

## OPPORTUNITY POTENTIAL MATRIX FOR

### ATLANTIC CANADIANS

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Opportunity for provision of Parks Service benefit to Atlantic Canadians was investigated by mapping travel behaviour into a matrix in terms of origin, season, purpose, distance, time, and destination. Findings identified potential for benefit in several activity areas, particularly within residents' own province.

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#### Introduction

The Canadian Parks Service (CPS) operates seven National Parks and twenty-six National Historic Sites within the four Atlantic provinces. These parks and sites are the primary leisure travel destinations in the region and provide exceptional opportunity for Canadians and foreign visitors to experience Atlantic Canada's rich natural and cultural heritage and to enjoy a variety of outdoor recreational pursuits.

In order to gain additional knowledge and understanding of one primary CPS beneficiary segment, Atlantic region residents, the Atlantic Resident Study (ARS) was undertaken. The purpose of this study was to investigate the level current benefit provided residents of Atlantic Canada in terms of awareness, support, and use of the Canadian Parks Service and, to examine the potential for provision of direct benefits to Atlantic Canadians by the program. This examination of the potential provision of direct benefit led to development of the opportunity potential matrix discussed here.

#### Current CPS Benefit to Atlantic Canada Residents

Understanding of the current benefit being provided Atlantic Canadians was gained from analysis of the 1988 CPS National Market Study (NMS). Support of the Parks system is generally quite high among Atlantic Canadians as approximately 70% are supportive of protection of natural areas, marine environments, and rivers and over 80% are in favour of increased advertising of national parks.

In terms of awareness, less than 20% of Atlantic Canadians can correctly identify the federal government department, Environment Canada, responsible for management of the National Parks and only 12% concerning National Historic Sites. However, awareness and use of actual parks and sites is very high. Virtually all Atlantic residents are aware of at least one national park or historic site, more than 80% are aware of at least seven national parks or sites and nearly 60% are aware of 10 or more. More than 97% of Atlantic Canadians have visited a national park or site at some time in their lives. During the previous two year period, more than 76% have made at least one visit to either a national park or site and more than 30% of the approximately four million visits made annually to the national

parks and sites in the Atlantic Region are made by Atlantic Canadians.

Awareness and visitation to Atlantic region national parks and sites is affected by the distance required to travel to them, their relative location to the population base, and the need to use ferries to access two provinces. This is particularly evident in the case of Fundy National Park in New Brunswick. Awareness is extremely high within New Brunswick and adjacent provinces of Nova Scotia. However, it is substantially lower in Newfoundland. This distance pattern becomes more pronounced when considering the 'ever visited' results for Fundy. A very high percentage of New Brunswick residents have visited the park, but the proportion of residents of other provinces visiting drops dramatically as distance increases. This pattern is consistent for nearly all of the parks and sites.

Over 62% of trips to the Region's parks by residents are over two hours travelling time one way and 40% are of travelling times of four or more hours one way. Even relatively nearby parks can require substantial time investments, particularly in Newfoundland. However a substantial percentage of the population of the Atlantic provinces is within a two hour travelling distance of the national parks and sites in their home province. In the case of New Brunswick and Nova Scotia, 100% of the population is within a six hour travelling distance. This indicates much visitation to the parks (65%) considering the substantial distance from home should occur within province.

Atlantic Canadians' ability to visit a specific or set of specific parks and sites is conditioned by the number of opportunities available and competing destinations within the time frame of the opportunity. Motivations for visiting must also be considered when attempting to determine potential opportunities for providing CPS benefit. The main reasons for going to parks are to enjoy nature and beautiful scenery. Considering the distances required to travel to many parks or sites, the locations which become competitors to CPS for the shorter opportunity times are destinations close to the potential visitor and those which offer similar experiences. The destinations which become competitors for longer available periods of time are not necessarily other outdoor recreation and historic sites in the region.

#### Understanding Potential Travel Behaviour

Understanding the level of awareness, support, and general use of the Atlantic region parks and sites is important, but does not provide for complete understanding of the potential opportunities for providing CPS benefits to Atlantic residents. Additional factors influence travel behaviour. Atlantic residents' trips with visits to national parks or historic sites are only one component of the larger phenomenon of travel behaviour.

The factors of perception, awareness, distance to travel, available time, and others must all be considered in an attempt to determine potential opportunity for provision of CPS benefit. However, the process of calculating a conversion rate for each park or site and averaging that conversion rate in comparison to the percentage of the population having made a visit in the past two years leads to the conclusion of a current, low conversion rate for each facility. Considering the high degree of specific park or site awareness, this would indicate a substantial amount of potential. However, such a process neglects other factors operating to influence travel and destination choice.

When compared to the volume of travel generated to either similar destinations, or to travel motivated by seeking to fulfil

a set of similar experiences, a better understanding of potential can be achieved. If studied in terms of potential trips generated and the behaviour and motivation behind those trips in relation to the current CPS market niche, opportunity for potential provision of benefit can be more accurately determined.

Travel behaviour is influenced by several factors. Research regarding travel attempts to understand why people travel and what factors influence decision making processes (Burnett, 1981). Travel generally occurs as a result of people seeking alternative spaces where they can participate in activities. Recreation related travel has long been thought to be particularly influenced by factors such as socio-demographic characteristics, availability of alternative destinations, and the availability of activities sought.

Although socio-demographic characteristics have been considered primary influences of travel behaviour, recent studies have provided support for substantial consideration of activities participated in during travel as strongly dictating destination choice. To understand opportunity to provide CPS benefit to Atlantic Canadians, it is necessary to consider motivations to travel and activities participated in while travelling. In addition, it is key, in investigating potential participation, to consider the market share of trips whose destinations were national parks or sites in comparison to total trips generated.

However, determining potential travel behaviour is, at best, difficult. Researchers make use of numerous methodologies and models attempting to predict or forecast quantities of travel behaviour. Several factors must be considered in attempting to forecast tourism and travel demands and the nature of forecasting can take various forms or models including: trend extrapolation; structural models; simulation models; and qualitative models (Smith, 1989). No single model is best for all criteria and often trade-offs must be considered between models which will provide ideals, the greatest accuracy, and precision and constraints imposed by time, budgets, and other resources.

Forecasting market potential is an essential aspect of market measurement. Forecasting is not, however, an exact science. The objective of forecasting is to guide or assist informed judgements for marketing and development (Jefferson and Lickorish, 1988). That is, identifying potential can indicate possibilities, a range of options, or perhaps orders of magnitude, not necessarily precise figures. Additional procedures exist in examining travel or tourism potential and forecasting in this vein. Kent (1990) discusses opportunity sets concerning people, places, and priorities in regards to their holiday choices. This is a multi-dimensional consideration beginning with a perceived opportunity set which includes those destinations of which a traveller is aware. This set is conditioned by pre-search decisions of the type of holiday and possible destinations able to provide the most satisfying experience. Thus, the search for possible destinations to provide for the desired experience is limited by available information concerning those places.

A consideration set is subsequently formed as the perceived opportunity set is condensed to the number of options worthy of detailed consideration. The perceived set of all known opportunities is thus reduced to a consideration set of the preferred options. The identification of a realisable set of opportunities is further conditioned by an individual's attainment ability. Here, operational models of spatial behaviour can be used to identify more specific predictions or forecasts.

the current CPS market niche is more accurately attainable than precise predictions or forecasted numbers of travellers. The identification of this opportunity potential, in a manner similar that discussed by Kent (1990), is considered in determining the potential for provision of CPS benefits to Atlantic Canadians. Travellers have to be aware of CPS to be considered potential beneficiaries. In order to inform them, CPS must know in advance what their travel behaviour is and what they are doing in order to know what to make them aware of and to develop methods of providing the information.

### Methodology

The Canadian Travel Survey (CTS) information for each province, by each quarter of 1988, was analyzed separately. Quarter breakdowns were winter (January through March), spring (April through June), summer (July through September), and fall (October through December). These compare favourably with the CPS peak and shoulder operating seasons. Analysis and discussion here pertain to a breakdown of person trips generated by New Brunswick residents only in the second quarter of 1988. Each person trip generated was broken down by: province of origin; main purpose (pleasure or business/personal); visit to a national park, historic site, or neither; duration (number of nights away from home); distance (travelled one way measured in kilometres); province of destination (including international); and activities participated in.

As a result of this exercise segments of travel behaviour, or patterns of trip generation, were established. Many activities in which travellers participated were recorded and subsequently measured against meeting the current CPS offer of: i) active outdoor recreation; ii) passive recreation; iii) sightseeing; and iv) history or culture. Several activities, and the resulting trips generated, did not match the CPS market niche and were not considered as activity areas for potential. These trips and activities represent many of the alternative activity and destination choices available to travellers.

The volumes of trips and park or site visits were mapped in terms of origin, season, purpose, distance, time, and destination. Trips to national parks and sites were then compared to provide an actual capture rate of total trips generated by residents. Further, the volume, destinations, and purposes of trips in the areas of active outdoor recreation, passive recreation, sightseeing, and history and culture were mapped into a matrix similar, but expanded, as that presented in Figure 1.

Opportunities where benefit from CPS could be provided were subsequently identified and ranked according to actual volume of trips meeting the travel behaviour patterns. Opportunity segments identified by travel behaviour are discussed in actual numbers of person trips qualifying under a trip pattern. CPS could not attract nor service these entire segments. Rather, at an optimistic rate, 10% of these totals would be considered a substantial accomplishment.

### Behaviour and Opportunity Potential for New Brunswick Residents - Second Quarter (Spring, 1988) - April Through June

More than 875,000 person trips were generated by New Brunswick residents in the second quarter or spring period. As detailed by information presented in Table 1 just 2.7% and 1.5% of those trips included visits to a national park or historic site, respectively. Nearly 70% of the trips were primarily for pleasure or visiting friends or relatives. Shopping, nightlife and dining and VFR are the most frequently participated activities. 63% and 53% of all trips included these activities respectively.

Sightseeing (21%) and outdoor activities (14%) also are frequently parts of trips.

Table 2 provides information indicating the primary trip patterns which included a visit to a national park during this quarter. All were to a destination within New Brunswick of a distance of 80 to 160 km and included various activities, sightseeing being the most common. No distinct travel patterns were evident for trips including visits to historic sites.

Visit Status: (park, site, neither)  
 Trip Purpose: (pleasure, business)

Dur Night	Dist (km)	Dest. Province	Active Rec.	Cult Hist	Sight See	Pass Rec.
0	< 80	within own adjacent other Atl. other Can. Internat.				
	80-160	within own adjacent ...				
	160-650	within own adjacent ...				
	> 650	within own adjacent ...				
1 ...	< 80 ...	within own adjacent ...				

Figure 1. Opportunity Potential Matrix.

Table 1. Trip purpose and visit status.

Visit Type	VFR %	Pleas %	Pers %	Bus %	Total
No Park /Site	31.7	35.0	14.0	15.3	840,654
Park	1.1	1.5	0.0	0.1	24,017
Site	0.3	1.1	0.0	0.1	12,658
TOTAL	32.5	37.7	14.0	15.5	877,329

Table 2. National Park visit trip patterns.

Purp	Dur	Dist (km)	Dest Rec.	Active Hist	Cult See	Sight Rec	Pass
Pleas	1	80-160	N.B.			X	
Pleas	0	80-160	N.B.			X	
Pleas	0	80-160	N.B.		X		X
Pleas	2-3	80-160	N.B.	X			

Information presented in Table 3 provides an overview of the CPS opportunity segments, based upon travel behaviour, identified for New Brunswick residents travelling in the second quarter of the year. Significant potential exists for national parks in the areas of active outdoor recreation and sightsee.

Table 3. Ranked opportunity segments.

Purp	Dur	Dist (km)	Dest	Active Rec.	Cult Hist	Sight See	Pass Rec
Pleas	2-3	160-650	N.B.	26,302	17,051	27,067	
Pleas	0	80-160	N.B.				
Pleas	2-3	160-650	N.B.	12,011	9,530	15,491	9,530
Pleas	0	80-160	N.B.				
Pleas	2-3	160-650	N.B.		9,153		9,153
Total				118,275	129,299	174,776	54,272

The significant travel pattern segments of important consideration for parks are those of 2 to 3 nights in duration, 160 to 650 km. in distance travelled, and those of 0 nights duration and just 80 to 160 km. in distance. 15.5% or 27,000 of the 175,000 trips which included sightseeing were of the 2 to 3 night, 160 to 650 km. nature. An additional 12,000 (10.2%) of the 118,000 trips which included outdoor activities were also of this pattern. The 0 night, 80 to 160 km. travel pattern resulted in over 26,000 trips (22%) including active outdoor activities and over 15,000 (9%) trips including sightseeing. Considering only a small percentage of these trips could be attracted, limited but clear opportunity exists.

As most trips which did include a visit to a national park were of the 80 to 160 km distance, the longer trips were potential exists should be explored. Fundy and Kouchibouguac are within 160 km of Moncton but are farther from the larger centres of Fredericton and Saint John and much of the rest of the province. Potential opportunity for consideration of historic sites primarily rests in the 2 to 3 night duration, 160 to 650 km. travel pattern. More than 13% (17,000) of the trips which included cultural and history related activities were of this nature. Again, this total of person trips provides limited but definite CPS opportunity.

### Summary and Conclusions

Opportunities for provision of CPS benefit to New Brunswick residents during the second quarter, and generally for all Atlantic residents, were generally found in the activity areas of active outdoor recreation and sightseeing which can be provided for in the national parks. Opportunities also were identified, but to a lesser extent, in the history and cultural activity area which can be fulfilled by historic sites and parks. Travel patterns varied for the primary opportunity segments, but travel behaviour generally took the form of 2 to 3 nights in duration, within a one day drive in distance from home, and for the primary purpose of pleasure.

The amount of opportunity evident during the summer period must be cautioned as CPS facilities, particularly the national parks, are at or near capacity at various times during the summer season. In understanding the type of travel patterns which could lead to increased visitation, CPS subsequently knows which travel segments to necessarily not attempt to attract.

The domestic, provincial traveller is often a neglected, if not forgotten, market particularly with provincial tourism departments and agencies. Opportunities do exist for provision of direct benefit to Atlantic residents by CPS. Consideration of park or site resource and service capacities must be made at various times of the year. However, at most facilities, such capacities generally could allow for increased provision of benefit. Consideration of opportunity segments and travel behaviour identified here should be made in future marketing and communications strategy development.

#### **Literature Cited**

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