



Prince Edward Island National Park Visitor Wants, Needs and Interests Research, Gap Analysis and Recommendations

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CORPORATE RESEARCH
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Prince Edward Island National Park Visitor Wants, Needs and Interests Research, Gap Analysis and Recommendations

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Table of Contents

Introduction	1
Executive Summary	3
Sommaire.....	5
Conclusions	8
Recommendations	10
Research Gap Analysis.....	12
Research Gap Summary	12
Emerging Tourism Trends	15
Motivations for Choosing PEI NP	17
Visitor Profile.....	20
Knowledge of PEI NP	22
Visitor Activities.....	23
Satisfaction with PEI NP	25
Overall PEI NP Experience/Visitor Expectations	27
Bibliography	28



Introduction

Corporate Research Associates Inc. (CRA) is pleased to present the results of the secondary research component of the **Prince Edward Island National Park Branding Research and Visitor Wants, Needs and Interests Research, Gap Analysis & Recommendations Study**.

Prince Edward Island National Park (PEI NP), under the jurisdiction of Parks Canada, is the 3rd smallest national park in Canada, yet boasts the highest national park visitation outside of the mountain parks in the Canadian Rockies, a total which exceeds one million visitors annually. Given such a small land base, the success of the Park has not come without a cost to its ecosystem that includes beaches, coastal dunes, wetlands, salt marshes and forest habitat. As stated in the Terms of Reference, the Park “has long been recognized for its recreational values as opposed to the role it plays in protecting a coastal landscape”. The natural processes of land, water, and wind are causing erosion of the shoreline, threatening current facilities and infrastructure. PEI NP encompasses more than 47km of coastline on the northern side of Prince Edward Island, and offers many activities and attractions, including:

- Beaches with supervised swimming and washroom/shower facilities;
- Hiking trails;
- Canoeing;
- Camping;
- Ecology preservation, with a primary focus on dune preservation and piping plover nesting sites;
- Windsurfing;
- Interpretive information, programs, and activities for visitors; and
- Green Gables House.

The development of a Visitor Experience Concept is occurring within the context of a changing tourism environment. Tourism travel to Prince Edward Island has been in decline for the past several years, and 2005/2006 visitation of PEI NP is at its lowest level since 2000/2001. Tourism travel to Atlantic Canada in general is also declining. Shifting demographics, the events of September 11, 2001, and the price of gasoline are just some of the factors that are affecting visitor travel to PEI and PEI NP. As a result, the tourism industry in Prince Edward Island has recognized the importance of strengthening Prince Edward Island’s unique proposition and developing products and services that will increase visitation to the Island. PEI NP is identified as being critically important to this development process, and it is expected that the Park will create a balance between sustainability and enhancing access to the Island’s coastlines. Attractions located in the vicinity of PEI readily acknowledge their dependence on the strength of PEI NP to attract visitors, and rely on the draw of PEI NP to drive visitation of their own facilities. A 1999 study concluded, “Parks Canada is by far the largest contributor to sustained tourism in Prince Edward Island.” Not surprisingly, conservation groups are keenly interested in the preservation aspect of PEI NP’s mandate.





The Park has an untapped opportunity to promote and be seen as leaders in environmental technologies. Similarly, the Park has an opportunity to engage the local communities in creating and sustaining a healthy park for people. Community support for and understanding of the relationship between a healthy park system and a healthy community is of paramount importance. This will not only ensure that people value our precious natural environment and utilize it responsibly, but also help to validate appropriate levels of funding. Consequently, Parks Canada on Prince Edward Island needs to initiate this campaign to communicate the contribution a healthy parks system makes to the well being of the community.

To this end, Parks Canada is interested in “conducting the necessary research to support the development of 1) a new visitor experience (product) concept and 2) a new brand for Prince Edward Island National Park”.

As PEI NP works towards creating a Visitor Experience Concept, a need has been identified to review existing research to better understand the Park’s current knowledge base in terms of the overall visitor experience. To meet this need, PEI NP commissioned CRA to undertake an assessment of secondary research relating to tourism in PEI and PEI NP. A variety of sources of information were included in the secondary research assessment including previous research commissioned by Parks Canada; Prince Edward Island Tourism research; Tourism Atlantic-ACOA; Atlantic Canada Tourism Partnership; Canadian Tourism Commission; Statistics Canada; Tourism industry reports and journals and general on-line searches.

The primary objective of this secondary research review was to conduct a review and gap analysis of existing research with a specific focus on:

- Visitor knowledge of Prince Edward Island National Park (PEI NP) and Prince Edward Island in general; and
- PEI NP visitor needs, interests, and wants, including what they are ultimately seeking through their travel experiences.

The following report presents the findings of the secondary research assessment and includes an executive summary of results, conclusions, recommendations and an analysis of results. A bibliography, which identifies the various documents utilized in the secondary research analysis, is also included in the report. Where appropriate, reference to a particular research document is noted throughout the report.

Please note, the word “motivation” or “motivations” appears several times throughout this report. It is important to note that “motivation” is used to describe the totality of an individual’s psychological, physical and emotional wants and needs that drives that person towards a desired goal. For example, to suggest PEI NP visitors are motivated to visit the Park because of the beaches is too simplistic, rather, the underlying motivations (to have a relaxing outdoor experience, to bring the family together, etc.) that prompt a visit to a PEI NP beach need to be understood in order to develop a compelling Visitor Experience Concept.





Executive Summary

As stated in the Parks Canada Corporate Document “Opportunities for Visitor Experience”, the Visitor Experience Assessment and Planning Process for Parks Canada has eight guiding principles, of which three are particularly relevant to this research review. These three principles include:

- **Client Focused** – Understanding and responding to the needs and values of visitors and stakeholders is the starting point of the visitor experience;
- **Strategic** – Long-term success depends on having a researched and systematically planned approach to programs and activities; and
- **Knowledge-based** – The assessment and action plan must be founded on accurate information on visitors, tourism, and leisure trends.

The secondary research analysis conducted on behalf of Parks Canada suggests the Park presently has insufficient knowledge regarding the **overall visitor experience** at PEI NP in terms of motivations, knowledge of Park activities and services, overall perceptions of PEI NP, visitors’ emotional connection to the Park, and the desired visit outcome. In addition, little is known about why non-visitors decide not to visit PEI NP.

There is detailed information available that provides an accurate picture of the number of visitors to PEI NP, and a good deal of operational information that evaluates specific Park initiatives, such as piping plover nesting protection signage and dune protection initiatives, as well as satisfaction with specific Park activities and services and limited information regarding the appeal of future Park programs and activities. The Park does not, however, have a **comprehensive understanding of visitor motivations, expectations, or knowledge of PEI NP products and services**. Indeed, the bulk of the visitor research conducted by PEI NP is operational in nature, in that it is designed to understand how PEI NP program objectives are being met, (e.g. the effectiveness of dune protection programs), with little focus on identifying current or potential visitor expectations of PEI NP. This in no way minimizes the importance of the ecology preservation mandate that PEI NP shares with all National Parks, however, it does highlight the need to better understand the relationship between PEI NP and visitors, and how this relationship might evolve in the future.

Of particular importance is the lack of visitor information essential to Parks Canada’s development of a compelling Visitor Experience Concept along with attitudinal and aspirational reasons to consider vacation experiences; PEI NP wants to fundamentally shift the Park’s focus to “Healthy Parks for People.”

How compelling and relevant information might be delivered to potential Park visitors is identified as an issue. A significant minority of visitors to PEI NP express dissatisfaction with the **availability of Park information** prior to their visit. As potential visitors tend to access information provided by Tourism PEI, it is essential that PEI NP, Tourism PEI, and other PEI tourism stakeholders work closely to ensure easy access to compelling and consistent information for potential Park visitors.





Value is another issue to be considered when developing an understanding of visitors' needs and expectations. Existing research suggests there may be a value issue in terms of the Park entry fee and campsite fees, however, there is no understanding of how entry and other fees affect Park visitation. At the same time, there is an opportunity for PEI NP to identify and develop Park experiences for which visitors are willing to pay premium prices.

As might be expected, the beaches located within PEI NP are the most utilized Park product. Research suggests visitors to the beach areas would be better served with an increased number of, and upgraded washroom, change room, and shower facilities. Use of the remaining PEI NP products and services is low, and visitors tend to become aware of these activities only after they have entered the Park. As these programs are directly related to the Park's nature preservation and education mandate, results show there is a significant opportunity for PEI NP to understand how to make interpretive and heritage presentation **activities that engage visitors**, and become a primary reason for visiting, rather than an afterthought. Indeed, there is a significant opportunity for Parks Canada to understand how the Park currently engages visitors emotionally, and how this emotional connection might be strengthened.

Finally, little is known about the **desired visit outcome**, that is, the feeling or memory that Park visitors would like to carry with them following their PEI NP visit.

Given that gaps in research are evident, CRA recommends PEI NP conduct a comprehensive **Visitor Segmentation Study** through the use of qualitative and quantitative research. More specifically, the secondary research analysis clearly indicates that a Visitor Segmentation Study is warranted to identify relevant visitor needs states or segments based on visitor (including current and potential visitors) interests, needs, and expectations, as well as the overall desired outcome of a visit to PEI NP. The parameters of the study should include an assessment of PEI NP today, as well as to identify how the Park may evolve to become a compelling destination choice. Results would provide clear and essential direction as to how the overall Visitor Experience Concept would be compelling to all high priority segments identified in the Visitor Segmentation Study.





Sommaire

Comme l'indique le document ministériel de Parcs Canada intitulé 'Expérience des visiteurs de la signification de Parcs Canada pour les Canadiens', le processus de planification et d'évaluation de l'expérience du visiteur de Parcs Canada comprend huit principes directeurs, dont trois particulièrement pertinents dans le cadre du présent examen de la recherche. Ces trois principes sont les suivants :

- **Axé sur le client** – comprendre les besoins et les valeurs des visiteurs et des intervenants, et y répondre, constitue le point de départ de l'expérience du visiteur;
- **Stratégique** – la réussite à long terme repose sur une programmation qui découle d'une approche axée sur la recherche et la planification systématique;
- **Fondé sur les connaissances** – l'évaluation et le plan d'action doivent s'inspirer de données exactes sur les visiteurs, le tourisme et les tendances en matière de loisirs.

L'analyse secondaire de la recherche menée au nom de Parcs Canada semble indiquer qu'il existe un manque de connaissances relatives à **l'expérience globale du visiteur** au Parc national du Canada de l'Île-du-Prince-Édouard (PN de l'Î.-P.-É.) et plus particulièrement aux motivations, à la connaissance des activités et des services offerts au parc, aux perceptions globales du PN de l'Î.-P.-É., à l'attachement émotif des visiteurs par rapport au parc et aux résultats visés par ces derniers. De plus, on possède très peu d'information pour expliquer pourquoi les non-visiteurs décident de ne pas visiter le PN de l'Î.-P.-É.

Il existe des données détaillées qui décrivent avec précision le nombre de visiteurs au PN de l'Î.-P.-É., de même qu'une grande quantité de données opérationnelles qui évaluent des initiatives particulières du parc, notamment la signalisation relative à la protection des lieux de nidification du pluvier siffleur et les initiatives de protection des dunes, ainsi que le degré de satisfaction par rapport à des activités et à des services particuliers du parc. On possède également de l'information limitée sur l'attrait de programmes et d'activités prévus pour le parc. Cependant, les responsables du parc **n'ont pas une compréhension approfondie des motivations et des attentes des visiteurs, ni de leur connaissance des produits et des services offerts par le PN de l'Î.-P.-É.** Effectivement, la majeure partie des études sur les visiteurs menées par le PN de l'Î.-P.-É. sont de nature opérationnelle en ce sens qu'elles sont conçues pour permettre aux dirigeants de comprendre comment les objectifs de programmation sont atteints (p. ex., étude sur l'efficacité des programmes de protection des dunes), mais portent peu sur la détermination des attentes des visiteurs actuels ou éventuels du parc. Ce fait ne minimise en rien l'importance du mandat de préservation de l'écologie que le PN de l'Î.-P.-É. partage avec tous les parcs nationaux; il met toutefois en évidence le besoin de mieux comprendre la relation entre le PN de l'Î.-P.-É. et les visiteurs, ainsi que l'évolution possible de cette relation dans l'avenir.





Ce qui est particulièrement important, c'est le manque d'information essentielle qui permettrait à Parcs Canada de développer un « concept de l'expérience du visiteur » qui serait convaincant, ainsi que le manque d'information sur les attitudes et les aspirations qui incitent les visiteurs à considérer des expériences de vacances. Le PN de l'Î.-P.-É. veut apporter un changement fondamental à sa raison d'être et miser sur le concept *Pour un parc en santé* (Healthy Parks for People).

La façon de communiquer des renseignements convaincants et pertinents aux éventuels visiteurs est considérée problématique. Une minorité significative de visiteurs au PN de l'Î.-P.-É. se disent insatisfaits de la **disponibilité de l'information sur le parc** avant leur visite. Puisque les visiteurs potentiels ont tendance à consulter l'information fournie par Tourisme Î.-P.-É., il est essentiel que le PN de l'Î.-P.-É., Tourisme Î.-P.-É. et les autres intervenants touristiques de l'Île travaillent en étroite collaboration afin d'assurer que les éventuels visiteurs ont facilement accès à des renseignements convaincants et uniformes.

Le **rapport qualité-prix** est un autre élément dont il faut tenir compte lorsqu'on tente de comprendre les besoins et les attentes des visiteurs. La recherche actuelle semble indiquer qu'il existe un problème de rapport qualité-prix en ce qui concerne les droits d'entrée au parc et aux terrains de camping, mais on ne comprend pas comment les droits d'entrée et les autres frais influencent le taux de fréquentation du parc. En même temps, le PN de l'Î.-P.-É. se trouve devant une occasion unique de déterminer et de concevoir des expériences pour lesquelles les visiteurs seraient prêts à payer le prix fort.

Comme on pourrait s'y attendre, les plages situées à l'intérieur du PN de l'Î.-P.-É. sont le produit le plus utilisé du parc. La recherche semble indiquer qu'il faudrait augmenter et améliorer les installations abritant les toilettes, les vestiaires et les douches afin de mieux servir les personnes qui visitent les plages. L'utilisation des autres produits et services du PN de l'Î.-P.-É. est faible, car les visiteurs n'ont tendance à en prendre connaissance qu'après leur arrivée au parc. Puisque ces programmes sont directement liés au mandat de préservation de la nature et d'éducation du parc, les résultats indiquent que le PN de l'Î.-P.-É. devrait y voir une occasion importante de comprendre comment préparer des activités d'interprétation et de présentation du patrimoine capables de **captiver les visiteurs** et de devenir la principale motivation de leur visite, plutôt qu'une pensée après coup. En effet, Parcs Canada se trouve devant une occasion unique de comprendre comment le parc suscite présentement la participation émotive des visiteurs et comment on pourrait renforcer cet attachement émotif.

Enfin, on connaît très peu sur le **résultat espéré** à la suite de la visite, c'est-à-dire sur les sentiments ou les souvenirs que les visiteurs aimeraient conserver après leur visite au PN de l'Î.-P.-É.





Étant donné qu'il existe des lacunes évidentes sur le plan de la recherche, CRA recommande au PN de l'Î.-P.-É. de mener une **étude de segmentation des visiteurs** exhaustive à l'aide de méthodes de recherche qualitatives et quantitatives. Plus particulièrement, l'analyse de la recherche de source indirecte indique clairement qu'une étude de segmentation des visiteurs est justifiée, car elle permettrait de définir et de classer les besoins des visiteurs (actuels et éventuels) en états ou en segments selon leurs intérêts, leurs besoins et leurs attentes, ainsi que le résultat global visé à la suite d'une visite au PN de l'Î.-P.-É. Les paramètres de l'étude devraient comprendre une évaluation du PN de l'Î.-P.-É. aujourd'hui, de même qu'une analyse des mesures à prendre pour que le parc devienne une destination de choix. Les résultats procureraient une direction claire et essentielle qui permettrait de comprendre comment le concept de l'expérience du visiteur serait convaincant pour tous les segments prioritaires dégagés lors de l'étude de segmentation des visiteurs.





Conclusions

The following conclusions are derived from the secondary research analysis.

- ***Emerging tourism trends are an important consideration for PEI NP, and it is important to understand how these trends affect Park visitor expectations.***

There are many external factors that PEI NP must consider in terms of how they affect potential visitors' needs, interests, and expectations. A desire for more experiential vacations, shifting demographics, changing technology, gasoline prices, terrorism, and a move towards more luxurious camping experiences must all be considered.

- ***Apart from the obvious attraction of the beaches, there is minimal information about visitor motivations for choosing to specifically visit PEI NP, or why non-visitors make the decision to not visit the Park.***

Visitors to Prince Edward Island identify visiting friends or relatives, curiosity, and past experience most frequently as their reasons for choosing PEI as a vacation destination. In terms of PEI NP, little is known about visitors' motivations, with the exception of to visit a beach. Even then, little is known about the desired outcome of the overall PEI NP beach experience. In particular, little is known about the attitudinal and aspirational aspects related to why a PEI NP visit would be desirable, and how PEI NP would meet these expectations among potential visitors.

Research does suggest PEI NP is more compelling for families compared with other types of visitor parties. Finally, compared with their overall travel to PEI, Quebec residents are over represented in terms of their visitation of PEI NP. Quebec residents are also more likely to mention beaches as a main reason for coming to PEI in general.

In addition, current research has been conducted only with visitors to PEI NP; no research has been conducted with potential visitors to understand why they decided not to visit the Park.

Value should be considered as a potential barrier to visit PEI NP, with some visitors to PEI NP taking exception to the entry fee and campsite fees. While there is some information that suggests value may be a barrier to visitation, little is known about the relationship between fees charged by Parks Canada and visitation to the Park.





■ ***Current understanding of the extent of visitor knowledge and awareness of the various PEI NP products and services is limited.***

While visitor information illustrates the importance of PEI NP (nearly half of all visitors to PEI visit PEI NP), there is very little information available that identifies the extent to which potential visitors are aware of PEI NP and its associated geography and activities prior to or during their visit. In addition, there is no information that assesses visitor awareness of PEI NP's nature preservation mandate prior to their visit to the Park, and there is only limited information available regarding visitors' awareness of the Park's mandate among visitors after they have entered the Park. There is data that suggests awareness of PEI NP heritage presentation programming often occurs only after entry to the Park. There is also an indication that information about PEI NP is not readily available to potential visitors.

■ ***Interpretative programs and activities do not appear to engage visitors to PEI NP.***

Participation in PEI NP's heritage presentation programming is quite low, and this pattern of participation is consistent with research conducted in other national parks. Research suggests that this programming is not a reason to visit PEI NP; rather, visitors will participate if they happen upon an activity. Research also implies that visitors do not react well to the idea that they "need" education, rather, they want educational activities that will enhance their overall park experience.

■ ***PEI NP does not have a comprehensive understanding of the Park "experience".***

Parks Canada has some high level information about the potential for national parks to engage visitors physically, emotionally, intellectually, and spiritually, however, little is known specifically about PEI NP and what visitors to the Park go away with in terms of an overall visit experience. Specifically, little is known about visitors' perceptions of the overall Park experience or with regard to their feelings about or emotional connection with PEI NP.



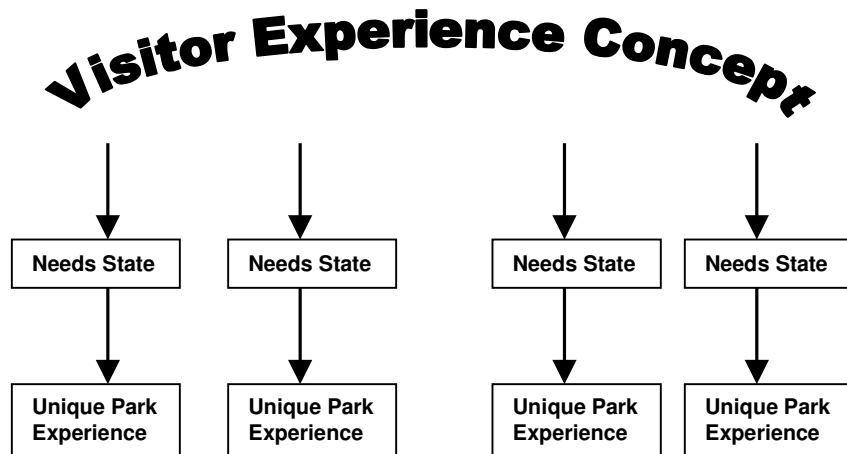


Recommendations

The following recommendations are presented for Parks Canada’s consideration.

1. PEI NP requires a better understanding of the current and future appeal of the Park to visitors and potential visitors.

As outlined on pages 11-13 of the report, key research gaps have been identified as related to the objectives of this secondary research review. To that end, CRA recommends a Visitor Segmentation Study to address the key visitor (and potential visitor) information gaps. The Visitor Segmentation Study will identify relevant visitor needs states based on visitor interests, needs, and expectations, as well as the overall desired outcome of a visit to PEI NP. The parameters of the study would include an assessment of PEI NP today, as well as identify how the Park may evolve to become a compelling destination choice. The results from this Visitor Segmentation Study should be the foundation for the construction of the Visitor Experience Concept.



2. There is a need for Parks Canada to better understand how the PEI NP fits within the overall Tourism PEI marketing strategy, and to ensure PEI NP promotional information is easily accessed, persuasive, and relevant to potential visitors.

Close to one-half of visitors to PEI in 2004 used the provincial tourism website, while four in ten used PEI travel information and two in ten visited a provincial Visitor Information Centre. As such, Tourism PEI is a vital conduit for PEI NP; however, Tourism PEI’s mandate is not necessarily congruent with PEI NP’s mandate. In addition, PEI NP is recognized as perhaps the most important contributor to sustainable tourism development on the Island. With this in mind, it is essential for PEI NP and other key tourism development stakeholders to ensure the PEI NP Visitor Experience Concept is clearly aligned with the overall PEI Visitor Experience Concept. It is vital that Parks Canada retain “ownership” of any messaging related to PEI NP.





Research data suggests that availability of PEI NP information prior to the visit is an issue for a significant minority of visitors to the Park, an indication that potential visitors may not be able to access sufficient Park information. Again, it is essential to ensure that all PEI NP information is actively promoted, easily accessed, and relevant to potential visitors.

3. The value proposition for PEI NP needs to be strengthened.

Information collected from visitors to PEI NP suggests value is an issue for some visitors. This is related to both campground fees and Park entry fees. In addition, little is known about the impact of the various fees charged by PEI NP on the visitation decision-making process. As PEI NP develops the Visitor Experience Concept, it is essential that the Park identify acceptable price points for the various products and services. This is also an opportunity for the Park to identify “value-added” products and services for which visitors are willing to pay a premium price.

4. There is a need to understand and clearly articulate how the PEI NP experience is similar to or different from other national parks.

This information is important to ensure that the national Visitor Experience Concept is easily translated into individual park experiences. It is also important to determine the extent to which visitors are aware they are visiting a national park. For example, when visitors make the decision to visit Brackley Beach, is the decision made to visit Brackley Beach, or is the decision made to visit PEI NP?





Research Gap Analysis

Research Gap Summary

In summary, the secondary research analysis identified some significant research gaps with respect to current understanding of visitor knowledge of PEI NP, as well as visitor needs, wants, and expectations of their PEI NP experience. The following table summarizes the knowledge areas and gaps with respect to the key objectives of the secondary research analysis. It is important to note that the gap analysis is based on a review of current research information and does not take into account future visitor research endeavours.

	Why?	Current Experience →	Future Experience
Motivations	“Motivation” is used to describe the totality of an individual's psychological, physical and emotional wants and needs that drives that person towards a desired goal. This is one of the most important endeavours for PEI NP as it works towards developing a Visitor Experience Concept. It is essential for PEI NP to have a comprehensive understanding of current and potential visitor motivations for visiting the Park.	<p>High-level understanding of why PEI was chosen – scenery, visit friends/relatives, etc.</p> <p>Limited understanding of why PEI NP was chosen – beach is primary attraction, but motivation for choosing PEI NP beach is not understood.</p> <p>No learning regarding understanding of PEI NP “ownership” of Park.</p> <p>No understanding of motivations for a PEI NP trip.</p> <p>Do not know why potential visitors decide not to visit.</p>	Comprehensive information regarding motivations of current and potential visitors to PEI NP is required.
Interests	Understanding visitor and potential visitor interests is important to developing a compelling visitor Experience Concept.	<p>Beach, beach, beach</p> <p>Emerging tourism trend information.</p> <p>No comprehensive understanding of PEI NP visitor interests.</p>	<p>Emerging tourism trend information.</p> <p>No comprehensive understanding of visitor or potential visitor interests.</p>
Activities	Participation in activities, while not a substitute for understanding the motivation for participation, may be used as a springboard to understanding why visitors to PEI NP choose or decline to participate in the various activities offered.	<p>Beach, beach, beach.</p> <p>Low use of heritage presentation programming – why?</p> <p>No comprehensive information on use of all PEI NP activities – information is limited to beach and interpretive programs.</p>	Limited information on appeal of future heritage programming – no information about potential for other services and activities that might be offered in the future.





	Why?	Current Experience	Future Experience
Satisfaction	Understanding current perceptions of PEI NP is an important step in developing the Visitor Experience Concept. This information, used in conjunction with what visitors (and potential visitors) desire as an outcome of their Park visit will identify gaps between the current and ideal PEI NP Visitor Experience proposition.	Some information on specific Park facilities and services, but not comprehensive. Value potential issue. Need for upgraded beach facilities.	There is a need to understand current satisfaction levels with the overall Park experience in addition to the various Park services and activities to inform the development of the Visitor Experience Concept.
Overall experience /Expectations	Identifying the overall PEI NP experience is what Parks Canada is striving for in its development of a compelling Visitor Experience Concept.	Limited information – how the Park meets overall experience expectations is not measured – there is little information on how the Park engages visitors emotionally, or visitors overall perceptions of their Park experience. There is no research on why visitors to PEI choose <u>not</u> to visit the Park.	This is the most significant gap; without a clear understanding of current and future PEI NP expectations of their visit outcome, a Visitor Experience Concept cannot be developed.

Perhaps the most significant research gap is the lack of a comprehensive profile of PEI NP visitor needs, interests, wants, and expectations, and a comprehensive understanding of visitor awareness of PEI NP and its mandate prior to and during their visit to the Park. In addition, there is little information that may be used to define what visitors are looking for in terms of their overall Park experience, particularly as it applies to the attitudes and aspirations of potential visitors. Some information is available through current research conducted by Parks Canada and other stakeholders, however, as existing research was not conducted with the research objectives specific to developing a Visitor Experience Concept, there are limitations related to this research as follows:

- The bulk of research conducted at PEI NP is operational in nature, and evaluates the Park’s performance against pre-defined measures. This research does not meet the information requirements to develop a Visitor Experience Concept.
- Participation in specific Park activities is not a surrogate for understanding visitor needs, interests, and wants. Visitors can only participate in activities that are offered, and there is limited understanding of what activities they would like to see offered by the Park.





- Assessing the appeal of a pre-defined set of activities that might be offered by PEI NP is a good starting point, however, this information should not be used to define visitor expectations.
- Satisfaction levels with specific park activities and services, as well as their overall Park visit, is not a replacement for understanding the overall visitor experience and how well the Park meets these specific visitor expectations.
- Testing visitor knowledge with True/False statements provides information about understanding of a few aspects of the Park's mandate, however it does not provide a comprehensive understanding of visitor awareness of the overall mandate of PEI NP.
- Perhaps the most significant limitation of existing research is the quantitative and close-ended nature of most of the questions posed to visitors; a more open-ended and qualitative approach is recommended, followed by a quantitative phase that focuses only on the key research objectives of the Visitor Experience Concept.





Emerging Tourism Trends

Emerging tourism trends are important to all tourism operators, and PEI NP is no exception. These “high level” trends provide valuable information about how the Park and services offered by PEI NP should evolve to stay abreast of current and future visitor needs. In addition, the impact of emerging trends should be considered within the context of PEI NP’s target market.

Emerging tourism trends are an important consideration for PEI NP, and it is important to understand how these trends affect Park visitor expectations.

Various trends that affect tourist travel in general have been identified, and this document briefly discusses those trends that may be relevant to the development of the PEI NP Visitor Experience Concept. These trends should be considered in the market research plan to further develop the Visitor Experience Concept, as the impact of these trends on potential visitors’ decision to visit PEI NP is not known.¹⁵

Experiential tourism is a trend that describes visitors who are no longer happy to simply look, but want to immerse themselves totally in their vacation experience. Local resource experts are considered very important components of this type of experiential tourism. In addition, connecting with visitors before they leave home is an integral part of the overall travel experience.¹⁵

“Individual national parks and historic sites must strive to facilitate and influence visitor experiences throughout every step of the trip cycle.”¹⁵

In conjunction with the aging baby boomer segment of the population, there has been a trend towards increasingly **luxurious camping**. What were once considered optional services, such as showers, electrical and water hook-ups, etc, have become required services for the growing RV market. In addition, campers are purchasing increasingly larger RVs, and many camping facilities have difficulty simply offering access to these larger vehicles. This trend is particularly troublesome for PEI NP, as current facilities for the most part do not meet the demands of these “campers”.¹⁵

Changing technology is affecting all our lives, and the tourism industry is no exception. There is a need for PEI NP to understand the extent to which visitors expect the Park to offer the latest technologies. With the Internet now identified as the most important source of travel information, online reservation services is considered an issue specific to the Park’s campsites.¹⁵

Shifting demographics, including an aging population, and population growth coming primarily by an increase in foreign-born Canadians, will have an impact on the desired PEI NP experience. Specifically, there is a need to identify aspects of the PEI NP experience that would appeal to these newer Canadians.¹⁵





There has been a significant increase in **gasoline prices** over the past three years, and these increased costs are being passed on to visitors at the gas station, as well as in increased costs of the various travel-related services used by visitors. This may affect how far visitors are willing to travel and how much they are willing or able to spend at their vacation destination, and PEI NP must determine how this will affect the key markets from which it presently draws its visitors.¹⁵

Finally, the **Western Hemisphere Travel Initiative** makes it more difficult for US tourists to travel outside of the US, as they are required to have a passport to re-enter the US.¹⁵





Motivations for Choosing PEI NP

As defined earlier, the word “motivation” is used to describe the totality of an individual’s psychological, physical and emotional wants and needs that drives that person towards a desired goal. This is one of the most important endeavours for PEI NP as it works towards developing a Visitor Experience Concept. It is essential for PEI NP to have a comprehensive understanding of current and potential visitor motivations for visiting the Park.

Apart from the obvious attraction of the beaches, there is minimal information about visitor motivations for choosing to visit PEI NP or their visit outcome expectations.

Reasons for Choosing PEI NP as Vacation Destination

Looking at visitors to Prince Edward Island, when asked to identify the primary reason for choosing the Island as their vacation destination (unaided, i.e. a list of possible reasons were not provided to survey respondents), visitors cite a variety of reasons, including to visit relatives/friends, curiosity, and past experience. To a lesser extent, visitors mention reasons that may be relevant to a PEI NP visit, such as scenery/landscape/sightseeing, beaches, Anne of Green Gables, and parks/camping. The following table illustrates the incidence of these specific reasons for visitors to Prince Edward Island as a whole, and visitors to the Cavendish, Beaches, and Dune Shore Tourist Region.²

Main Reason for Visiting	Prince Edward Island 2004	Cavendish, Beaches, Dune Shore Tourist Region 2004
	%	%
Scenery/landscape/sightseeing	8	7
Beaches	5	10
Anne of Green Gables	5	5
Parks/camping	2	3

Little is known about visitors’ reasons for choosing to specifically visit PEI NP, however, based on observational data collected within PEI NP, it is evident that the beaches within the Park are the primary destinations for most visitors. The relatively low use of the various programs and activities available for visitors suggests these programs and activities are not a primary attraction of PEI NP. Information collected about national parks in general suggests that national parks offer visitors a “controlled nature experience”. Learning activities may not currently be a key motivation for visitors, however, visitors will participate in these activities while visiting a national park.^{13, 14, 18}

² A significant portion of PEI NP is located within The Cavendish, Beaches, and Dune Shore Tourist Region, and as such, visitors who stay overnight in this area may have some similarities to those who visit PEI NP.





A 2005 beach study conducted by PEI NP identified the following factors (using an aided approach, i.e. a list of possible reasons was provided to respondents) most often as important to visitors' decision to choosing their particular beach:¹³

- Convenience or proximity
- Always/generally come to the same beach
- Happened upon it
- Beach was recommended

It is important to note the question in the study that assesses PEI NP beach usage is asked as follows: "What motivates you to access the beach at specific locations?" In addition, a pre-determined list of responses is provided, and as such, does not allow for responses that may not fit within these pre-determined answer categories. Because of the narrow focus of the question, it does not address the broader objective of understanding visitor motivations for visiting PEI NP, rather, it focuses primarily on reasons why a specific beach was chosen.¹³

This particular study attempted to have visitors to PEI NP articulate their overall beach experience, however, the quantitative nature of the study did not allow for the emotional richness or depth of response that might be expected if this topic was pursued in a more qualitative setting. Data suggests that for some visitors, playing in the dunes is an important part of their PEI NP experience, an indication that what some visitors expect may be in direct conflict with Parks Canada's mandate to protect the natural landscape of PEI NP. While the study validates the effectiveness of roping off dunes as an effective deterrent to dune access by beach visitors, it also raises the question of not only visitor knowledge of the delicate ecology of the beach areas, but also their desire to respect Parks Canada's mandate to protect the area. As such, obtaining a better understanding of the expectations of visitors to PEI NP is of paramount importance.¹³

Importance of PEI NP Interpretive Activities and Topics

A 2005 study conducted with visitors to PEI NP (n=261) assessed the importance of a set of possible interpretive activities and topics. The following table illustrates the relative interest in each activity and topic. While this information does provide PEI NP with some direction in terms of the development of specific heritage programming, activities and topics that receive the highest ratings do not necessarily translate to visitor expectations and should not be interpreted as an accurate and comprehensive representation of visitor wants, needs, and interests. These topics, particularly those with higher ratings, may be used as discussion points when examining heritage programming within the context of the entire PEI NP experience. It is important for PEI NP to gain a more comprehensive understanding of the role of heritage programming within the evolving Visitor Experience Concept.⁷





Appeal of Interpretive Activities	Mean Score (scale of 1 to 10)
Self-guiding interpretive trails	7
Interpretive exhibits	7
Guided walks/tours with an interpreter	6
Participation in archeological investigations	5
Outdoor theatre shows	5
Self-guiding audio walking tours	5
Audio-visual presentations	5
Participation in natural restoration projects	5
Participation in ecological monitoring activities	5
Campfire programs	5
Interpretive videos	4
Self-guiding audio driving tours	4
Animation or theatrical performance	4
Guided bike/hikes	4
Puppet shows	2

Interest in Interpretation Topics	Rating of 4 or 5 on 5-Point Scale
	%
Nature	84
Local culture	73
Ecosystem management	62
History of park	58
Geology of park	62
Aboriginal heritage	49
Scientific research in park	54

PEI Information Sources

Information collected from visitors to Prince Edward Island underscores the importance of ensuring PEI NP information is easily accessed when potential visitors are searching for information about Prince Edward Island in general. Close to one-half of visitors to PEI in 2004 used the Tourism PEI website, while four in ten utilized PEI travel information and two in ten visited a PEI Visitor Information Centre. Clearly, tourism PEI is an important conduit for information about PEI NP.²





Visitor Profile

Understanding who current visitors are is important information, and provides important demographic context to the overall Visitor Experience Concept. It is also important to understand demographic differences between current and potential Park visitors.

PEI NP has an excellent demographic profile of current visitors, although little is known about potential visitors to the Park.

Party Composition

Examining party composition can shed some light on the relative attractiveness of a vacation destination to different types of travellers, e.g. families versus adult couples. The following table illustrates travel party composition of visitors to Prince Edward Island in general, compared with visitors that spend at least one night in the Cavendish, Beaches, and Dune Shore Tourist Region, and visitors to PEI NP.^{2, 7}

The Cavendish, Beaches, and Dune Shore Tourist Region and PEI NP appear to be more developed in terms of use by families compared with overall visitors to Prince Edward Island.

Visitor Party Composition	Prince Edward Island 2004	Stayed Overnight Cavendish, Beaches, Dune Shore Tourist Region 2004	Visited PEI NP* 2005
	%	%	
Couples	44	34	n/a
Family	31	43	38
Adult friends	11	12	n/a
2 or more couples	9	9	n/a
Single	5	2	n/a

**Note: Visitor party descriptions utilized by PEI NP do not match those utilized by Tourism PEI.*

Visitor Origin

While there is limited information specific to visitors' reasons for visiting PEI NP, examining PEI visitors' reasons for visiting the Island by place of origin does uncover some differences that may be relevant to PEI NP. For example, **Anne of Green Gables** appears to be a bigger draw to US visitors compared with visitors from Canada. In addition, visitors from Newfoundland and Labrador and Quebec are more likely than others to cite **beaches** as a main reason for coming to the Island.²





Main Reason for Visiting PEI	Overall	NL	NS	NB	QU	ON	Other Canada	NE	Mid Atl.	Other US
	%	%	%	%	%	%	%	%	%	%
Scenery/landscape/sight seeing	8	2	9	7	11	9	4	9	8	7
Beaches	5	10	6	6	14	3	2	4	2	-
Anne of Green Gables	5	-	2	-	4	4	3	5	15	16
Parks/camping	2	-	3	6	2	2	-	-	-	-

There are no appreciable differences between the place of origin of visitors to the Island as a whole and the Cavendish, Beaches and Dune Shore Tourist Region, with the exception of Nova Scotians, who are more likely to stay overnight in the Cavendish area compared with elsewhere on the Island. When looking at those who specifically visited PEI NP, Quebec is significantly over represented, while Nova Scotia, New Brunswick, and the United States are under represented compared with visitation to the Island in general.²

In terms of visitors to PEI NP who reside in PEI, only 17 percent (n=44) of those who were interviewed are from PEI. This sample size limits any further extrapolation of information with respect to differences between Park visitors who live in PEI compared with those who live elsewhere.^{2,7}

Place of Origin	Prince Edward Island 2004	Stayed Overnight Cavendish, Beaches, Dune Shore Tourist Region 2004	Visited PEI NP* 2005
	%	%	
Ontario	24	26	27
Nova Scotia	18	22	11
New Brunswick	16	19	6
Quebec	9	10	28
Newfoundland and Labrador	2	2	2
Other Canada	7	4	7
New England	10	8	US 14
Mid-Atlantic	3	2	-
Other US	8	6	-
International	3	2	4

**Note: Tourism PEI does not measure travel by PEI residents, while PEI NP captures the place of origin of all visitors, including those who live in PEI (17% of visitors to PEI NP reside in PEI). The PEI NP numbers are derived from numbers collected by PEI NP.*





Knowledge of PEI NP

Having an understanding of visitor (and potential visitor) knowledge of PEI NP is an important starting point for developing a compelling Visitor Experience Concept.

Current understanding of the extent of visitor knowledge and awareness of the various PEI NP products and services is limited.

The secondary research analysis did not uncover any information regarding the level of awareness of PEI NP among Park visitors prior to their visit. There is awareness that Prince Edward Island is home to beautiful beaches, but whether or not visitors make the connection between these beaches and PEI NP prior to their visit is unknown. Indeed, there is no information that examines visitor awareness of what PEI NP is, i.e. awareness that several beaches, Anne of Green Gables House, hiking trails, etc. are included in PEI NP. It is essential to understand whether visitors consciously identify PEI NP as their destination, rather than a specific PEI NP attraction, such as Cavendish Beach or Green Gables House.

Research conducted by PEI NP suggests that apart from the beaches, there is low awareness of the various interpretive activities and heritage presentation programming available at the Park. There is also a low level of awareness and understanding of several knowledge areas PEI NP considers to be of national significance. There is data to suggest awareness of heritage presentation programming occurs only after arrival at the Park, and that participation is more of an afterthought for some visitors. This finding is echoed in research conducted for Banff National Park, which indicates participation in learning activities is more of an “afterthought” for visitors.^{7, 18}

A significant minority of Park visitors offer an unfavourable assessment of the availability of PEI NP information prior to their visit to the Park. With availability of information identified as a potential issue among visitors to the Park, this should be considered as a potential barrier to visit among non-visitors.⁷

In terms of the mandate of PEI NP, visitors to the Park are asked to assess a series of six True/False statements related to specific aspects of the Park’s ecology preservation mandate. This exercise provides some information about visitors’ understanding of the Parks ecology preservation mandate, however, it is not comprehensive, in that it does not assess visitor awareness of the overall ecology preservation mandate of PEI NP. In addition, there is no information regarding visitor awareness of the Park’s geography or the various Park activities and locations.⁷





Visitor Activities

Participation in activities, while not a substitute for understanding the motivation for participation, may be used as a springboard to understanding why visitors to PEI NP choose or decline to participate in the various activities offered.

Visitors to Prince Edward Island

In 2004, close to one-half of visitors to Prince Edward Island reported visiting PEI NP. In addition, more than six in ten visited a beach, and approximately seven in ten went sightseeing, both activities that are related to PEI NP products and services. Four in ten PEI visitors went to an Anne of Green Gables attraction, however, the data does not indicate the proportion of these visitors who actually went to Green Gables House. The following table illustrates visitor activities relevant to PEI NP among overall visitors, and among visitors who stayed overnight in the Cavendish, Beaches, and Dune Shore Tourist Region.²

Relevant Visitor Activity	Prince Edward Island 2004	Stayed Overnight Cavendish, Beaches, Dune Shore Tourist Region 2004
	%	%
Sightseeing	68	71
Beaches	63	74
Visited PEI NP	46	57
Anne of Green Gables attraction	38	41
Historical/cultural attractions	38	37
Camping	21	31
Hiking	15	17
Bird watching	14	16
Boating/canoeing/kayaking/sailing	8	7
Stayed at PEI NP campground/trailer park	4	11

As illustrated in the above table, visitors who stay overnight in the Cavendish, Beaches, and Dune Shore region of the Island are more likely than the average visitor to go to PEI NP or to stay at a PEI NP campground or trailer park, as well as engage in other activities relevant to PEI NP, such as camping and going to a beach.²

While information about participation in specific activities does not and should not by itself define visitors' overall experience, participation (or not) in these activities may be used as springboards to better understand both visitors' interests and needs when coming to PEI NP, as well as what they are ultimately seeking in terms of their trip outcome.





PEI NP Visitors

Examining PEI NP visitors, the majority identify themselves as beach users, sightseers, or walkers; visitors are less likely to describe themselves as hikers, bikers, or runners.⁷

The primary activity for visitors to PEI NP is to go to a beach, and the vast majority of visitors do not spend the night at PEI NP. With the exception of interpretive exhibits, self-guided interpretive trails, and staffed displays and demonstrations, which have moderate to low participation rates, there is very low participation in the Park’s heritage presentation programming. Perhaps not surprisingly, visitors to the Park who live in PEI are less likely than non-residents to participate in heritage presentation programming. The following table illustrates visitor participation in specific Park heritage presentation programming activities and services.⁷

Participation in Heritage Programming	%
Intrepretive exhibits	38
Self-guiding interpretive trails	37
Staffed displays and presentations	25
Roving reporter	6
Guided nature walks	6
Campfire programs	4
Outdoor theatre shows	3

Those who participate in the various heritage programming activities are for the most part, satisfied with the experience. The challenge for PEI NP is to identify those aspects of their nature preservation mandate that are most compelling to potential visitors, and ensure programs and activities involve and engage visitors and ultimately enhance their Park experience. Research conducted with Banff National Park visitors suggests that visitors do not want to be made feel like they require education; rather they want learning opportunities to be fun and enhance their overall experience. Indeed, a success measure for such a program should be whether it is identified as a primary reason for visiting PEI NP.^{7, 18}

Information collected from visitors to PEI NP suggests visitors to the Park are more likely than the average visitor to Prince Edward Island to go hiking. Parks Canada has collected some preliminary information from Park visitors regarding the development of a multi-purpose trail. The following six are identified as the most important considerations:⁷

- Separation from vehicular traffic;
- Trails less than 10km;
- Available rest areas along trail;
- Connectivity with other Park trails;
- Looped trail system; and
- Surface condition.

There is a broader need, however, to understand how such a trail can best fit with potential visitor expectations within the context of the new Visitor Experience Concept.





Satisfaction with PEI NP

Understanding current perceptions of PEI NP is an important step in developing the Visitor Experience Concept. This information, used in conjunction with what visitors (and potential visitors) desire as an outcome of their Park visit will identify gaps between the current and ideal PEI NP Visitor Experience proposition.

There is limited information regarding satisfaction with visitors' overall Park experience.

Ratings of the quality of facilities and services available at PEI NP range from moderate to very good. Lower rated items include the condition of campsites and the conditions for biking. The following tables illustrate visitor satisfaction with the various facilities and services under consideration.⁷

Satisfaction with Facilities and Services	Rating of 4 or 5 on 5-Point Scale
	%
Service in official language of choice	91
Park staff courteousness	96
Hiking trails	93
Visit as recreational experience	92
Service time at campground registration	92
Visitor Centre	92
This visit meeting your expectations	90
Picnic or day use areas	89
Service time at entry gates	88
This visit as a memorable experience	87
Park staff knowledge	86
Number of beach access points	85
Quality of service	85
Number of supervised beaches	83
Usefulness of park visitor guide	79
Protection of sand dunes	76
Visit as a learning experience	75
Facilities available at beaches	73
Value for entry fee	70
Value for camping fee	57





Quality of Facilities and Services	Rating of 4 or 5 on 5-Point Scale
	%
Availability of...	
Visitor Centre(s)	84
Picnic/day use areas	81
Park staff	78
Hiking trails	78
Information on park activities	66
Park information prior to visit	69
Campsites	59
Condition of...	
Beaches	90
Hiking trails	90
Picnic/day use areas	81
Campsite	86
Biking along Gulf Shore Parkway	57
Park washrooms	72
Park facilities overall	86

It is important to note that while these satisfaction ratings are a good measure of specific Park activities and services, **they do not provide information regarding visitor wants, needs, interests, or how the Park met overall visitor expectations.**

Information collected from PEI NP visitors also identifies **value** as a potential issue for visitors. This is an area worth pursuing as a barrier to visiting the Park or using Park campsites. It is important to note there is no information that evaluates the relationship between price and visitor participation; PEI NP does not know how the various fees charged by the Park affect visitors and non-visitors' Park visitation decision.⁷

In terms of Parks Canada standards, the following facilities and services fall below the 85 percent Top 2 Box satisfaction ratings (the percent who give each area a rating of 4 or 5 on a 5-point satisfaction scale):⁷

- Number of supervised beaches;
- Usefulness of park visitor guide;
- Protection of sand dunes;
- Visit as a learning experience;
- Facilities available at beaches;
- Value for entry fee; and
- Value for camping fee.





Overall PEI NP Experience/Visitor Expectations

Identifying the overall PEI NP experience is what Parks Canada is striving for in its development of a compelling Visitor Experience Concept.

PEI NP does not have a comprehensive understanding of the Park “experience”.

The review of the various documents reveals a significant gap in terms of understanding what visitors to PEI NP walk away with in terms of their overall experience – physically, emotionally, intellectually, and spiritually. Indeed, one might hypothesize that there are different desired experiences depending on the visitors’ demographic and psychographic profile. Information collected about national parks in general suggests there is the potential for visitors to develop an enduring bond with PEI NP, and to engage with the Park on a deeper level than simply going to the beach. National parks should elicit an emotional response from visitors, and national data suggests visitors are willing to develop a relationship with a national park if the proposition is sufficiently compelling.

There is general agreement that national parks are very important, and visitors recognize national parks’ role in protecting the natural environment. Visitors identify the role of national parks as both preserving the natural landscape and providing recreational opportunities.¹⁸





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