1.

The study ran from July 19 to September 6, 1982. Over 500 valid responses were received. The results were then coded, compiled and entered into the Carleton University CP-VI computer. The data was analyzed using the SPSS (Statistical Package for the Social Sciences) program. Analysis and evaluation of the results is discussed in Chapters 5 and 6.

Because of a lack of research specifically relating to this topic, Chapter 2, the Literature Review, has been written to acquaint the reader with the prevailing literature on tourism and travel patterns in Canada as a whole, as well as a review of surveys pertaining to Ottawa. This information serves as a background useful in comparing the results of this study to previous studies. Furthermore, research investigation on user habits and preferences in the commercial accommodation industry is also discussed.

CHAPTER 2

LITERATURE REVIEW

Both the federal and provincial governments have produced a great deal of literature on the travel habits and patterns of Canadian tourists as a whole. As well, there have been numerous studies dealing specifically with the tourist trade in the National Capital Region itself. There has, however, been relatively little investigative work published that examines user characteristics in the commercial accommodation industry and even less studying the hostelry decision-making processes of travellers. What literature is available offers a valuable background for this study. Further, previous surveys of tourists' habits, patterns and accommodation preferences are an important benchmark from which this study can begin.

2.1 CGOT Studies

Since the early 1960's, the Canadian Government Office of Tourism (CGOT) has been actively interested in defining and studying the travel and vacation habits of Canadians. Over that period they have amassed a substantial library of information about the travel habits of Canadians as a whole as well as the demographic characteristics and patterns of specific segments of the travelling population, such as bus/train travellers and the seniors' market. Their research has enabled them to compile a composite picture of the typical vacationing Canadian.

In 1980, as part of their annual study, CGOT interviewed 3,851 adult Canadians about their travel patterns. Extrapolating their results to the whole of Canada, it is estimated that 8.9 million adult Canadians travelled in that year (CGOT, 1981, 1). Most of these trips were taken by car (59% of all trips) and over half of the survey sample took trips lasting 4 nights or more. In that year there was an emerging trend "toward summer travel by car closer to home and for fewer nights" (ibid, 56) although the average trip taken in Canada still lasted 11.2 nights.

For those travelling exclusively within Canada, the automobile was by far the preferred mode of transportation. Over 80% of those travelling less than 450 miles (ibid, 53) did so by car. Auto travel remained the most dominant form of transportation until trip length exceeded 1,500 miles (seventy percent of those journeying between 450 and 1,500 miles). For trips exceeding 1,500 miles, aircraft became the preferred means of transportation (ibid, 53).

CGOT confirmed that the vacation traveller represented an upscale market. Fully three quarters (3/4) of Canadians with a family income in excess of \$30,000 took a vacation trip, compared to about one third (1/3) of those who earned less than \$10,000 (ibid, 10, 4). Further, 70% of university graduates travelled for pleasure while only 39% of those who had "less than some high school education" travelled (ibid, 11). They hasten to add, however, that "although the traveller profile is skewed somewhat toward the higher socio-economic strata... the traveller is not that different in terms of demographics from the Canadian population" (ibid, 92). Most Canadians, therefore, consider an annual vacation as an integral part of their lifestyle.

Dissecting the data further, CGOT discovered that there was little difference between Ontario vacationers and those from the rest of the country. Approximately half of the province's pleasure

travellers earned over \$20,000, and two-thirds were employed in professional, white collar or skilled trade fields. Their age distribution and educational backgrounds closely resembled those of the rest of the Canadian travelling population (ibid, 99).

In addition to these annual general surveys, from time to time CGOT studies a specific segment of the travel market. Three that are pertinent to this study are their surveys of the youth and seniors' markets and their study of bus/train travellers.

The youth market, comprising by definition those between 16 and 24 years, represents an unexploited resource. Very little marketing strategy is directed towards them, even though they comprise about 20% of the population and took 19.8% of all person-trips in 1980 (Morin and Rennie, 1981, 7, 52). For study purposes they were divided into two groups, teenagers (15-19 years old) and young adults (20-24). Most travel is done by auto for both groups. Seventy-nine percent (79%) of the teenagers and 83% of the young adults stated this was their means of transportation (ibid, 54, 55). For the younger group bus travel was the second most popular method of travelling, followed by air transport. Conversely, the older group travelled more frequently by air than by bus. Pleasure was the primary reason for the trip, followed by visiting friends and relatives. These two categories represented between 75-85 percent of the total trips taken (ibid, 54, 55). Generally Morin and Rennie found that the youth market was relatively easy to please, had wide interests, welcomed new experiences and were generally satisfied with simple accommodation (ibid, 3).

Like the youth market, the proportion of trips taken by seniors compared closely to their overall population. Further, proportionately as many retired people travel as do working people. Retired people tend to take longer trips on the average (15.9 nights) and are

less likely to travel by car than the rest of the population (CGOT, 1981, 137). Still, however, 60% of all senior travel is done by car, 25% by air, 13% by bus and 6% by other means (ibid, 137).

Bus and train travellers in this country represent an interesting market. Canadians, who have a much different attitude to these forms of transportation than do Europeans, consider them as poor second or third choices of transportation. Indeed, they are an economic alternative to more costly forms of travel. At any rate, most of those travelling by bus or train are either under 24 years old or older than 55 (Hockin, 1978, 11, 22). These two groups represent 60% of the total market. Similarly their demographic pattern is skewed towards the lower end of the socio-economic spectrum. Almost 46% of bus travellers and 32% of train travellers earned less than \$10,000 annually compared to only 7% and 12% respectively that had an income of more than \$30,000 (ibid, 14, 24). This contrasts with the national norm suggesting that most travellers were relatively well off. Further, about one third of both train and bus travellers were either students or retired. Also, both sectors had a large proportion of single travellers, 54% of bus trippers and 61% of train voyagers (ibid, 10, 21).

Like other travellers, the primary trip purpose was once again pleasure (55% bus, 48% train) followed by visiting friends and relatives, business and personal business (ibid 3, 15). The preferred choice of accommodations was with friends and relatives (about 50% of each group), with hotels (30% bus, 37% train) and motels (21% bus, 6% train) ranking second and third (ibid, 6, 16). Finally, the average trip length for bus travellers was 15.8 nights while train travellers stayed away from home an average of 12.3 nights (ibid, 5, 16).

All three of these subgroups of the Canadian travelling population varied significantly from the national norm. Their economic

characteristics are significantly lower than that of the travelling population as a whole, however, they tend to travel for longer periods of time. As far as their accommodation preferences are concerned, they represent cost conscious consumers who select modest lodgings that, while meeting their needs, lack some of the amenities of luxury accommodation.

2.2 Visitors to Ottawa

In the past ten years researchers have become more interested in studying the profiles of visitors to the Ottawa area. Since 1972, five major studies have been completed: in 1972 by Market Facts of Canada (MFC), 1976 by Carleton University School of Commerce, 1979 and 1981 by the National Capital Commission (NCC) and in 1980 by CGOT. Four of the studies, with the exception of the 1980 CGOT survey, used on-site interviews to assess the attitudes of visitors to the city as well as compiling quantitative information about their demographic characteristics and travel habits. The CGOT study, on the other hand, used data derived from its quarterly nation-wide tourism surveys. Information from people who had visited the city was culled from this data and analyzed. The results of these studies have provided for the first time fairly accurate information on who visits Ottawa and what they do once here. This data base has assisted both local and regional agencies to plan for future tourism development. Further, these studies offer the researcher demographic data on summer visitors to the National Capital Region.

In the summer of 1972, Market Facts of Canada Ltd. (MFC) was commissioned by the Ontario Ministry of Industry and Tourism (OMIT), Canada's Capital Visitor and Convention Bureau (CCVCB), the National Capital Commission (NCC) and the Canadian Government Office of Tourism (CGOT) to study visitors to Ottawa. As with all subsequent personal interview surveys of the region, MFC sought to discover who visited Ottawa, what they did here and how they felt about Canada's capital.

Approximately 1,200 travellers were questioned at various entry and exit points throughout the city, including the airport, bus and train stations and along the major access highways. Market Facts then divided their findings into three sections; auto travellers, bus/train travellers and air travellers. Demographically, the visitors tended towards the upper socio-economic strata, as each group displayed above average incomes and educations, as well as a greater proclivity towards professional/managerial jobs. Two thirds of the auto travellers originated in Canada while the other third were American (MFC, 9, 13, 19). This figure increased to over 70 percent of air travellers and almost 90 percent of bus and train travellers (ibid, 20). The average length of stay for auto travellers was 3.6 nights compared to 5.2 and 5.3 nights for bus/train and air travellers respectively (ibid, 56). The primary reasons for the trip by auto and bus/train visitors was pleasure, while the air travellers on the other hand came to the city primarily for business purposes.

Auto travellers and those journeying by bus or train principally stayed with friends or relatives. The second most popular choice of accommodations was hotels, motels or inns. More air travellers stayed at commercial facilities than with friends and relatives. Motel and hotel usage declined as the total length of stay increased, while staying with friends and relatives, and campground or cottage usage rose as the length of stay increased. Market Facts also discovered that generally higher income visitors were more likely to stay in commercial facilities.

During the summers of 1976, 1979 and 1981 three more surveys using similar interviewing techniques were conducted. The 1976 survey was run by the Carleton University School of Commerce, the others by the NCC. Adult visitors to the National Capital Region, residing more than 40 to 60 miles from Parliament Hill (depending on the survey) were asked to participate in the study. Interviews were conducted at

a number of tourist information kiosks in the core area of Ottawa as well as in Downtown Hull in 1979 and 1981 and at the tourist information building on Highway 16 in the south end of the city. The sample size ranged from a low of 1,116 in 1981 to a high 2,130 in 1976.

Most of the visitors originated in Canada (between 54% and 63% of each sample), followed by the United States (between 20-28% of the samples). In each study around 13% came from Europe and less than 5% originated elsewhere (Bourgeois, 1976, 2; NCC, 1980, 21; 1982, 10). The percent of Canadian travellers originating in Ontario declined from 52.5% in 1979 to under 40% by 1981. This figure compares to an increase in Quebecers visiting Ottawa from 29.9% to 40.6% in the same time frame. Comparing those who came from other geographic regions of Canada, 11.3% originated from the west and north in 1979 compared to 15.1% in 1981, and 6.3% came from the east coast compared to 5.6% of the latter sample (ibid, 1980, 24; 1982, 11).

The automobile remained the primary means of transport. In 1979, for example, 70% of the visitors arrived by car, 16.7% by bus or train, 9.7% by airplane and 3% arrived by other means (NCC, 1980, 41). By 1981, the percentage of auto travellers had declined to 55% of the sample, while bus/train voyagers had increased to 20% and air travellers had risen to 18% of the sample (NCC, 1982, 24).

One cannot, however, draw accurate conclusions about future trends in the mode of transportation of visitors to Ottawa from these data. Each survey used slightly different sampling techniques, time frames and interviewing locales. For example, the 1981 study included an unusually high proportion of pleasure craft travellers in its study (5%). Further, due to the sampling technique employed, no attempt was made to acquire a truly random sample of the population. Each survey contains a caveat stating that the results can only be interpreted as

being representative of the characteristics of those visitors who were surveyed and not of the travelling public as a whole. Nonetheless, they are valuable documents as they are among the few quantitative sources of data available about visitors to the National Capital Region.

These studies also made no attempt to eliminate those visitors who were in Ottawa on day trips only. As a consequence, well over half of those people interviewed stated that they were staying in Ottawa one night or less (between 57% (1981) and 63% (1976, 1979)). About half of the visitors stated that Ottawa was their main destination.

Again, the principal reason for a visit to the city in the summer was for pleasure, either to take a vacation or to visit friends and relatives. Over 80% of the respondents in each survey stated this was their main purpose in comparison to about 10% stating they were here on business.

The largest single age group represented among the surveys was 25-44 year olds (49% in 1976, 55% in 1979, 46% in 1981) (Bourgeois, 1976, 25; NCC, 1980, 16; NCC, 1982, 13). The sample population was also more likely to be employed in the professional/managerial field than in other areas.

For those staying one night or more, between 40-52% of the sample stated they were staying at hotels or motels, 10-15% were using campsites, about 5% were staying at hostels or residences. About 30% of the sample in each study stated that they were staying with friends or relatives. The 1976 Carleton University study discovered that the preference for hotels and motels increased with the age of the traveller. Persons under 25 were least likely to use them, while those over 65 relied most heavily on commercial lodging. For trips

lasting 4 days or less, about half of the sample used commercial accommodation. This figure declined to less than one quarter for people staying 5 days or more. On the other hand, the use of private residences rose in accordance to the trip duration (Bourgeois, 1976, 40).

Unfortunately, neither of these four studies used standardized questionnaires, time frames, or interviewing techniques. As a result it is both difficult and potentially misleading to compare them directly. As mentioned earlier, the two NCC surveys contain caveats warning that their results can only be suggestive of the characteristics of the summer visitors during the specific study period. Nonetheless, some general conclusions may be drawn. The visitors represent an affluent market, possessing higher education, income and occupation levels than the national average. During the summer, visitors most often arrive in Ottawa by car, primarily for pleasure purposes, to vacation or to visit friends and relatives. Their stays in Ottawa are short in duration, two days or less, and their preferred lodging is either in hotels, motels or with friends and relatives. Hotel and motel usage increases with income and age and is inversely related to the length of stay. Conversely, younger less affluent travellers are more likely to seek alternative forms of accommodation.

In 1980, as part of the CGOT quarterly study, Canadian residents who visited Ottawa were studied. Approximately 93% of all the person-trips made to the city originated in Ontario or Quebec, with fully 26% of them from the Montreal region (CGOT, 1982, 2). Eighty percent of all the trips were made by car, while 19% were made by public carriers (ibid, 3). This figure of 19% is almost double the national average of ten percent. Trip purpose was evenly split between pleasure, visiting friends and relatives, and business (ibid, 3). No attempt was made to isolate summer visitors.

The average length of stay was 3.7 nights per person-trip and about 20% of the visitors used commercial accommodations. These figures compare favourably to the national average of 15% choosing commercial hostelries (ibid, 3).

Ottawa in 1980 attracted a higher proportion of older visitors. Sixteen percent were 65 years or older and only 25% were under 25 years (ibid, 5). In comparison, the national averages were 12% and 28% respectively. Once more this study confirmed that demographically the visitor to the capital had a higher education and a greater income than the average Canadian.

Clearly, these five studies have produced a great deal of data describing visitors to Ottawa. Information on trip length and duration and where they are most likely to find lodging was produced in each study. There are discrepancies between the findings in each study, but these can be explained in terms of sampling methodology and time frames.

Unfortunately, all the studies have only given accommodation selection a cursory look, having done little or nothing to isolate and study the segment of the travelling population that chooses commercial lodging. The 1976 Carleton University study was the only project to draw some conclusions about accommodation usage.

At best, therefore, these surveys can be used to provide background information to this study. The results from this study can be compared to those of the previous works to see if users of differing qualities of commercial lodging vary a great deal from the general characteristics of visitors to Ottawa.

2.3 User Characteristics

The preceding section offers a reasonably precise description of summer visitor traits and characteristics. A shortcoming of all the Ottawa studies from the point of view of this project is, however, that none of them have attempted to isolate and study users of various types of accommodation, non-commercial lodging, friends and relatives or commercial facilities such as hotels, motels, campgrounds or hostels. The Carleton University study dealt very briefly with the likelihood of certain types of facilities being used, but otherwise did not look at the commercial hostelry industry in Ottawa.

To date, little has been published concerning the characteristics of users of commercial accommodation in general, and even less has been written about the decision-making factors involved in the selection process. A composite picture can be drawn from existing literature, however, describing the general characteristics of such guests.

The travelling public can be placed in three broad categories; domestic pleasure travellers, domestic business travellers, and international travellers. Domestic pleasure travellers are affluent, may be male or female, and generally tend to be young. Business travellers, on the other hand, are predominantly male, young, affluent, and are more likely to hold white collar jobs. International travellers are quite similar to domestic pleasure travellers in that they are affluent and again equally likely to be either male or female. Unlike domestic pleasure travellers, however, there is no one dominant age group.

A study of 689 hotel and motel users in 1974, conducted by the School of Hotel Administration, Cornell University, found that 68.7% of their study group had at least one university degree and that 88.6% had attended some university. Further, 68% of the sample reported

incomes of \$20,000 or more. The sample group was predominantly married and over 70% of the sample was between 29-54 years old (Cornell, 1975, 4). Most trips taken were business-related (86.5%) (ibid, 6). The results of this study are very highly skewed towards the upper end of the socio-economic spectrum. This finding may be more indicative of the type of person who responded to the questionnaire rather than of the actual type of guest staying at the inns. The researchers acquired guest lists from 24 hotels and motels throughout the U.S. and mailed 3,451 surveys to the former guests. The 689 questionnaires returned represented a response rate of 19.9% which, while acceptable for a self-response survey, seems rather low to definitively state that the findings are entirely representative of all guests (ibid, 27).

E.J. Mayo, of the Department of Marketing at the University of Notre Dame, investigated the accommodation price/value decisions of auto vacationers in the United States in the summer of 1973 (Mayo, 1974). He distributed questionnaires to people in the midst of their vacations at 24 sites across the U.S. The respondents were asked to complete and return them after finishing their trip. Twenty seven percent of the sample, or 748 surveys, were returned (ibid, 1974, 1).

The primary goal of the study was to investigate the motivations and attitudes of summer travellers in choosing overnight accommodation. Mayo, however, also gathered extensive demographic data about his study group. He similarly discovered that the auto vacationer represented an "upscale" market. About 54% of his sample had either attended or graduated from university; the U.S. national average was 21%. Again over half (55%) were either self-employed or worked in the professional/managerial field, compared to the national average of 25%, and 51% earned over \$15,000 (national average 22%) (ibid, 1). Mayo further discovered that the typical auto traveller was a family man, travelling with his wife and an average of two children. The

trips generally lasted slightly over 10 days (ibid, 13). One can conclude that the average American auto vacationer is well educated, fairly affluent and employed in highly skilled jobs. His findings confirm virtually all the evidence from the preceding literature on visitor patterns.

One can further speculate that because of his background and general financial well-being, the auto vacationer is aware of the different types of accommodation available to him and would, therefore, base his selection on factors other than price alone.

2.4 Accommodation Preferences

Most travellers enjoy a large, varied choice in the type of accommodations available to them. They can opt for simple hostels or campgrounds, where they must supply most of their own needs, to full service hotels catering to all their needs, and to all types of lodging in between. What factors affect their decision-making process? Mayo discovered that the average auto traveller behaved much like any rational consumer, trying to get the best value for his accommodation dollar (ibid, 24). He states, "the average auto traveller is a price conscious consumer... he feels that the price is generally an accurate reflection of the value... he has more confidence in well known brands than in lesser known brands" (ibid, 11).

The potential user presumably calculates the desirability of a prospective hostelry by computing a mental tally of the value he feels he will receive for the price he will pay. Different types of travellers, business, pleasure, family, etc., have different sets of criteria.

In almost all cases, however, the first factor considered when forming this equation was price. Vacationers established an upper limit of what they were willing to pay for lodging and kept to it.

Those in the most advantageous stage of life, between 34-45 years old, generally paid the highest rates, while the youngest and oldest travellers paid the least (ibid, 21). Interestingly, there was very little correlation between the price paid and the income or occupation of the user. People felt that a vacation was an adventure, a change of scenery and a change of pace and were, as a result, willing to treat themselves in a more luxurious manner than they would normally have done at home (Mayo, 1974).

There was a stronger relationship, however, between price paid and trip purpose. Business travellers, especially salesmen, on full expense accounts generally pay the most (ibid, 21). Similarly, those on short term vacations generally paid higher rates than people who were planning on being away from home for longer periods. People travelled with a vacation budget. On longer trips they saved money by choosing less expensive lodging.

The vacationer's perception of what he wanted from his lodging also dictated the price he was willing to pay. Some travellers considered their room only as a place to lay their head, and therefore neither needed nor wanted all the frills. On the other hand, the amenities offered by some establishments such as colour televisions, room service, air conditioning, dining and recreation facilities were important to those who felt the hotel or motel was an integral part of their trip.

Although price rated very highly, few travellers in Mayo's study expressed an interest in paying as little as possible for lodging. Less than one third of his sample solely assessed the cost when deciding upon the type of facility chosen. What they were more interested in was the value of accommodation they received for the price they paid. Moderately priced facilities with a range of services were preferred to truly budget priced places offering few amenities.

There are many factors that determine the users' value perceptions when deciding upon a room. Mayo (1973), Rushmore (1978) and Cornell University (1975) have all assessed the importance of certain criteria in the decision-making process. Tables 2.4.1, 2.4.2 and 2.4.3 summarize their findings.

TABLE 2.4.1

Relative Importance of Motel-Choice Variables
(from Mayo, 1974, 31)

Variable	Mean Rating	Variable	Mean Rating
1. Moderately Priced	1.52	8. Swimming Pool Available	2.31
2. Not too far from main route	1.75	9. Restaurant Facilities	2.35
3. Convenient Parking	1.73	10. Close to Gas Station	2.78
4. Quiet Setting	1.98	11. Close to Fast-Food Restaurant	2.83
5. Room Size & Decor	2.04	12. No Charge for Children	2.84
6. Close to Tourist Attraction	2.16	13. Colour TV Available	2.85
7. Attractive Setting	2.18	14. Late Check-Out Time	2.96
		15. Accept Credit Cards	2.96

TABLE 2.4.2

Customer Preferences (In Order of Preference)
(from Rushmore, 1978, 39)

Type of Traveller	Type of Accommodation		
	Economy	Standard	Luxury
Vacationer	1 Price	Amenities	Image
	2 Amenities	Quality	Amenities
	3 Quality	Price	Quality
	4 Management	Image	Management
	5 Travel Time	Management	Travel Time
	6 Image	Travel Time	Price
Commercial	1 Price	Travel Time	Image
	2 Travel Time	Quality	Quality
	3 Quality	Price	Management
	4 Management	Image	Travel Time
	5 Amenities	Management	Amenities
	6 Image	Amenities	Price

Table 2.4.3

Ranking of Attributes Important to the Selection of a Motel/Hotel

RANKING OF ATTRIBUTES IMPORTANT TO THE SELECTION OF A MOTEL/HOTEL				
RANKING INDEX	BUSINESS TRIPS	CONVENTION MEETING CONFERENCE	PERSONAL BUSINESS	PLEASURE
12.00	LOCATION	LOCATION	LOCATION	
11			PRICE/VALUE	PRICE/VALUE LOCATION FURNISHINGS
10	FURNISHINGS PRICE/VALUE	FURNISHINGS PRICE/VALUE REPUTATION	FURNISHINGS	REPUTATION FOOD & BEVERAGE
9	REPUTATION FOOD & BEVERAGE	FOOD & BEVERAGE	FOOD & BEVERAGE REPUTATION	RECREATION SIZE OF ROOM
8	SIZE OF ROOM	SIZE OF ROOM		
7	SECURITY PARKING COLOR TV CLIENTELE WORK SPACE	SECURITY WORK SPACE PARKING CLIENTELE RECREATION COLOR TV	SIZE OF ROOM SECURITY PARKING COLOR TV CLIENTELE RECREATION WORK SPACE	SECURITY PARKING COLOR TV CLIENTELE
5	RECREATION			
3				WORK SPACE
2				
1				
0				
OTHER	10.67 24 HR. SWITCHBOARD COMPANY ROOM CLEANLINESS GUARANTEED RESERVATION	10.92 CLEANLINESS MEETING SERVICE	11.70 CLEANLINESS SERVICE DESIRE TO PLEASE	9.76 CLEANLINESS SERVICE POOL DESIRE TO PLEASE

from Cornell University, 1975, 11.

Other than price, the most important factor was the locale of the facility. Both business and pleasure travellers stated a strong preference for a "good" locale. The definition of a good locale depended on the needs of the user. It could be either close to a major attraction, or proximate to a major transitway. Nonetheless, locale was rated as the most important feature in the Cornell study (Table 2.4.3) for business, personal business and convention travellers and rated a close second behind price/value for pleasure travellers. Proximity to a major thoroughfare or to a major attraction were both rated in the top six factors of the Mayo study (Table 2.4.1).

Next, for people who did not reserve their room prior to their trip, the physical appearance of the potential hostelry rated highly in all the studies. The traveller's initial choice was based on the physical appearance of the building. Was it attractive and well maintained? If not he dismissed it immediately, if so he may have decided to investigate further. After deciding that indeed he wanted to spend the night, he then entered the building and the next features inspected were the front foyer, then the room, and finally the wash-room. He then decided if the furnishings were attractive, whether the place had a neat, clean appearance, and how well maintained it was. Only after having considered these variables did the traveller decide for or against staying there.

Mayo discovered that chain or affiliated establishments generally held a wide edge over independents in perceived cleanliness. The reason many people stayed at chains was that they felt they knew what type of accommodation experience to expect (Mayo, 1974, 35).

In addition to the cleanliness and room decor, the physical amenities and services greatly influenced the price/value decision. At the end of a long, hot day a swimming pool was extremely attractive

to a family. On the other hand, business travellers rated a television as well as work space very highly.

Services offered and the desire of the staff to please the customer reflected the overall management attitude toward its clientele. These were the most important "intangibles" influencing the perceived value of the lodging. Vacationers, especially, seek a change of pace from their normal lives and appreciate being pampered by an attentive staff. It is human nature that people like to feel important. Facilities that recognize this factor often leave their clientele with a good feeling.

Further, the type of clientele that is attracted to a certain facility tends to induce other people having similar characteristics to stay there. For example, business travellers are not generally attracted to youth hostels, while young overseas visitors are. This feature is especially true in the lower quality facilities, small motels, hostels and certain campgrounds.

Any services that are found associated with, or in close proximity to an establishment can enhance its attractability. Restaurants, bars and nightclubs are most common, but some major hotel complexes such as the Holiday Inn Ottawa-Centre also have shopping concourses attached to them.

Whether or not a hotel or motel is affiliated to a chain or franchise further affects the perceived value of the facility. As stated previously, a guest at a chain has certain expectations associated with that hospitality. Holiday Inn's "guarantee of satisfaction or your money refunded" policy is one example. Moreover, people believe that a chain offers a dependable product that is superior to that offered by independents, in respect to cleanliness, decor, service, etc. They are willing to pay higher rates for this.

Furthermore, chains generally offer easy advanced-booking procedures. Again, some people are prepared to pay for the privilege of having an assured bed when they arrive in a strange city. This situation applies especially during the peak season when rooms are often scarce. Mayo discovered that the preference for chain facilities increased with the client's income, education and somewhat surprisingly (to the author) with party size (ibid, 55, 63, 68).

Independents, on the other hand, were perceived to offer a more personalized, friendly atmosphere at lower rates. Independents were preferred over chains and franchises during longer trips, primarily because they charged lower rates. Indeed, Mayo discovered that while 95% of those staying in chains preferred them to independents, 40% of his sample staying in independent facilities would have preferred chains (ibid, 55). Since the mid-1960's in the U.S., "the number of non-affiliated hotels and motels has been rapidly declining... the majority of these hostelries are now bordering on economic obsolescence" (Rushmore, 1978, 35). This trend is not evident in Ottawa, however, as there are many profitable large independent facilities such as the Chimo Inns, the Lord Elgin Hotel, Webb's Motel and the Bayshore Hotel.

There are other factors that influence accommodation selection to lesser degrees. These include the availability of parking, room security, twenty-four hour service, proximity to gas stations, late checkout times, payment by credit card and the availability of direct dial phones.

In general, therefore, the potential client assesses each facility to ascertain whether or not it meets his needs and whether or not he feels he is getting good value for his travel dollar. Different types of travellers, i.e. businessmen versus vacationers, have different accommodation needs as outlined by Rushmore (1978, 39). Further-

more, no two travellers have identical rating criteria. The selection of commercial lodging is, clearly, a very personal matter.

2.5 Overview of the Commercial Hostelry Industry in Ottawa

There are over 50 hotels and motels in Ottawa listed in the 1982 Accommodation: Facilities, Rates, Tourist Information, Farm Vacations guidebook jointly published by the Province of Ontario and Tourism Ontario Inc. In addition to these there are a number of facilities not listed, bed and breakfasts, tourist homes, hostels, residences and seasonally operated campgrounds. The summer visitor to this region, therefore, can select from well over 70 different establishments.

In virtually every other city in Canada, the hotel industry enjoys a peak season of three months, June, July and August. Ottawa presents a unique situation, however, as the operators can look to a 6 month long peak period from May to October. May, September and October historically are the three busiest months followed by June, July, August (Laventhal & Horwath, 1976, 9). Even during off peak time the hotels enjoy a very stable business. As Laventhal and Horwath state,

...government activity provides relatively consistent demand for accommodations in the city and increases in room supply have been generally absorbed due primarily to growth in government related travel... Hotels are generally full during the Tuesday to Thursday period of the business week throughout most of the year (ibid, 9).

The motel, hostel and camping trades are more dependent on the summer traveller. Consequently their peak season is generally confined to June, July and August.

Figures released for the first nine months of 1982 by the Greater Ottawa Hotel and Motel Association illustrate the occupancy

rates of its member establishments. These data along with the average room rates charged is summarized in Table 2.5.1.

TABLE 2.5.1
Ottawa Monthly Occupancy Rates and Average Room Rate Charged
January-September 1982

<u>Month</u>	<u>Occupancy Rate (%)</u>	<u>Average Room Rate</u>
January	51.13	\$46.18
February	63.38	\$46.60
March	63.86	\$47.02
April	63.27	\$47.65
May	84.15	\$49.23
June	77.36	\$46.33
July	77.71	\$49.96
August	75.25	\$48.17
September	76.77	\$49.97

It is readily evident that even though June, July and August do not represent the busiest months, their impact on the overall well being of the local industry is immense. It must be noted that these figures represent a compendium of both hotel and motel usage, while the information published by Laventhal and Horwath deals strictly with the hotel industry.

According to Laventhal and Horwath (1980) the average monthly total room occupancy rate peaked in 1977 and 1978. Since then it has been in a moderate decline. They feel this decline is due in part to the two most recent federal elections, in 1979 and 1980, as well as concerted federal effort to decentralize the civil service, and in part by the recent introduction of a number of first class hotel rooms, Hotel Plaza de la Chaudière in Hull in particular.

According to Mr. Neil Powell (pers. com.), the president of the Greater Ottawa Hotel and Motel Association, 1982 was a fairly typical summer, although business may have been down "a touch". He felt the primary reason for the slight softening of the market was due to the state of the economy. The poor weather in June and August had little effect according to Powell. Overall, the feeling is that the future is bright for the accommodation industry in Ottawa. There are major hotels planned or under construction. Since July 1982 two new hotels, Howard Johnson's and the Roxborough, have opened in the downtown core. There is also a major hotel being built as part of the Rideau Centre Complex and plans are underway to develop a large hotel to service the airport.

The most pressing concern Mr. Powell has is the wide variety of standards among certain motels in the city. He feels an upgrading of the sub-standard facilities would have an overall beneficial effect on the reputation of the hostelry industry as a whole.

During the summer months the clientele profile changes significantly from that of the rest of the year. Business travel, which forms the foundation of the industry, declines and is supplanted by an influx of pleasure travellers. There is no hard data available indicating the extent of this shift, but in the early stages of this project virtually every hotel and many of the motels that were approached said that the summer trade was atypical of their annual business. These facilities knew their business clients fairly well, where they came from, how long they stayed, etc. They did not, however, know very much about their summer trade.

Generally, the commercial accommodation industry in Ottawa is fairly healthy. It appears to be withstanding the recession and is actively planning for future growth. The backbone of the industry is the business traveller. Summer vacationers, however, form a very

important and relatively unknown market that not only replaces the loss of business trade in June, July and August but also injects significant capital into the local economy.

2.6 Summary

The preceding chapter has served to introduce the reader to some of the data produced on tourism in Canada, Ontario and Ottawa, as well as summarizing the existing literature on accommodation preferences and decision making factors. It has also served to illustrate the lack of research specifically pertaining to the problem identified, notably the differences in the characteristics of users of different qualities of accommodation, and the motivating factors behind the selection process. The CGOT studies, as well as the four studies specifically examining summer visitors to Ottawa, have discussed visitor patterns, but unfortunately have only peripherally touched on the above problems. As such they serve only as an outline in which to frame this study. Other research has investigated this problem more directly, but has made no distinction between the different qualities of accommodation offered within a region.

CHAPTER 3

SURVEY METHODOLOGY

3.1 Introduction

Before the questions raised in Chapter 1 could be investigated, a suitable research methodology had to be decided upon. Three fundamental problems had to be overcome prior to data collection. These were: arriving at a suitable rating system for the participating establishments; deciding upon a suitable sampling methodology; and developing and testing the questionnaire. Further, a method of analysis had to be determined. Chapter 3 discusses the research methodology involved and Chapter 4 discusses the data collection and statistical analytical techniques used.

3.2 Rating Systems

One of the major logistical problems encountered in devising this study was the lack of an all-encompassing, uniform rating system of the accommodations available in the Ottawa area. This problem is not unique to Ottawa nor indeed to Canada. During the past 60 years over 100 classification/rating systems worldwide have been designed to assess accommodation qualities (TOI, 1975, 2). All have employed slightly different techniques and all have met with varying degrees of success. Simplistic methods, such as those used by "Fodors" and "Exxon" base their rating solely on the price of the lodging. For those who wish only to know the cost this system is valid, but clearly cannot take into consideration the value of the lodging in comparison to the price paid. Others, like Les Guides Bleus, a French publica-

tion, utilize a more complex system incorporating price, facilities, services offered, restaurants and entertainment, etc. to rate a facility. This is somewhat better, but it does not differentiate between different types of lodging. As such it is biased heavily in favour of full service hotels. Motor hotels and motels that in their own right may offer excellent accommodations receive lower ratings because they do not attempt to offer the same accommodation experiences as major hotels.

On the other hand, Tourism Ontario Inc. (TOI) and the Canadian Automobile Association (CAA) stratify varying hostelries into similar categories when assessing the quality of accommodation. This eliminates face-to-face comparisons between different types of facilities while enabling the potential user to form a valid opinion of each operation. For example, it is unfair to compare two four-star facilities such as a roadside motel like Webb's Motel with a luxury downtown hotel like the Chateau Laurier, for each clearly offers a different accommodation experience and caters to a different sector of the market. Yet, in their own right, each offers excellent accommodations.

In order to meet the need of a standardized classification system, Tourism Ontario Inc., a non-profit private federation composed of hospitality and travel associations, has endeavoured to organize a voluntary evaluation and rating system for all types of accommodation in the province. Their system

...offers an objective analysis of measurable qualitative (cleanliness and state or repair) and quantitative (physical facilities and guest services) criteria in nine distinct property categories. (TOI, 1979, 7).

The results are then published using a five star system. In order to achieve a certain star rating an establishment must meet the minimum requirements specified for that category.

The inspection includes such items as phone service, room furniture (quality and quantity), beds, linens, the cleanliness and state of repair of both the establishment and the room itself, availability of food outlets, beverage rooms, parking facilities, and so on.

Four of the nine categories specified by Tourism Ontario Inc. may be found in the Ottawa area. These are large hotels (located in the core area, having more than 100 rooms, food and beverage outlets and having access to the room exclusively from an interior hallway), small hotels (the same criteria as large hotels but having less than 100 rooms), motor hotels (located on a major highway, having less than 300 rooms and including at least one licensed food outlet) and motels (fewer than one hundred rooms, located on a highway and may or may not offer dining services).

The inspection is done strictly on a voluntary basis by the hotel or motel staff itself. To date, response to this program has been poor. In the 1982 edition of the Accommodations: Facilities, Rates, Tourist Information, Farm Vacations booklet produced jointly by the Ontario Government and Tourism Ontario Inc., only 11 of the 50 hotels, motels and motor hotels in the Ottawa area had submitted themselves to an inspection. It is possible that since this program is relatively new, not all facilities have had time to complete their self-assessment. It may also indicate, however, that there are a number of operations that are apprehensive of any rating system for fear that they will score poorly. Does it not look better for a facility to be listed as unrated rather than to carry a 1 star rating?

One method to overcome this problem of self assessment and lack of co-operation is to have an independent agency rate the accommodations available in an area. In North America, the most widely known and highly respected organization is the American Automobile Association/Canadian Automobile Association (AAA/CAA). This service organization employs over 50 full-time field representatives to inspect various accommodation and restaurant facilities throughout the United States and Canada. The CAA and AAA annually produce a guide of all the hostelrys that meet their rigorous standards. If a facility is not listed it is because it did not meet their standards, not because it chose not to be studied. They employ a five diamond rating system ranging from one diamond, indicating that the operation has met the basic requirements for accommodation, to five diamonds, which is reserved for exceptional properties with superior guest facilities, services and atmosphere. Incidentally, Ottawa does not have any five diamond facilities.

Like Tourism Ontario Inc., the CAA rates each type of facility against other similar types of operations, dividing the hostelry market into 10 distinct categories. The field representative is responsible for an annual inspection of the facility, assessing each one according to its decor, physical appearance, cleanliness, exterior appearance, room layout, security, ventilation, bedding size and linens, washroom facilities, caliber of management provided, etc.

Both the CAA and Tourism Ontario Inc. utilize a comparative rating system. Similar types of accommodation are compared to each other. Thus, motels are compared to motels, and hotels to hotels. It is unwise, therefore, to make definitive comparisons of different types of accommodations. One cannot state with full confidence, for example, that because both Webb's Motel on Carling Avenue (an 80 room motel) and the Holiday Inn - Ottawa Centre (a major urban luxury, highrise hotel) are rated at four stars that they will each offer their clientele the same lodging experience.

TABLE 3.2.1

Ratings of Participating Hotels, Motels, Campground and Hostel

Facility Name	Exxon* Travel Club	Fodors 1982	Les Guides Bleus	CAA	Tourism Ontario Inc	Final Composite Rating
Aristocrat Apt Hotel			9999	ddd		***
Bayshore Hotel	M			dd		**
Chimo Inns		Moderate- Expensive	9999	dddd	***	****
Holiday Inn Market Sq.	H		9999	ddd		***
Holiday Inn Ottawa Ctr.	HH	Expensive	9999	dddd	****	****
Journeys End Motel°				ddd		***
Lord Elgin Hotel	M	Moderate	999	ddd	***	***
Macies Ottawan Flag Inn	M			ddd	***	***
Ottawa Youth Hostel						*
NCC Camping Lebreton						*

° Journeys End Motels was under construction when the 1980 CAA listing was produced, however in their 1983 guide it will receive a three diamond rating.

TABLE 3.2.1 (cont'd)

Ratings of Participating Hotels, Motels, Campground and Hostel

Facility Name	Exxon* Travel Club	Fodors 1982	Les Guides Bleus	CAA	Tourism Ontario Inc	Final Composite Rating
Southway Motel						**
Stardust Motel			99			**
Talisman Motor Hotel	H	Expensive	9999	dddd	****	****
Townhouse Motor Hotel	M		99	dd	***	**
Webb's Motel	M			ddd	****	****

* M - Moderate
H - Expensive
HH - Very Expensive

What can be concluded from the star rating, however, is that since both operations are rated very highly they will offer their guests among the best quality lodging in their respective classes. The intent of this study is to investigate why people choose different qualities of accommodation and not why they prefer different types of hostelries. For this reason both the Holiday Inn Ottawa Centre and Webb's Motel are included in the same category.

As indicated in the preceding pages, no one rating system has been devised that is universally accepted by the accommodation industry. Some have intrinsic biases based on their rating methodology, others have met with little success because of a lack of co-operation from the industry. Further, facilities such as campgrounds, university residences, YMCA's and hostels are rarely rated because they are not part of the mainstream of the hostelry industry. In order to arrive at a workable rating system for the places studied in this paper, it has been necessary to create an arbitrary score based on a synthesis of the existing rating supplied by the CAA, Tourism Ontario Inc., Les Guides Bleus, the Exxon Travel Club and Fodors Canada. Table 3.2.1 summarizes the existing rates of each operation and also indicates the composite rate assigned to each one for the purpose of this study.

Beginning in the spring of 1982, 36 facilities offering commercial accommodation were approached to see if they would co-operate in this study. These 36 were representative of the range of accommodations available in the Ottawa area, encompassing no-frills campgrounds to hostels to simple motels, motor hotels and finally to large luxury hotels. Seventeen operations eventually agreed to participate in this study, and 15 returned completed surveys.

The facilities that agreed to co-operate in this study represent the varying qualities of accommodation available in the Ottawa market.

The Ottawa Youth Hostel and the NCC Camping Lebreton are the two best known inexpensive no-frills hostelries in the city. They offer spartan lodging with basic conveniences. Camping Lebreton offers shower facilities only, while the youth hostel offers showers, a common room, a bed and an inexpensive breakfast. The Stardust and Southway motels are typical of small roadside motels. The rooms are small, offering a bed, colour television and a bath. There are no eating facilities available. The Townhouse, Macies Ottawan, the Journey's End and Webb's motels offer the traveller somewhat better quality motel facilities. Each has larger rooms with better furnishings and has an eating facility either affiliated with the establishment or adjacent to it. The Holiday Inn Market Square and the Talisman Motor Hotel offer their clientele fairly luxurious settings in a motor hotel mode. The rooms are well furnished and the facilities offer their guests many amenities. Further, there are on-site eating establishments and bars. The Bayshore, Lord Elgin, Aristocrat, Holiday Inn Ottawa Centre and the Chimo Inns are representative of the varying qualities of hotel accommodations available to the traveller. Table 3.2.2 summarizes the rating assigned to each facility involved in this study.

TABLE 3.2.2
Hostelry Rating

1*	2*	3*	4*
NCC Camping	Townhouse	Holiday Inn M.Sq.	Talisman
Lebreton	Bayshore	Aristocrat	Webbs Motel
	Stardust	Macies Ottawan	Chimo Inns
Ottawa Youth	Southway	Journeys End	Holiday Inn Ctr.
Hostel		Lord Elgin	

3.3 Sampling Methodology

A suitable sampling methodology was required to ensure ample representation from each of the 4 strata identified. The four previous studies investigating the habits and patterns of visitors to Ottawa, as discussed in Chapter 2, employed a stratified non-probability sampling technique based on a sample of adults who were interviewed at specific pre-determined sites in the core area. This type of study, by design, is not truly random, and therefore of questionable value for probability based statistical analysis. It does, however, permit the researcher to acquire an insight into the population as a whole and thus allows him to derive results that may be suggestive of overall patterns (NCC, 1980, 13; 1982, 8) and is, therefore, a valid methodology when one is interested in looking at general trends and patterns.

This study, on the other hand, presupposes a detailed study of four clearly defined strata and, as such, requires a sampling technique that will ensure a sizeable representation from each group. This method is commonly known as a "disproportionate stratification quota" sampling system (Hoinville, et al, 1978, 64). The researcher, after having decided on the number of strata to be investigated, sets out to acquire an acceptable sample from each area. In this way, each sub-group is assured adequate representation while a large overall sample is acquired.

There are some innate problems with this technique, however, that must be recognized. First, since there was no attempt to acquire a random sample of the population it is impossible to acquire a normal distribution of the population. As such, strict quantitative statistical analysis cannot be performed on the data. One can, however, use non-parametric statistical techniques to analyze these data to describe trends and patterns that emerge. Further, this type of methodology runs the risk of bias, especially when the researcher

tries to extrapolate general trends from the entire data-base without properly weighing the results (Hoinville, et al, 1978; Moser, 1971, 85; Kalton, 1970, 118; Kish, 1967, 56). For example, approximately 40 percent of the respondents in this survey stayed at either the Ottawa Youth Hostel or the NCC Camping Lebreton. It would be erroneous to suggest though that 40 percent of all visitors to Ottawa used this type of lodging and to therefore draw conclusions about all summer visitors to the city. Indeed these people represent probably less than 5% of all visitors to the National Capital Region and any conclusions about them would have to be strongly down-weighted to be able to validly include them in any overall conclusions about the commercial accommodation industry. One can, however, formulate valid judgments about those who chose to stay at this type of facility.

This sampling methodology is most practical when one wishes to make comparisons among clearly defined groups that comprise a continuum. It is also a valid sampling technique when there is little available empirical data and when funds are in short supply. It ensures that enough data will be acquired for each section to be studied, greatly enhancing the chances of the objectives of the study being met (IUTO, 136). Since the intent of this project is to investigate users of different qualities of commercial accommodations in Ottawa, it was felt that this sampling technique was appropriate.

To this end a total of 17 different hotels, motels, motor hotels, hostels and campgrounds agreed to participate and 15 eventually returned completed questionnaires. This number represents four 4 star facilities, five 3 star hostelries, five 2 star motels and hotels and two facilities that offer minimal services. These are listed in Tables 3.2.1 and 3.2.2.

The front office personnel in each establishment were instructed to distribute between 30 and 75 questionnaires weekly to a cross-

section of their guests. The number of surveys to be distributed depended on the size of the establishment and the number of facilities in each stratum. Ideally, three hundred useful completed questionnaires were sought from each group.

3.4 Questionnaire Development and Distribution

A self-response survey was judged to be the most practical method of questioning the guests (Hoinville, et al, 1978; Kish, 1967, MacLean & Genn, 1979). This type of survey is divided into two parts, the covering letter and the survey itself. The covering letter is the only motivational tool at the surveyor's disposal and is, therefore, crucial to the success or failure of the entire project. It must be short, yet complete. The aims and objectives of the study must be clearly stated, as well as a statement indicating the importance of response to the study. Furthermore, assurances of confidentiality must be made. In format, short paragraphs using simple sentences achieve the best results.

There are a number of inherent problems in preparing the questionnaire itself that can be reduced through careful planning. First, the researcher must rely on the respondent accurately completing the survey. The only instruction and guidelines he receives are in the form of simple written rules. There is by definition no human contact. Thus instructions as well as the questions must be simple and straight-forward. Complex questions and concepts may not be adequately explained and as such are often inaccurately or incompletely answered (MacLean & Genn, 1979; Moser & Kelton, 1971, 303).

Similarly, open-ended questions meet with low response rates. Qualitative questions should be quantified in some way. One solution is to include a graded quality scale as a method of response. For example, a question such as "how satisfied are you with your lodging?" can be answered on a 5 point sliding scale with "1" representing "not satisfied" to "5" representing "totally fulfilled".

Since there is no guidance from the researcher when the questionnaire is being completed the respondent has a free hand not to be entirely truthful in his answers. One can never be certain if the completed form is factual or simply a figment of the respondent's imagination. This situation also applies when the researcher is present, but to a much lesser degree. It is assumed that a large enough sample of valid replies will be gathered to make such fallacious responses insignificant in the overall study.

Finally, the order of the questions is important. Personal questions regarding ages, incomes, occupations etc. are vital to the overall success of all demographic studies, yet are the ones least likely to be answered. Highest response rates have been achieved when these questions have been placed in the middle or at the end of the survey after the interviewee's apprehensions have been eased (Moser & Kelton, 1971; Survey Research, 1976).

The overall success or failure of the proposed study ultimately depends on the response rate of the survey. An attractive, easy to read, simple to follow, straightforward questionnaire preceded by a letter making the potential respondent want to answer the questions will lead to a high return rate. Any return rate of greater than 25% is considered acceptable for this type of survey (Hoinville et al, 1978).

This study sought information about visitors' demographic characteristics, travel and expenditure patterns, and reasons for selecting a certain facility. To this end a 21-question, 48-answer survey was produced (Appendix 1). The questions were devised in part from the Mayo (1974), Cornell (1975) and Rushmore (1978) studies, in part from personal discussions with the management of the participating hotels, motels, hostel and campground, and in part from other literature sources. The first nine questions sought general informa-

tion about the traveller's point of origin, expected trip length and length of stay in Ottawa, the purpose of the trip, travel party size, ages and sex, and the mode of transportation used. The following five questions asked the visitor how and why the hostelry was selected, as well as seeking information on the satisfaction with the facility and whether the respondent was spending more or less for it than expected. This section also included a question with a list of fourteen features common to all hotels, motels, campgrounds or hostels. The guest was asked to rate how important each feature was in his or her overall selection. Features such as reputation, services provided, pool and recreational facilities, locale, cleanliness, price, etc. were included. The guests rated them on a 0 (not applicable) to 5 (very important) scale. The intent of this question was to look at some of the factors that affected the decision making process of the user and to investigate whether or not there were differences in the priorities of users of different qualities of lodging.

This section was followed by three questions asking about their expected expenditures while in Ottawa and the method of payment. The final four questions sought information about the respondent's occupation, income and education.

The questionnaire package consisted of the questionnaire itself (English on one side, French on the reverse), a bilingual covering letter on Carleton University letterhead (explaining the intent of the study and assuring confidentiality), an addressed envelope in which to place the questionnaire after completion, and a complimentary brochure (restaurant guide or city map) to act as an inducement for the person to complete the survey.

During the first two weeks of June 1982, a pre-test was run at the Ottawa Youth Hostel and the Lord Elgin Hotel. Minor revisions were then made to the questionnaire and covering letter. The survey

proper began on July 18, 1982 and ran for six weeks to September 6. This period covered the height of the tourist season and included the August 1 and the Labour Day long weekends.

Two thousand questionnaires were distributed to seventeen establishments throughout this period. By the end of the study 1,513 of them had been handed out to guests. Four hundred and eighty-seven of them had not been dispensed by the co-operating establishments.

The front desk personnel were asked to select a cross section of guests at random, and offer them a questionnaire. They would then take five to ten minutes to complete the forms, place them in the envelope and return them to the front desk. The management at each facility was given written instructions as to how the survey should be distributed. They could then choose to distribute it in that manner, or not to.

CHAPTER 4

DATA ACQUISITION AND ANALYSIS TECHNIQUES

4.1 Response Rate

A total of 501 useful questionnaires were returned, representing a completion rate of 33.05 percent, very acceptable for a self-response type of survey. Surveys that were only partially completed (i.e. one page only) or those lacking specific information such as point of origin and in some cases the name of the hostelry, are not included in this figure. Furthermore, when more than one questionnaire was obviously completed by the same immediate travel party only one survey was included. This situation occurred primarily at the NCC Camping Lebreton and occasionally at the youth hostel. Where it was not clearly obvious that more than one person in the party had completed the forms then all questionnaires were included.

The response rate varied tremendously according to the type of facility selected. Table 4.1.1 summarizes the number of returns per establishment.

Fifteen of the seventeen places that initially agreed to assist in this study had at least one questionnaire returned by their guests. Two two star places, for varying reasons, did not return any completed questionnaires. One encountered negative feedback from its guests when the survey was distributed and after two weeks decided to discontinue the study. The other simply did not attempt to distribute any

surveys at all. The analysis of the results will not include these two establishments.

TABLE 4.1.1
Number of Completed Questionnaires Per Establishment

Aristocrat	3
Bayshore Hotel	11
Chimo Inns	70
Holiday Inn Market Sq.	30
Holiday Inn Ottawa Ctr.	42
Lord Elgin Hotel	37
Macies Ottawan	17
Ottawa Youth Hostel	127
Stardust Motel	1
Southway Motel	3
Talisman Motor Inn	25
Townhouse Motor Hotel	7
Webb's Motel	43
NCC Camping Lebreton	68
Journeys End Motels	<u>17</u>
Total	501

The survey met with varying degrees of success at the other fifteen facilities. It seemed that the hostelrys that were the most interested in seeing the results, the Ottawa Youth Hostel, Camping Lebreton and the Chimo Inns, enjoyed the highest return rate from their guests. On the other hand, those places that were either reluctant to join in the survey or that did not express a great deal of enthusiasm encountered poor response rates.

Furthermore, the distribution of the returns by star ratings (Table 4.2.2) reveals that there was a very small sample from the 2

star facilities while the other strata produced adequate results. The loss of 137 potential rooms due to the withdrawal of two two star hostelrys severely limited the results from this stratum.

TABLE 4.1.2
Number of Responses by Star Rating

1*	195
2*	22
3*	104
4*	180

These results could possibly reflect the type of traveler staying at the various types of facilities, but it seems likely that the number of responses is directly related to the attitude of the management toward the survey. The Ottawa Youth Hostel and Camping Lebreton are always interested in acquiring information about their guests and are therefore generally responsive to this type of survey. The major three and four star hotels and motels in Ottawa that agreed to assist in this project were found, for the most part, to have progressive managements that felt they could derive some benefits from this study. The smaller motels, on the other hand, expressed limited interest in the project from the outset. During the planning stages of this paper the greatest difficulty was encountered in trying to convince these operations of the benefits that would accrue from the study. Many of those who eventually agreed to participate did so somewhat halfheartedly.

At any rate, the 501 responses received from the four strata represent an acceptable overall sample size. Patterns may be discerned from the data for the various qualities of accommodation studied. There is, however, one caveat. There were only 22 replies from guests staying at two star facilities. It is impossible to draw

definitive conclusions for that group. A sample of that size can be skewed by one respondent at the extreme, who may not be representative. For example, one respondent originated in Algeria. It would be absurd to assume that 4.5% of all guests using moderate accommodations in Ottawa are Algerian. As such, any results produced for the two star data should be considered as being representative of the data collected and not necessarily as being typical of the guests of all two star motels and hotels.

4.2 Sample Techniques

Because of the sampling methodology it is erroneous to attempt to draw conclusions about tourism in Ottawa in general from this study. Table 4.2.1 illustrates that even among the four strata studied there was a disproportionate distribution of questionnaires received.

TABLE 4.2.1

Distribution of Questionnaires Received
Compared to Total Potential Sample Size

<u>Star Rate</u>	<u>Total Rooms</u>	<u>Sample Received</u>	<u>Total Room /Days**</u>	<u>Ratio***</u>
1	250*	195	11,500	1.696
2	179	22	8,234	.267
3	950	104	43,700	.238
4	1,052	180	48,392	.372

* Capacity based on the total number of beds and campsites available.

** Study period (46 days) x total number of rooms.

*** Sample received \div Total Room/Days (expressed as a percentage).

It is evident that a much larger proportion of one star guests were sampled than any other group, but that nearly 50% more four star guests were proportionately sampled than 2 or 3 star guests. Places such as the hostel and campground have relatively small capacities and therefore a larger proportion of their guests had to be studied. The problems encountered with the two star group, principally the loss of two establishments representing 137 rooms or 6,302 potential room/days, severely hurt the acquisition of a larger sample from this group.

The sample size gathered from within each stratum also varied, for there was not an equal distribution from all the co-operating hostelries. For example, the Journey's End Motel, the Lord Elgin Hotel and the Aristocrat Apartment Hotel all comprise part of the three star category. The Journey's End supplied only 17 results, but this represented a fairly high percentage (.528%) of their total room/days. The Lord Elgin Hotel furnished 37 responses, or .201%, and the Aristocrat only 3, or .031% of their total possible room/days.

4.3 Statistical Analysis Methodology

The questionnaire was designed to elicit either nominal or ordinal responses. Nominal questions were coded either 1 for yes or 0 for no. Other questions could be easily coded on a rank order scale. Non-responses were coded separately and not included in the final analysis.

Since the surveying technique was not based on a random selection of guests from the entire population, and further, since the questionnaire was designed to receive responses that could be easily rank ordered, the potential statistical analysis techniques that could be used were limited to non-parametric statistics. Yeates writes,

...nonparametric techniques are useful tools either when the data can only be nominally scaled or rank-ordered, or when the data are so untrustworthy that only a rank order can be inferred. Furthermore, if the data derived from a sample are non-normal and cannot be normalized by any readily interpretable transformation the use of non parametric techniques may again be most appropriate (Yeates, 1974, 184).

The data were coded and input into the Carleton University CP-VI computer system. The CROSSTABS and FREQUENCIES sub-routines of the SPSS (Statistical Package for the Social Sciences) program were used to categorize, sort and analyze the raw data. The CROSSTABS sub-routine were used to produce a series of tables comparing the variables while FREQUENCIES was used to rank order certain variables.

The SPSS program produced a series of statistics that were used to define the presence, strength and direction of relationships. Chi square, contingency coefficients and Kendall's Correlation Coefficient, Tau, were the tests used most frequently.

These tests are designed to test for the acceptance or rejection of the null hypothesis, the lack of a relationship. For example, the chi square statistic is used to determine the significance of the differences between sets of data consisting of frequencies in discrete categories. This calculation is based on computing the expected frequencies for each cell if no relationship exists and then comparing them to the actual frequencies encountered.

$$x^2 = \sum_{i=1}^n \frac{(O_i - E_i)^2}{E_i}$$

O = observed count

E = expected frequency

Depending on the number of degrees of freedom, the greater the discrepancy, the higher the chi square value, meaning the stronger the relationship is between the two variables. This is a valid technique when less than 20% of the cells have expected frequencies of less than 5.0 and none have expected frequencies of less than 1.0. Once the value has been computed, it is then compared to the appropriate table of significance to determine the significance of the relationship (Gibbons, 1971; Seigel, 1956; Nie, et al, 1975).

The contingency coefficient is a further refinement of the chi square value. It is used to measure the strength of a relationship between two sets of attributes and is most useful when comparing tables of the same dimension. It is calculated,

$$C = \sqrt{\frac{x^2}{x^2 + N}}$$

If the chi square value was significant, then the contingency coefficient will also be significant.

The last method used extensively was a non-parametric correlation test, Kendall's tau. Like all correlation coefficients the value of tau can range between -1 (a perfect inverse relationship) to 0 (no relationship present) to +1 (a perfect direct relationship). Unlike other correlation coefficients, the value must be compared to significance tables to determine its significance. This technique uses

...the information about the ordering of categories of variables by considering every possible pair of cases in the table. Each pair is checked to see if their relative ordering on the first variable is the same (concordant) as their relative ordering on the second variable or if the ordering is reversed (discordant) (Nie, et al, 1975, 227).

As Seigel writes, tau b is a function of the minimum number of inversions or interchanges between neighbours. In other words it is a sort of coefficient of disarray (Seigel, 1956). Simply stated, tau can be calculated by comparing actual rank scores to the maximum possible number of rank scores (Yeates, 1974, 194).

FREQUENCIES was the other SPSS sub-program used to analyze the data. This routine is used principally in Question 14, dealing with the psychological decision making processes of the guests. They were asked to rate 14 different variables on a 0 to 5 scale stating the individual importance of each factor in the selection of the specific hotel, motel, campground or hostel. The data was again analyzed according to class type and a mode and median for each variable was calculated. These figures enabled comparison of the relative importance of the variables to be made.

CHAPTER 5

DEMOGRAPHIC, TRAVEL AND EXPENDITURE PATTERNS

The following two chapters discuss the analysis of the results of the questionnaire. Chapter 5 investigates the demographic characteristics, travel and expenditure patterns of the guests, looking first at a general summation of the results as a whole and then studying each individual group separately. Chapter 6 examines the accommodation preferences displayed by the guests of the four classes of hostelryes.

5.1 Introduction - General Trends

A total of 501 questionnaires were returned by the guests of the 15 participating establishments. The breakdown by class-type is as follows:

One star	195
Two star	22
Three star	104
Four star	<u>180</u>
Total	501

As noted in the previous chapter, there was a small return rate from the users of modest quality lodging. Some of the reasons for this have been discussed. The caveat stated in Chapter Four is worth repeating. The small two star sample (22) cannot be truly indicative of all users of this type of accommodation. There is a great chance

of bias invading a sample population of this size. One extreme response, while statistically valid, may have an unduly large impact upon the entire sample (one response represented about 5% of the sample). There is, therefore, an enhanced chance of error entering a sample of this small size. The results, therefore, represent the characteristics and attitudes of those who co-operated in the study, and not necessarily of the entire population of users of modest accommodation. The other three sample groups, on the other hand, consist of a reasonably large population gathered from a variety of facilities in each stratum over the entire study period. As such, while one still cannot state with impunity that these samples represent the characteristics of all visitors to Ottawa, they do offer a fairly complete study of the summer visitor traffic of the participating establishments and, therefore, of the various qualities of accommodation available.

Table 5.1.1 summarizes the point of origin of the entire population. They came from eight of ten Canadian provinces, with the exception of Newfoundland and Prince Edward Island, as well as the Yukon Territories, 28 of the states in the United States, the rest of North and South America, Europe, Asia, Africa and Oceania. Appendix 2 contains a more detailed list of all the points of origin. Clearly, Ottawa is a tourism magnet, attracting visitors from all over the world.

Most of the Canadian visitors originated either in Ontario (59.3%) or Quebec (25.7%), while only about 2.8% came from Eastern Canada and 11.8% from the West or North. Investigating these figures further reveals that 36.6% of the Ontario visitors came from Toronto while another 51.2% came from either Southwestern or Central Ontario. The remainder (12.2%) came from Eastern and Northern Ontario. By comparison, 58.3% of the Quebecers originated in the Montreal area, 13.9% came from the Eastern Townships, and 27.8% from the rest of the province.

Over 87% of the sample population responded to the questionnaire in English.

Ottawa was the main destination for 45.8% of the visitors, while 53.2% considered it only as a stopover point. This figure conforms quite closely to the previous visitor studies. Almost half the visitors (49.6%) were visiting the National Capital Region for the first time.

TABLE 5.1.1

Point of Origin

		<u>Total</u>	<u>Percent</u>
CANADA			
Ontario	166		
Quebec	72		
British Columbia	13		
Alberta	12		
Saskatchewan	2		
Manitoba	6		
Yukon Territories	1		
New Brunswick	5		
Nova Scotia	3		
Total Canada		<u>280</u>	55.8%
UNITED STATES*			
North-East	67		
Midwest	30		
South	13		
West	5		
Total United States		<u>115</u>	23.0%
OTHER NORTH AMERICA		2	.4%
SOUTH AMERICA		2	.4%
EUROPE		77	15.4%
ASIA		11	2.2%
OCEANIA		11	2.2%
AFRICA		3	.6%
TOTAL		<u>501</u>	<u>100.0%</u>

* The geographical definition of the regions of the U.S. is identical to those used by the NCC in their 1979, 1981 studies.

The sample was highly educated. Three quarters had either attended or graduated from a post-secondary institution. Only 6% stated that they had less than some high school education. They were also likely to be employed in professional/managerial positions.

The predominant reason for the trip was pleasure. Over 70% of the respondents stated they came to Ottawa either to vacation or to visit friends or relatives. Those who came here on business trips stated non-government business most often, followed by government related business and personal business as the rationale for their visit.

The accommodation selected, regardless of the class chosen, seemed to satisfy the guests. Fully 96.8% stated that they were pleased with their lodging. They usually stayed at their first choice of hostelry (85%). Again the majority of the guests seemed satisfied with the rates paid for their lodging. Sixty eight percent (68%) felt they either paid less than, or what they had expected, for their hostelry. A slight variation was noted among the classes which will be discussed in greater detail in a latter section of this paper.

TABLE 5.1.2

Ottawa as Main Destination Compared to Total Trip Duration

Trip Duration (days)	<u>1-2</u>	<u>3-4</u>	<u>5-7</u>	<u>8-10</u>	<u>11-17</u>	<u>17+</u>
Main Destination - Yes (%)	89.7	81.5	41.7	30.0	23.7	14.3
No (%)	11.3	18.5	58.3	70.0	76.3	85.7

As total trip length increased, (defined by the number of nights expected to be away from home), Ottawa was less likely to be a main destination for the trip. Table 5.1.2 clearly illustrates this trend. Almost 90% of those travelling two nights or less stated Ottawa was

their main destination. This ratio declined to less than 15% for travellers intending to be away from home for more than 17 days.

Similarly, as trip distance increased, there was a decline in Ottawa being considered the main destination (Table 5.1.3). This decline is not unusual, as many of the people who were travelling great distances probably wanted to see much of Eastern North America. Further, there are higher profile Canadian tourist destinations close to Ottawa, notably Montreal or Toronto.

TABLE 5.1.3

Ottawa as the Main Destination vs. Trip Distance (miles)

Distance (mi)	<u>100</u>	<u>101-250</u>	<u>251-500</u>	<u>501-1,000</u>	<u>1,000+</u>
Yes (%)	70.3	65.2	49.1	35.5	16.9
No (%)	29.7	34.8	50.9	64.5	83.1

Further, visitors from Montreal (8.4% of the total) and Toronto/Southern Ontario (29.1% of the total) constituted a large segment of the total sample size. The total distance travelled by these people was less than 500 air miles.

The major mode of transportation was by motor vehicle. Sixty three percent (63%) of the sample arrived in the city in this manner. Another 9% arrived by plane, 10.8% by bus or as part of a bus tour, 5% by train and 12.2% by other means.

These figures represent cumulative totals derived from this study and are not meant to be indicative of the overall trends and patterns of visitors to the city. Instead, they offer the reader a summary of the results that may be referred to in comparison to the findings presented in later sections of this paper. It is interesting to note, however, that these general conclusions correspond fairly

closely to data derived from the various NCC studies. For example, the 1981 NCC study concluded that 54% of the visitors were Canadian (NCC, 1982, 1), compared to 56% in this study. Similar results are seen in mode of transportation used, average length of stay and trip purpose.

Generally Ottawa attracts visitors from a broad geographical background, Europe, the Far East, Africa, Oceania as well as from the major geographic regions of North and South America. It is an attractive main destination for those travelling shorter distances and seems to be a worthwhile waypoint for longer trips. The city attracts a well educated, affluent traveller who is likely to be employed in the professional/managerial field.

As stated earlier, the generalizations presented above act only as a foundation from which the data can be compared. The purpose of this project was to look at users of different qualities of commercial accommodation and to identify similarities and differences in user habits, patterns and preferences. The questionnaire was designed so that information about four specific characteristics of the guests would be gathered: their demographic make-up, their travel and expenditure patterns and their accommodation preferences and selection processes.

5.2 Demographic Characteristics

Questions 1, 7, 8, 18, 19, 20 and 21 (Appendix 1) sought information about the demographic makeup of the visitors to Ottawa during July, August and the early part of September. Questions about points of origin, age, sex, size and total income of the immediate travel party, as well as the respondent's education and occupation were asked.

5.2.1 No Frills (1*) Accommodation

Those who stayed at the Ottawa Youth Hostel and the NCC Camping Lebreton came from the most varied geographic backgrounds. Forty percent of the sample originated in Canada, 13.9% from the United States and 45.9% came from 19 other countries, principally Europe and Oceania.

Almost half of the Canadian visitors (46.2%) came from Quebec, compared to 30.8% from Ontario, 2.6% from the east and 20.5% from the west and north. Further examination of these figures reveals that 20.8% of the Canadian sample came from the Montreal area while only 9% came from Toronto. This stratum was the only one studied that had a larger proportion of Quebec and Montreal visitors than Ontarians and Torontonians. One possible explanation is the people that chose this type of facility did not have a viable alternative in Quebec, unlike the guests choosing better quality accommodations, and were consequently forced to stay here. No facilities in the Outaouais Region were studied, which probably eliminated a large proportion of the travelling Francophone population staying at two, three or four star hostelries.

The hostel and campground attracted the smallest proportion of American residents of the four groups studied (13.9%). Most of them (59.3%) came from northeastern states. The south, midwest and west were represented almost equally. Interestingly, the greatest number of visitors from the western states chose this class of lodging over all others.

The travellers were generally young and male. Approximately 78.1% of the sample was between 15-30 years old. About 48% were between 22-30. Over 70% were male (71.5%) and only 28.5% female. The average travel party size was 2.12, however, 44% of this sample stated that they were travelling alone.

There is a sample bias built into this stratum. Both the NCC Camping Lebreton and the Ottawa Youth Hostel cater to young, single, itinerant travellers. Inclusion of campgrounds on the periphery of the city might have yielded much different responses as many family groups would have been included in the survey. Camping Lebreton specifically excludes families and the hostel, while not excluding them, is not equipped to handle family traffic. As such, by its design, this sample has excluded many people who are taking family vacations, but who chose to camp rather than to pay hotel or motel fees. It would be interesting to conduct a study comparing users of these two downtown facilities with those staying at suburban campgrounds and cottages.

Considering the above, it is not surprising that 46.8% of this sample stated that their combined travel party income was less than \$10,000. Over 73% stated an income of less than \$20,000. The reader will note a great difference between this figure and the income figures which will be presented for the other three strata.

Nonetheless, they are a highly educated group. More than seven of ten have attended or are attending a post secondary institution and more than four of ten indicated that they had graduated from university. Almost 40% of this sample listed their occupation as "students", by far the largest of any strata. Conversely, only 22% stated that they worked in either the professional or managerial fields.

The users of this type of facility can, therefore, be described as young, male, likely to be students, and originating from broad geographical backgrounds. Furthermore, they were likely to be traveling alone.

5.2.2 Moderate (2*) Accommodations

The demographics of those who chose moderate, quality or luxury accommodations changed accordingly; trends become more pronounced as the quality of lodging improved. It must be stressed that because of the small sample size from two star users (22), it is impossible to state that this sample is characteristic of people choosing moderate accommodations. Indeed these respondents may not even represent the typical customer of the participating hotels and motels. They do, however, exhibit some interesting trends by themselves that are intermediate between one and three star lodgers.

Half the guests came from Canada, with a further 36.4% originating in the United States. The rest (3 respondents, 13.6%) came from Trinidad, Columbia and Algeria. Ten of the guests (45.5%) came from Ontario. The next largest region represented was the midwestern United States (22.7%), specifically Michigan and Illinois. Third was the northeastern U.S. with 13.6% of the total sample. There were no respondents from the Province of Quebec. This deficiency is most probably due to the small sample size rather than to a lack of Quebec visitors. The locale of the facilities studied may also have played a role. The Bayshore Hotel and the Stardust Motel are located in the west end of Ottawa, while the Southway is located in the southern edge of the city. None of these three places would be readily accessible to visitors arriving from the east, who would likely first see the motels along Montreal Road. Indeed, only the Townhouse Motor Hotel, located on Rideau Street, is proximate to the main eastern entranceway to the city. A sample of only seven guests was gathered from this location.

The ages ranged from the mid-twenties to the early sixties. Each of the age categories, "22-30", "31-45" and "46-64", were represented by 28.6% of the sample. There was also a tendency for this sample to be male (59.5%) rather than female (40.5%). The average

immediate travel party size was 2.05. Obviously the small sample size has inordinately influenced these figures. No clear age group dominated. The guests in this stratum had the smallest average party size, as well as the lowest proportion of children (2.4%). The literature suggested that these types of facilities, small roadside motels and hotels, would cater to the summer family vacationer. This survey does not support that idea. Either the users of these facilities are atypical of the norm, or family vacationers do not like to complete questionnaires.

Those who completed the survey are again highly educated. Over 3/4 of the group had attended a post secondary institution and 36.4% were university graduates.

The travellers could be considered fairly affluent. Over 95% stated a total travel party income of greater than \$20,000. Again, due to the small population studied, no one income category dominated. Five guests stated incomes of "\$20,000-\$29,999", "\$30,000-\$39,999" and "\$50,000 plus" respectively, and six stated an income of between "\$40,000 and \$49,999". What is evident, however, is that there is an increase in total income when compared to users of no frills lodging.

Occupationally, this group was likely to be employed in the professional/managerial field (45.4% of the time), but they also included the largest proportion of salesmen, other white collar workers and retired people. One should note that while 13.6% of the respondents said they were retired, only 7.1% of this group were over 65 years old.

Summarizing the characteristics of this group, therefore, the guests were likely to be Canadian and certainly North American, came from all age groups and were employed in responsible positions. Furthermore, they were well educated people who earned above average incomes.

5.2.3 Quality (3*) Accommodations

The people who chose three star, quality accommodations exhibited similar characteristics to those staying in moderate quality lodging. The trends that emerged between one and two star places were even more pronounced here. The hotels studied included the Lord Elgin Hotel on Elgin Street and the Aristocrat on Cooper Street. Three motels were also included in this category. These were the Holiday Inn Market Square on Dalhousie Street, Macies Ottawan Flag Inn on Carling Avenue and the Journeys End Motel near St. Laurent Boulevard and the Queensway in the east end.

More of these clients originated in Canada (59.2%) and the United States (39.4%) than were seen in the other two strata, while the numbers of overseas visitors continued to decline. As in the case of users of moderate facilities, Ontario (50.9% of the Canadian sample, 27.2% of the total sample) was the single most common point of origin, followed closely by the northeastern United States with 26.2% of the total. Massachusetts (10.4%) and New York state (9.4%) were the two states that were most heavily represented.

The Canadian sample came primarily from Ontario. Toronto alone accounted for 23.6% and another 20.0% came from southwestern Ontario. Quebec was the second largest supplier of guests adding 32.7% to the total. Montreal accounted for most of that, generating 23.6% of the guests, the same as Toronto. Western Canada accounted for 14.5% of the Canadian sample and the Maritime provinces only 1.8%.

Overseas visitors amounted to only 7.7% of the total population. Most came from Europe, although there was one guest at the Lord Elgin Hotel who came from Sri Lanka.

It is becoming increasingly evident that as the quality of accommodation improved, the visitors were travelling much shorter

distances. The proportion of European and other foreign visitors was declining, while the ratio of Ontario, Quebec and Northeastern American tourists rose.

The guests of these facilities studied were on average the oldest of the four strata, due, perhaps, to the influence of five major bus tours that were encountered during the study period. The respondents were specifically asked to state the size of their immediate travel party and the sex and age of each member. Five respondents stated that their immediate travel party consisted of 29, 44, 45, 45 and 46 people. They may very well have perceived that this was indeed their immediate travel party if, for example, they were a social club or a church group that was travelling together. It had the effect, however, of artificially inflating the average party size and age statistics. Most were women over 65. The impact of five groups of seniors (29 to 46 people each) upon a total sample size of 104 was immense. Thirty-eight percent (38%) of the sample were over 65 years old and the average party size was 4.2.

When bus tourists were excluded, however, this type of accommodation still attracted the oldest population as a whole. The percent of seniors declined to 10.9%, still the highest of the four groups. The largest single age group represented was "46-64" (26.7%) followed by "31-45" (23.1%). An indication that family travel was increasing was expressed by the increase in the number of children (under 14 years) which now represented over 10% of the total population. Also the average party size had decreased to 2.32, again another indicator of increased family travel. Twenty-nine percent were travelling alone and another 39% were travelling in couples. Thus, 68% of this group had a party size of two or less. This compares to 80% of no frills users and 90.5% of moderate accommodation guests. This percentage drops to 64% for users of luxury lodging.

Again, this segment was highly educated. Indeed, those staying in quality lodgings registered the highest percentage of post secondary education (78.4%), although the actual proportion of university graduates was third (38.2%). Also, they appeared financially stable. Over 78% earned more than \$30,000 annually. The mode for this group was "\$30,000-39,999" with an actual count of 30 respondents. The number stating group incomes of greater than \$50,000 was 26. No other sector had more than sixteen responses.

Almost half the sample stated they were employed in professional or managerial jobs (49.6%). Skilled technicians, tradesmen and technologists ranked second (11.7%), and sales positions, white collar jobs and retired people each contributed 9.7% of the occupational classes.

Although the proportion of American visitors was the highest of the four strata (39.4%), the population remained predominantly Canadian. They were well educated, well employed and earned a high income. Two groups seem to prefer this type of lodging, the retired market and middle aged travellers.

5.2.4 Luxury (4*) Accommodations

Those who selected the best accommodations were generally younger than the users of 3 star facilities. The largest single age group represented here was 31-45 year olds (32.18%). They were followed by 46-64 year olds and 22-30 year olds. Furthermore, this sample had the largest proportion of young children (14.7%), indicating a high degree of family travel. Also, this group had the lowest proportion of seniors among two, three and four star accommodations (4.83%). Could this indicate that age plays a strong role in accommodation preferences? Do those in the best station of life and at their highest earning capacity prefer the "best" lodging, while those either approaching or departing from this group (i.e. younger or older

travellers) settle for more modest facilities? Furthermore, did seniors who were now staying at three star facilities once stay at four star places, but because they are now on limited incomes choose the next best type of hostelry (three star hotels and motels) that offer most of the amenities associated with four star places but at a lower cost? These questions will be again raised in Chapter 6.

A further indication of family travel is the increase in the average party size to 2.41, the largest of the four strata. Again, one quarter of these people were travelling alone.

The vast majority of the people choosing these facilities were Canadian. Over 73% of the users surveyed were Canadian, compared to 24% of Americans and only 2.8% that came from outside North America. The Canadian visitors originated principally in Ontario (76.1%), with Quebec (13.4%), the west (6.7%) and the east (3.7%) completing the native sample. Toronto was the largest single source of Canadian visitors, accounting for 27.6% of the sample itself. Central and Southwestern Ontario also contributed significantly, supplying 18.7% and 20.9% respectively. Somewhat surprisingly, the Montreal area accounted for less than 10% of the total Canadian sample. This figure was unexpected for the 1981 CGOT study of travel to Ottawa suggested that Montrealers accounted for 26% of total visitors to the region, while Torontonians accounted for only 9% (CGOT, 1982, 2). If this is so, it would appear that most Montrealers return home the same day, stay in Hull or with friends and relatives.

The American visitors did not travel great distances to come to Ottawa. Residents of New York State accounted for 24.4% of all Americans. The Northeastern region supplied 53.7% of the visitors and the Midwest supplied another 36.6%. With the exception of New York State, no other state accounted for more than ten percent of

TABLE 5.2.1

Visitors' Demographics

Variable	1*	2*	3*	4*
<u>Origins:</u>				
Canada	40.2%	50.5%	52.9%	73.3%
United States	13.9%	36.4%	39.4%	23.9%
Other	45.9%	13.6%	7.7%	2.8%
<u>Average Travel Party Size</u>	2.22	2.05	2.32 ¹ 4.24 ²	2.41
<u>Dominant Age Group</u>	22-30 (46.3%)	22-30, 31-45, 46-64 (28.6% each)	46-64 (26.3%) ¹ 65+ (38.1%) ²	31-45 (31.5%)
<u>Income</u>	\$20K (73.1%)	\$20-50K (72.7%)	\$30-50K (74.2%)	\$40K (52%)
<u>Education:</u>				
Some Post Secondary or More	71.5%	77.3%	78.4%	74.8%
University Degree	40.4%	36.4%	38.2%	42.4%
<u>Occupation:</u>				
Professional/Managerial	21.8%	45.4%	49.6%	61.7%
Sales	2.1%	13.6%	9.7%	11.7%
Skilled Technician	15.0%	13.6%	11.7%	10.0%
Student	38.3%	-	2.9%	1.7%
Retired	7.3%	13.6%	9.7%	3.9%
Other	15.5%	13.6%	16.5%	11.0%

1 Excluding bus tour.

2 Including bus tour.

Americans, although New Jersey, Connecticut, Wisconsin, Illinois, Massachusetts and Michigan were well represented.

This group had the largest percentage of university graduates, the highest average income and the most professionals/managers of the four strata studied. Over 42% had graduated from university and 75% had attended some post secondary institute. Interestingly, the second highest proportion of university graduates were the people who stayed at the no frills facilities.

Over half the sample had total travel party incomes of over \$40,000, with 31% stating an income of greater than \$50,000. There was, however, a large group with an income between \$20,000 and \$40,000 (41.2%), indicating that these facilities do not cater exclusively to the highest wage earners.

Finally, 61.7% of the guests worked in the professional/managerial fields. Another 11.7% were salesmen. Somewhat unexpectedly, both the 4 star places and the 1 star hostels were the only types of accommodation to attract people who stated their occupation as "blue collar" (1* - 1%, 4* - 2.8%).

5.2.5 Summation

Table 5.2.1 summarizes the demographic characteristics of the users of the different calibers of accommodation available in Ottawa during the past summer.

It seems evident that as the quality of lodging improves there is a greater likelihood that the guests will come from Canada. Similarly, as the quality diminishes, the percentage of overseas guests rises sharply. Americans prefer two and three star lodgings, although many choose four star facilities.

Table 5.2.2 illustrates these trends.

TABLE 5.2.2

Point of Origin Compared to Quality of Lodging Selected

Country/Region			<u>Canada</u>	<u>U.S.</u>	<u>Europe</u>	<u>Other</u>	<u>Total</u>
Quality 1*	no.		78	27	68	20	193
	%		40.4	14.0	35.2	10.4	100.0
2*	no.		11	8	0	3	22
	%		50.0	36.4	0.0	13.6	100.0
3*	no.		55	41	7	1	104
	%		52.9	39.4	6.7	1.0	100.0
4*	no.		132	43	3	2	180
	%		73.3	23.8	1.6	1.1	100.0

Chi Sq = 154.14 with 9df

2 of 16 (12.5%) valid cells have expected frequencies less than 5.0

Significance level = .0000

Clearly, as indicated by the large chi square (154.14), there is a significant relationship between the type of accommodation selected and the visitor's point of origin. The more modest facilities attracted those who came the greatest distances.

The Canadian traveller generally expressed a greater interest in better quality lodging than other travellers. Most originated in Ontario, specifically in the populous south. The distribution of visitors from the Province of Quebec was low. The NCC studies of 1979 and 1981 found that between 30% and 40% of all visitors hailed from Quebec (1980, 24; 1982, 11). This study discovered that while 46.15% of the Canadian users of one star facilities were Quebeckers, the percentage declined to 32.7% of three star users and only 13.4% of four star users. None of the two star guests sampled were from Quebec.

American tourists preferred two or three star lodgings above all others. Most came from the highly populated Northeast and Midwest. This finding conforms to the existing literature (NCC, 1982, 11).

European and other foreign visitors preferred the simple offerings of hostels or campgrounds, due to a combination of factors. This sample was young and often travelling alone. The person would, therefore, not object to spartan accommodations offered by hostels or campgrounds (Morin and Rennie, 1981, 3). More importantly, most were travelling for long periods of time on very strict budgets. One cannot conclude, however, that all European visitors select this type of facility. The findings herein are probably more indicative of the type of lodging preferred by young, itinerant travellers and the results may have been similar if one conducted the same study in Europe.

The average party size remained fairly constant, ranging from a low of 2.05 for 2 star users to a high of 2.41 for four star users. With the exception of the two star users, whose results are suspect, the average party size increased with improved quality accommodations. These findings support Mayo's research. He determined that the party size increased with the price paid (Mayo, 1974, 68). There is not a perfect correlation between price charged and star rating, but the relationship is sufficiently robust to compare Mayo's research which was based on price paid to this survey which is based on overall quality.

TABLE 5.2.3

Ages of Members of Total Travel Party (Male and Female Combined)

	<u>Age</u>	<u>< 14</u>	<u>15-21</u>	<u>22-30</u>	<u>31-45</u>	<u>45-64</u>	<u>65+</u>	<u>Total</u>
1*	no.	37	126	183	35	12	0	383
	%	9.66	32.90	47.78	9.14	3.13	0.00	
2*	no.	1	2	12	12	12	3	42
	%	2.38	4.76	28.57	28.57	28.57	7.14	
3*	no.	26	22	49	67	96	160	420
	%	6.19	5.23	11.67	15.95	22.86	38.10	
	(excluding bus tours)							
	no.	25	21	49	57	66	27	246
	%	10.16	8.53	19.92	23.17	26.83	10.98	
4*	no.	64	23	74	140	113	21	435
	%	14.71	5.29	17.01	32.18	25.98	4.83	

Chi Square 681.95 with 15df.
Significance = .0000

There is an extremely strong relationship between the ages of the guests and the type of lodging selected as illustrated in Table 5.2.3. A chi square value of 681.95 with 15 df was calculated. Young adults, between 15 and 30, most commonly chose inexpensive no frills accommodations while seniors were most likely to stay in three star facilities. Those who are considered to be in the best station of life, 31-45 years old, generally preferred four star facilities as did those travelling with young children. No dominant age group emerged among the two star users.

TABLE 5.2.4

Travel Party Income vs. Accommodation Choice

	<u><\$20,000</u>	<u>\$20,000- \$29,999</u>	<u>\$30,000- \$39,999</u>	<u>\$40,000- \$49,999</u>	<u>\$50,000+</u>
1*	125	18	8	11	9
2*	1	5	5	6	5
3*	11	14	30	16	26
4*	12	36	36	37	54

Chi square 225.00 with 12 df

4 of 20 cells (20.0%) have expected values of less than 5.0

Similarly, there is an equally strong relationship between the total travel party income and the type of lodging chosen. Table 5.2.4 has a chi square of 225.00 with 12df. As income increased so did the likelihood of staying at higher quality lodging.

All groups were highly educated, and with the exception of the users of one star facilities likely to be employed in professional/managerial positions. Those that stayed at the campground or hostel were young and either starting their careers or still in school. Professional/managerial occupations became more prevalent as quality improved. Retired people tended to stay at either two or three star places, while students preferred one star lodgings.

There is a great variety in the demographic profiles of the users of the different qualities of accommodation available in the Ottawa area. Canadian, American and overseas visitors all indicated their preferences for certain qualities of facilities. Similarly, the members of the various age and income groups studied also stated their preferences.

5.3 Travel Patterns

Questions 1, 2, 3, 4, 5, 6 and 9 sought information about the travel patterns of the visitors to the region. Information was gathered concerning total trip duration, distance travelled, length of stay in Ottawa, whether Ottawa was the main destination, if it was the first visit to the city and the mode of transportation used.

TABLE 5.3.1

Distance Travelled

(miles)

		≤ 100	101-250	251-500	501-1,000	> 1,000
1*	no.	22	31	26	3	111
	%	11.4	16.1	13.5	1.6	57.5
2*	no.	2	7	5	4	4
	%	9.1	31.8	22.7	18.2	18.2
3*	no.	18	28	35	6	17
	%	17.3	26.9	33.7	5.8	16.3
4*	no.	22	72	51	18	16
	%	12.3	40.2	28.5	10.1	8.9

chi square = 136.15 with 12 df Signif = .0001

2 out of 20 (10.0%) of the valid cells have expected cell frequency less than 5.0

Kendall's Tau B = -.2845 Signif = .0001

There was a strong inverse relationship between the distance travelled and the quality of accommodation selected, as shown in Table 5.3.1. The greater the distance travelled, the more likely a party was to select modest lodging. Over half of those staying in the luxury hostelrys travelled less than 250 miles, and 80% had travelled less than 500 miles. Conversely, only 27% of one star users and 41% of 2 star users travelled less than 250 miles. On the other hand, as

the trip journey increased (over 500 miles), the percentage of users of poorer quality lodging rose from 19% (4*) to 22.1% (3*) to 36.4% (2*) to 59.1% for 1 star users.

A chi square of 136.15 with 12 df was calculated, significant beyond the .0001 level. Furthermore, a contingency coefficient of .4633 was also calculated, indicating again a robust relationship. Finally, Kendall's tau b was $-.2845$ (significance .0001) indicating that a significant inverse relationship existed. This table was derived from question one, point of origin. The respondent's home was plotted on a map and the air distance to Ottawa was then calculated. No attempt was made to calculate the actual road distance travelled. Presumably, some came directly to Ottawa, while others followed less direct routes to arrive in the city. The results do, however, confirm both the findings of Mayo (1974, 25) and Bourgeois (1976, 40). Each discovered that people travelling greater distances generally selected less expensive lodging.

TABLE 5.3.2

Accommodation Selected vs. Total Trip Duration (Nights)

<u>No. of Nights</u>	<u>≤ 3</u>	<u>4-7</u>	<u>8-17</u>	<u>18-31</u>	<u>32+</u>
1* no.	14	17	34	29	86
%	7.1	9.3	20.6	15.8	47.6
2* no.	5	3	7	4	1
%	25.0	15.0	35.0	20.0	5.0
3* no.	40	19	29	11	4
%	38.8	18.4	28.2	10.7	3.9
4* no.	83	38	43	4	8
%	47.2	21.7	24.5	2.3	4.5

Chi sq. 177.40 with 12 df signif .0000
 Contingency coeff .5183
 Kendall's tau b $-.4549$ signif .0000

Similarly, there is an extremely strong inverse relationship between total trip duration in nights and the type of lodging selected. A chi square of 177.40 with 12df is significant beyond the .0000 range. The contingency coefficient of .5183 is very large. Further, Kendall's tau b was .4549, again highly significant (beyond .0001).

The vast majority of those staying at the hostel and campground were long distance travellers who were planning on being away from home for more than 18 days (62.5%). Indeed, almost half the sample was planning on travelling for more than 32 days (46.7%). It must be noted that 46% of this sample came from countries other than Canada or the United States and were assumed to be travelling throughout much of Canada or North America. Some of the respondents stated that their total trip duration would be a year or more. Conversely, only 16.4% of this sample said they were travelling for less than 7 days.

Again, a continuum is evident between trip duration and the quality of lodging selected. The largest percentage of those staying at two star facilities planned to be away from home for one to two weeks (35%), 60%, however, planned on being away for more than one week. Fifty-seven percent (57%) of those who selected three star lodging were going to be travelling for less than seven days with almost 39% indicating a total trip duration of three days or less. Those choosing luxury accommodations were even more inclined to travel for shorter periods of time. About 69% said they were travelling for one week or less and almost half (47%) indicated a trip duration of 1 to 3 days. This result once more coincides with Mayo's findings concerning the relationship between price paid for lodging and trip duration (Mayo, 1974, 69). This may also be indicative of the difference between weekend travellers and full-fledged vacationers. It is impossible, however, to discuss this matter as no data was collected concerning the day of the week the survey was completed.

The respondents were asked to give a numerical answer for their trip duration and not to select from a progressive scale of days. Due to the wide variety of responses for some taking longer trips, some of the responses were grouped to facilitate easier manipulation of the data. The trip durations were therefore coded into one of the following periods: 1, 2, 3, 4, 5, 6, 7, 8 to 10, 11 to 17, 18 to 31, and 32+ nights away from home. By arbitrarily assigning a midpoint score to the sectors that encompassed more than one night (e.g. 8 to 10 nights would be given a score of 9, etc., 32+ was assigned a score of 32), one can arrive at an approximate average trip duration. The results were quite revealing.

TABLE 5.3.3
Average Trip Duration (Nights)

	<u>Mean</u>	<u>Mode</u>
1*	18.1	32+
2*	12.1	11-17
3*	9.2	11-17
4*	6.9	2

Clearly, as the quality of lodging improved the user travelled for much shorter periods of time.

Upon discovering this trend it was decided to run a cross-tabulation of the combined results comparing distance travelled to total trip duration. Table 5.3.4 reveals a very strong relationship between the two variables. One may conclude, therefore, that as total trip duration increased there was likely to be a consequent increase in distance travelled and a subsequent decline in the quality of hostelry selected. Mayo discovered that the automobile vacationer generally paid less for his accommodations on longer trips. The typical traveller was on a fairly strict budget and that one method of

staying within this allotment on longer trips was to reduce his lodging expenses.

This situation seems to apply to visitors to Ottawa. As mentioned previously, the hostel or campground cost between \$3 and \$6 nightly, while two star places studied charged between \$30-\$34, three star places ranged in price from \$30-\$60, and the four star hotels and motels studied charged on the average over \$60 nightly. There is a clear relationship between trip duration and accommodations selected.

TABLE 5.3.4

Total Trip Duration (Nights) vs. Distance Travelled (Miles)

		Distance (miles)			
		≤ 250	251-500	501-1,000	1,000+
Duration (nights)	3				
	no.	101	30	7	3
	%	71.6	21.3	5.0	2.1
4-7	no.	47	23	5	2
	%	61.0	29.9	6.5	2.6
8-17	no.	31	45	13	27
	%	26.7	38.8	11.2	23.3
18-31	no.	5	10	2	31
	%	10.5	20.8	4.2	64.6
32+	no.	11	6	4	77
	%	11.2	6.1	4.1	78.6

chi square = 264.34, 12df Signif .0000

This trend was not evident, however, with the average length of stay in Ottawa. Employing a similar method as that used to calculate the average trip duration, an interesting pattern emerged.

TABLE 5.3.5
Average Length of Stay in Ottawa (Nights)

	<u>Mean</u>	<u>Mode</u>
1*	3.45	2
2*	3.45	1
3*	3.40	2
4*	3.03	1

It seems that Ottawa can be "done" in three to three and a half days. There was very little variation among the four strata studied.

TABLE 5.3.6
Length of Stay in Ottawa (Nights)

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4-7</u>	<u>8-17</u>	<u>18+</u>
1* number	56	61	41	23	2	8
1* cum. %	29.3	61.2	82.7	94.7	95.7	100.0
2* number	8	2	2	5	2	0
2* cum. %	38.1	52.4	66.7	90.6	100.0	100.0
3* number	30	34	19	14	4	3
3* cum. %	28.8	61.5	79.8	93.2	97.0	100.0
4* number	70	65	24	13	1	6
4* cum. %	39.1	75.4	88.8	96.1	96.7	100.0

Table 5.3.6 dissects this figure further. Sixty percent of the users of no frills lodgings stayed one or two nights. Eighty-two percent (82%) planned to be in Ottawa for three nights or less and 94.7% said they were going to be in the capital for one week or less. Similarly, 81% of users of two star motels and hotels spent four nights or less here and 90% spent less than one week in the Nation's Capital. Sixty-one percent (61%) of the users of quality lodging and

75% of those staying at luxury accommodations were going to be here for one or two nights. In both cases over 93% were planning on staying one week or less. The mode of the length of stay in Ottawa was two nights for one and three star users and one night for two and four star guests.

The 1979 and 1981 NCC studies discovered that the average length of stay of visitors in Ottawa was 4.25 nights and 4.00 nights respectively (NCC, 1983, 32; NCC, 1982, 22). They found that the majority of the visitors stayed from one to three days and that over 90% stayed one week or less. Further, the mode of the length of stay was two nights. Their results coincide very closely with the findings from this study. The type of accommodation selected appeared to have very little impact on the overall length of stay, as visitors, be they business travellers or vacationers, stayed in the city three days or less.

When asked if Ottawa was the main destination for their trip, 54% of the total sample responded "yes". This figure compares favourably to the various NCC studies and the Carleton University 1976 study (NCC, 1980, 35). There is, however, wide variation among the four strata. Table 5.3.7 illustrates this difference.

TABLE 5.3.7

Ottawa As The Main Destination
(Percent)

	<u>Yes</u>	<u>No</u>
1*	21.0	79.0
2*	45.5	54.5
3*	61.5	38.5
4*	64.2	35.8

It seems apparent that those staying in superior quality lodging specifically came to Ottawa, while those choosing moderate or spartan accommodations considered the city to be a waypoint in their trip. It must be noted that users of three and four star lodgings had the shortest trip durations and travelled the shortest distances to arrive in the National Capital Region. Their lengths of stay in the city, however, were similar to those of the other groups. This may again have been the result of the impact of weekend travel.

Those staying in modest lodgings, who tended to travel greater distances and stay away from home for longer periods of time, were less likely to state Ottawa as their main destination. This response became even more evident for those staying in no frills places, where only 21% said Ottawa was their main destination.

It would have been interesting to have asked those who did not feel Ottawa was the goal of their trip to state their destination. Some may have had a specific destination in mind, while others may not.

TABLE 5.3.8

Was This the First Visit to Ottawa?

(Percent)

	<u>Yes</u>	<u>No</u>
1*	71.6	28.4
2*	45.5	54.5
3*	45.2	54.8
4*	28.9	71.1

Possibly related to the above, there was a strong inverse relationship evident between the quality of accommodation chosen and the

incidence of first visits to Ottawa. Table 5.3.8 shows that most of those selecting four star lodgings were repeat visitors, while almost half of those who stayed at two and three star places had been here before. Only slightly more than one quarter of the visitors using the hostel or campground had been to Ottawa previously.

This revelation contrasts sharply with that displayed in the previous table. Those using poorer quality facilities were the most likely to be visiting the city for the first time, yet did not consider it as the main destination of their trip. As the quality improved, Ottawa more often became the main destination with a larger proportion of the guests being repeat visitors. Some of this variance may be explained by the impact of business travellers upon the two, three and four star facilities. They accounted for between 28-33% of the total sample in each group.

There may be, however, another possible explanation. Those who selected quality or luxury lodging travelled relatively short distances to come to Ottawa and were travelling for short periods of time. It is not, therefore, unreasonable for these people, many of whom originated in the Toronto-Golden Triangle Region or from Montreal, to consider Ottawa as an attractive proximate vacation locale. They are likely repeat visitors who enjoy a short stay in Ottawa and perceive their visit as an attractive mini-vacation, possibly travelling here on weekends.

TABLE 5.3.9

Ottawa as Main Destination vs. First Visit to the City

(Percent)

First Visit	Yes	No
Main Destination		
Yes	26.6	73.4
No	68.9	31.1

When comparing those who stated Ottawa was their main destination to those who were visiting the city for the first time this pattern becomes clear. Apparently, Ottawa is a very attractive main destination for repeat visitors, while relatively few first time visitors specifically journey to see the capital. There was a slight tendency evident that repeat visitors stayed in Ottawa for longer periods of time. Sixty five percent of those staying 5 nights or more had been to Ottawa before, although by actual count this represented only 28 respondents of the total sample of 494.

TABLE 5.3.10

Mode of Transportation

		<u>Motor Vehicle</u>	<u>Bus/Train /Bus Tour</u>	<u>Airplane</u>	<u>Other</u>	<u>Total</u>
1*	no.	72	56	8	59	195
	%	36.9	28.7	4.1	30.2	
2*	no.	21	0	1	0	22
	%	95.5	0.0	4.5	0.0	
3*	no.	68	17	19	0	104
	%	65.5	16.4	18.3	0.0	
4*	no.	155	6	17	2	180
	%	86.1	3.3	9.4	1.2	

Chi sq. 182.56 9df signif .0000

3 of 16 cells (18.75%) have expected values of less than 5.0

Contingency coeff .5168

Kendall's tau b $-.3672$ signif .0000

Table 5.3.10 lists the various modes of transportation used to travel to Ottawa. Again there was a strong relationship between mode of transportation used and the quality of lodging selected. The chi square of 182.56 with 9 df had a significance of .0001, as well,

Kendall's tau b was calculated to be $-.3672$, again significant beyond $.0000$. These two figures indicated that a strong inverse relationship existed. Alternative modes of transportation become more dominant as the quality changed.

Only 37% of those using the hostel or campground arrived by automobile. This figure represents the smallest proportion of auto travellers of the four strata. The Canadian Government Office of Tourism suggests that about 80% of all Canadian visitors to the region arrive by car (CGOT, 1982, 3). They also found that again about 80% of all youth travellers journey by car (Morin and Rennie, 1981, 54, 55). This situation does not appear to be the case with users of these facilities. Almost half this sample are of non-North American descent, and one would assume that, therefore, many would not have a car at their disposal. Further, 38% were students and 47% stated a combined travel party income of less than \$10,000. They could probably not afford to rent a vehicle for the duration of their stay. They would, as a result, likely have to choose other means of transportation. Twenty-one percent (21%) of the sample hitchhiked to Ottawa and another 8.2% stated that bicycles were their mode of transportation. These facilities also attracted the highest proportion of bus and train travellers of each of the strata (19.5% by bus, 9.2% by train). Hockin (1978) discovered that bus and train travellers typically were either younger (37% less than 24 years old) or older than the average population, travelled for longer periods of time than the average Canadian (12.3 days for train and 15.6 days for bus travellers) and often travelled alone. Furthermore, there was a disproportionate number who had an annual income of less than \$10,000. Hockin's description of these visitors coincides quite closely with the demographic profiles of users of one star facilities studied here.

The small sample that used two star, moderate facilities travelled almost exclusively by automobile. It is unfortunate that there

was not a larger sample to confirm if indeed the patterns displayed by the users of the four hostelries studied were typical. These facilities cater primarily to a drive-in trade, all are located along major corridors in the city. The Bayshore Hotel and Stardust Motel are on Carling Avenue, the Stardust is on Bank Street South, and the Townhouse is on Rideau Street.

The users of quality, three star facilities illustrated the greatest variety in transportation used. Over 65% of the clientele travelled by car. Auto travel was still the dominant means of transportation, but the figure is significantly lower than the 86% of luxury users and 95% of moderate accommodation users. This group did, however, possess the highest proportion of air travellers and, among the more traditional types of lodging (2*, 3* or 4*), the highest percentage of bus, train and bus tour users. The Lord Elgin Hotel, which specifically caters to bus tours, accommodated five of the six tours that were encountered during the course of the study. It also had half of the people who stated they came by bus, but not in conjunction with a tour. The large number of bus and train travellers can once more be explained by referring to Hockin (1978). Bus and train tourists were likely to be either older or younger than the norm. These facilities attracted the older segment of the bus travellers.

Explaining the high proportion of air travellers is, however, much more difficult and tenuous. Quality motels and hotels proportionately attracted twice as many air travellers as any other class of facility. There are a number of factors that may have played a role in this trend, including the impact of travel agents and tour operators, the ages of the respondents and the possible cost disparities between driving and flying. This survey did not attempt to study

these inter-relationships and as such, can only raise the questions, not answer them.

Those staying at luxury facilities again overwhelmingly arrived by automobile. Over 86% of the sample travelled by car. Air travel (9.4%), rated a distant second, and train/bus/bus tour traffic was third with a combined total of only 3.3%. Most of these people journeyed 500 miles or less (81%) to come to Ottawa and had an average trip duration of less than seven days. This type of short distance, short duration trip is ideally suited for an automobile.

TABLE 5.3.11

Mode of Transportation vs. Total Distance Travelled

		<u>< 500 mi</u>	<u>500-1,000 mi</u>	<u>> 1,000 mi</u>
Motor Vehicle	no.	245	23	47
	%	77.8	7.3	14.9
Bus/Train	no.	28	1	42
	%	39.4	1.4	59.2
Bus Tour	no.	4	1	3
	%	50.0	12.5	37.5
Hitchhiking	no.	6	0	34
	%	15.0	0.0	85.0
Bicycle	no.	13	1	2
	%	81.3	6.3	12.4
Aircraft	no.	22	5	18
	%	48.9	11.1	40.0

A comparison of the mode of transportation used versus the distance travelled seems to confirm that automobile use rose with shorter distances travelled (Table 5.3.11). Over three quarters of the auto vacationers travelled 500 miles or less, compared to 39.4% of bus/train travellers, 49% of air voyagers and 50% of the bus tours.

Conversely, 85% of those who arrived by hitchhiking, 59% of the bus/train travellers, 40% of aircraft users, 37.5% of bus tourists and only 14.9% of auto travellers journeyed over 1,000 miles.

TABLE 5.3.12A

	<u>Trip Purpose</u>			
	<u>Vacation</u>	<u>Visiting Friends/ Relatives</u>	<u>Business Total</u>	<u>Personal Business/ Other</u>
1* no.	165	5	3	21
%	85.1	2.6	1.5	10.8
2* no.	13	1	6	2
%	59.1	4.5	27.3	9.1
3* no.	62	6	32	4
%	59.6	5.8	30.8	3.8
4* no.	82	19	60	18
%	45.8	10.6	33.5	10.1

TABLE 5.3.12B

Business Travel

	<u>Non-Gov't. Business</u>	<u>Government Business</u>	<u>Seminars Confer., Convent.</u>
1* no.	1	2	0
%	33.3	66.7	0.0
2* no.	4	1	1
%	66.7	16.7	16.6
3* no.	20	9	3
%	62.5	28.1	9.4
4* no.	44	16	0
%	73.3	26.7	0.0

Pleasure was the reason most often stated as the trip purpose by the guests of the four strata, followed by personal business for one star users and non-government business for the other three groups. Tables 5.3.12A and 5.3.12B compare trip purpose with the accommodation selected. A relationship exists between trip purpose and the type of lodging chosen.

Most of the campers and hostellers were travelling for pleasure, either on vacation (85.1%) or to visit with friends and relatives (2.6%). There were, however, a large number of people who were here on personal business, such as to register for university or to try to find lodging in the fall.

The percentage of pleasure travellers declined as the quality of hostelry improved. About 64% of the guests of moderate types of facilities were here to vacation or to visit with friends and relatives, compared to 65% of quality users and 60% of luxury lodging guests. At the same time the percent of those visiting friends and relatives rose from 2.6% at one star places to 11.2% of all four star users.

Similarly, the proportion of business travel rose with the quality encountered, from 1.5% (1*) to 27.3% (2*), to 30.8% (3*) to 32.6% (4*). Government-related business travellers surveyed stayed principally at three or four star places while those working in the private sector were likely to choose all types of conventional accommodation. The few people visiting Ottawa for conferences, seminars or conventions seemed to stay at either moderate or quality facilities. The impact of business travel may be significant. Because the trip is subsidized in part or in whole the business traveller may opt for quality or luxury lodging.

The hotel trade here feels that the business traveller represents the foundation of the industry. Laventhal and Horwath have

TABLE 5.3.13

Travel Patterns

Variable	1*	2*	3*	4*
Mode of Distance Travelled	1,000 miles	101-250 miles	251-500 miles	101-250 miles
Ave. Length of Trip (nights)	18.1	12.1	9.2	6.9
Ave. Stay in Ottawa (nights)	3.45	3.45	3.40	3.03
Ottawa as Main Destination	21.0%	45.5%	61.5%	64.2%
First Visit to Ottawa	71.6%	45.5%	45.2%	28.9%
Mode of Transportation:	Motor Veh. (37)	Motor Veh. (95)	Motor Veh. (65)	Motor Veh. (86)
(by percentage)	Hitchhiking (21)	Airplane (5)	Airplane (18)	Airplane (9)
	Bus (20)		Bus (6)	Bus (1)
	Train (9)		Bus Tour (6)	Train (1)
	Other (13)		Other (5)	Other (3)
Trip Purpose:	Vacation (85%)	Vacation (59%)	Vacation (60%)	Vacation (46%)
	Pers. Bus. (5%)	Non-gov't. (18%) Bus.	Non-gov't. (19%) Bus.	Non-gov't. (24%)
	Other (5%)	Conference, VFR* Pers. Bus. (5%)	Gov't Bus. (9%)	VFR* (11%)

* Visiting friends and relatives.

illustrated that in Ottawa the peak months are May, September and October, when business travel is at its highest. In the summer, however, business travel declines, in both real and in proportional terms, and is superseded by pleasure travel in June, July and August. The data acquired in this study support this trend, as pleasure travel (vacations, visiting friends and relatives) accounted for at least 60% of all the bookings in each stratum. The business traveller maintained his importance in the better quality facilities, however, accounting for up to one third of luxury bookings.

Table 5.3.13 presents a summary of the variables discussed in this section of the paper. As trip duration and distance travelled increased, there was a greater tendency to select poorer quality accommodation. Mayo's findings with American auto vacationers (Mayo, 1974) are again confirmed. Similarly, the mode of transportation used showed a marked division among the strata. Two star users, being typical auto vacationers as defined by Mayo, and four star guests seemed to prefer auto travel, while three star guests used a much wider variety of transportation forms. Those who stayed at the hostel or campground most often used alternative means. This group was the greater user of inexpensive public carriers, buses and trains, and journeyed extensively by hitchhiking and bicycle, the last two forms being essentially cost-free.

Interestingly, there was very little difference between the length of stay in Ottawa among the four groups. The mode of the stay ranged from one to two nights and mean stay was between 3.03 and 3.45 nights. There was, however, an inverse relationship evident between Ottawa as a main destination and the type of lodging selected, and whether or not it was the visitor's first time in the city. Ottawa became increasingly a main destination as the quality of accommodation improved. These better quality facilities also attracted many more repeat visitors than the one or two star places. Possible explana-

tions for this trend are, point of origin, distance travelled, total trip duration, trip purpose, and weekend travel.

Pleasure travel was the principal reason for visiting the National Capital Region during the study period, mid-July to early September. The proportion of business travellers rose as the quality of the lodging improved. The same trend was also noted with those who stated their trip purpose was visiting friends or relatives.

In conclusion, therefore, one can speculate that trip distance and duration played a vital role in the overall selection process. Those travelling for longer periods of time and over greater distances were more likely to select poorer quality lodging. This idea was further supported by the varieties of modes of transportation used in the different strata. Pleasure travel declined as the quality of lodging improved. The same trend was noted when Ottawa was mentioned as the main destination of the trip and with repeat visits to the city.

5.4 Expenditure Patterns

Questions 15, 16 and 17 dealt with the expected daily expenditures of the guests and with their expenditure patterns. Question 15 asked "how much were the expected daily expenditures in Ottawa including accommodation, meals, charge accounts, etc.". The other two questions asked about the use of travellers cheques, credit cards and expense accounts.

TABLE 5.4.1

Anticipated Daily Expenditures

(per capita)

		<u>< \$50</u>	<u>\$50-\$100</u>	<u>\$101-\$200</u>	<u>> \$200</u>
1*	no.	170	15	1	1
	%	80.9	8.0	0.5	0.5
2*	no.	2	10	9	0
	%	9.5	47.6	42.9	0.0
3*	no.	5	37	46	7
	%	5.3	38.9	48.5	7.4
4*	no.	2	42	112	16
	%	1.2	24.2	65.1	9.3

chi square 405.86, 9 df signif .0000

3 of 16 cells (18.75%) have expected values of less than 5.0

Kendall's tau b .6869 signif .0000

As is readily evident from Table 5.4.1, there is a very strong relationship between anticipated daily expenditure and the type of facility selected. A chi square of 405.86 with 9 df was calculated, which is highly significant, indicating an exceptionally significant relationship. This relationship is not difficult to interpret, however, as a major proportion of a traveller's daily expenses go towards paying for suitable lodging. The visitors who stayed at the NCC Campground paid \$3 per night per person, while hostellers could pay up to \$6 per night if they were not members of the hostelling association. It is not surprising that 80.9% of these people said they were planning on spending less than \$50 per day in Ottawa. Indeed, over 63% of this group said they would be spending less than \$20 per diem. What is important from this revelation, however, is that the truly budget-minded traveller can still enjoy a full vacation experience at relatively little expense. Alternative modes of transportation (hitchhiking, bicycle, bus, train) and inexpensive lodging,

with the availability of on-site cooking facilities permit a pleasure trip to be taken at a cost which is only nominally greater than normal daily living expenses.

Expected daily expenditures rose with improved accommodation. Almost half of those staying at two star facilities stated expected expenses of \$50 to \$100 daily, while 55.9% of quality guests and 74.4% of luxury guests expected to spend in excess of \$100 daily. Again, the price of the lodging seemed to play a major role in the increase in daily expenditures. The average rate for two star hotels and motels was around \$30-\$35 per night, while three star places charged on average \$40 to \$60 and the luxury facilities over \$60 per night, single occupancy.

There are other factors that may also explain this general trend. Mayo (1974) discovered that those travelling for shorter periods of time were prepared to pay more for lodging. The visitor to Ottawa who is travelling for a short period of time seems to pay more for his accommodation. Total trip duration decreased as better quality accommodation was chosen. Further, he also discovered that the 35-44 age bracket paid more for lodging while younger and older vacationers paid less. This same trend was inferred by Hockin (1980) in her study of bus and train travellers. The same general trend was discovered in this survey.

Moreover, total travel party income rose with the quality of lodging. With the exception of campers and hostellers, the incomes were well above the national average. Those who stayed at better quality places could have felt that they had more discretionary income to spend on lodging, as well as shopping, restaurants and entertainment. Also, there was an increase in business travel in better hotels and motels. These people were likely travelling on expense accounts.

Finally, the average party size increased slightly with each level of hostelry. One would expect, therefore, that expenses such as food and beverages would also be higher.

TABLE 5.4.2
Credit Card vs. Travellers Cheque Usage

	<u>Credit Cards</u>	<u>Travellers Cheques</u>
1*	21.4%	63.0%
2*	42.9%	33.3%
3*	65.7%	36.3%
4*	73.2%	23.0%

When questioned about their method of payment, an interesting pattern emerged. Table 5.4.2 compares the use of credit cards with the use of travellers cheques. Both exhibited a significant relationship with the type of lodging selected (travellers cheques chi sq. = 63.21, credit card chi sq. = 111.96). What is most intriguing is that there was an almost equally strong inverse relationship between the uses of each (Kendall's tau b travellers cheques = $-.3281$, credit cards = $.4289$ signif .0000 for both). As the quality of accommodation improved there was a greater likelihood that credit cards would be used. On the other hand, when the quality declines, travellers cheque usage increased.

Question 17 asked the respondents if they were using credit cards or travellers cheques to pay for their trip, not just for their accommodations. It had been suggested, by various hoteliers, that one of the reasons for increased credit card use was because better quality motels and hotels accepted them, whereas some of the moderate quality facilities and the hostel and campground would not. This point is valid, but other factors may play a more important role in explaining this trend.

It is interesting to note that 63% of one star guests used travellers cheques, compared to 33-36% of two and three star guests, and only 23% of four star respondents. On the other hand, 73% of luxury guests used credit cards. This figure declined to 66% for three star users, 43% for two star guests and to only 21% with the hostellers and campers.

The total trip duration possibly had an equally strong impact on the expenditure patterns. Those travelling for shorter periods of time may have preferred to pay for their trip using credit cards instead of paying by cash. After the trip they would have one manageable bill to be paid. Those that were travelling for longer periods of time, on the other hand, seemed to prefer to pay for services at the time of the purchase. By doing so, they could assure themselves that they would stay within their travel budget.

Furthermore, those travelling for shorter periods of time had higher daily expenditures. Someone who expected to spend in excess of \$100 per day on such things as shopping and restaurants, as well as lodging, would possibly find it more convenient to put these expenses on credit cards, rather than to carry large amounts of cash or travellers cheques.

A final explanation can be inferred from the demographic makeup of the users of the various strata. Hostellers and campers were young, often students and earned small incomes. When they travelled they did so on limited budgets. It was presumably easier for them to maintain that budget when they paid by cash. Furthermore, many may not have been eligible for credit cards. The users of other types of lodging, on the other hand, were older, at a better economic station in life and earned relatively large incomes. They would likely not be confined to a strict budget and could, therefore, afford more discretionary expenses.

TABLE 5.4.3

Expense Account Use vs. Trip Purpose

	Using Expense Accounts (%)	
	<u>Yes</u>	<u>No</u>
Business Related	87.0	13.0
Vacation	6.7	93.3
Visiting Friends/Relatives	12.9	87.1
Personal Business/Other	22.2	77.8

The percentage of those who were travelling on expense accounts (Table 5.4.3) approximated the number of business travellers found in each stratum. For example, 33.3% of the quality guests were travelling on expense accounts and 30.8% stated business as their trip purpose. Similarly, the percentages for two star travellers are 28.6% and 27.3% respectively, four stars 36.9% and 33.6% respectively. There was apparently some confusion about exactly what travelling on an expense account meant. The intent of the question was to discover the number of people who had the trip subsidized in part or in whole. Many people, especially those using one star lodgings, apparently interpreted this question as asking whether or not they were travelling on a budget.

The expenditure patterns of the various guests using the different qualities of accommodations were, for the most part, expected by the author. Those staying at better quality facilities had higher daily expenditures than those choosing more modest lodging. This trend is explained not only by the higher rates charged for these facilities, but the increased travel party size, trip purpose, and the likelihood of the traveller having more discretionary income at his disposal seemed to have some influence.

What was interesting to note, however, was the difference between credit card and traveller cheque usage. Credit cards were used much more frequently by those staying at superior accommodations, while travellers cheques became more prevalent when the accommodation became more modest. A number of possible explanations for this trend were forwarded.

5.5 Conclusions

This chapter has identified the demographic profiles, travel and expenditure patterns of summer visitors to Ottawa. Each stratum appeared to attract a different group of travellers who exhibited individual habits and patterns. Moreover, the four strata studied form a continuum of accommodation experiences seemingly providing all visitors with a wide variety of choices.

The relationships between trip duration and distance travelled compared to type of facility selected emerged as the strongest patterns. The quality of accommodation rose as trip length and duration diminished. The average trip length declined from 18.1 nights for one star users to 6.9 nights for those selecting the best quality of accommodation.

This factor was further illustrated by the point of origin of the visitors. Almost half of the one star users were non-North Americans compared to less than 14% of two star, 8% of three star and 3% of four star users. Conversely, the number of Canadian travellers rose from 40% to 73% from the lowest to the highest level of lodging. Furthermore, the proportion of Canadian visitors from Southern Ontario and the Montreal regions also increased with better quality facilities. Americans and retired people preferred two or three star hotels or motels.

The entire sample population was highly educated. Over 70% had some post-secondary education. The employment and income profiles, however, varied from group to group. Again, as the quality of lodging improved median income rose, as did the likelihood of a guest being employed in the professional/managerial field.

Income seemed to be related to the age of the respondents. Those choosing one star facilities were, by far, the youngest group and as a result earned the lowest average income. As the clientele aged, up to 45, incomes grew and subsequently better quality lodging was chosen. Seniors and those over 45, however, who were less likely to have large disposable incomes, chose three star lodgings. It would be interesting in a future study to look at accommodation choices over time to see if, indeed, as an individual ages he chooses better lodging, until he reaches a certain age where luxury accommodations become too costly for him and he must then start seeking out suitable alternative facilities.

The age and income factors also seemed to play a role in the method of transportation used. The young traveller sought alternative means to auto travel: bus, train, hitchhiking and bicycles, while bus tours were most popular with the seniors market. Two and four star guests seemed to use cars almost exclusively, while only two-thirds of three star people used them. Public carriers did not play an important role with the guests of two and four star hostelrys, while they did account for about 33% of one star and 35% of three star users. Most people who travelled by plane chose quality, three star facilities.

Even though the total trip length increased with more modest facilities, there seemingly was very little variation in the duration of the stay in Ottawa. Most of the guests spent three nights or less regardless of where they slept. It was notable, though, that the

number of repeat visitors and those who considered Ottawa as their main destination rose as the quality of accommodation improved. It is also interesting to note the inverse relationship between credit card and travellers cheque usage among the various strata.

Most people come here for pleasure, either to vacation or to visit friends and relatives. The data suggested, however, that business use increased with better quality lodging. Non-government business was carried on by the guests twice as often as government-related business.

It seems evident, therefore, that each sector of the Ottawa hospitality industry tends to cater to a specific type of traveller. Whether this is due to a conscientious division of the market or to natural selection is a research problem that needs further investigation. This chapter has identified the characteristics of visitors, their demographic profiles, travel and expenditure patterns, in an effort to illustrate the differences in the respective segments of the four qualities of commercial accommodation available in the Ottawa area. Chapter 6 will investigate the booking procedures of each guest and consider some of the preferential decisions a person undergoes before selecting a hotel, motel, campground or hostel. As mentioned in Chapter 1, visitors to Ottawa have the choice of not only four classes of commercial accommodation, but also of numerous hostelries within each class. What motivates them to select certain strata of commercial accommodation and why, after making that choice, do they choose one specific hostelry?

CHAPTER 6

ACCOMMODATION PREFERENCES

6.1 Introduction

Questions 10 through 14 sought attitudinal information on why certain classes of facilities were chosen. Ten, eleven, twelve and thirteen asked for specific information about how the lodging was booked, whether or not it was the first choice of hostelry, did the guest spend more or less than expected and, was he satisfied with the accommodations. Question 14 sought a more qualitative assessment of the amenities associated with the hostelry that played an important role in the selection process. The respondents were asked to rate 14 variables on a "0 to 5" scale, to offer an idea of the importance of each in the user's overall choice. In addition, they could, if they wished, use the back of the covering letter to write additional comments or complaints about the facility.

6.2 Booking Practices, Satisfaction Levels

Booking arrangements varied with each type of accommodation. The general trend, however, was that the better quality places (three and four star) were likely to have been pre-booked, whereas the more modest places (one and two star) were not. Furthermore, with the exception of quality lodgings, travel agents or tour operators seemed to play an insignificant role in the accommodation process. Most reservations were arranged by the guests themselves.

TABLE 6.2.1

Booking Procedure

		<u>Pre-Paid Package</u>	<u>Travel Agent</u>	<u>By Self</u>	<u>Not Pre-Booked</u>	<u>Other</u>
1*	no.	4	2	8	168	10
	%	2.1	1.0	4.2	87.5	5.2
2*	no.	0	1	7	14	0
	%	0.0	4.5	31.8	63.7	0.0
3*	no.	1	21	48	29	5
	%	1.0	20.2	46.2	27.9	4.8
4*	no.	5	15	75	67	18
	%	2.8	8.3	41.7	37.2	10.0

Chi sq 163.56 12 df signif .0000

6 of 20 (30%) of the valid cells have expected frequencies of less than 5.0

(The chi sq value is inflated due to the large number of cells with expected values of less than 5.0.)

Table 6.2.1 summarizes the reservation patterns of the four sample groups. Question 10 asked the respondents to state how their lodging was booked. They had 5 possible choices. Was the room reserved as part of a pre-paid package (i.e. bus tour), by a travel agent, by the respondent prior to the trip, not pre-booked, or reserved by other means.

The vast majority of the guests staying at the one star facilities did not, or could not, pre-book their accommodations. Under normal circumstances, neither the hostel nor the NCC campground accepted reservations. In special situations, usually with large groups, when suitable advanced notice was given, the hostel could arrange accommodations. Individuals, however, do not enjoy this service. It is surprising to discover, therefore, that 3.1% of the hostellers stated their lodging was arranged by a travel agent or

that it was included as part of a package tour. Also, it is difficult to explain how 9.4% of these people pre-booked their lodging by themselves prior to the trip, or through "other" means.

The pattern that emerged from the two star facilities was easily interpreted. Over sixty-three percent of this sample did not pre-arrange their accommodations prior to the trip. These facilities, small motels and hotels located along major thoroughfares at the edge of the city (excepting the Townhouse Motor Hotel which is located on Rideau Street), cater primarily to a drive-in trade. Their customers selected these places either because they were listed in travel guides, such as the CAA or Tourism Ontario Inc. (Townhouse, Bayshore), or more commonly simply by deciding it is time to stop for the evening and then looking for suitable lodging. These facilities, therefore, had the largest percentage of automobile users (95%) of all four strata studied. It would appear that these people based their selection decision on roadside choice.

Rooms in the three and four star places, on the other hand, were usually reserved prior to the trip, the most common method being by oneself. Only 28% of the three star guests and 37% of the four star users had not pre-arranged their accommodations in some manner. Mayo found that, if they could be guaranteed a room, they were willing to pay more for lodging (Mayo, 1974, 25). This idea seems to be borne out in this study.

Travel agents or tour operators had very little influence on the booking habits of summer visitors. They accounted for 20% of the bookings at three star places, but for less than 10% in all other types of hostelries. It must be noted that the three star places had the highest concentration of bus tourists, air travellers and senior citizens.

"Other" reasons specified by respondents included reservations being made by secretaries, business associates in Ottawa and friends or relatives. These people seemed to select better quality accommodations than those recommended by tour operators.

"The average auto traveller tends to behave as a rational consumer on the road" (Mayo, 1974, 24). Mayo feels that the summer vacationer shops for the best accommodation value for his travel dollar. Is this evident in Ottawa? Apparently not, for, with the exception of one star users, most had pre-booked their lodging prior to the trip. The decision apparently had already been made. Furthermore, when asked if the facility used was their first choice of accommodation, the respondents overwhelmingly stated yes. The only exception to this were the users of two star places, yet here still 59% of the sample stayed at their first choice.

TABLE 6.2.2

Was This Your First Choice of Accommodation

		<u>Yes</u>	<u>No</u>
1*	no.	161	31
	%	83.9	16.1
2*	no.	13	9
	%	59.1	40.9
3*	no.	82	16
	%	83.7	16.3
4*	no.	156	19
	%	89.1	10.9

Most of the users of moderate quality accommodations travelled by car (95.5%) and rarely pre-booked their room (36.4%). In this situation the consumer could be selective in his/her lodging choice. In other instances where pre-booking is the norm (3 star 72.1%, 4 star 62.8%), the choice had already been made prior to the trip. Thus

these guests may not have enjoyed the same flexibility as two star guests. On the other hand, since much of the 3 and 4 star business is based on repeat customers, by returning repeatedly many may be simply expressing their satisfaction with the hostelry.

Furthermore, people prefer to stay in chains or affiliated hotels and motels. Chains generally offer their guests superior accommodation experiences. Hostelries such as the Holiday Inns (Ottawa Centre and Market Square), the Talisman and Macies Flag Inns are among the most popular places to stay in the city. For each of the Holiday Inns, 93% of the guests surveyed stated that it was their first choice.

While the users of moderate quality lodging may survey the market before deciding where to stay, those staying at quality and luxury facilities have pre-determined ideas as to where they want to spend their time in Ottawa. Consequently, they will either reserve a room in advance of their trip or, upon arriving in the city, seek out one specific hostelry.

TABLE 6.2.3

Did You Spend More or Less Than Expected for Accommodation
(Percent)

	<u>Less</u>	<u>As Expected</u>	<u>More</u>
1*	42.3	27.5	31.2
2*	31.8	18.2	50.0
3*	17.0	53.0	30.0
4*	22.6	43.5	33.9

People seem generally to be satisfied with the rates charged for their lodging. The respondents were asked to state whether they felt

they paid more or less for their lodging than expected (Table 6.2.3). It seems evident from Table 6.2.3 that what guests considered paying more than expected for lodging was a very relative phenomenon. People who sought inexpensive accommodations may have felt they had been over-charged if they were forced to pay \$6 per night at the hostel, while another person may have felt they were getting a good rate at the Holiday Inn Ottawa Centre when charged \$65. Almost 40% of those staying at the NCC Campground felt they paid more than they had expected. Camping Lebreton charged a flat rate of \$3 per person per night. On the other hand, 21% of the guests at the Holiday Inn Ottawa Centre felt they spent less than expected. The standard rate there was \$74.50 per night, single occupancy.

Generally, about one third of the guests in each stratum expressed the view that they paid more for their accommodations than expected. The only exception noted was with the users of two star facilities. Here, one half paid more than expected. These people supposedly comparison-shopped before arriving at an accommodation decision, staying at their first choice only 59% of the time. Mayo found that vacationers established an upper limit of what they were prepared to spend for lodging and generally stayed within that limit (Mayo, 1974, 19). That does not appear the case in Ottawa. Much of this aberration may be due to the small sample size of 22. As a result it is difficult to draw conclusions about the habits of all guests choosing this type of accommodation.

On the other hand, however, many of the guests felt that they received a bargain in their lodging, especially with users of one and two star facilities. Between 17% and 43% stated they paid less than expected.

One anomaly that presented itself among quality and luxury users was that 72% of three star and 62% of four star guests had pre-booked

their lodging. Presumably, these people would have been aware of the costs of their rooms prior to their trip, yet 47% of three star and 56.5% of four star guests stated that they had paid either more or less than expected.

The consumer, however, did not always seem to be aware of the cost of the lodging, as evidenced by the large number of three and four star guests who had pre-booked their room, but still felt they paid either more or less than expected.

TABLE 6.2.4
Are You Satisfied With This Facility?
(percent)

	<u>1*</u>	<u>2*</u>	<u>3*</u>	<u>4*</u>
Yes	96.4	100.0	95.1	97.8
No	3.6	0.0	4.9	2.2

The guests expressed, however, almost universal satisfaction with their accommodations, as illustrated by Table 6.2.4. Between 95 and 100% of the guests from each stratum were satisfied with the lodging selected. People seem universally satisfied with the type of lodging found in Ottawa, be it a campground, hostel, simple roadside motel or hotel, or a luxury class hotel. Most also feel they have paid a fair price for their room. This would suggest that the commercial accommodation industry in the National Capital Region does cater to the needs of the Ottawa bound visitor.

6.3 Psychology of Choice

What motivated people to select certain qualities of accommodation? Demographic data, no matter how precise, can only define characteristics of users and, as such, one can only infer information about the accommodation selection process from such data. Demographic

information and vacationer's travel and expenditure patterns are useful in identifying types of visitors and their vacation patterns, but such information cannot disclose why one hostelry is selected while essentially the same type of facility is not.

In some cases price plays an obvious role. Student travellers, seniors and others on limited incomes cannot choose to stay in luxury hotels. This answer is not, however, complete. The data presented herein have revealed that the typical traveller to Ottawa earns an above average income and as such may not be constrained to specific lodging choices. Question 14 of the survey sought to uncover some of the personal decision making factors involved in the selection process. The respondents were asked to rate 14 variables as to their importance in the selection of their accommodations. The variables were:

- 1) reputation of the hostelry
- 2) price
- 3) pool and other recreation facilities
- 4) location
- 5) dining facilities
- 6) entertainment
- 7) services provided
- 8) colour television
- 9) friendliness of staff
- 10) cleanliness of the facility
- 11) ease of reservations
- 12) booked as part of a package tour
- 13) nothing else available
- 14) affiliation with a chain

This information was augmented by additional comments by the guests written on the back of the covering letter.

The selection of these variables was based in part on the Mayo, Rushmore and Cornell University studies, and in part from personal interviews with the management of the co-operating hotels, motels, campground and hostel. The guests were asked to rank each variable on a "0 to 5" scale, "0" representing not important/not applicable, "1" little importance, "3" moderate importance, and "5" very important. Non responses (i.e. blanks) were not included in the total count.

Variables 1 through 13 will be discussed together. The impact of chain affiliation will be discussed separately.

6.3.1 No Frills (1*) Accommodations

TABLE 6.3.1
Factors Affecting the Choice of One Star Accommodations

<u>Variable</u>	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>Median</u>	<u>Mode</u>
Price	4	4	2	16	34	127	4.76	5
Location	12	4	6	39	48	77	4.17	5
Cleanliness	16	7	5	42	38	74	4.05	5
Friendly Staff	35	8	10	44	37	49	3.37	5
Services Provided	46	11	18	47	27	31	2.82	3
Reputation	63	17	13	51	19	21	2.42	0
Ease of Reservations	96	6	10	23	21	25	0.44	0
Dining Facilities	108	13	22	21	11	4	0.33	0
Entertainment	112	16	17	21	8	6	0.30	0
Nothing Else Available	110	19	10	20	2	8	0.27	0
Pool/Other Recreation	125	19	9	20	6	2	0.22	0
Part of Package Tour	153	12	3	6	1	3	0.08	0
Colour TV	165	6	5	3	0	1	0.05	0

Table 6.3.1 is a summary of the preferences stated by the guests staying at the hostel and campground. Clearly, the single most

important factor influencing accommodation choice expressed by these people was price, scoring a median rating of 4.76 and a modal score of 5. Guests staying at these types of facilities weighed the price/value continuum heavily towards the price side, as opposed to amenities received for the hostelry dollar. A guest of the hostel stated it succinctly when he wrote:

Youth hostels are cheap. You can look up in a book they give you to find the place and know its cost beforehand. The facilities are known... most other places are too pricey and campgrounds are too far away from the city centre. Basically its a compromise between price and locality.

The visitor identified the compromise he made between price and quality. The user is either aware of the facilities offered before arriving in the city (i.e. through the International Youth Hostel Guide) or has a fairly accurate idea of what to expect from a certain hostel or campground. It is accepted that these facilities will offer minimal services at a reasonable price. The guest does not expect restaurants, pubs, colour televisions, etc., and moreover has decided that those are of little importance in the hostelry choice. If one expects few amenities, then it is difficult to be disappointed when none are available.

Ranking a close second and third are locale and cleanliness. Both the NCC campground and the hostel are situated in the core area, Camping Lebreton just west of Bronson Avenue at Albert Street and the hostel along Nicholas Street. They are in close proximity to the city's major transportation, bus routes and tourist attractions. A typical comment from a camper concerning the locale was "excellente idée d'un camping dans (ou à proximité) d'une grande ville" (excellent idea to have a campground in or close to a large city). Many people using these facilities did not have the use of an automobile. As such, it was important for them to be in close proximity to many of the major attractions, as well as local transit routes.

Even though these guests did not express high expectations about the type of facility they wished to stay in, they nonetheless demanded a clean hostelry. The hostel uses a co-operative program to keep its building clean. Guests are expected to perform a chore in the morning as part of accommodation agreement. As a consequence, it maintains a satisfactory level of cleanliness. The campground was situated on a well manicured, obviously well kept field that was equipped with numerous garbage cans. A visitor from France commented, "les sanitaires des camping du Quebec and de l'Ontario sont très propre et très agréable si l'on fait la comparaison avec les sanitaires français" (the washrooms in Ontario and Quebec campgrounds are very pleasant and clean in comparison to those in France).

The other factor that had a median score of greater than 3.0 (moderate importance) was the friendliness of the staff. Over 40% of this sample was travelling alone and most were travelling over long distances for long periods of time. It was likely important to them to be greeted by a friendly face and a warm staff upon arrival in a strange city. It would make them feel more comfortable and greatly enhance their impression of Ottawa. An American travelling from Washington State summed up his feelings when he wrote, "I will remember the Nicholas Street Youth Hostel. The accommodations are great and the staff very friendly and helpful. My stay here helped make my visit to Ottawa a very pleasing experience".

Other factors that had some impact on the choice of this type of hostelry were services provided and the reputation of the facility. The services provided included shower and bathroom facilities, security for packs, bicycles, etc., 24 hour staff, and in the case of the hostel, cooking facilities and the availability of an inexpensive breakfast. The campground offered, in addition, picnic tables and cooking priveleges.

The International Hostelling Association and the Canadian Hostelling Association annually publish a guide book of hostels, where and how to find them, their cost, what they offer, and a brief description of the building in which each is housed. The hosteller, therefore, has a good idea of what type of accommodations are available. Furthermore, these travellers have developed an informal information network offering advice and comments to those who are about to go to a certain locale. There is, therefore, a great deal of word-of-mouth advertising.

The other variables mentioned apparently had very little influence on the selection process of a majority of hostellers or campers. A few felt that dining facilities, recreational opportunities and even a television were important, but most stated that these features had "no importance" or were "not applicable" to their hostelry choice.

The modal score of the variables also reflected this idea. Price, locale, cleanliness and friendliness of staff all had scores of 5. Services provided had a score of 3. The mode for all other variables was 0. Clearly the users of these facilities valued a clean, convenient place to sleep at a reasonable price, as being the most important factors influencing their choice. Mayo suggested that people who considered their motel accommodation as being simply a place to sleep and not as being an intrinsic part of the vacation experience would pay less for lodging. To a large extent this seems to apply here. An American visitor, from Iowa, best summed up the reason why hostels are preferred. He wrote:

...it is clear from my answers, I think, that what I am looking for in accommodation is something cheap and minimal. It is frustrating that there are so few accommodations of this type. I am not usually interested in, nor do I want to pay for, a lot of frills that I don't need: TV, plush carpets, etc. Basically I don't like to camp or sleep outside and what I ideally would like to be able to find more easily are hostel type lodgings - a bunk on

which to lay my sleeping bag, a roof over my head and the availability of a hot shower, nothing more. If I want something more private or plush I can always choose that but at least it's good to have a choice. In so many places there are no hostel type accommodations at all and one is left with no choice but to pay \$15 or \$20 for more than one wants. We need a greater variety of choices at the lower end of the scale.

6.3.2 Moderate Lodging (2*) Accommodations

Those who chose better quality accommodations appear to use subtly different decision-making criteria. The demographic characteristics of two, three and four star guests were similar to each other and dissimilar to those staying at the hostel or campground. These people were generally older and more affluent. As well, they were more likely to travel by automobile over shorter distances and for shorter periods of time. For reasons previously discussed (disposable income, transportation, trip purpose, availability, etc.) they enjoyed the potential selection of a greater number of lodging types.

TABLE 6.3.2

Factors Affecting the Choice of Two Star Accommodations

<u>Variable</u>	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>Median</u>	<u>Mode</u>
Cleanliness	0	0	0	1	5	15	4.80	5
Location	2	0	2	6	4	7	3.63	5
Price	0	0	0	12	4	5	3.38	3
Friendliness of Staff	3	1	2	7	5	3	3.14	3
Ease of Reservations	7	1	1	5	3	3	2.70	3
Services Provided	6	1	2	8	4	0	2.69	3
Reputation	7	0	2	7	3	1	2.64	3
Colour TV	7	2	1	5	3	3	2.60	3
Dining Facilities	14	0	1	3	2	1	0.25	0
Pool/Other Recreation	14	1	1	2	1	0	0.18	0
Nothing Else Available	14	1	2	2	0	0	0.18	0
Entertainment	17	1	1	0	1	0	0.09	0
Part of Package Tour	19	0	0	1	0	0	0.08	0

It is notable that cleanliness has replaced price as the most important factor. Cleanliness implies tidiness, state of repair and the general attractiveness of the hotel or motel. The median score of this variable was 4.80, the highest score of any variable in all the strata. These people rarely reserved their rooms prior to the trip. The facilities studied, the Bayshore Hotel, the Stardust and Southway Motels and the Townhouse Motor Hotel, cater especially to the drive-in trade.

The first impressions a potential guest has of a motel or hotel is its external attributes, followed by the cleanliness and decor of the lobby and room. If it does not appear to be clean and attractive then the guest will reject it out of hand. Overall cleanliness, therefore, becomes one of the most important features influencing the choice.

Cleanliness has a median rating 1.17 higher than the next most important variable, location (3.63). The four places in this category are all located on major thoroughfares, Carling Avenue, Bank Street and Rideau Street. With the exception of the Townhouse Motor Hotel, which is situated in the core area, all are located in the fringe area of the city. Mayo discovered that auto vacationers felt a "good" locale was either proximate to a major thoroughfare or to a major tourist attraction (Mayo, 1974, 31). These four places meet this requirement. Bank Street is one of the major southern gateways to the city, while Carling Avenue is the prominent road in the west end. The Townhouse is located within easy walking distance of the Market area, Parliament Hill and the Sparks Street Mall.

Price, somewhat surprisingly, rated third in importance, with a median score of 3.38. It became relatively less important in the overall evaluation of the price/value continuum. It was surprising because the manager-owner of the Townhouse Motor Hotel felt that most

people choose motel accommodation strictly because of price. He indicated that potential guests went from door to door asking about rates. The place with the lowest rate would get the business. The data do not appear to support this contention. While many of the guests did travel from place to place, many also did not feel they had paid the lowest price possible. In fact, half paid more than they had expected. Price still had an important role, as indicated by its "relatively important" median score of 3.38, but was superseded by other factors in this survey. One possible explanation was that there was relatively little variation in the price charged by these hostellers. The four places studied each charged between \$32 and \$36.50 per night, single occupancy.

The only other variable rating above "moderate importance" (3.0) was "friendliness of staff", ranking fourth with a median score of 3.14. Again, like hostellers and campers, peoples' impressions of a city depended on the treatment they received during their stay. Cordial, helpful hotel, restaurant and retail staff play significant roles in forming this impression. The guests here did not expect full services, but demanded to be treated in a courteous, complimentary fashion.

Four more features ranked very closely together with a median score of between 2.60 and 2.70, indicating that, while they did not determine the type of lodging selected, they did influence the perception of the value received from the hostelry. These were ease of reservations (2.70), services provided (2.69), the reputation of the hostelry (2.64) and the availability of a colour television (2.60).

The ease of reservations and the services provided reflect the quality of the management provided. The guests preferred to be able to register quickly without undue problems. They were, furthermore, paying over thirty dollars a night for accommodation and, therefore,

wanted some amenities for their travel dollar, including such features as a friendly front office staff, colour televisions, twenty-four hour service, daily maid service, and the availability of a coke machine, snack bar or tuck shop. They did not express a desire for room or valet service, on-premises dry cleaning or many of the other frills associated with more expensive hotels or motels, being willing to do without these and at the same time saving some money.

It is interesting to note that the reputation of the various facilities rated only slightly more importantly to two star residents than to one star guests. Two of the four places studied were rated in various provincial accommodation guides. The Bayshore Hotel and Townhouse Motor Hotel both received two diamond ratings from the CAA. The Townhouse, furthermore, had a three star rate from Tourism Ontario Inc. The guests who stayed at these places were aware of what each had to offer. One person staying at the Bayshore said he selected it "because of the AAA listing. I never heard of this place from any other source". Over half of the guests at these two places rated the reputation as being moderately to very important, while one third said it had no bearing on their lodging decision.

Those that stayed at the motels that were not rated (the Southway and Stardust) were again somewhat aware of what type of facility offered. Two of the four guests stated the reputation was moderately to more important to them, indicating that they were aware of these places, possibly either because of prior visits or through advice from business associates.

The data suggested that the remaining five variables played virtually no role when choosing two star lodging. The sample placed very little importance on dining or entertainment experiences or recreation facilities. These places were not included as part of a

package tour nor did the guests feel that nothing else was available. All five variables had a median score of less than 0.26 and a modal score of 0.

The modal scores revealed an interesting shift in the price/value consideration. Cleanliness and location each had a mode of 5, while price, friendliness of staff, services provided and the reputation of the facility were most often responded to as being "moderately important" (3). Reputation also had a bimodal score, both "0" (not important/not applicable) and "3" (moderately important) each garnered 7 responses. All other features had a mode of 0, including "colour television", even though its median score was 2.60. Many felt it was unimportant while others obviously expressed the desire to have one available.

Cleanliness clearly seems to be the single most important factor influencing the selection of two star hostelries, followed by location. Price ranked third, in both median and mode, and the friendliness of the staff rated fourth. There was then a series of four factors expressed that represented the quality of management and the services provided.

It is evident from both the median and modal scores that price is becoming relatively less important. The guests are beginning to pay significant amounts for their lodging, and regard other factors as being of more importance in their decision-making process. Cleanliness is of paramount importance but a good locale, friendly staff, good management and the services provided are important.

6.3.3 Quality Lodging (3*) Accommodations

TABLE 6.3.3
Factors Affecting the Selection of Three Star Accommodations

<u>Variable</u>	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>Median</u>	<u>Mode</u>
Cleanliness	4	1	0	10	15	62	4.78	5
Location	5	1	1	22	20	48	4.48	5
Price	6	1	2	20	25	43	4.28	5
Reputation	15	1	6	23	17	35	3.71	5
Friendliness of Staff	14	2	7	22	17	29	3.53	5
Ease of Reservations	21	0	2	24	12	32	3.43	5
Services Provided	18	5	12	24	16	16	2.94	3
Colour TV	29	10	8	25	10	9	2.31	0
Dining Facilities	48	8	0	16	4	9	0.48	0
Pool/Other Recreation	53	11	5	11	8	6	0.38	0
Entertainment	77	3	5	7	1	1	0.11	0
Nothing Else Available	77	2	1	5	0	5	0.08	0
Part of Package Tour	78	3	1	3	1	3	0.07	0

The users of this quality of accommodation specified more services for their lodging dollar than those of any other stratum. Table 6.3.3 lists, in order of importance, thirteen variables, six of which had a median score of greater than 3 and a mode of 5. These people reserved their rooms prior to the trip and relied on travel agents or tour operators to book their accommodations more than anyone else.

Again cleanliness was the most important attribute of the hostelry, having a median score of 4.78, location rated next at 4.48 followed by price at 4.28. The importance of cleanliness was still dominant.

The reservation practices, specifically self pre-reservation, indicated that the clientele was quite familiar with these facilities. Three places, The Journey's End Motels, Macie's Ottawan Flag Inn and the Holiday Inn Market Square are affiliated with chains and as such have an assumed level of quality.

The location also ranked very highly. Much of the explanation used for two star hostelries again applies to these places. The Holiday Inn Market Square, the Lord Elgin and the Aristocrat Hotel are all located in the core area close to shopping, sightseeing and business offices. Macies Ottawan and The Journey's End are situated along the major east-west corridors close to shopping centres, restaurants and theatres.

Price rated third with a median score of 4.28. This score represented the second highest median score for price of the four strata studied, raising some questions as to why it rated such importance. Did people select these facilities as a compromise between amenities and cost, searching for hostelries that offered most of the amenities of four star hostelries, but at significantly reduced costs? The data would suggest that this may be a valid assumption.

After the triad of cleanliness, location and price, three other variables seemed to exert a great deal of influence. All had a median of greater than 3.40 and a mode of 5. They were reputation, friendliness of staff and ease of reservations. Almost 70% of the guests booked their rooms prior to the trip, either by themselves or through a travel agent or tour operator. Four of the five places studied have high profiles, possessing either assumed or inferred standards of excellence, three are affiliated to chains and the Lord Elgin Hotel has a reputation as being one of Ottawa's venerable hotels.

People who are paying a relatively high price for lodging appear to demand a friendly, courteous staff. If the staff is curt or inconsiderate the reputation of the facility may suffer. Quality and luxury class hotels and motels have developed a carefully manicured image, based on superior service, excellent facilities and a clean-cut, courteous, efficient staff. The guests have in turn come to rightfully expect this type of service. It is not surprising, therefore, that "friendly staff" rated so highly.

It has been found that people were willing to pay higher rates for lodgings if they can be assured of a room upon arrival (Mayo, 1974). Each of the hostelries offers their guests advanced reservation facilities. Such a service is important to those who do not want to face the problem of arriving in a city late in the afternoon without confirmed accommodations.

The services provided received a moderately important score of 2.94. They included such features as valet service, free parking, free phone service, dry cleaning services, recreation and entertainment opportunities.

Ease of reservations and the services provided contribute to the human elements of the hostelry that serve to enhance the individual's lodging experience. People who are travelling on budget vacations appear willing to sacrifice these features in exchange for less expensive accommodation. Those who are on business trips or not on such restricted vacations want these personalized services. They are evidently not requisites that determine the acceptance or rejection of a hostelry, but do influence the satisfaction with the hotel or motel. In some ways they may also influence the decision to return at a later date.

The data suggest that the physical accoutrements of quality lodging, colour televisions, dining facilities, pools and other recreational activities are more important to these people than to users of two star places, yet apparently still have very little overall impact on the decision to stay at a place. The median rating for these features was, television 2.31, dining facilities 0.48, pool and other recreation activities 0.38.

The three factors that had the greatest impact on the selection of three star, quality levels of accommodation are the same as those that influence two star choices: cleanliness, locale and price. There were, however, other variables that played an increasingly important role in making these places more attractive than modest quality motels and hotels. The patrons, as a rule, paid higher rates to stay in these facilities and consequently demanded more services. The human qualities of these places were the dominant factors affecting choice. The physical amenities, pools, dining facilities, etc., while becoming slightly more important, still appeared to play only a nominal role.

The modal scores clearly indicate what factors guests feel were very important to them. Six features had a mode of 5, the largest number of all the strata. These included cleanliness, locale, price, reputation, ease of reservations and the friendliness of staff. Services provided had a mode of 3, the other variables 0. These guests appeared to be aware of the type of accommodations they wanted and as such specifically searched for facilities that met their needs. Furthermore, it would seem from the booking practices that once a facility met with approval the guest would then return again.

6.3.4 Luxury Lodging (4*) Accommodations

TABLE 6.3.4
Factors Affecting the Selection of Four Star Accommodations

Variable	0	1	2	3	4	5	Median	Mode
Cleanliness	6	0	1	11	35	119	4.78	5
Location	8	3	12	46	35	73	4.06	5
Friendliness of Staff	15	1	5	55	43	53	3.73	3
Reputation	27	3	5	52	39	48	3.50	3
Ease of Reservations	41	1	7	37	36	48	3.47	5
Price	12	2	10	71	36	45	3.40	3
Services Provided	25	6	10	49	37	43	3.40	3
Colour TV	35	11	12	48	32	33	3.07	3
Dining Facilities	52	10	17	50	27	18	2.66	0
Pool/Other Recreation	54	15	18	37	20	27	2.41	0
Entertainment	100	21	22	19	6	5	0.37	0
Nothing Else Available	133	9	2	12	2	4	0.11	0
Part of Package Tour	137	13	3	11	0	2	0.11	0

Users of luxury facilities did not exhibit the same accommodation decision-making processes as did one, two and three star guests. Cleanliness and location retained their prominence, but price became less important, being grouped with a second set of variables all are of moderate importance, rating between moderately important (3.0) and more important (4.0).

Table 6.3.4 illustrates that again cleanliness was the most important factor, having a median score of 4.78, followed by locale, 4.06. The next six variables, friendliness of staff 3.73, reputation 3.50, ease of reservation 3.47, services provided 3.40, price 3.40 and a colour television 3.07, all rated very closely together.

In economy and modest lodging, the physical features of the building, its state of repair, location, cleanliness and the price charged, appeared to be very significant, indicating whether or not a facility was acceptable. In luxury accommodation, on the other hand, a second group of variables appeared to become increasingly important, supplanting price as a strict deciding factor. The respondents from the facilities studied, the Holiday Inn Ottawa Centre, The Talisman Motor Hotel, The Chimo Inns and Webb's Motel, rated price as the sixth most important factor, in a tie with "services provided". A friendly staff, ease of reservations and the reputation of the facility all became more important in the overall choice. Unlike small roadside hotels and motels, these places generate much of their income through repeat customers. They must, therefore, cater to the needs of their clientele. This procedure continues through the summer months when tourist and pleasure travellers dominate the market. As noticed with all other types of hostelries, the staff plays an important role in the guests' perception of the attractiveness of the inn.

Typical comments made by guests at the Chimo Inns and the Holiday Inn Ottawa Centre support this claim. They wrote:

We have been coming to this Holiday Inn since its opening ten years ago and have never had an unpleasant experience here. The staff... have all gone out of their way to accommodate us on all our visits. This is, in our estimation an A-1 hotel.

and,

To stay in such a friendly and clean hotel (Chimo Inns) is only an extension of Ottawa. Will without doubt be back.

These places have well earned reputations. They have acquired superior ratings from travel associations not only because they offer their guests luxuriant, plush furnishings, fixtures and settings, but also a truly exceptional lodging experience. The guests have in turn come to expect such amenities as room and valet service, fine

restaurants, shops, lounges, easy convenient reservations, recreation facilities, etc.

For the first time, the availability of dining services and swimming pools or other recreational facilities rated as being somewhat important (2-3). Each facility studied had an on-site quality restaurant, a swimming pool and a sauna. In addition, the Chimo Inns has a working agreement with the Ottawa Athletic Club.

The data illustrated in Table 6.3.4 suggest that the users of these facilities did not base their decision on one dominant feature. Granted cleanliness and location each had a median score of greater than 4.0, but these two factors were universally important. Instead, the guests appear to weigh the importance of a number of amenities associated with the inn before making a decision. The modal scores again reinforce this idea. Cleanliness, location and ease of reservations had modes of 5, while five other factors, friendly staff, reputation, price, services provided and a colour television had modes of three. Unlike guests of quality facilities who identified six features as being very important, these people selected only three but listed another five as having moderate importance. It seems that, while none of these five features were vital to the ultimate acceptability of the hostelry, each one played a role in the decision-making process.

6.4 Impact of Chains

The last variable to be discussed is the influence of chains and affiliated hotels on accommodation selection. Mayo discovered that most of the guests staying at chains were satisfied with their choice but that about 40% of those who stayed in independents would have preferred to have been in affiliated hotels or motels (Mayo, 1974, 53). Six of the places studied included in this study were either members of a chain or affiliated to other hostelries. These include

the four star Holiday Inn Ottawa Centre and the Talisman Motor Hotel, (Seaway Hotel), the three star Holiday Inn Market Square, Journeys End Motel and Macies Ottawan Flag Inn and the one star Ottawa Youth Hostel. The importance of affiliated hotels and motels is shown in Table 6.4.1.

TABLE 6.4.1

Importance of Staying at a Chain Type of Hostelry

	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>Mean</u>
1* Affiliated	63	15	7	9	10	11	1.30
Non-affiliated	56	4	3	0	1	0	0.22
2* Non-affiliated	19	1	0	0	0	0	0.05
3* Affiliated	25	6	1	10	7	10	1.97
Non-affiliated	28	2	0	5	0	0	0.49
4* Affiliated	24	4	6	13	9	6	2.05
Non-affiliated	79	3	11	10	5	0	0.69

It would appear that having an affiliation with a chain had little impact on the overall selection process. This variable had a mean of about 2.0 for three and four star hostelries and 1.3 for the hostel. It was superseded by nine other criteria in luxury lodging, eight others at quality places and seven others at no frills facilities.

What was notable, however, was that as the quality improved more people seemed to want to stay at chains. Indeed, some guests rated this variable as being extremely important in their overall choice. One female business traveller wrote:

Before the Journey's End opened I was disappointed by the lack of reasonably priced chain hotels in Ottawa. I like to stick with chains because I know they will be clean and have a good level of security (important to a woman travelling alone).

TABLE 6.5.1
Summary of Median Scores

Quality	1*	2*	3*	4*
<u>Median Rate</u>				
5.0	Price	Cleanliness	Cleanliness Location Price	Cleanliness
4.0	Location Cleanliness	Location	Reputation Friendly staff Easy reserv.	Location Friendly staff Reputation Easy reserv. Price Services prov.
3.0	Friendly staff Services prov.	Price Friendly staff Easy reserv. Services prov. Reputation Colour TV	Services prov.	Colour TV Dining facil.
2.0	Reputation		Colour TV	Pool/other rec
1.0	Easy reserv. Dining facil. Entertainment Nothing else Pool/other rec Package tour Colour TV	Dining facil. Pool/other rec Nothing else Entertainment Package tour	Dining facil. Pool/other rec Entertainment Nothing else Package tour	Entertainment Nothing else Package tour

It is also interesting to note that as the quality of the accommodation improved so did the belief that the guest was staying in a chain establishment. "Staying at a Chain" in non-affiliated hosteleries rose from a mean of 0.05 for two star non-affiliated users to 0.49 for those staying at three star independents, to 0.69 for independent luxury guests. Guests at the Chimo Inns and the Lord Elgin two of the most respected independents often thought they were staying at affiliated hotels.

6.5 Conclusions

What factors, therefore, were most important in selecting different qualities of accommodation? The data suggested that cleanliness and location were universally selected as being critical in the choice and that, depending on the expectations of the clientele, price played an important role. Table 6.5.1 compares the median scores of each variable in the four class types, and Table 6.5.2 summarizes the modal ranks.

Cleanliness of the establishment rated the highest in all the traditional types of lodgings (4.78-4.80) and third at the campground and hostel (4.05). Furthermore, it was considered as being far more important than any other factor to two and four star guests. All travellers demanded clean and attractive accommodations regardless of what type they chose.

Location ranked second in all groups. As suggested previously, a good locale either meant being adjacent to a major transitway or proximate to a major tourist attraction. The 15 places studied were all located either in the downtown core or along the major entranceways to the city. As such, their clientele would have ready access to all areas of interest in the city.

The importance of price seemed to vary more with the type of accommodations expected than with the actual cost of the room. It ranked very highly for one (4.78) and three (4.28) star guests, yet had only moderate influence in the choice of two and four star places (3.40). Its impact on the selection of the campground and hostel was self-evident. The people who used these places generally felt they did not have a lot of extra money to spend. As such, they probably felt that they could only afford to pay \$3 to \$6 for accommodation.

It would appear from the data that those who selected two and four star hostelries were aware of the type of accommodation they were about to receive. As long as they felt the desired amenities were available, they seemed satisfied with the price charged. These people seemed to be relatively easy to please, rating many variables as being moderately important but few as being very important.

The people choosing three star, quality hostelries, on the other hand, felt that price was very important. It is possible that they were not certain of the type of accommodations they were about to obtain and therefore were very conscious of the price paid compared to the amenities received. These places represented an intermediate hotel or motel experience, coming between simple two star places and luxury, four star hotels or motels. If a customer was upgrading he would probably want many more extras for the additional \$20 to \$30 charged. If he was downgrading from a luxury hotel he may still have wanted to assure that he was receiving as many amenities as possible, but at a lower price.

A friendly staff rated at least "moderate importance" by all groups. This became increasingly more important, however, as the quality improved. The rise in importance was gradual, though, and it was not until superior lodging was encountered that it superseded price in overall importance.

The same general pattern emerged with reputation of the facility, the ease of reservations and, to a lesser degree, the availability of colour television.

Interestingly, of all the strata the guests at moderate facilities rated the services provided as being least important. Services, of course, varied from hostelry to hostelry. They were as marginal as a hot shower at the campground or as luxuriant as a full room and bar service at a major hotel. The guests' expectations of the services also varied. They seemed, for the most part, to be aware of the amenities offered by each class of hotel, motel or hostel.

Two variables apparently played no role in the selection of one, two and three star hostelrys, but became significant factors in four star places. Dining facilities and the availability of a pool or other recreational facilities rated 2.66 and 2.41 respectively at these places, yet never rated above 0.48 at one, two and three star facilities.

The other variables in the list seemed to have little or no importance in the decision-making processes of the guests. Colour televisions, pools, dining and entertainment facilities and advanced booking were apparently not important to hostellers and campers. Similarly, dining, entertainment and recreation facilities seemed to play small roles in two or three star lodgings, and entertainment apparently had no importance to guests staying at four star places.

The mode (Table 6.5.2) revealed a similar pattern. Cleanliness and location each scored five in the four strata, again revealing the critical importance of these variables in the overall choice. Price, on the other hand, rated a mode of five for one and three star users, but only three for two and four star users. The same situation also applied to friendliness of staff.

TABLE 6.5.2

Modal Scores

<u>Mode</u>	<u>1*</u>	<u>2*</u>	<u>3*</u>	<u>4*</u>
5	Price Location Cleanliness Friendly staff	Cleanliness Location	Cleanliness Location Price Reputation Friendly staff Easy reserv.	Cleanliness Location Easy reserv.
3	Services prov.	Price Friendly staff Services prov. Reputation	Services prov.	Friendly staff Price Reputation Services prov. Colour TV

Those selecting one and three star accommodations had the most specific demands from their lodging as each had the largest number of variables with a mode of five, price, cleanliness, location and friendliness of staff. In addition quality lodging guests felt that ease of reservations and the reputation of the establishment also played a very important role in the choice.

Two and four star guests, on the other hand, stated fewer explicit demands. Cleanliness and location still rated very highly, but with the exception of ease of reservations to four star guests, no other variable had a mode of greater than three. It seems that these people considered a host of features equally, rather than demanding specific amenities individually. Users of luxury accommodations wanted more and varied services than those selecting moderate quality accommodations.

In summation, therefore, what factors played vital roles in lodging choice? All travellers demanded clean, attractive accommoda-

tions that were favourably situated in the region. The price charged was very important to those travelling on strict budgets. For others, however, price was of less importance, being more a reflection of the services the client wished to purchase and therefore of the value received for the lodging dollar. As the quality of accommodations improved, the guests expressed a desire to have more services for the increased rates charged. Easy reservations, advanced bookings, pool or other recreation facilities, dining services and the availability of in-room colour televisions became increasingly important.

Price was the principal factor influencing the lodging choice of one star guests. They appeared prepared to accept spartan accommodations offering the basic amenities, providing the price was reasonable. Contrary to opinions expressed by certain local operators, guests at two star hotels and motels did not seem to seek out places that charged the lowest rates. The price paid was not the single most influential factor affecting the price/value consideration. These people also placed a great deal of importance on a friendly staff and services provided. Those staying at three star, quality accommodations stated the most exacting opinions of what they wanted from their lodging. Speculation suggested that these people felt they were making a compromise between services offered and the price charged, and, as such, sought accommodations that satisfied their needs as well as their wallets. Luxury guests, on the other hand, did not specifically demand these same services. They expected the amenities to be a part of their lodging experience and as such did not feel the need to specifically seek them out.

Price/value considerations were evident throughout the four qualities of accommodation studied. Price was the dominant factor for people choosing basic lodging, but became relatively less important as the quality improved, being supplanted by the services provided and the amenities offered.

CHAPTER 7

CONCLUSIONS

7.1 Restatement of Purpose

Different classes of accommodation attract different types of clientele. Little previous research has, however, compared and contrasted the demographic characteristics, travel and expenditure patterns as well as the decision-making process of people using varying qualities of commercially operated hostelries. The purpose of this thesis was to investigate these factors in an urban setting, using Ottawa as an example.

Some researchers, principally E.J. Mayo (1974) and those at the School of Hotel Administration at Cornell University, have attempted to assess people's preferences for certain hotels or motels, but none have attempted to stratify the hostelry market by quality and to systematically study the clientele in each stratum.

In order to accomplish that in this study it was necessary first to classify the facilities into clearly defined strata. Four classes were identified: (1) one star, campgrounds and hostels, offering minimal services; (2) two star, moderate quality small motels and hotels, that offered limited amenities; (3) three star, quality hotels and motels offering more services, restaurants and better quality facilities; and (4) four star, luxury hotels and motels that offered their guests the best accommodation available in their respective type of hostelry.

7.2 Research Design

The study was conducted between July 19 and September 6, 1982 at 15 facilities representing these four qualities. A total of 501 useful questionnaires were returned by the guests. A response rate of 33% was achieved. Some problems were encountered with the research design and questionnaire development that may have had some bearing on the results.

The most noteworthy problem area was the size of the sample of two star guests. From the outset, great difficulties were encountered in trying to convince the small operator of the benefits of such a study. About 20 hotels or motels in this class were approached before four finally agreed to co-operate. Further, three places initially indicating a willingness to participate, withdrew their support either prior to the start of or during the project. As a consequence, the potential sample size was greatly reduced, and a small total sample of only 22 was gathered.

Overall, the total number of responses was lower than anticipated. Initially the researcher hoped to acquire a sample of approximately 300 respondents from each stratum, for a total of 1,200. Instead, slightly over 500 surveys were returned. It seemed that many of the places that initially agreed to co-operate became disenchanted when the reality of distributing and collecting surveys was realized. A personal interview type of survey would have been ideal, but because of logistics and financial constraints this idea was deemed to be not feasible.

The variation of responses was widely distributed among the four classes and even more widely distributed among the 15 hostelries, raising the question of representativeness of the sample. A sample of 22 from two star guests, for example, is likely not representative of the clientele of the four hostelries studied, let alone of all modest

quality hotels and motels in Ottawa. Similarly, because of the number of hostelries studied and the variety in response rates, the three and four star samples may also not be entirely representative of all visitors using these facilities. Nonetheless, the data collected proved valuable in demonstrating some of the interrelationships evident between the guests of the various classes of hostelry in Ottawa.

There were also some inherent shortcomings with the methodology chosen. The greatest problem to overcome at the outset was deciding on suitable quality codes. Some places were rated the same by all agencies, while other received different ratings from different sources. It was necessary to assign an arbitrary code to some places.

In future studies, the questionnaire could also be improved. There were two areas that were particularly problematic, the income questions (20-21) and the attitudinal question (14). The total travel party income often gave misleading results. Five students travelling together may have had a combined income of \$40,000, but they likely did not exhibit the same expenditure patterns as a family of five with the same income. Similarly, some bus tourists felt their immediate travel party included everyone on the bus. They consequently stated a total travel party income of greater than \$50,000, with over 40 people contributing to it. In such a situation, the income value was meaningless.

Question 14, regarding the decision-making process, generally proved enlightening. After analyzing the results it became apparent that some factors could have been excluded and other more suitable ones included. "Entertainment", "part of a package tour" and "nothing else available" could have been omitted, while questions pertaining to state of repair, room decor and furnishings, and possibly an assessment of the price/value consideration may have been added.

The type of statistical analysis that could be conducted was restricted by the questionnaire format. Non-parametric techniques could best be used with this type of survey. It would have been interesting to have been able to use multi-variate or factor analysis techniques to analyze the data.

Future studies could be improved by lengthening the survey period to encompass the entire summer (from mid-June to September). Also, inclusion of facilities in the Outaouais Region may result in a better representation of Francophone visitors. Lastly, an effort should be made to include a greater number of hotels and motels, especially at the more modest level, to ensure a greater likelihood that all types of travellers could be studied.

The limitations in the survey that were identified above serve to remind the reader that the result presented herein should not be interpreted as necessarily being indicative of the accommodation preferences of all visitors to Ottawa. Instead, the study presents the results of those who decided to complete the survey and may, at best, represent the characteristics of the guests of the places studied and, at worst, simply of the participants.

Notwithstanding the problems and shortcomings identified above, the study proved useful in providing some indication of the type of person choosing different qualities of accommodation in Ottawa, and in assessing the importance of certain services and amenities in the decision-making process.

7.3 Visitor Profiles and Preferences

The survey results suggested that each quality of accommodation catered to a specific segment of the travelling population, defined either by demographic composition, travel or expenditure patterns. In spite of this, a continuum appeared evident. Patterns gradually

changed as quality of lodging improved or declined. It was only in the attitudinal question that a delineation between accommodation class types became apparent. One and three star guests exhibited similar tendencies, as did two and four star guests.

The information presented here may be useful to local operators, for it offers them an idea of the type of clientele using their establishment; where they come from, how far they travel, how much they expect to spend in Ottawa, and, most significantly, what features of the facility they feel are important to them in arriving at their lodging decision.

Furthermore, local agencies involved in tourism (Canada's Capital Visitor and Convention Bureau and the National Capital Commission) now have available to them some quantifiable data concerning overnight visitors. This information may be included with other existing literature to help plan and develop future marketing strategies and to help identify potential marketing areas.

There are some general conclusions concerning the travel patterns of the visitors that may prove beneficial to the above agencies as well as local operators. For example, those choosing better quality accommodations usually travelled fairly short distances, coming from either Southern Ontario, Quebec or the Northeastern U.S. As the distance travelled and duration of trip increased, people tended to choose more modest lodging.

Similarly, as quality of accommodation decreased, the proportion of Canadian travellers declined from about three quarters of the four star guests to slightly over 40% of all hostellers. Americans stated a preference for two and three star hostelleries, while almost half those staying at the campground and hostel were non-North American.

Those travelling shorter distances for shorter periods of time also often stated Ottawa was their main destination. Longer distance travellers, on the other hand, seemed to feel the region was an attractive waypoint. At any rate, the average length of stay in the city, for all classes of accommodation, was about 3 nights.

The type of person selecting the hostel or campground was usually young, male, well educated and often travelling alone. He was here for pleasure travel. Most were under 30 and were either students or seemingly starting in the business world. As a consequence, their incomes were low; half earned less than \$10,000 per annum, and as such, they relied most often on public carriers or on their own means of transportation to come to Ottawa. Most also felt they were limited to spending about \$20 per day in toto, to travel.

The data suggested that for these people price was the most important factor in their price/value consideration. In spite of paying only \$3 to \$6 per person per night for accommodations, though, they demanded some services for their travel dollar. They were prepared to forego colour televisions, dining facilities, entertainment, etc., but felt that clean facilities with an advantageous locale were requisites. Further, they considered a friendly staff, the reputation of the facility and the services that were provided as being quite important in their choice.

The people who stayed at two star hostelries and responded to the questionnaire, were, on the whole, a varied group. No one age or income group dominated, although they were older and more affluent than hostellers or campers. They were again a well educated group who travelled for pleasure. There were still more males than females. Most were employed in managerial/professional positions. This sample almost always drove to Ottawa.

Very few had arranged accommodations prior to the trip, yet most stayed at their first choice of hostelry. All expressed satisfaction with their choice, although half felt they paid more than expected. Their lodging choice appeared to be based on a roadside decision, and, as such, most stated that the cleanliness of the facility was the most important factor influencing them. Their price/value consideration seemed to be based on familiarity with the type of services and amenities offered. Beside cleanliness and locale, the other features, including price, received only a moderate rating. It seemed they knew what to expect from these facilities and were, therefore, generally satisfied with what they received.

This expectation was apparently not evident in the three star guests surveyed. The researcher has the impression that these people were somewhat cautious when choosing these places even though almost three quarters had booked the room prior to the trip. Of all groups identified, three star guests expressed the most adamant lodging requirements. They seemed very price conscious, but were also very much aware of receiving many services for their travel dollar. It seems that they felt that those places offered a compromise between moderate and luxury facilities and if they were going to pay rates substantially higher than two star hostelrys they wanted the extra services available. On the other hand, if they felt they could not afford luxury hotels or motels they still tried to find places that offered as many amenities as possible, but at a lower price.

This sample was, on average, the oldest group studied, containing the highest proportion of seniors and those over 46. Most worked in professional or managerial fields, although there were many retired people. They appeared to be fairly affluent, three quarters earned over \$30,000 per annum. Most were travelling for pleasure.

They travelled primarily by car, but flew more often than any other stratum (18%) and used other public carriers second most frequently (16%). They also used the services of travel agents and tour operators more than any other group (20%).

These findings raised a number of questions that cannot be answered here. Did the guests really perceive that they were compromising between price and quality? How much did the cost of air travel influence the lodging decision? Exactly what was the impact of tour operators on lodging choice? Did the age of the guests play a role in their hostelry choice? (It has been suggested by other researchers that travellers in their thirties and early forties select the most expensive lodging, while younger and older vacationers choose less expensive hotels and motels. The data from Ottawa seems to support this contention.) Without further investigation, however, such conclusions are tenuous at best.

Those who selected luxury accommodations were generally between 31 and 45 years old and were often travelling with children. They were on the whole the most affluent sector and had the largest proportion of people employed in professional or managerial fields. They had the highest daily expenditures and used credit cards most frequently. Most were travelling for pleasure, but about one-third were here to conduct business. About 60% reserved their room prior to the trip.

As far as their hostelry decision was concerned, as with two star guests they were seemingly less demanding than one and three star guests. They were aware they were paying top rates and seemed to feel they would receive many amenities and services for the price paid. The price/value perception was weighed heavily towards the value received. These people, though, seemed to feel many services were forthcoming and, therefore, did not rate any one feature as being

critical to the choice. Instead, many services ranked as being moderately important. Combined, they would offer the guest the lodging experience desired.

7.4 Future Research

While this study has provided some insight into the market divisions within the commercial accommodation industry in Ottawa, it has also raised some interesting questions that bear further investigation. One such issue is: how does a person's individual accommodation selection pattern change over time? Does an individual, as suggested, prefer better quality facilities up to a certain age and then downgrade, compromising between price and quality? At what age is this compromise made? Indeed, was the pattern inferred by this study a reflection of a general trend over time, or of the economic realities of 1982? One must also consider the influence of public carriers and tour operators on this choice.

The age component also has some potentially important implications for the industry itself. As our population ages the proportion of seniors will rise. Previous studies have revealed that these people are active travellers. This study has suggested that they might prefer quality (3*) lodging over budget or luxury hotels and motels. The question arises as to how long the existing 3* hostelries can meet their needs. Will there be a shortage of suitable accommodations in the future? Should more hostelries be developed that specifically cater to the seniors' market?

Another possible avenue for future research is to conduct a more involved study, over a wider variety of hostelries. A detailed personal interview studying the accommodation preferences of each guest would prove enlightening. During this project, a great deal of insight was acquired from the respondents who wrote additional comments on the reverse of the covering letter.

Beside cleanliness, the decisional factor having the highest median score was location. As stated previously, a good location was perceived by the guests to be either proximate to a major thoroughfare, or close to a major attraction. The question raised, however, is by what process do the hostelries themselves select their sites? Are certain sites more suited to moderate quality facilities rather than to luxury hotels, and vice versa? Future studies could be sanctioned to develop a location equation to assess the various factors that play important roles in the location of various quality hotels and motels. Variables such as customer needs and lifestyles, as well as economic considerations such as land availability and cost could be included.

The last question to be raised is: does Ottawa represent a unique situation? It is one of the few cities to offer a full range of facilities, including camping in the core area. Does the fact it is a national capital influence people's decisions to come here? Those travelling to Ottawa from a major metropolis such as Toronto are faced with a fairly long drive. Does this influence them to include an overnight stay in their trip? Finally, do other cities in Canada attract the same type of visitor, and does the visitor exhibit tendencies and habits similar to those seen here?

7.5 Summation

The study illustrated the differences in the type of clientele attracted to some of the hotels, motels, campground and hostels in the Ottawa area. On the whole, the findings from this study conform fairly closely to those of Mayo (1974) and Cornell University (1975). Analysis of the data suggested that there were many more factors other than price affecting the hostelry decision-making process. Indeed, the decision seems to be related to point of origin, trip duration, distance travelled, age of the traveller, whether Ottawa was the main destination, as well as the perceived value received for the price

paid. Other variables having somewhat less importance included method of payment, mode of transportation, occupation, income, travel party size and whether or not this was the first visit to Ottawa. It would appear that people visiting Ottawa have pre-determined hostelry preferences, based on these factors and that the local commercial accommodation industry has evolved to meet their needs.

APPENDIX 1

QUESTIONNAIRE



Carleton University
Ottawa, Canada K1S 5B6

Users of commercial accommodation in Ottawa have the choice of many types of lodgings, hotels, motels, campgrounds, youth hostels, etc.

In fulfillment of my Masters degree in geography from Carleton University I am interested in studying the reasons why certain facilities are selected.

As such, this questionnaire has been circulated to a number of facilities throughout Ottawa.

We would appreciate it if you could take a few minutes of your time to complete the survey and return it to the front desk. The questions are self explanatory. Please complete all questions.

Confidentiality has been assured by the participating establishments.

The attached information brochure should help you have a more enjoyable stay in Ottawa.

Thank you for your assistance.

Sincerely,

R.D. (Bob) McKercher

L'industrie de l'hôtellerie d'Ottawa offre à sa clientèle une grande variété d'hébergements y compris hôtels, motels, auberges de jeunesse et terrains de camping.

Due à maîtrise en géographie obtenue à l'Université Carleton, je suis intéressé d'investiger les motifs du choix de la clientèle.

C'est pourquoi le questionnaire suivant vous est soumis par l'entremise de votre logeur et d'autres participants d'Ottawa.

Il serait grandement apprécié que vous preniez quelques minutes pour répondre aux questions suivantes et remettiez le questionnaire complété à la réception. Les questions sont claires et précises. Veuillez répondre à chacune d'elles.

Les établissements participants garantissent la confiance de l'information.

La brochure d'information ci-jointe vous aidera à passer un beau séjour à Ottawa.

Merci de votre collaboration.

Cordialement,

R.D. (Bob) McKercher

Do Not Complete

1) Where do you live? City or nearest city, town, village _____
 Province/State _____
 Country _____

1

2

3

2) Is Ottawa the main destination of your trip? _____ (yes/no)

4

3) Is this your first visit to Ottawa? _____ (yes/no)

5

4) How many nights do you expect to stay in Ottawa? _____

6

5) How many nights do you expect to be away from home on this trip? _____

7

8

6) What is the main purpose of this visit?

- a) business/government related _____
- b) business/non-government related _____
- c) convention/conference/seminar _____
- d) personal business _____
- e) vacation _____
- f) visit friends/relatives _____
- g) other (specify) _____

9

7) How many people are in your immediate travel party? _____

8) How many of there in each age category?

	Male	Female
under 15 years	_____	_____
15-21 years	_____	_____
22-30 years	_____	_____
31-45 years	_____	_____
46-64 years	_____	_____
older than 65 years	_____	_____

10 11

12 13

14 15

16 17

18 19

20 21

22

9) How did you travel to Ottawa?

motor vehicle _____ train _____ bus _____ bus tour _____ airplane _____
 hitchhiking _____ other (specify) _____

23

10) How was your accommodation booked?

part of a pre-paid package _____ reserved through a travel agent _____
 reserved by self prior to the trip _____ not pre-booked _____ other _____

24

11) Is this your first choice of accommodation? _____ (yes/no)

25

12) Are you satisfied with this facility? _____ (yes/no)

26

13) Have you spent more or less than you expected on accommodation? _____

14) How important were each of the following items in choosing this facility?

Please rate each one on a 0 to 5 scale of importance as follows:

"0" - not important/not applicable, "3" - moderately important, "5" - very important.

reputation	0 1 2 3 4 5	services provided	0 1 2 3 4 5	<input type="checkbox"/> 27	<input type="checkbox"/> 28
price of accommodation	0 1 2 3 4 5	colour TV	0 1 2 3 4 5	<input type="checkbox"/> 29	<input type="checkbox"/> 30
pool/recreational facilities	0 1 2 3 4 5	friendliness of staff	0 1 2 3 4 5	<input type="checkbox"/> 31	<input type="checkbox"/> 32
location	0 1 2 3 4 5	cleanliness	0 1 2 3 4 5	<input type="checkbox"/> 33	<input type="checkbox"/> 34
part of a chain	0 1 2 3 4 5	part of a package tour	0 1 2 3 4 5	<input type="checkbox"/> 35	<input type="checkbox"/> 36
dining facilities	0 1 2 3 4 5	ease of reservation	0 1 2 3 4 5	<input type="checkbox"/> 37	<input type="checkbox"/> 38
entertainment	0 1 2 3 4 5	nothing else available	0 1 2 3 4 5	<input type="checkbox"/> 39	<input type="checkbox"/> 40

15) How much do you expect to spend per day in Ottawa (please include accommodation, meals, charge accounts, etc.) \$ _____ 41

16) Are you travelling on an expense account? _____ (yes/no) 42

17) Are you using charge cards _____, or travellers cheques _____ to help pay for this trip? 43 44

18) What is your occupation? 45

- a) professional _____
- b) management _____
- c) sales _____
- d) other white collar _____
- e) skilled worker/technician/tradesman _____
- f) other blue collar _____
- g) retired _____
- h) student _____
- i) unemployed _____
- j) other _____

19) What is the highest level of education you have achieved? 46

- a) some highschool or less _____
- b) completed highschool _____
- c) some post secondary education _____
- d) college diploma _____
- e) university degree _____

20) What is the total income of all the people in your immediate travel party? 47

less than \$10,000 _____ \$20,000 - \$29,999 _____ \$40,000 - \$49,999 _____

\$10,000 - \$19,999 _____ \$30,000 - \$39,999 _____ greater than \$50,000 _____

21) How many people contribute to this income? _____ 48

You have now completed the questionnaire.
If you wish to add any further comments, please use the back of the covering letter.

THANK YOU FOR YOUR CO-OPERATION

Ne pas remplir

- 1) Où demeurez-vous? ville ou village _____
 province/état _____
 pays _____
- 2) Est-ce Ottawa le but principal de votre voyage? _____ (oui ou non)
- 3) Est-ce votre première visite à Ottawa? _____ (oui ou non)
- 4) Combien de nuits pensez-vous rester à Ottawa? _____
- 5) Pendant ce voyage, combien de nuits pensez-vous être parti de votre demeure? _____
- 6) Quel est le but principal de cette visite?
- a) affaires gouvernementales _____ e) vacances _____
 b) affaires non-gouvernementales _____ f) visites d'amis/parenté _____
 c) congrès, conférence, séminaire _____ g) autres (spécifiez) _____
 d) affaires personnelles _____
- 7) Combien de personnes dans votre groupe de voyage? _____
- 8) Combien d'entre elles dans chaque groupe d'âge? hommes femmes
- | | | |
|-----------------|-------|-------|
| moins de 15 ans | _____ | _____ |
| 15-21 ans | _____ | _____ |
| 22-30 ans | _____ | _____ |
| 31-45 ans | _____ | _____ |
| 46-64 ans | _____ | _____ |
| plus de 65 ans | _____ | _____ |
- 9) Comment êtes-vous venu(e)s à Ottawa?
- automobile _____ train _____ autobus _____ visite organisée en autobus _____
 avion _____ auto-stop _____ autres (spécifiez) _____
- 10) Comment votre hébergement fût-il arrangé?
- fait parti d'un arrangement tout-compris _____ réservé par soi-même _____
 réservé par une agence de voyages _____ aucune réservation _____ autres _____
- 11) Ceci est-il votre premier choix de logement? _____ (oui ou non)
- 12) Êtes-vous satisfait de cet endroit? _____ (oui ou non)
- 13) Avez-vous dépenser moins ou plus que vous pensiez pour l'hébergement? _____

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18
- 19
- 20
- 21
- 22
- 23
- 24
- 25
- 26

1) Veuillez évaluer les items suivants d'après leur importance dans le choix de ce logis.

Encerclez le chiffre approprié:

"0" - sans importance/ne s'applique pas, "3" - moyennement important, "5" - très important.

réputation	0 1 2 3 4 5	services disponibles	0 1 2 3 4 5	<input type="checkbox"/> 27	<input type="checkbox"/> 28
rien d'autre disponible	0 1 2 3 4 5	télé-couleur	0 1 2 3 4 5	<input type="checkbox"/> 29	<input type="checkbox"/> 30
placine/autres facilités récréationnelles	0 1 2 3 4 5	endroit	0 1 2 3 4 5	<input type="checkbox"/> 31	<input type="checkbox"/> 32
fiabilité du personnel	0 1 2 3 4 5	propreté	0 1 2 3 4 5	<input type="checkbox"/> 33	<input type="checkbox"/> 34
fait parti d'une chaîne	0 1 2 3 4 5	restaurant	0 1 2 3 4 5	<input type="checkbox"/> 35	<input type="checkbox"/> 36
inclus dans un voyage forfait	0 1 2 3 4 5	divertissement	0 1 2 3 4 5	<input type="checkbox"/> 37	<input type="checkbox"/> 38
facilité de réservations	0 1 2 3 4 5	prix	0 1 2 3 4 5	<input type="checkbox"/> 39	<input type="checkbox"/> 40

15) Combien pensez-vous dépenser par jour à Ottawa? \$ _____
(SVP inclure logis, repas, cartes de crédit, etc.)

16) Etes-vous sur un compte de dépenses de voyage? _____ (oui ou non)

17) Utilisez-vous des cartes de crédit _____ ou chèques-voyages _____ pour payer ce voyage?

18) Quel est votre profession?

a) professionnelle _____	f) employé(e) d'usine/manoeuvre _____
b) cadre supérieur _____	g) étudiant(e) _____
c) ventes _____	h) sans emploi _____
d) autre employé de bureau _____	i) autres _____
e) artisan/technicien/employé de métier _____	j) retraité(e) _____

19) Quel est votre niveau d'éducation?

a) un peu d'école secondaire _____	d) diplôme de CEGEP _____
b) secondaire complète _____	e) degré universitaire _____
c) niveau post-secondaire _____	

20) Quel est le revenu total de toutes les personnes dans votre groupe intime de voyage?

moins de \$10,000 _____	\$20,000 - \$29,999 _____	\$40,000 - \$49,999 _____
\$10,000 - \$19,999 _____	\$30,000 - \$39,999 _____	plus de \$50,000 _____

21) Combien de personnes contribuent à ce revenu? _____

Vous avez maintenant complété le questionnaire.
Si vous avez d'autres commentaires svp utilisez le verso de la première page.

MERCI DE VOTRE COOPERATION

APPENDIX 2

POINT OF ORIGIN

Alberta
British Columbia
Manitoba
Ontario
Quebec
Saskatchewan
Yukon Territory

CANADA

(Province, Territory)

	<u>1*</u>	<u>2*</u>	<u>3*</u>	<u>4*</u>
Alberta	5	4	2	1
British Columbia	7	0	3	3
Manitoba	3	0	1	2
New Brunswick	2	0	0	3
Nova Scotia	0	0	1	2
Ontario	24	10	31	101
Quebec	37	0	16	11
Saskatchewan	0	0	0	2
Yukon Territory	1	0	0	0

UNITED STATES

(Region, State)

	<u>1*</u>	<u>2*</u>	<u>3*</u>	<u>4*</u>
Northeast				
Connecticut	0	1	1	3
Maryland	3	0	2	1
Massachusetts	3	0	10	4
New Hampshire	1	1	0	0
New Jersey	1	0	1	3
New York	8	1	9	10
Pennsylvania	0	0	3	0
Dist. of Columbia	0	0	0	2
Vermont	0	0	1	0
Midwest				
Illinois	0	2	3	3
Iowa	1	0	0	0
Kansas	1	0	0	0
Michigan	0	2	0	4
Minnesota	1	0	0	2
Missouri	0	0	4	0
Ohio	0	0	2	1
Wisconsin	0	1	0	4
South				
Florida	2	0	0	0
Georgia	0	0	0	1
Mississippi	0	0	0	1
North Carolina	1	0	0	0
Texas	1	0	3	0
Virginia	0	0	0	1
West Virginia	0	0	0	1
West				
Arizona	0	0	0	1
Colorado	3	0	0	0
Washington	1	0	0	0

ORIGIN BY COUNTRY OF RESIDENCE

	<u>1*</u>	<u>2*</u>	<u>3*</u>	<u>4*</u>
North America				
Canada	78	11	55	132
Mexico	1	0	0	0
Trinidad	0	1	0	0
United States	27	8	41	43
South America				
Brazil	0	0	0	1
Columbia	0	1	0	0
Europe				
Bulgaria	1	0	0	0
Denmark	1	0	1	0
France	21	0	0	0
Holland	4	0	0	0
Ireland	1	0	0	1
Sweden	1	0	0	0
Switzerland	4	0	0	0
United Kingdom	24	0	4	1
West Germany	10	0	2	1
Asia				
Israel	4	0	0	0
China	1	0	0	0
Singapore	1	0	0	0
Sri Lanka	0	0	1	0
Taiwan	3	0	0	0
Oceania				
Australia	7	0	0	1
New Zealand	3	0	0	0
Africa				
Algeria	0	1	0	0
Nigeria	2	0	0	0

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