



Chapter 2: Audience Analysis

Introduction

This chapter is divided into two sections:

- current conditions
- market analysis

Each section includes summaries of information about audiences and discussions of the implications for Visitor Experience and Outreach products and services.

Section 1. Current Conditions

This section looks at what is known about audiences Prince Albert National Park is currently serving. These people are divided into Visitor Experience and Outreach audiences.

This section is weighted heavily toward Visitor Experience because up to the time of the development of this plan, the park provided limited outreach products.

Section 2. Market Analysis

This second section reviews current literature on market segments, including statistics and trends. Sources include Statistics Canada and provincial and national tourism organizations.

Target Audience Recommendations

The final segment of this chapter identifies and prioritizes key audience segments.

Section 1: Current Conditions

1. Park Visitors

1A: Visitor Numbers and Trends

Summary visitor statistics provided by park staff for 2006 through 2009 include indicators such as overall visitation numbers, visitation permit sales and campground statistics.

Assessment

In the past four years Prince Albert National Park has generally increased or maintained visitation. The total number of visitors rose from approximately 219,000 in 2006 to almost 228,000 in 2009 (see Figure 2.1).

Implications for Visitor Experience and Outreach

In the next five years, park staff may not have as much pressure to increase visitation in order to combat declining visitation. Instead, they should concentrate on providing high quality meaningful visitor experiences.

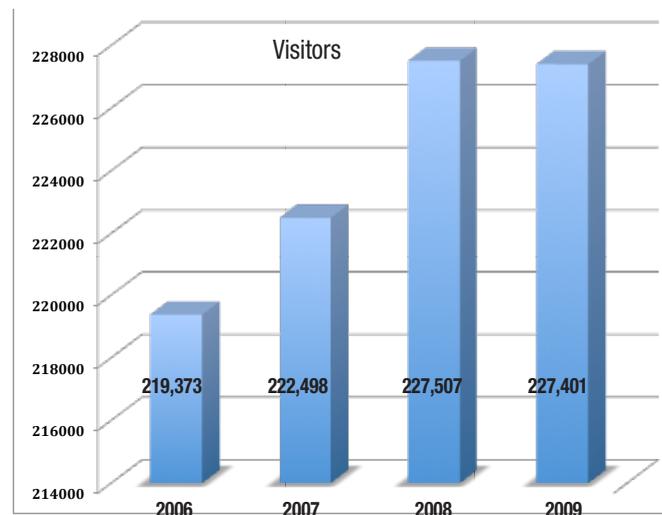


Figure 2.1 Total number of visitors to Prince Albert National Park 2006–2008 (data from park statistics).



1B: Information About Park Visitors

The 2007 park visitor survey (EnviroNics 2008) provides some general information about park visitors. Key findings are listed below.

General Description of Park Visitors

- average age 57
- details on children and youth are scarce in this study, what is known includes:
 - just over one third of all visitor parties entering the park include children
 - 15 percent of all visitor parties include one or more teenagers
 - 22 percent of all visitor parties include one or more children 12 years old or younger
- the park is the trip destination for 76 percent of visitors
- most (80 percent) are from Saskatchewan
- smaller proportions come from Alberta (11 percent) or the rest of Canada (8 percent)
- there are few visitors from overseas (1 percent) and the United States (less than 1 percent)

According to the visitor segmentation model in the *Prince Albert National Park Visitor Survey* (EnviroNics, 2008):

- most (79 percent) of the visitors coming to the park are not coming primarily to enjoy and learn about the park's natural and cultural heritage
 - the biggest focus is on activities in the townsites many of which are urban-like walking the streets, shopping, eating in restaurants

- scenic drives are the most popular activity that gets people out into the park
- only just less than ¼ (21 percent) of park visitors come primarily to recreate in the wilder, more natural areas of the park

Frequency of Visits

- 84 percent multiple repeat visitors
 - Of these:
 - 30 percent have been coming to the park for over 40 years
 - trip planning mostly based on past experience
 - also involved advice from family and friends
 - 55 percent stay for the day
 - 16 percent stay for one or two nights
 - 20 percent stay between three to seven nights
 - 9 percent stay longer than a week
 - 2 percent stay longer than a month
- only 10 percent of all visitors are first time visitors
 - Of these:
 - 50 percent stay for the day
 - 26 percent stay for one or two nights
 - 24 percent stay between three to seven nights
 - none stay longer than a week

Seasonality of Visits

- visitation is very seasonal
 - almost all come in the summer
 - some shoulder season
 - few in winter

Implications for Visitor Experience

An Aging Visitor Base

Although visitation to the park is not declining, park visitors appear to be aging and recruitment of younger families appears to be low. This is not specific to Prince Albert National Park, this is a phenomenon noted across North America. Some explanations are that our society is becoming more urban with younger people looking to electronic devices and cities (malls, skating rinks, etc.) as the main source of recreation and relaxation.

Implications for Programming

To counteract this trend Visitor Experience staff need to be inventive and experiment using action research methods similar to those used in adaptive management to search for programs that attract and hold the interest of younger Canadians while maintaining a solid base of products tailored to long term visitors.

A Smaller number of Children

Probably as a reflection of the aging visitor base, the number of children coming to the park appears to be small. Only one third of the groups entering the park

include children. Unfortunately, the 2007 survey did not gather information about the number of children and the relationship to the group they traveled with (e.g., are a significant number grandchildren traveling with grand parents).

Implications for Programming

Many parks tend to automatically deliver a high percentage of Visitor Experience services and products aimed at children and families. Unfortunately, current data is not clear on the true numbers of children and youth coming to the park and their percentage within the overall park visitor population. According to Frank Grigel, regional Social Science Monitoring Specialist, detailed information can be gathered in the next park visitor survey in 2011.

Until more information is available, Visitor Experience and Outreach staff should maintain current levels of products aimed at children and families.

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Multiple Repeat Visitors

The Environics data (2007) and anecdotal information from park staff indicate that a very high percentage (over 80 percent) of park visitors have visited the park several times, often for many years.

Key features of multiple repeat visitors include:

- have a strong passion for the park and its special places
- have deep interest and understanding of many aspects of the park
- want to share their knowledge and passion with people that have similar passion and interest (e.g., other repeat visitors and knowledgeable, long-term staff)
 - generally not interested in superficial coverage of park ecology, animal behaviour and history by novice staff that are new to the park
- willing to learn more and take part in meaningful stewardship activities, such as wildlife and plant censuses, habitat restoration and invasive species removal

Implications for Programming

The high percentage of multiple repeat visitors coming to Prince Albert National Park puts a special requirements on Visitor Experience programs. These include:

- regular turnover of programs to ensure that repeat visitors have opportunities to experience new, fresh programs
- and/or focus on discovery-based activities where Visitor Experience staff provide tools, e.g., binoculars, dip nets, field guides, etc., ideas and opportunities to go to specific places in the park to explore and record discoveries
 - participants then return to share their observations and ask questions about what they have seen with park staff and other park visitors
 - well designed programs can be participated in many times before a multiple repeat visitor tires of it
- program design should not place repeat visitors in a passive watch and learn position
 - much better to provide opportunities for two way conversations between Visitor Experience staff and participants giving repeat visitors opportunities to share their knowledge and passion

Recommendations for Increasing Seasonal Visitation

Low shoulder and winter visitation is a challenge common to many northern parks. Prince Albert National Park has a long season of low use (November through April) where there are very few visitors and most businesses in the townsite close.

This park has the potential to become a winter resort featuring its splendid winter wildlife watching opportunities supported by:

- a fully functional winterized townsite
 - several open hotels
 - winterized rental cabins
 - a selection of restaurants
- Visitor Experience products offering wolf-howl outings, instruction in wildlife watching, snowshoeing, winter ecology, cross-country skiing, and winter survival
- a series of nested loop trails originating at various points in and on the edge of the townsite enabling visitors to access winter activities without using a car

- a regular STC skibus service between the park and Sasakatoon and Regina making the site more attractive to visitors who do not like long winter drives (currently a bus does not come to Waskesiu from late fall through to early spring)

Implications for Programming

This type of transformation would require cooperation between the park and many stakeholders and is beyond the scope of the Visitor Experience programs. However, Visitor Experience staff can develop pilot programs to show the viability of winter-based activities in the park.

Visitor Experience staff could work with local experts to deliver public programs featuring:

- instruction in cross-country skiing and snowshoeing
- winter safety and survival
- winter forest ecology
- wildlife watching featuring the highly visible wildlife near the townsite and special wolf/howls and watching programs



1C: Visitor Motivation

Enviroics (2008) reported on park visitor responses to questions about their motivation for visiting the park. On a scale from 1 (low) to 5 (high) visitors rated the following motivation factors:

Motivation Factor	Mean Rating (out of 5)
Experience the Natural Outdoors	4.6
Have a Recreational Experience	4.5
Get Good Value for My Money	4.3
Get High Quality Service	4.3
Spend Time with Friends and Family	4.0
Experience a Family Tradition	4.0
Have a Learning Experience	3.5

Implications for Visitor Experience

Visitor Experience staff must realize that having a learning experience is not the top priority motivation for most park visitors. However, it remains an important motivation.

The most important motivators for park visitors are to experience the outdoors and have a recreational experience. Visitor Experience staff should consider designing many of their offerings focusing on facilitation of these experiences and framing their promotions to highlight these opportunities.

Park visitors' interest in good value (ranked #3) and high quality service (ranked #4) strongly supports the need for quality products and skilled well trained Visitor Experience staff in order to show audiences that their park fees and taxes are money well spent.

It should also be noted that visitors strongly value time spent with family (ranked #5) and following family traditions (ranked #6). This strongly suggests that Visitor Experience products should enable and encourage program participation in family groups whenever possible.

1D: Visitor Segmentation

The purpose of visitor segmentation is to divide the mass of visitors into units of similar knowledge interests, motivation and behaviour. Detail information about visitor characteristics is gathered and a set of criteria is used to separate visitors into logical units.

Visitor Experience staff use visitor segmentation as a tool to ensure that they design products to meet the needs, interests and abilities of specific audience segments. Knowing details about numbers of people, timing and duration of visits, locations where specific visitor segments gather and what they already know about the park and its features helps them to efficiently develop effective and meaningful products.

Information used for visitor segmentation requires detailed statistics and anecdotal information about visitor characteristics and park use. General information about park use is gathered annually in park statistics and detailed information about visitor characteristics is gathered through a Parks Canada visitor surveys.

Audience Segmentation Models

Prince Albert National Park has two visitor segmentation models available to it.

- Regional Survey Model, used in current and future Park Visitor Surveys conducted approximately every five years
- Explorer Quotient (EQ), a model recently adopted by Parks Canada

Both provide useful insights into the make up of park visitors and are used to identify key target audiences for Visitor Experience products.

According to Frank Grigel, Regional Social Science Specialist, the 2011 visitor survey for the park will include the Regional Survey model's visitor segmentation. He indicated that some questions will be directed toward developing EQ profiles but that questionnaire space will be limited. Through the development of the Prizm Database park staff will soon have more information about current and potential visitor EQ profiles.



1E: Regional Survey Segmentation Model

This model was first developed for the mountain parks in Alberta and BC. It is now being used At Prince Albert National Park. This model identifies four visitor segments based on their behaviours and attitudes:

- Townsite Visitors
- Park Sightseeing Visitors
- Park Experience Visitors
- Area Sightseeing Visitors

Of key importance in this segmentation model are three Visitor Segments that until recently have not been recognized by Parks Canada. Indeed, many park agencies in Canada remain unaware of these large and significant groups within their visitor population. These are Townsite Visitors, Park Sightseers and Area Sightseers. Until this model was adopted, most people expected everyone to fit the description of a Park Experienter.

A Modified Regional Visitor Segmentation Model

The following pages of this plan use information from the Environics report plus anecdotal information provided by park staff. Also, additional audiences are identified in Parks Canada's Corporate Plan (2008) and the parks 2008 management plan.

The following visitor segments have been identified:

- Waskesiu Townsite Visitors
- Park Sightseeing Visitors
- Park Experience Visitors
 - including Townsite Leaseholders
- Area Sightseeing Visitors
- Other Key Audiences
 - Youth
 - Including schools
 - Aboriginal Communities
 - New Canadians

1.1 Townsite Visitor Segment (41% of total visitors)

This is by far the largest visitor segment in the park. It encompasses 41 percent of annual park visitors.

Location: Waskesiu townsite

Key Characteristics:

- most stay in the townsite for all or most of their visit
- the majority (59%) come on day passes
 - location and type accommodation of most day pass visitors was not gathered in the 2007 park visitor survey
- type of accommodation for overnight visitors is shown in the figure below

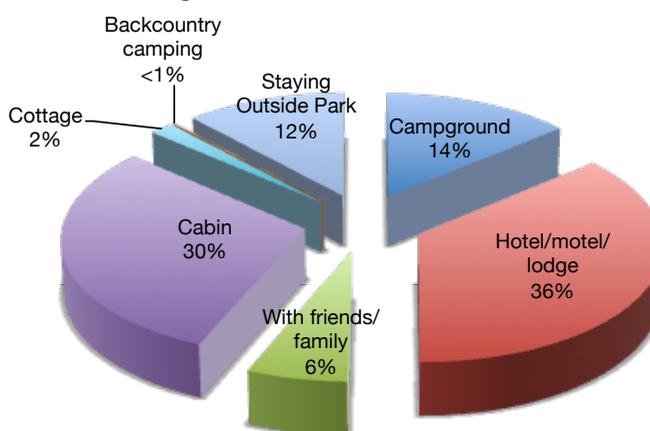


Figure 2.18 Where overnight Townsite Visitors stay (data from Environics [2008]).

- strong seasonality in visitation pattern:
 - most in summer (64 percent)
 - 27 percent come in spring
 - 10 percent come in fall
 - no data on winter, but numbers are very low
- some make trips to other parts of the park, including boat trips on Waskesiu Lake, drives to the north road to Kingsmere, Crean and Hanging Heart Lakes, the Narrows Road and the Highway 263
- walking the townsite is most frequent visitor activity
 - however, according to park staff, at times many of these visitors seem at a loss for things to do beyond walking the streets, shopping, buying ice cream and watching other visitors
 - staff report that many indicate that they would prefer accessing the natural areas of the park without having to drive a car
 - many request opportunities to rent canoes and kayaks in the townsite rather than having to drive to the marina
 - some indicate that more short and medium nature trails accessible from the townsite would be appreciated
- activities in order of frequency are listed in Figure 2.17



Snapshot: Park Experience Visitors Segment Where Do They Go, What Do They Do

Key Locations Where this Segment Can be Found (in general order of importance)	Current Activities
<ul style="list-style-type: none"> • all major beaches for family and children's programs <ul style="list-style-type: none"> - Main Beach in Waskesiu - Paignton Beach - Trippers Beach • all visitor nodes • trails (in order of use) <ul style="list-style-type: none"> - Waskesiu River - Amiskowan - Boundary Bog - Kingfisher - Mud Creek - Height of Land Tower - Red Deer Trail - Treebeard - Shady Lake - Ice Push Ridge - Kingsmere River • accommodation sites <ul style="list-style-type: none"> - cabins - cottages - hotel/motel/lodge - campgrounds • boat launches <ul style="list-style-type: none"> - Waskesiu Lake marina - Hanging Hearts Lake - Narrows marina - Namekus Lake 	<ul style="list-style-type: none"> • scenic drive/sightsee 100% • walk/hike 100% • picnic/swim 99% • heritage site visit 93% • shop 92% • ate at restaurant 78% • cycle 65% • motorboat 54% • golf 43% • canoe/kayak 39% • fish 39%

Implications for Visitor Experience

This is an important segment because they are active in the park and most strongly support the concept and actions of national parks. With the increase of the growth of cities across Canada, including Saskatchewan, the number of people taking part in many forms of outdoor recreation is decreasing. Parks Canada is developing initiatives to make people more aware of the agency, and specific national parks, historic sites and marine protected areas and the many recreational and learning opportunities that they provide. Park Experience Visitors is a segment that Prince Albert National Park should serve well in order to maintain and grow its numbers.

The Park Experience Visitors is the most interested in taking part in Visitor Experience activities in the park. This suggests that they will be the easiest to provide products for. However, this group has some key characteristics that must also be kept in mind when developing products these include:

Many are Multiple Repeat Visitors

- know a lot about the park
 - are interested in in-depth activities
 - expect knowledgeable Visitor Experience staff that know the site very well
 - products must provide participants with opportunities to ask questions and communicate things that they know and feel to park staff
- visit often and stay for long periods
 - will be looking for programs with changing content or location
- often have specific activity plans destinations and timetables
 - more apt to take part in programs that have flexible start/finish times (e.g., drop-in activities)
 - more apt to take part in programs located at the places they travel to
- Visitor Experience staff should consider advertising and delivering some programs at places where this segment stays overnight, particularly focusing on the townsit's core accommodation area
- to better serve this segment, the park should consider developing:
 - a program site within the townsit's core accommodation zone to deliver some programming to this segment and others (e.g., Park Sightseeing Visitors)
 - interpretive trails with trailheads near the townsit's core accommodation area

Many outdoor recreationist do not think of Prince Albert National Park as an outdoor activity destination, especially people living outside of Saskatchewan.

Staff can promote the park to provincial, national and international audiences as:

- a safe, comfortable place to experience Canadian wilderness

For backcountry enthusiasts and outdoor sport competitors

- an accessible wilderness where novice and intermediate outdoor enthusiasts can develop skills and experience as a step to making excursions to more remote wilderness areas
- a training site where intermediate and expert backcountry enthusiasts can build up strength and endurance

Finally, people in this visitor segment are the best target candidates for taking part in the growth of winter activities in the park.



1.4 Area Sightseeing Visitors (11% of total visitors)

This is the smallest visitor segment in the park. People in this segment behave in a similar way to those in the Park Sightseer Segment. They prefer travelling about in vehicles to getting out on the trail or onto the lake. This group has come to the Prince Albert region to look around. They may not have known that the park even existed before seeing the direction signs on the highway.

Data from the 2007 visitor survey suggests that members of this group are older on average than members of the other three segments.

Location:

- most visit only one or two favourite visitor activity nodes (not identified)

Key Characteristics:

- most do not visit all the visitor nodes in the park
- many are interested in having a learning experience
- some are active anglers and boaters
- least likely to have children in their party
- many of the people who come from outside the province (Alberta, rest of Canada and overseas) belong to this segment
- many (62 percent) travel in groups of 3 or more people
- most (85 percent) are day visitors
 - current visitor survey data does not provide information on where these people spend the night
 - it is probably in nearby resorts or Prince Albert and area
- those that stay overnight (15 percent) are most likely to stay in a campground (see Figure 2.21 below)

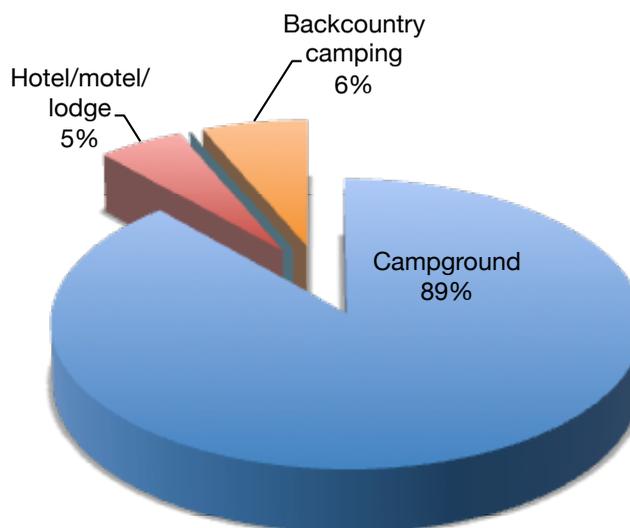


Figure 2.21 Where overnight Area Sightseeing Visitors stay (data from Environics [2008]).

Snapshot:
Area Sightseeing Visitors Segment
Where Do They Go, What Do They Do

Key Locations Where this Segment Can be Found (in general order of importance)	Current Activities
<ul style="list-style-type: none"> • all visitor nodes <ul style="list-style-type: none"> - Highway 263 (42% visit here) - Waskesiu townsite (40% visit here) • trails (in order of use) <ul style="list-style-type: none"> - Kinowa (373 users) - Waskesiu River (175 users) - Grey Owls Cabin (174 users) 	<ul style="list-style-type: none"> • scenic drive/sightsee 31% • picnic/swim 30% • canoe/kayak 19% • shop 15% • motorboat 13% • fish 13% • ate at restaurant 13% • walk/hike 11% • cycle 2% • golf 2% • heritage site visit 1%

Implications for Visitor Experience

This is the smallest visitor segment identified in the 2007 Park Visitor Survey.

Because this is such a small segment, staff should not expend over 10 percent of their time and effort on developing and delivering products to Area Sightseeing Visitors. That said, this segment has good growth potential as the Parks Canada national campaigns to increase the agency's profile get underway. Key targets

for these national campaigns are urban Canadians, new Canadians and youth. It is very likely that these campaigns will increase the number of Area and Park Sightseeing Visitors coming to Prince Albert National Park. Park Visitor Experience staff must pay careful attention to annual visitor statistics and any new information coming from park visitor surveys to look for increases in numbers of these visitor segments and be prepared to respond to these changes.



2. Outreach Audiences

2A: Current Conditions

In the past years, very little data was kept about Outreach audiences. As a result of the ERVE realignment there have been an increased focus on Outreach. Parks Canada has very little information on the attitudes, needs, motivations and desires of Canadians who don't visit national parks. Research is slowly starting and will continue for many years. Several target audiences have been identified to date. This Interpretive Plan will be completed before more can be learned about these audiences. The Outreach sections are very brief, but will have new material added as it becomes available.

2B: Other Key Audiences

As stated earlier in this chapter, Parks Canada's Corporate Plan clearly identifies Canadian youth, urban Canadians and new Canadians as important target markets for Outreach, and the park's Management Plan (2009) clearly identifies Aboriginal Canadians as a key target market.

Youth

Parks Canada in its Corporate Plan clearly identifies Canadian youth as an important target market. Prince Albert National Park will come on board and increase its efforts to involve youth in park Outreach products.

Implications for Outreach

In many ways Outreach staff face an even harder task to engage youth remotely.

Outreach Strategies for Engaging Youth

Outreach staff will have to compete with the wide spectrum of on-line and social media that youth currently engage in. Outreach staff will need to know why and how youth use these media and experiment with use of tools such as YouTube, FaceBook and Twitter.

Like Visitor Experience staff, Outreach personnel will need to develop an adaptive management/action research approach whereby they monitor use of their Youth-focussed on-line offerings and develop, deploy, analyse and revise and fine-tune methods media and themes.

Aboriginal Communities

The park's management plan is clear in stating the importance of engagement of Aboriginal communities both as park visitors and as partners in interpreting the history and culture of their people. As well, it is expected that all park initiatives to include Aboriginal perspectives whenever possible. Therefore, staff must include this group as a regular target for engagement and programming.

People in Major Canadian Urban Centres

Canada is becoming a very urbanized society. Most Canadians live in cities and the highest concentrations are in the MTV. Studies by Parks Canada indicate that the majority of Canadian city dwellers are not visiting National Parks, and many are unaware of the conservation values of national park. As a result, urban Canadians, including the MTV centres, are an important target for the park's Outreach program.

Implications for Outreach

Outreach staff will also need to understand the needs and interests of urban Canadians and the real and perceived barriers seen by urban Canadians to engage with the park and to support Parks Canada and a heritage agency.

Key approaches can include featuring wildlife watching in the park.

New Canadians

Similar to urban Canadians, new Canadians have been identified as a key target for Outreach programming.

Implications for Outreach

Outreach staff will also need to understand the needs and interests of new Canadians and the real and perceived barriers seen by them to engage with the park and to support Parks Canada and a heritage agency.

Key approaches can include:

- featuring Prince Albert National Park as the place to experience Canadian wilderness and safely observe iconic Canadian wildlife
 - virtually on the web
 - on-site in the park



Explorer Quotient

What is Explorer Quotient (EQ)

Explorer Quotient was developed by the Canadian Tourism Commission as a tool for segmenting tourism travelers. Recently, Parks Canada has adopted this model as a tool to help perspective visitors classify themselves and choose appropriate activities and destinations. EQ is also being developed as a tool for staff in classifying visitors and designing products that meet their needs. Information about EQ can be found at: www.pc.gc.ca/voyage-travel/qe-eq/qe-eq_e.asp Appendix 2.1

You can take an EQ Quiz at the EQ Canada website: www.eq.canada.travel/.

Table 2.6 summarizes key characteristics and experiences sought by people in each segment. The park has no data compiled regarding the EQ of visitors.

Explorer Type	Learning Explorers				Social Explorers			Reluctant Explorers		
	Authentic Experiencers	Cultural Explorers	Cultural History Buffs	No Hassle Travelers	Personal History Explorers	Free Spirits	Gentle Explorers	Rejuvenators	Virtual Travellers	
Social Values	<ul style="list-style-type: none"> globally aware spontaneous targeted traveler (strategic) learn through experience 	<ul style="list-style-type: none"> globally aware flexible, creative explorer of unique reasoned-risk taker self-willed, organized social, independent, self-reliant 	<ul style="list-style-type: none"> open minded culturally sensitive positive minded social, independent, self-reliant 	<ul style="list-style-type: none"> simplicity seekers feeling time stress aversion to complexity seeks stability and predictability rational low sense of vitality not spontaneous or impulsive 	<ul style="list-style-type: none"> like personal challenge resists cultural assimilation and searches for roots celebrates life passages need for status and association with brands 	<ul style="list-style-type: none"> many weekend trips likes organized groups luxury and status craves social intimacy, celebrating passages and crowds 	<ul style="list-style-type: none"> prefer cultural assimilation rather than multiculturalism few recent vacations don't like travel but go along with spouse travel in organized groups, package tours 	<ul style="list-style-type: none"> do not want to go off the beaten track not interested in risk taking prefer weekend trips, visiting family/friends get away to recharge travel in organized groups stay in branded hotels 	<ul style="list-style-type: none"> fear of the unknown traditionally-minded conform to norms few/ short vacations travel for family to celebrate events travel close to home 	
	<ul style="list-style-type: none"> ecologically sensitive and concerned social, independent, self-reliant supportive, cooperative 		<ul style="list-style-type: none"> enjoys visiting family/friends 		<ul style="list-style-type: none"> prefer cultural assimilation rather than multiculturalism buy on impulse prefer familiarity/return to destinations 					

Table 2.6 Summary of Characteristics of Explorer Quotient Visitor Segments *continued*



Section 2: Market Analysis

3. Populations and Trends

3.1 Saskatchewan Market

Saskatchewan is currently the park's biggest market representing over 80 percent of the people visiting each year. The province will be the major source of park visitors and will be potentially a major outreach target market for at least the next five to ten years.

In order to best serve this primary market, park staff must be aware of the population dynamics of the province and their implications for products.

Age Structure

Saskatchewan's situation is interesting in that it has both the largest proportion of seniors (15.4 percent) in Canada and one of the largest proportions of children among the provinces (19.4 percent). This seemingly paradoxical state of affairs is because of:

- higher fertility than any other Canadian province
 - people in Saskatchewan have larger families
- on average, Saskatchewan residents tend to live longer than most Canadians
 - the province has the largest proportion of very elderly people (80 and over) in Canada
 - in 2006, one out of 20 Saskatchewan residents was 80 and older
- high numbers of young adult Saskatchewanians move to other provinces (e.g., Alberta) for work and education
 - reduces the proportion of Saskatchewan residents between the ages of 20 and 40

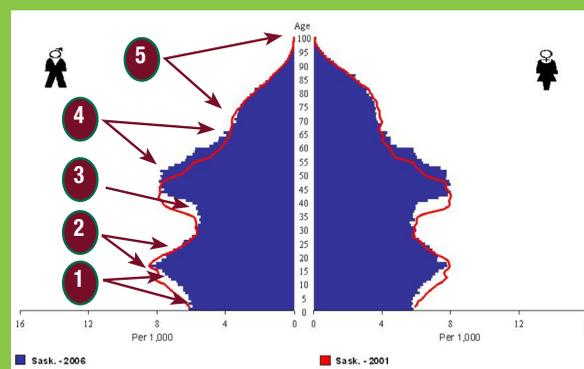
Trends in Age Structure

Statistics Canada predicts that the trend to an aging population will continue with a proportion of senior citizens (people 65 and older) will increase from 14 percent in 2006 to 25 percent by 2031.

Using a Population Graph

The province's population graph of the last two censuses (2001 [red line] and 2006 [blue infill]) show:

1. a decrease in children (age 0-12)
2. a steady population of youth (age 13-19)
3. a decrease in young adults (age 30-45)
4. an increase in middle aged adults and young seniors (age 45-70)
5. a steady maintenance of older seniors (age 70-100)



Changing Family Structure

The traditional two-parent, one-earner, two-child household is no longer the norm in Canada, including Saskatchewan. More than one-third of all marriages end in divorce. This has resulted in a significant increase in single-parent and blended families. In Saskatchewan 11.7 percent of all families are led by one parent (Canadian average is 13 percent).



Implications for Visitor Experience and Outreach

Senior Audiences

Both staff should:

- regularly monitor information about seniors in order to track current population dynamics and their level of visitation to the park
 - this group may make up a significant proportion of the Park Sightseeing Segment
- ensure that there are products aimed at seniors
 - reduced physical demands for some
 - increased two-way communication to allow senior participants to contribute information and experiences
- be prepared to increase efforts aimed at this market as their population increases over the next 5-10 years

Note: The fact that there are significant numbers of older seniors, many of who may not wish to or are unable to travel but have an interest in the park suggests that this will be a small but significant target market for outreach.

Family Audiences

Middle Aged Parents and Youth

Since middle aged adults have increased and will continue to do so and the numbers of youth is predicted to remain unchanged, park staff may expect families with older children will remain as an important market for products. These should provide adults and youth opportunities to work together on:

- outdoor adventures
- wildlife watching activities
- meaningful stewardship activities in the park

Young Families and Children

These are traditional markets for Visitor Experience programming. However, current trends suggest that for all but Aboriginal families, this group has declined in size and will likely continue to do so. As a result emphasis on this type of programming should decrease over the next five years to make way for a wider spectrum of programming.

Youth

Youth is a audience identified in the Parks Canada Corporate Plan. As indicated elsewhere in this plan, engaging youth is difficult and most parks systems in Canada are struggling to find an effective suite of programming that attracts and holds the interest and attention of people 13-25 years old.

Strategies for Visitor Experience staff should include:

- engaging a charismatic young person as a youth programmer
 - provide a series of outdoor activities that feature the charismatic leader and opportunities to do activities in the company of age-group peers
- e.g.,
- outdoor adventures (mountain biking, kayaking, canoeing, etc.)
 - wildlife watching activities
 - meaningful stewardship activities in the park

Strategies for Outreach staff should include:

- engaging a tech savvy young person as a youth programmer
- develop a presence on the web through Facebook, Twitter, YouTube
- feature youth doing interesting things in the park

Adults (45-65)

This is a very large segment of Saskatchewan's population. This includes a significant number of people who may be finding that traditional camping is getting to be less comfortable. Both Visitor Experience and Outreach staff can feature Prince Albert National Park with its well equipped townsites with a wide variety of comfortable accommodation options as an ideal place to experience wilderness in comfort.



Trends in Community Structure

Another feature of the Saskatchewan population is that people in the province tend to have deep roots. This can be measured by looking at the proportion of people who's families have been in the province for several generations. Table 2.1 shows that well over 70% of the province has lived in the Saskatchewan for at least 3 generations. Aboriginal people included in these numbers can trace their linages much further back.

This table also shows that immigration of people into the province (first generation living in Saskatchewan) is largest in the main cities (Saskatoon and Regina) and is less than the provincial average in Prince Albert.

Table 2.1 Duration in the Community in Saskatchewan and its three largest cities	Percentage of Population			
	Prince Albert	Saskatoon	Regina	Province
1st generation living in Saskatchewan	5%	10%	10%	7%
2nd generation living in Saskatchewan	16%	17%	17%	18%
3rd generation or more living in Saskatchewan	79%	73%	73%	75%

Implications for Visitor Experience and Outreach

By far the majority of Saskatchewanians have family roots that extend back more than three generations. Aboriginal people can trace their roots back as far as 10,000 years.

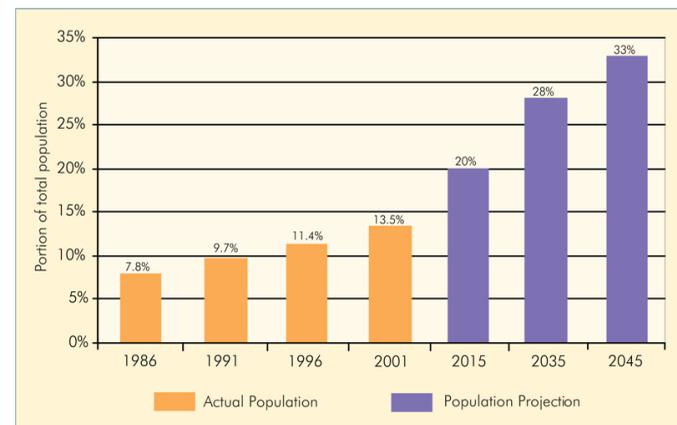
This long connection with the province often results in long family history with Prince Albert National Park. Both Visitor Experience and Outreach programming can make use of these deep connections to engage people in sharing their memories, artifacts and photos from their family history. This can be done through personal products, exhibits and through interactive elements of the park's website.

Aboriginal Communities

Provincial Perspective

Aboriginal people number at about 150,000 people in the province and represent about 15% of the total population. First Nations communities have the fastest population growth of all communities in Saskatchewan

- currently account for 12.6% of the population
- Statistics Canada predicts this will rise to 33 percent by 2045 (see graph below)



Aboriginal youth is the fastest growing segment of the Canadian population

- a significant number are interested in regaining their language and learning more about their culture

Urbanization of Saskatchewan Aboriginal People

Statistics Canada reports a major shift of Aboriginal population from reserves to urban centres. Aboriginal people make up:

- 34% of the population of Prince Albert
- 9 % of the population of Saskatoon
 - 21,000 people in 2006
- 9 % of the population of Regina
 - 17,000 people in 2006



Aboriginal Communities Near Prince Albert National Park

First Nations Communities	Population (2006 Census)
City of Prince Albert (Includes Wahpeton First Nation and part of the Peter Ballantyne First Nation)	6,250
Lac La Ronge First Nation	8,954
Ahtahkakoop First Nation	2,600
Sturgeon Lake First Nation	2,558
Mistawasis First Nation	2,216
Big River First Nation	2,120
Pelican Lake First Nation	1,030
Montreal Lake First Nation	880
Witchekan Lake First Nation	546
Little Red River First Nation	319
Total	27,473
Métis Communities	Population (2006 Census)
City of Prince Albert	6,250
Weyakwin	183
Molanosa	unknown
Total	> 6,433

Details About the Aboriginal Population of the City of Prince Albert

- 13,600 people in 2006
- half Métis and half First Nations
- high growth rate
 - First Nations population growth rate: 25 percent
 - Métis population growth rate 12 percent (2001-2006)
- Aboriginal population living in the City of Prince Albert is younger than the non-Aboriginal population
 - Aboriginal median age is 22 years, non-Aboriginal median age is 44
- First Nation reserve located within the boundaries of Prince Albert:
 - Peter Ballantyne Cree Nation (Opawakoscikan)

Implications for Visitor Experience and Outreach

Local Aboriginal people are a key audience for Visitor Experience and Outreach programming. As well, the park's management plan indicates the intention of building positive relationships with these communities and working with Aboriginal people as partners in resource management and in the design and delivery of interpretation and education products.

Key points in a strategy for engaging Aboriginal communities:

- integrate Aboriginal perspectives into all products
 - recognize the key roles that Aboriginal people played in the history of the lands that make up Prince Albert National Park
 - introduce the Aboriginal perspective—their relationship with wildlife and nature
 - be sensitive and respectful of spiritual values and traditional knowledge
- ensure that all park products and materials are promoted in Aboriginal communities
- encourage and enable qualified Aboriginal elders and traditional knowledge keepers to tell some of their stories and to demonstrate traditional methods

- encourage and enable studies on the social and economic barriers that exist to Aboriginal people visiting Prince Albert National Park and/or taking part in outreach programming and develop strategies to overcome key barriers
 - apply this knowledge and recommendations to remove barriers whenever possible
- staff to take cultural awareness workshops and seminars on Aboriginal culture
- keep abreast of the work of the park's Aboriginal Affairs Manager in developing connections and relations with elders and community leaders
- hire staff from Aboriginal communities to assist in developing and delivering products
- work with urban Aboriginal organizations and community groups (e.g., Friendship Centres) to integrate the park with programs aimed at inner city and reserve youth and children



Baby Boomers

The baby boomer cohort is a large group of people who were born shortly after World War 2. They are the largest age cohort in the Canadian and Saskatchewan population and have important affects on the economy, social structure and also on park visitation. In 2011, the boomers are in the age range of 45 to 65. In the next five to ten years a majority of them will become senior citizens.

Baby boomers are a demographic wave that is influencing park visitation and interpretation. According to researchers, the baby boom generation is becoming a group of empty nesters. Their children will be grown up and will have left home. Boomers “are educated, sophisticated, experienced travelers who are used to a lifetime of getting what they want.”

Boomer Facts

- 1/3 of Canada’s population are baby boomers
- in 2011 the boomers number 10.2 million in Canada
- 2026—the 65+ segment of the population will be 21% of Canada’s population
- 2016 marks the time when the trailing edge of the baby boom reaches age 65
 - will represent 34% of family households
 - boomers will move from the young-family part of their lives to becoming empty nesters
 - mortgage-free, and kid-free, this group will be looking for travel and adventure opportunities
 - comfort is important
 - many are shifting from camping in tents and trailers to motor homes a, cabins and hotels
- boomers are the most likely to travel outside of North America
 - competition for their interest will be significant

Boomers will be interested in:

- comfort before and after outdoor activities
- longer term stays in areas
- soft adventure—active outdoor adventure with comfortable accommodation
- learning adventures with deeper content—experiential travel
- traveling with grandchildren
- demand high quality Visitor Experience and Outreach experiences.
 - there will be increasing demand for deeper, more meaningful products

Implications for Visitor Experience and Outreach

Baby Boomers are a large, affluent educated group of people with time on their hands. They are an important target audience for both Visitor Experience and Outreach programming.

Visitor Experience

Baby boomers are interested in more in-depth and often more tailored Visitor Experience programming. This type of programming is more costly to develop and produce. However, they can pay their own way through fees. Many baby boomers are willing to pay for deeper, more significant experiences.

An increase in demand for personal Visitor Experience services will also require high skills and knowledge from Visitor Experience staff. There will be little place for quickly-trained summer/seasonal staff.

Successful programs aimed at baby boomers often last over several days and are focussed on meaningful activities focussed on resource management, stewardship and real scientific research. This would require Visitor Experience working with resource conservation staff and perhaps outside researchers to identify locations and methods for programs. Key topics for such programming could include assisting with:

- wildlife behavior studies
- habitat restoration projects
- archeological digs

Outreach

Outreach could provide other baby boomers and other audiences with the opportunity to vicariously take part in park research and stewardship projects by viewing streaming video and reading blogs written by on-site participants, resource conservation staff and researchers.



4. Key Market Segment Trends

4.1 Soft Outdoor Adventure Enthusiasts

In 2003, Research Resolutions and Consulting and the Canadian Tourism Commission (CTC) published *Canadian Soft Outdoor Adventure Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey*. This document provides some valuable information that can be used to assess the tourism potential of Prince Albert National Park.

The CTC defines soft tourism tourists as people who regularly take part in:

- **hiking/backpacking**
- **cross-county skiing**
- **kayaking or canoeing**
- **horseback riding**
- **biking**
- **motor boating**
- **sailing**
 - motorcycling (including quad)
 - snowmobiling
 - hot air ballooning
 - wind surfing
 - downhill skiing
 - snowboarding

Note that the activities listed above in bold type take place in Prince Albert National Park.

Research Resolutions and Consulting (2003) claim that the Soft Outdoor Adventure Enthusiasts group, numbering about 4.4 million Canadians over 18 years old at the time of writing, is the largest activity-based domestic market segment among those identified by the CTC.

Demographics of Soft Outdoor Adventure Enthusiasts

Research Resolutions and Consulting (2003) identified the following characteristics of Soft Outdoor Adventure Enthusiasts:

- both women and men are represented equally in this group (e.g., 50% are women, 50% are men)
- concentrated at the younger end of the adult age spectrum
 - 70 percent are between 18 and 44 years
 - 39 percent are in the 18 to 34 year age group
 - 31 percent are in the 35 to 44 year age group
 - only 4 percent are over 65 years old
- most live in adult-only households (no members under the age of eighteen)
 - 61 percent are adult only households
 - 39 percent of households include teenagers or children
- span a broad spectrum of income and education
- 92 percent are Canadian-born

Most Popular Activities

Research Resolutions and Consulting (2003) identified the most popular activities as follows:

- 58 percent **hiking/backpacking in wilderness settings**
- 38 percent **cycling**
- 37 percent **kayaking or canoeing**
- 37 percent **motor boating**
- 28 percent downhill skiing
- 22 percent **cross-county skiing**
- 19 percent snowmobiling
- 18 percent **horseback riding**
- 13 percent **sailing**
- 10 percent motorcycling (and quad)
- 5 percent snowboarding
- 4 percent wind surfing
- 2 percent hot air ballooning

Implications for Visitor Experience and Outreach

Soft outdoor recreation activities represent the largest grouping of outdoor activities that take place in Saskatchewan and the rest of Canada.

Staff should promote the park as an ideal location to take part in soft outdoor activities in comfort.

The park should look carefully into the opportunity to expand the park's profile as a provincial cross country ski destination.

- shows a relative weakness for attracting new Canadians

- Income
 - about 33 percent have relatively low annual income (under \$40,000)
 - possibly because of the high proportion of young people in this group
 - 25 percent have household incomes of \$40,000–\$60,000
 - 28 percent have household incomes between \$60,000–\$100,000
 - 13 percent have household incomes in excess of \$100,000
- Education
 - 7-14 percent have some secondary or less
 - 17 percent have completed secondary education
 - 40 percent have some post secondary education
 - 26 percent have graduated university



Implications for Visitor Experience and Outreach

Visitor Experience staff developing products aimed at this group should remember:

- the focus should be on men and women equally
- about 60 percent of Visitor Experience offerings

should focus on adult participants

- about 40 percent of Visitor Experience offerings should focus on children and family participants
- level of Visitor Experience presentation and content should be accessible to participants from a wide range of educational backgrounds

Other Outdoor Activities

Research Resolutions and Consulting (2003) also looked at other activities that Soft Outdoor Adventure Enthusiasts take part in while on trips. These include:

- 47 percent **wildlife viewing**
- 42 percent **fishing**
- 14 percent **ice fishing**
- 32 percent **wildflowers/flora viewing**
- 22 percent **bird watching**
- 8 percent hunting – big game
- 8 percent hunting – birds or small game
- 7 percent white water rafting
- 1 percent ice climbing
- 1 percent rock climbing
- 1 percent bungee jumping
- 1 percent dog sledding

Note that the activities listed above in bold type take place in Prince Albert National Park.

Heritage Activities

Research Resolutions and Consulting (2003) indicate there is overlap between Soft Outdoor Adventure Enthusiasts and Heritage Enthusiasts. They listed the following heritage activities that soft outdoor adventure enthusiasts often take part in:

- 38 percent **general history museums**
- 37 percent farmers' fairs or markets
- 34 percent local festivals or fairs
- 25 percent science & tech museums
- 22 percent pick-your-own farms/harvesting
- 20 percent **historic sites**
- 11 percent **pow wow/other Aboriginal celebrations/attractions**
- 11 percent children's museums
- 11 percent western theme events

Implications for Visitor Experience and Outreach

The information suggests that Soft Outdoor Adventure Enthusiasts visiting Prince Albert National Park will be interested in activities such as wildlife viewing, fishing, native plants and bird watching. They will also likely be interested in the museum and Nature Centre. Visitor Experience should work to include these types of activities into Visitor Experience program for this target group.

Outreach staff can feature these topics in newspaper and magazine articles and also feature these activities on the park's website and FaceBook pages.

Future Predictions

Research Resolutions and Consulting (2003) noted that the demographic profile of Soft Outdoor Adventure Enthusiast consists largely of young adults. Older Canadians, and particularly those over 65 years are less likely to take part in these activities.

The total Canadian Soft Outdoor Adventure Enthusiast market is predicted to grow from 4.4 million in 2003 to 6.0 million people by 2026. However, because the Canadian population will shift over the next two decades to an older and childless one, and because much of the new younger population will come from immigrants who do not take part in soft outdoor adventure activities, Research Resolutions and Consulting predicts growth in Soft Outdoor Enthusiast group will be 52 percent lower than would have been expected given today's population structure.



5. School Market

5.1 Local Saskatchewan Schools

Schools are an excellent venue for Parks Canada to fulfill parts of its education mandate. They are also important locations for staff to access youth, a key target audience identified in Parks Canada's Corporate Plan.

Number of School-Aged Children

Enrollments in Saskatchewan schools is slightly over 200,000 and has remained relatively stable during the last decade.

Statistics Canada indicates that the number of school-aged children across Canada is expected to drop over the next decade as a result of a declining birth rate. In Saskatchewan, this trend may be offset by the growing Aboriginal population.

Implications for Visitor Experience and Outreach

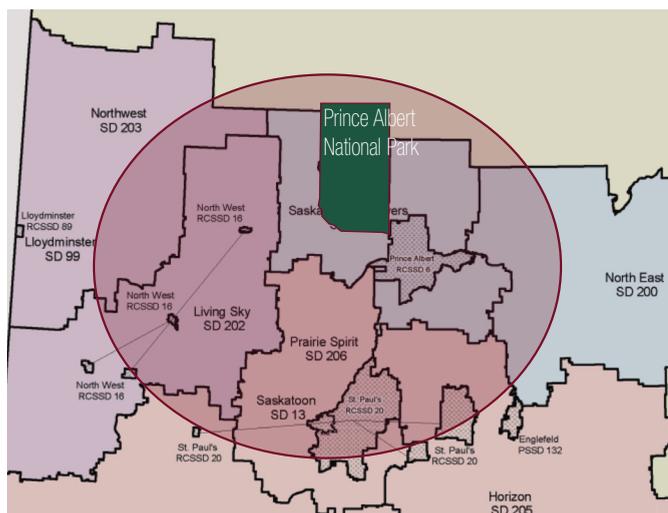
The school market in Saskatchewan will likely remain unchanged over the next five to ten years in Saskatchewan and will decline elsewhere across the country.

Visitor Experience staff can expect that demand for school programs will remain the same over this time period.

Outreach staff will likely experience a decline in demand for education materials about the park from the rest of the country.

Local School Boards

The major market for school products are schools that lie within a 2.5 hr. drive of the park. The map below shows the public and Catholic School Divisions that lie within this zone.



The table below lists local school divisions and the number of schools and students in each (2010).

School Populations		
School Division	Number of Schools	Number of Students
Saskatchewan Rivers School Division (Prince Albert)	32	9,000
Prince Albert Catholic Schools	8	??
Saskatoon Public Schools	55	22,000
Greater Saskatoon Catholic Schools	37	15,000
Prairie Spirit School Division No. 206	44	9,400
North East SD 200	31	4,689
Northern Lights*	21	4,040
*Many schools in the far north (beyond catchment for the park)		
Total	228	62,129

Saskatchewan Rivers School Division (Prince Albert)

This is a large school division that holds most of the schools likely to visit the park. It has schools located in the City of Prince Albert, as well as in rural areas in all directions from the city, including Big River, St. Louis, Kinistino, Meath Park and Christopher Lake. The map below shows the school division boundaries and the location of some of its schools.





6. Recommended Target Audiences

In order to be efficient with budget and time, it is important that all staff and their managers recognize and understand the priority of target audiences. It must be noted that the Visitor Experience and Outreach programs will have differences in audience priorities.

Audience priority is based on these criteria:

- agency direction
 - audiences identified in the Parks Canada Corporate Plan and the Prince Albert National Park Management Plan
 - this criteria tends have heavier weight than other criteria
- numbers
 - numbers of visitors currently or potentially coming to the park
 - primarily targets for the Visitor Experience program

- numbers of people currently interested in or potentially interested in the park
 - primarily targets for the Outreach program
 - who knows about and supports Parks Canada and Prince Albert National Park and who potential would visit the park
- audience accessibility
 - audience interest in participating in interpretation and education products via the park's Visitor Experience and Outreach programs
 - audience activities
 - people who come for short-term intensive activities (e.g., day visits, for back county hikes, fishing, canoe or beach activities) are less accessible than extended stay people
 - audience location
 - ease of their access to the park or its outreach program

Priority Audiences for the Visitor Experience Program

Table 2.2 applies the criteria to each audience identified.

Primary Audiences

These are the audiences on which Visitor Experience staff should devote approximately 60 percent of their time and effort. To be classified as a primary audience, each must have scored high in two or more criteria in table 2.2.

Primary Audiences Include:

- Waskesiu townsite Visitors
- Park Experience Visitors
 - including Townsite Lease holders
- Schools and youth groups

Secondary Audiences

These are the audiences on which Visitor Experience staff should devote approximately 30 percent of their time and effort. To be classified as a secondary audience, each must have scored at least moderate in two or more criteria in table 2.2.

Table 2.2:
Prioritization of Visitor Segments for the Visitor Experience Program at Prince Albert National Park Based on Data from *Prince Albert National Park 2007 Visitor Survey* (EnviroNics 2008)

Criteria	Agency and Park Mandates*	Numbers *	Audience Accessibility*	
			Audience Interest	Ease of Contact
Audience Segment				
Audience Segments from 2007 Visitor Survey	Waskesiu townsite Visitor Segment	very high	low-moderate	high
	Park Sightseeing Visitors Segment	high	low	moderate
	Park Experience Visitor Segment	moderate	moderate-high	high-low
	Townsite Lease Holders	low	low-high	moderate
	Area Sightseeing Visitors Segment	very low	moderate	moderate
Other Key Audiences	Aboriginal Communities	very low	low-high	variable
	Youth	low	low-high	low-moderate
	Schools and Youth Groups	moderate	high	high
	New Canadians	low	low-high	low-moderate

* For complete definition see the text on this page.