
Chapter 2

Audience Analysis



SAMPLE PAGES

Contents

- Campers
- Day Visitors
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Introduction

An audience analysis is a process whereby current and potential participants/users of Heritage Appreciation services and products are identified and their characteristics are reviewed and analyzed. For the purposes of this report the following lines of inquiry are followed:

- Who camps/visits CHIP-AB (in person or via remote access)?
- Who does not camp/visit at CHIP-AB (in person or via remote access)?
- What kinds of groups do they come in – e.g., traditional family (2 parents with children)?
- What education levels do they have?
- What ages are they?
- What portion are return visitors/new visitors?
- How often do return visitors come to CHIP-AB?
- When do they come (season, day of the week, time of day)?
- How long do they stay?
- Where do they come from?
- Why do they come?
- What do they do when they visit the park?
- What are their interests?
- What do they already know about the park's HA topics?
- What are their current attitudes about park-related issues?
- What appropriate and inappropriate behaviours do they display?

This information is then analyzed from the point of view of providing Heritage Appreciation services to identified audience groups. Lines of analysis for each group include:

- What topics and themes fit the needs and interests of each particular audience group?
- What times and locations are best for presenting HA services and products to identified audiences?

For visitation projections, see Park Centre Program Statement in Appendix B.

Camper Characteristics

Campers are people who rent campsites in the park's public camp grounds (the park's Group Camping facilities were considered separately). Information about campers is based on two recent studies:

- *Visitor Profile and Satisfaction Survey: 1999 Site Summary Report: Cypress Hills Provincial Park.* Program Development and Coordination Branch, Alberta Community Development, 2000.
- *Market Assessment and Visitor Projections: Cypress Hills Interprovincial Park, Dinosaur Provincial Park, Writing-on-Stone Provincial Park.* Western Management Consultants, March 2003.

These two studies focused almost entirely on camping visitors (see Sidebar: Focus of Key Visitor Studies).

Most of the detailed information described here comes from the two studies above.

Sidebar: Focus of Key Visitor Studies

Both recent studies of Cypress Hills Provincial Park visitors focused almost entirely on camping visitors who attended HA presentations.

Visitor Profile and Satisfaction Survey: 1999 Site Summary Report: Cypress Hills Provincial Park. Program Development and Coordination Branch, Alberta Community Development, 2000.

Unlike the 1998 survey of both campers and day use visitors, the large majority of respondents in the 1999 survey were campers with very few responses from day-use visitors. As a result, the 1999 survey results were not broken down according to day use visitors versus campers.

Market Assessment and Visitor Projections: Cypress Hills Interprovincial Park, Dinosaur Provincial Park, Writing-on-Stone Provincial Park. Western Management Consultants, March 2003.

The focus of interest for this survey was the visitor who experiences a heritage appreciation contact, an interpretive experience, an information contact or environmental interpretation. The sampling methodology was designed to collect data from people on guided tours, visitors at the visitor centres, audience members at amphitheatre presentations and others who were experiencing heritage appreciation contacts.

... In the case of CHIP-AB, they reflect the views of 15-20% of all visitors.

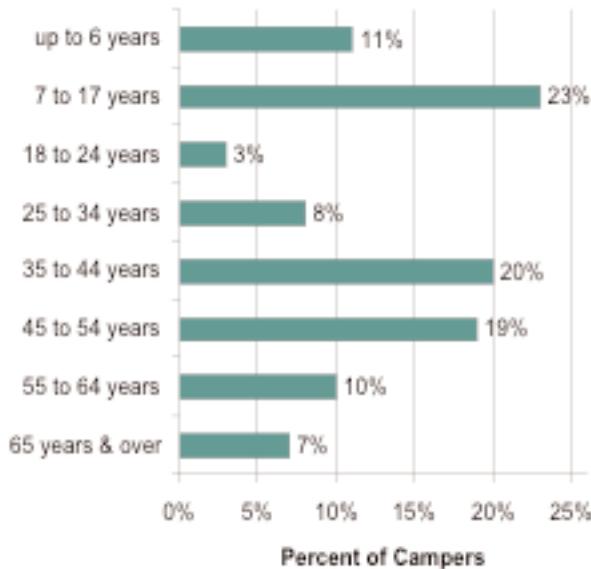
It is important to understand this characteristic of the sample as the survey results are reviewed.



Heritage Appreciation Development Plan

for Cypress Hills Interprovincial Park-Alberta

Figure 2.1:
Age
Breakdown
of 1999
camping
visitors. From
Visitor
Profile and
Satisfaction
Survey
(2000).



Who Camps at CHIP-AB?

Family groups are the biggest segment of campers:

- 85% come with their families

Groups of unrelated people make up a small but significant cluster of campers:

- 10% come with one or more friends

Implications for Heritage Appreciation Services

Family groups continue to dominate camping visitors. Heritage Appreciation services for campers should focus on family programming.

- Theme concepts should include:
 - sharing the natural world with your children
 - sharing history with your children.

Education

There has been no comprehensive study on the education and economic status of campers at CHIP-AB. However, Western Management Consultants (2003) polled participants attending Heritage Appreciation programs (who were almost entirely campers). Their findings are as follows:

Education

- most are relatively well educated
 - 26.4% of respondents completed technical school
 - 39% had some university, one university degree or more

Implications for Heritage Appreciation Services

A significant percentage of campers are well educated.

- To engage this segment of the park audience, Heritage Appreciation services should include:
 - in-depth content (information, concepts and ideas) and
 - sophisticated presentations plus opportunities for two-way communication (chances for participants to ask questions and to communicate their own personal knowledge)
 - challenging presentations

Age

Findings from the two major studies show a high percentage of campers under the age of 17, reflecting the dominance of family camping (See Figure 2.1). Details include:

For 1999

- there is a significant number of young people
 - over 1/3 of campers in 1999 were under the age of 17
 - camping party groups were largely comprised of campers aged:
 - 7-17 years (23%)
 - 35-44 years (20%)
 - 45-54 years (19%)



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Implications for Heritage Appreciation Services

Heritage Appreciation staff must take into account the desire of campers to relax and enjoy the natural setting of the park. This should become part of the HA themes by:

- providing knowledge and skills to enjoy and understand the natural and cultural features of the park
- provide orientation services to enable campers to experience park locations that they may not have visited before
- encourage good practice in natural and cultural appreciation activities
- provide participants with the means to record and communicate their experiences, impressions and discoveries with park staff and other visitors

What Are They Doing?

Information was gathered in 1999 about activities carried out by campers at CHIP-AB (see Figure 2.2).

Key data include:

- The four most popular activities carried out by campers at CHIP-AB in 1999 were:

Activity	% campers
- visiting viewpoints and lookouts	57
- nature viewing or photography	54
- fishing	46
- participating in self-guided HA activities and walking self-guided trails	45
- three of the four most popular activities are non-consumptive HA activities
- 8 out of 16 activities listed could directly be associated with HA activities
- 13% of the campers participated in staff-led activities

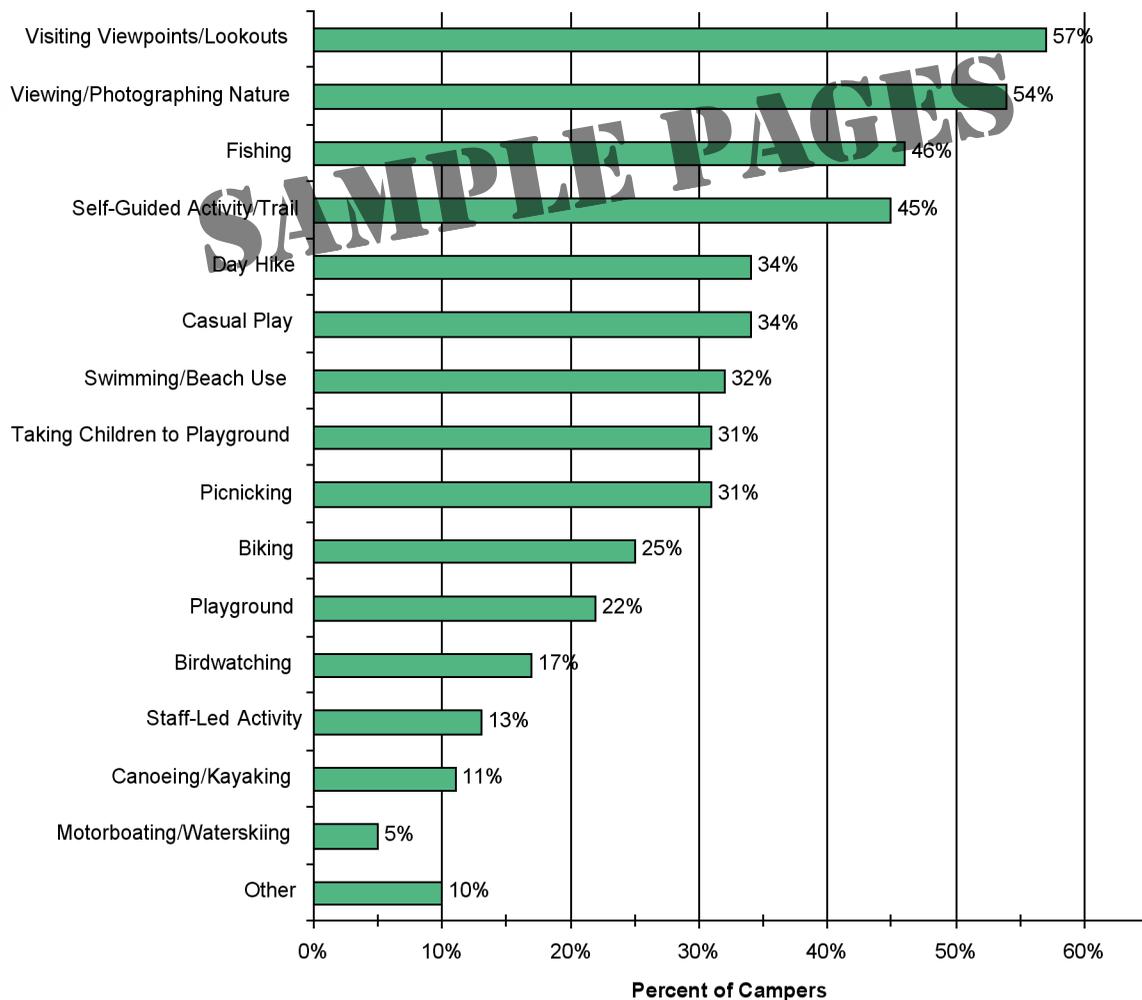


Figure 2.2: Camper Activities. From Visitor Profile and Satisfaction Survey (2000).



Heritage Appreciation Development Plan

for *Cypress Hills Interprovincial Park-Alberta*

➔ Implications for Heritage Appreciation Services

Nature-related HA activities are important to camping visitors. HA programs should:

- orient campers to natural areas of the park
- provide instruction on outdoor activity skills, safety, and best practices in stewardship behaviour
- encourage and facilitate HA activities that explore natural features of CHIP-AB

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Day User

Day users are *person(s) making a recreational visit to a Provincial Park or Recreation Area for one day or portion of one day without staying overnight* (Visitation Statistics Provincial Parks and Recreation Areas 1998/99).

Day Use Facilities

Cypress Hills has numerous facilities and sites used by day users. These include:

- Elkwater Beach
- Trails
- Golf Course
- Picnic Areas
- Visitor Centre

Western Management Consultants, March (2003), indicated that up to 70% of park visitors belong to this group. Unfortunately recent studies of park visitors have not focused on day users, partly because few of this group attend heritage appreciation programs or regularly visit the park's visitor centre.

Some data on day users is available in two reports:

- *Visitation Statistics Provincial Parks and Recreation Areas 1998/99*, Program Development and Coordination Branch
- *Survey Technician Report Summer 1996*, Dalcyce Russel

The majority of data presented here is from questionnaires circulated by EcoLeaders to Cypress Hills Provincial Parks staff and contractors in 2003 (see Appendix G). The information presented is anecdotal, and not based on rigorous scientific data collection and analysis. However, the respondents represent many years of observation and interaction with day users.

Who Uses CHIP-AB's Day Use Facilities?

Family groups are the biggest group of day users. Estimates of family groups were as follows: (hyphenated numbers indicate the range of estimates given by park staff).

- Traditional Family Group 15-30% (2 parents plus children)
- Single Parent Family Group 10% (1 parent plus children)
- Extended Family 10-15% (Includes at least one parent, one grand parent plus one or more children or Grand parents with grandchildren)
- 2 or more families together 0-15%

The cumulative total for these family groups could be as high as 70%.

Another important cluster of day user is groups of friends.

Staff estimates include:

- A group of friends 0-15% (teens-early 20s)
- A group of friends 0-10% (Late 20s-mid 30s)
- A group of friends (over age 30) 0-10%
- A group of friends (mixed ages) 0-10%

The cumulative total for these groups of friends could be as high as 45%. However, the ranges for these groups is very wide (some staff did not recognize any of these groups as being significant).

Implications for Heritage Appreciation Services

Family groups continue to dominate the day user group. Heritage appreciation services for day users should focus on family programming.

- Theme concepts should include:
 - sharing nature with your children and
 - sharing history with your children.

Groups of friends, especially groups of similarly aged friends, could be a significant audience group. Further, formalized research may be needed to determine the importance of this audience cluster.

Education

There is no overall information on the education and economic status of day users at CHIP-AB.

Implications for Heritage Appreciation Services

It is very difficult to design effective Heritage Appreciation services for audiences without basic information such as education levels, range of interests and current knowledge, skills and attitudes. Information on the education levels of day users should be gathered through:

- Formal scientific methods such as on-site questionnaires
- Informal methods such as discussions with park staff and contractors

Age

Since a large portion of day users are family groups (up to 70%), it is expected that :

- there is a significant number of children under the age of 17
- approximately half of this greater family cluster is made up of adults of child-raising age (approx. 24-60 years)

Implications for Heritage Appreciation Services

Heritage Appreciation services should be targeted at:

- Family groups
- Children
- Adults of child-raising age



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How Long Do They Stay?

Staff indicated that day users stay in CHIP-AB for the following lengths of time:

- Less than 1 hour 5-10%
- 1-3 hours 10-20%
- Approximately 1/2 day 35-40%
- Most of the day 30-50%

It appears that the between 60 and 90 percent of day users spend between half and most of the day at the park.

Peak Hours

Peak hours of visitation are from 1-5 PM. But day users are active between 9 AM and 8 PM.

➔ Implications for Heritage Appreciation Services

When to Program

- day users can be targeted between 9 AM and 8 PM
- Almost all day users will not be available for standard evening amphitheatre programs (most start after 8 PM)

Provide HA services where day users congregate.

Return Visitors/New Visitors

A very significant number of day users are repeat visitors.

- Visit park only once in a year 0-25%
- Visit park 2-5 times in a year 5-40%
- Visit park 5-10 times in a year 10-25%
- Visit park more than 10 times in a year 10-80*

(*Note: most respondents reported rates of 75-80%)

➔ Implications for Heritage Appreciation Services

Multiple return rates are very high—up to 80% of day users may return to the park more than 10 times in a year.

- many in this audience will be knowledgeable about the park and its issues
 - program designers must design services to meet the needs and interests of knowledgeable repeat visitors
- it will be very difficult to develop set-piece canned programs for a large multi-return audience
- HA programs and services should focus on:
 - longer-term development of skills such as wildlife watching techniques
 - facilitation of self-guided activities
 - short-duration visitor activities
 - facilitation of self-directed discovery-learning activities
 - two-way interaction with participants, allowing them to share discoveries and ask questions

Where Do They Come From?

The day users come from the following locations:

- Medicine Hat 60-75%
- Redcliff 10-15%
- Bow Island 10-15%
- Brooks 1- 5%
- Lethbridge 1-15%
- Calgary 1-10%
- Red Deer 0- 5%
- Edmonton 1- 5%

➔ Implications for Heritage Appreciation Services

The majority (up to 75%) of day users come from Medicine Hat.

- many visitors will have a wide understanding of area natural and cultural history
 - should consider including two-way communication component into program design
- there are many opportunities to partner with heritage appreciation service providers in Medicine Hat that should be followed up

Why Do They Come?

The Cypress Hills have a long tradition of being a cool, shady get-away location for local people to recreate. Ranchers and townspeople have come to get a respite from the heat and dryness of the surrounding plains. This tradition continues to this day. In addition, the park has become a winter recreation area, providing locals with opportunities for downhill and cross-country skiing plus many other winter activities.

➔ Implications for Heritage Appreciation Services

Day users come to get away for a quiet recreational moment with family and friends. Heritage Appreciation services for this audience will need to be:

- related to the recreation activities that they have planned
- non-intrusive—they should not appear to interfere with their chosen recreational activities
- be located in or near the areas that they plan to recreate (locations away from their chosen recreation areas will be much less attractive)
- be open ended in duration and start time to better fit the recreation schedules of visitors

What Are Their Interests?

The reasons for day users visiting the park include recreation, social interaction and learning about natural and cultural heritage. It is clear that relaxing and recreating in a quiet, secluded natural setting is more important to most day users than learning about the park.



➔ Implications for Heritage Appreciation Services

Cross-country skiing could become an important winter recreation activity in the park with tremendous potential for associated HA activities such as winter wildlife watching and ecology. In order to encourage cross-country skiing in the park the following is needed:

- development of more cross-country ski trail loops, or the upgrading of existing trails for safe cross-country skiing
- advertising of current park ski conditions in local media
- partnership with community recreation departments, especially in Medicine Hat, to rent ski equipment and provide lessons
 - there is also an opportunity to partner with the Hidden Valley downhill ski facility in the park
- personal and self-guided HA activities could be incorporated into the cross-country ski recreational program

Cottager

The park has 280 cottages concentrated in the town of Elkwater.

Cottagers represent a small but important group of stakeholders who often have long association with the park and experience in working with park staff.

Who Owns Cottages at CHIP-AB?

Families

Like the other groups discussed previously, families are the largest group of cottagers. Most park staff indicated that:

- significant numbers are co-owned by several family members
- 20–40 % are traditional families with two parents plus one or more children
- 10–35% are extended families including one or more grandparent
- 10–20% are childless couples aged 41-65
- 10-15% are senior couples
- 5% are single parent families

Others

All staff indicated that a small percentage of cottagers were single men or women.

Inter-generation Ownership

Many cottages have been passed on from generation to generation within the same family.

➔ Implications for Heritage Appreciation Services

Families dominate the cottage group.

- HA services for this group should focus on family activities
 - may also include drop-in and scheduled Elkwater-based programs for older children who can walk or cycle to the program site

Many families have owned the same cottage for several generations.

- many cottagers will have extensive experience and understanding of the park—its history and resources
 - HA services should provide opportunities for two-way sharing and discussion to make use of these people's knowledge and experience

Education

Little direct information is available about the education background of cottagers. However, staff indicated an increasing numbers of people from Calgary and even Edmonton are purchasing cottages that come onto the market. This implies that some new cottage owners are high income with higher associated education levels.

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for Cypress Hills Interprovincial Park-Alberta

➔ Implications for Heritage Appreciation Services

Many cottagers are likely to be highly educated.

- HA services should cover topics in greater depth and sophistication to attract this group

How Long Do They Stay?

In order of frequency cottagers appear to stay for:

- regular weekends
- summer holidays of a 1–3 week duration
- long weekends in the spring, summer and fall

➔ Implications for Heritage Appreciation Services

Cottagers stay for durations ranging from a weekend to several weeks.

- HA services targeting this group may take place sequentially over the summer and shoulder season.
- HA services for long-stay cottagers may include:
 - trips to distant parts of the park
 - volunteer opportunities to take part in research and management activities
 - volunteer opportunities to support and perhaps lead HA services

Return Visitors/New Visitors

Obviously cottage families and often their guests are regular return visitors to the park. Many have regularly visited the park throughout their lives and intend to pass their cottages on to their children and grandchildren. Park staff indicate rates of cottager return visitation as follows:

- only once per year 0–10%
- 2–5 times per year 5–20%
- 6–10 times per year 10–30%
- >10 times per year 40–85%

➔ Implications for Heritage Appreciation Services

Cottagers stay for durations ranging from a weekend to several weeks.

- HA services targeting this group may take place sequentially over the summer and shoulder season.
- HA services for long-stay cottagers may include:
 - trips to distant parts of the park
 - volunteer opportunities to take part in research and management activities
 - volunteer opportunities to support and perhaps lead HA services

Where Do They Come From?

Traditionally, most cottagers were local people, often from Medicine Hat and other nearby communities. However, park staff indicate an increasing trend of cottages being bought by people further afield, especially from Calgary. This trend is likely to increase as the cottage market near Calgary reaches saturation.

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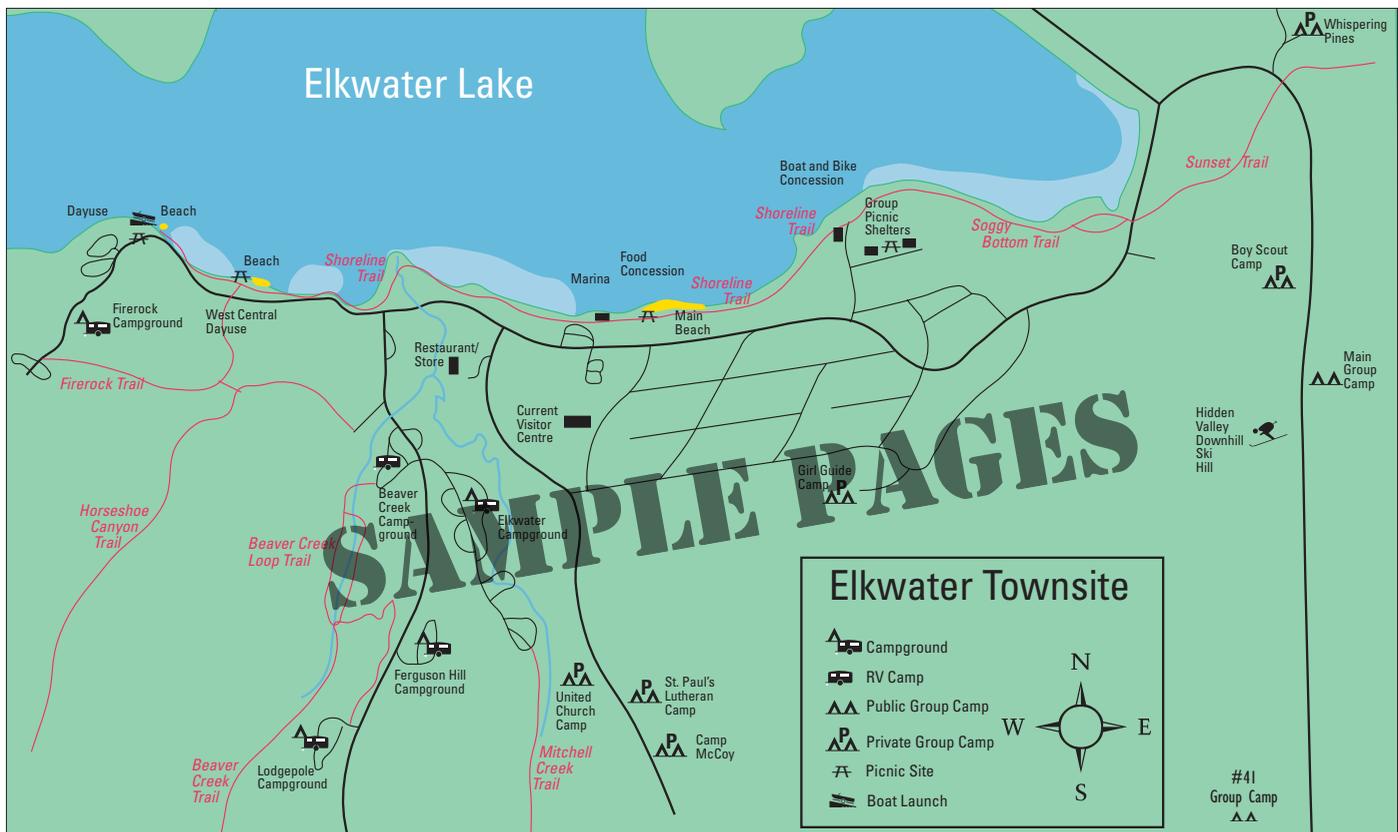
2.12



Heritage Appreciation Development Plan

for Cypress Hills Interprovincial Park-Alberta

Map 2.1:
Elkwater Townsite



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Group Campers and Group Day Users

At CHIP-AB group camps can be divided into two groups:

- public sites maintained by the park
- private camps on land leased from the park for 25 year terms

Public Group Sites

The park maintains both day and camping group sites which are booked by groups in advance.

Day Use Sites

Two day use group shelters are located in the Elkwater townsite (see Map 2.1). These sites are most often booked by large groups for family reunions and special events like company picnics and wedding receptions.

User characteristics usually include:

- a broad spectrum of ages ranging from very young children to seniors
- most are likely from nearby communities, especially Medicine Hat

Implications for Heritage Appreciation Services

Group day users have come for a short time (several hours) and have a full agenda of activities planned.

- HA services for these groups are generally inappropriate.

Public Group Camp Sites

The park has three group camps. Two are located along Highway 41, the other along Willow Creek Road (see Map 2.1).

Like the group day use sites, these sites are often used by large family groups as well as associations and clubs.

User characteristics usually include:

- a broad spectrum of ages ranging from very young children to seniors
- most are likely from nearby communities, especially Medicine Hat
- some will be from other parts of the province, from other provinces and from out of the country
- most stay for a regular or a long weekend
- some may stay for up to a week

Implications for Heritage Appreciation Services

Group campers stay at least for a weekend.

- HA services for these groups may be inappropriate for groups that stay for several days
 - personal services involving HA staff are not likely to be cost effective
 - service could include special self-guided activities centered around the group camp site
 - services could also include the group participating in public programs

Private Group Sites

The park has five private group camps located close to the Elkwater townsite.

To date, information on the numbers, composition and duration of stay of users to these sites has not been shared with park staff. However, some groups make use of the park's public HA services.

Motel/Hotel

The park has a single motel located in the Elkwater townsite. The Green Tree Motel offers 16 modest rooms. Information on patrons is not available.



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Children and Youth/Education Groups

Introduction

For the purposes of this study Youth/Education groups are groups of school-aged children with one or more teachers or leaders. The groups that visit Cypress Hills Provincial Park at the time of writing are listed below in order of numbers attending.

- school classes
- community service groups and clubs (e.g., scouts and guides)
- church groups

The Importance of School Groups

Currently school classes are the largest part of Youth/Education visitors. According to park staff, most students taking part in education programs come from Medicine Hat. However, a sizable number of students also come from communities near the park.

Implications for Heritage Appreciation Services

A current trend in schools is toward smaller transportation budgets.

- It is unlikely that the market for in-park school learning experience will increase in the foreseeable future
 - if budgets continue to decline, this market may shrink
 - if in-park market is to increase HA offerings must:
 - cover a greater diversity of topics and approaches such as over-night park visits
- There is a potential increasing market for in-school education programs where park staff visit the schools
- There is a potential market for distance, electronic education services to local and other schools

How Big is the Local Education Market?

Detailed education market studies for HA services in schools have not been conducted. However, Learning Alberta provides information on school populations across the province. Tables 2.3–2.6 were developed from this information to provide basic information about the local education market.

Catholic Schools Medicine Hat RCSSD #20 2001-2002		Grade												Total Students
School	ECS	1	2	3	4	5	6	7	8	9	10	11	12	
Primary														
St. Francis Xavier School	19	20	33	22	28	27	31							180
St. Louis School	24	26	22	21	23	15	26							157
St. Michael's School	42	33	32	36	33	36	37							249
St. Patrick's School	61	57	49	52	38	33	47							337
St. Thomas Aquinas School	19	19	16	22	19	24	30							149
Mother Teresa School	43	33	39	48	48	57	51							319
St. Michaels School	18	18	16	14	15	9	15	13	15	12	11	13	9	178
Junior High School														
St. Mary's Junior High School								213	187	160				560
High School														
McCoy High School											184	170	167	521
Total for Grade	226	206	207	215	204	201	237	226	202	172	195	183	176	
Total Number of Students in District														2,650

Table 2.4: Medicine Hat Catholic School Population, 2002.

Source: Alberta Learning www.learning.gov.ab.ca/ei/statistics/population.asp

