

2004 SURVEY OF NATIONAL
HISTORIC SITES

FINAL REPORT

Prepared by
Environics Research Group Limited

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INTRODUCTION

There are currently 904 designated national historic sites in Canada, of which 149 are directly managed by Parks Canada and 755 are owned and operated by others, including heritage agencies, corporations, other federal government departments, other levels of government in Canada and individual citizens. Designation of a particular place as being of national historic significance is made by the Minister of the Environment based on recommendations from the Historic Sites and Monuments Board of Canada (HSMBC). Parks Canada acts as a secretariat for the HSMBC.

Parks Canada manages its sites to maintain their “commemorative integrity” (CI), which is realized when:

- Resources directly related to the reasons for designation as a national historic site are not impaired or under threat;
- Reasons for designation as a national historic site are effectively communicated to the public; and
- Heritage values are respected in all decisions and actions affecting the site.

Parks Canada encourages and supports other owners to maintain the commemorative integrity of their sites but does not directly control their actions.

Research Objectives

Up to this point, Parks Canada has not collected any systematic information on how these owners manage historic sites, including their understanding of commemorative integrity, the priority given to CI, or access to best practice information. To address this gap, Parks Canada commissioned a survey to collect benchmark information about how owners manage sites, their experiences with Parks Canada services, and their orientation and practices as they relate to CI. Parks Canada expects to repeat the survey process on a two to three year cycle in order to track the extent of awareness and of access to information. This information will be used for reporting to Parliament and the Canadian public, as well as for internal management purposes.

The survey consisted of telephone interviews conducted with a sample of owners/managers from a database provided by Parks Canada. The survey consisted of 291 interviews with owners of historic sites throughout Canada, conducted between October 20 and December 7, 2004. A more detailed description of the methodology used to conduct this study is provided at the back of this report.

The report begins with an executive summary outlining key findings, followed by a detailed analysis of the survey data.

Unless otherwise noted, all results are expressed as a percentage.

EXECUTIVE SUMMARY

For the most part it would appear that Parks Canada has had a substantial impact on many of the historic sites that are owned by other organizations. This is clear from the levels of interaction and satisfaction with the Agency, involvements in alliances of national historic sites and, in particular, the use of Parks Canada as a source of best practices information.

The following are key highlights from the survey findings.

Use and Identification as a National Historic Site

Of the 291 sites surveyed just over half are either used primarily as a heritage attraction or equally as heritage plus another purpose, such as churches, theatres, hotels, etc. Sites are generally identified to the public as national historic sites, but in Quebec almost half are not. The most common form of identification as a historic site is by means of a plaque. More than three quarters of owners claimed to have a Historic Sites and Monuments Board of Canada (HSMBC) plaque at their location.

The majority of sites also indicate their historic nature in their communications material. Whereas more than two thirds of the Quebec locations use web sites to convey the heritage aspect of their sites, the Internet is rarely used for best practices

information in that province. National historic sites in Quebec tend to be more creative and use more communications vehicles than do sites in the rest of the country.

Historic Designation

A national historic designation is considered positive by many owners in terms of impact on both management and communications. This is mostly because of the increased credibility and visitor traffic that such a designation creates.

Effectiveness of Management

Only a few owners feel that management of their site is not effective. However, we suggest caution with this finding as many of the owners presumably had operations management of their site as a primary responsibility.

Effectiveness of Communications

There would appear to be room for improvement in the effectiveness of communications and presentation materials in terms of conveying the historic importance of sites. While some sites use surveys and others use informal visitor feedback to evaluate the effectiveness of their communication materials, many sites do nothing in this regard.

Condition of Sites

With respect to the condition of sites, one quarter are considered excellent, one half are said to be in good condition, and the remaining quarter in only fair or poor condition. BC/Yukon and Manitoba/Saskatchewan have a greater proportion of sites in only fair or poor condition. Most of the sites in only fair or poor condition have been in this state for more than five years. Approximately one fourth of the sites in this condition expect things to deteriorate further, and in most cases the reason for this is the lack of access to the necessary capital or resources.

Investment and Funding

Owners report a wide range of annual expenditures on conservation and maintenance on the historic aspect of sites. One third of sites spend less than \$10,000 annually. One sixth of sites spend between \$10,000 and \$69,999, while one in seven invests \$70,000 or more, and up to \$2.5 million. Government grants, from all levels of government, are the major sources of funding followed by voluntary contributions. New sources of funding being considered are led by federal and provincial government grants, followed by foundation endowments.

Best Practices

A majority of sites claim to have access to information on best practices about preserving, presenting or managing a national historic site. These are more likely to be sites with effective management and larger annual investments in conservation. Parks Canada is the leading source of information on best practices. The major sources of professional or technical advice are contractors and consultants, on-site staff or volunteers and Parks Canada.

Involvement with Parks Canada

A majority of sites state that they have had regular or occasional contact with Parks Canada over the past three years, but almost a quarter of sites surveyed have had no contact. Sites having contact with Parks Canada are more likely to be categorized as primarily heritage or dual usage (heritage plus other use). Sites having little or no contact with Parks Canada tend to be owned by educational institutions, private organizations, municipalities or religious groups. Although the majority of all sites surveyed have had contact with Parks Canada, fewer are familiar with Parks Canada products and services (42%), and this is particularly the case in Quebec and Alberta.

The most common forms of contact or interaction with Parks Canada are: advice either by phone or thorough on-site visits, alliance of national historic sites, and assistance in preparing a Commemorative Integrity Statement (CIS). Cultural Resource Management (CRM) training was more common in Ontario, Manitoba/Saskatchewan and the Atlantic region. A lack of interaction with Parks Canada was more likely in Manitoba/Saskatchewan, Quebec and the Atlantic region. Parks Canada enjoys fairly good levels of satisfaction at the sites surveyed, with two thirds of those having some interaction with Parks Canada being very or somewhat satisfied. Satisfaction levels are strongest in Ontario. The major reason given for dissatisfaction is a lack of communication, particularly in Quebec.

Commemorative Integrity

With the exception of sites in Quebec, half or more owners claim to be aware of the term Commemorative Integrity (CI). Most claim that their site actively implements the concept of CI, and half of them either have a Commemorative Integrity Statement or plan to establish one.

Site Operations

The most common services offered at national historic sites are: guided tours or other personal interpretations, displays/exhibits, gifts shops, food and beverage services and educational programs.

Nationally the majority of sites are open year round. But in the Atlantic region most are only open seasonally, particularly in the summer.

Access to almost half the heritage sites is by paid admission, and a majority of locations receive fewer than 10,000 visitors annually. One in ten sites has over 100,000 visitors per year, with the highest annual total reported at one million visitors.

In most instances the volume of annual visitors to a site is less than the site is capable of handling. Only a few sites indicate that their typical annual visitor traffic has been greater than the facility can handle.

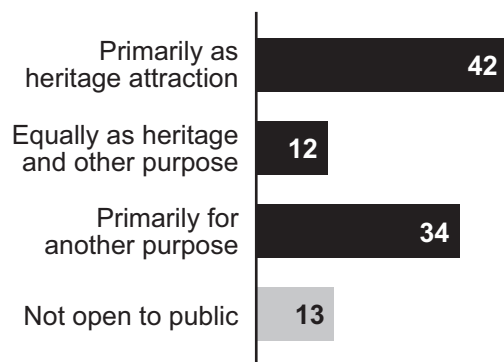
USE AND IDENTIFICATION AS A NATIONAL HISTORIC SITE

More than half of the sites are used as primarily heritage attractions or equally as a heritage attraction and some other purpose, and seven in ten sites are identified as national historic sites.

Site use

Owners were first asked on an aided basis whether their site is used primarily as a heritage attraction, primarily for another purpose, equally heritage and other purpose, or is not open to the public.

Site use



Q.1

Are you open to the public primarily as a heritage attraction, or for some other purpose?

A plurality (42%) of sites contacted are used primarily as a heritage attraction. One third are used primarily for another purpose.

Only twelve percent are used equally as a heritage attraction and for another purpose while the same proportion of sites are not open to the public.

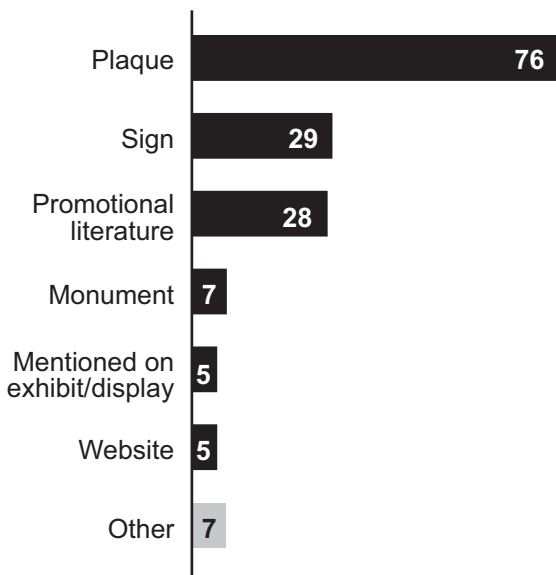
A greater proportion of sites in Quebec (24%) enjoy dual usage, whereas there are no sites of this type in Manitoba/Saskatchewan.

Identified as a national historic site

When owners were asked if their site is clearly identified to the public as a national historic site, more than seven in ten (72%) confirm that this is the case.

In Ontario 83% are identified as national historic sites, whereas in the province of Quebec we find the lowest incidence of sites being identified as national historic sites (54%).

How identified as national historic site



Q.13

In what way is the site identified as a national historic site?

Subsample: Those who said their site is clearly identified to the public as a national historic site (n=208)

The most common way in which the site is identified as a national historic site is by means of a plaque. Three quarters of those sites which are clearly identified as a national historic site are identified by means of a plaque. This, as with the other responses to this question, was unaided. Almost nine in ten (89%) of the identified sites in Quebec are marked with a plaque.

Three in ten of the identified national historic sites have a sign to indicate its historic nature. More than one in four of the identified sites suggest that this identification is by means of promotional literature. Promotional literature is more likely to be mentioned in Ontario where this means is mentioned by 41% of owners.

No other means of identification is mentioned by more than 10% of this group of sites.

HSMBC Plaque

When all owners were specifically asked if there is a HSMBC (Historic Sites and Monuments Board of Canada) plaque at their site, three quarters indicate that this is so. Most (91%) of those who volunteered a plaque in response to the previous question also said yes to this question.

HSMBC plaques are more likely to be found at sites in Alberta (85%) and Ontario (83%). In Quebec and Manitoba/Saskatchewan fewer sites report having the HSMBC plaque (60% and 53% respectively).

Eight in ten of those sites used primarily for heritage purposes display the HSMBC plaque, compared to 77% of dual usage sites, 71% of those that have primarily some other use, and 62% of those sites which are not open to the public.

Promotional material indicating historic nature of site

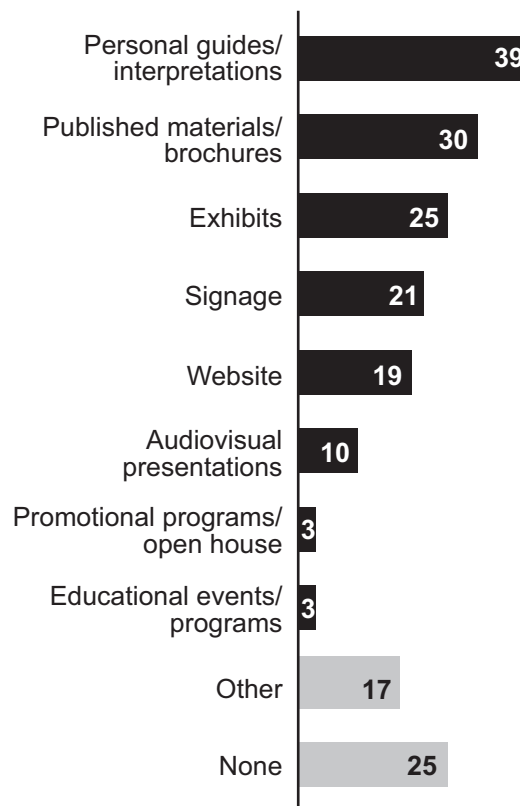
Owners who did not spontaneously mention promotional materials were specifically asked if they have promotional materials (such as brochures, pamphlets or posters) indicating the historic nature of the site. Six in ten report that they do indeed have such materials, with higher proportions reported from Alberta (72%), Quebec (69%) and Ontario (66%).

Not surprisingly, such materials are more likely to be found at sites which are either primarily heritage or dual use (heritage plus other use).

Other methods of presenting heritage messages

When owners were asked, on an unaided basis, what methods other than promotional material they used to convey the historic messages of their sites, a number of vehicles were mentioned, with four in ten sites reporting the use of personal guides or interpretations.

Other methods of presenting heritage messages



Q.16

In what ways, if any, do you present heritage messages at the site itself?

A number of methods for presenting heritage messages are mentioned by owners. Almost four in ten of all sites surveyed report using personal guides or interpretations as a means of presenting their heritage message. Half of all sites in Quebec report the use of personal guides/interpretations.

Published materials are the second most common way of conveying heritage messages, with more than half of the Quebec sites reporting this.

Exhibits are the next most popular method of communicating a site's historic nature, with greater use of this means in Quebec (42%) and BC/Yukon (36%).

It is interesting to note that whereas web sites (specifically for the heritage aspect of a site) are mentioned by less than one in five nationally (19%), they are reported by more than two thirds (68%) in Quebec.

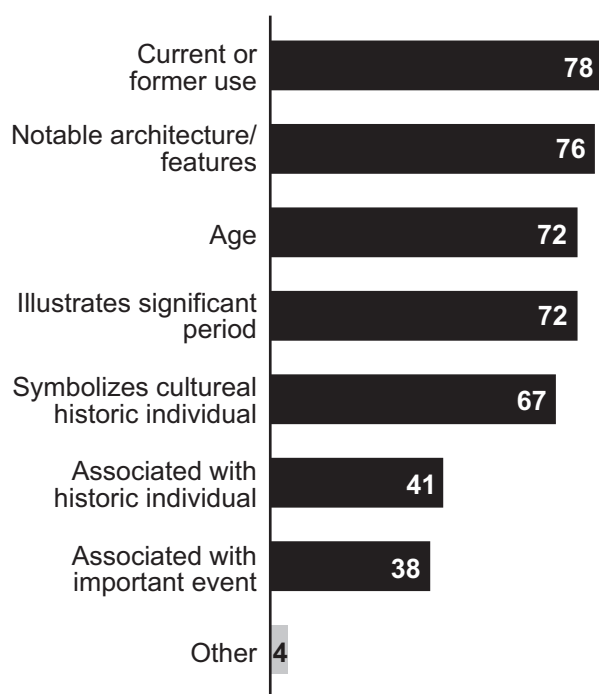
Audiovisual presentations are three times more likely to be mentioned by Quebec sites (30%) than the national average (10%).

HISTORIC DESIGNATION

Main reasons designated

In most cases rather than a single reason being given for the national historic designation owners indicated several reasons among the options presented to them.

Reason site designated as historic



association with an important event ... How it symbolizes a cultural tradition, way of life or important idea ... How it illustrates a significant period in the development of Canada.

Five different reasons were mentioned by more than two thirds of owners: the site's current or former use, its architecture, age, the illustration of a significant period, and the fact that it symbolizes a cultural tradition. The other two possible reasons presented were deemed appropriate by a smaller proportion of owners – approximately two in five.

The site's current or former use was mentioned by 90% of locations in Quebec.

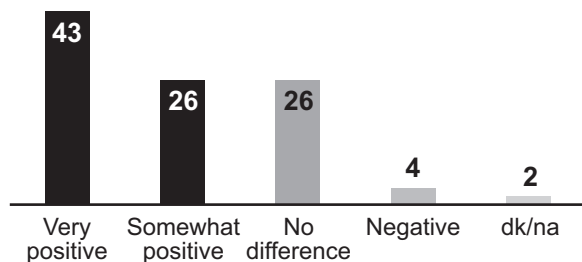
Q.17

There are a number of reasons why a site might be designated as a national historic site. Please tell me which of the following is the main reason or reasons for your site being designated ... The age of the site ... Notable architecture or architectural features ... The site's current or former use ... An association with an important historical individual ... An

Impact of historic designation on management of site

Owners are positive about the impact of the historic designation on the management of their sites.

Impact of historic designation on management of the site



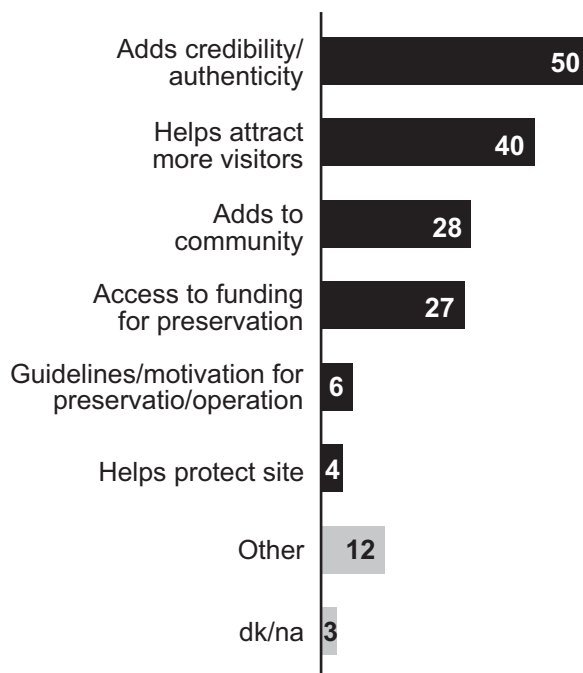
Q.18

Do you feel that this historic designation is positive, negative or makes no real difference in terms of the management of the site? Would you say that it is very or somewhat positive/negative?

Seven in ten owners feel that this designation is positive (43% very, 26% somewhat) in terms of the management of the site. One fourth of owners feel that the historic designation makes no real difference. Very few (4%) feel that the designation has a negative impact on the management of the site.

Owners in Ontario and Quebec were more positive than those elsewhere, with 78% and 76% respectively expressing this positive attitude.

Reason historic designation is positive for management of site



Q.18a

In what ways is it positive for management of the site? Anything else?

Subsample: Those who feel that the historic designation is positive in terms of the management of the site (n=200)

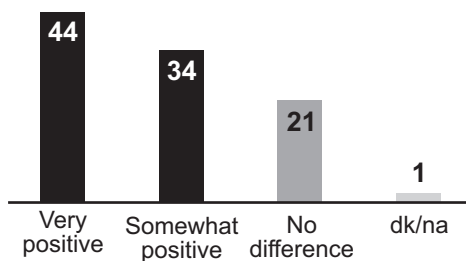
Those owners who feel that the historic designation is positive in terms of management of the site were asked in what ways it is positive. The two major reasons given were that the historic designation adds credibility (50%) and helps attract more visitors (40%). Two other reasons were provided by approximately one fourth of owners and these were that the historic designation adds to the community (28%) and provides access to funding (27%).

The few owners who expressed a negative view gave as reasons that the designation limits how they can use or modify the property and that people assume that they are federally-supported.

Impact of historic designation on promotion of site

Owners are also positive about the impact that the historic designation has on the promotion of their sites.

Impact of historic designation on promotion of the site



Q.19

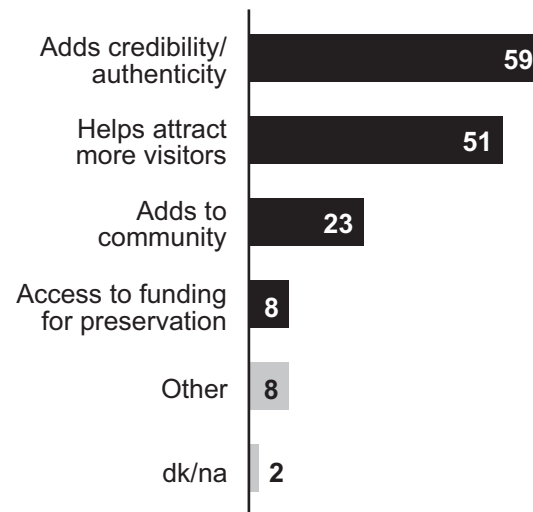
Do you feel that this historic designation is positive, negative or makes no real difference in terms of the promotion of the site? Would you say that it is very or somewhat positive/negative?

Nearly eight in ten owners are positive (44% very, 34% somewhat) in terms of the promotion of the site while one in five feel that it makes no difference, and no one expresses a negative point of view.

The positive attitude in this regard is most prevalent in Ontario where 62% of owners were very positive.

Those who feel the designation makes no difference in terms of promotion of the site are more likely to be those sites owned by a provincial or territorial government.

Reason historic designation is positive for promotion of site



Q.19a

In what ways is it positive for promotion of the site?

Subsample: Those who feel that the historic designation is positive in terms of the promotion of the site (n=227)

The two primary reasons for believing that the historic designation is positive for promotion of the site are the same as in the case of the management of the site, namely that it adds credibility or authenticity (59%) and helps attract more visitors (51%).

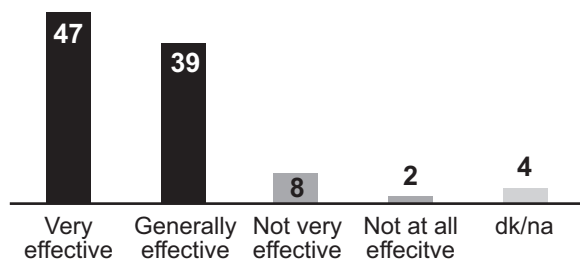
Nearly one in four owners also mention as a reason that the designation adds to the community (23%), and this view is particularly prevalent in Quebec (46%).

EFFECTIVENESS OF MANAGEMENT

Effectiveness of management in respecting historic value

Nearly nine in ten owners believe that the day to day management of their sites is effective.

Effectiveness of day-to-day management in respecting historic value of site



Q.20

How effective do you believe the day-to-day management is in respecting the historic value of the site?

More than four out of five owners believe that the day to day management is either very effective (47%) or generally effective (39%) in respecting the historic value of their sites. One in ten feel that it is either not very effective (8%) or not at all effective (2%).

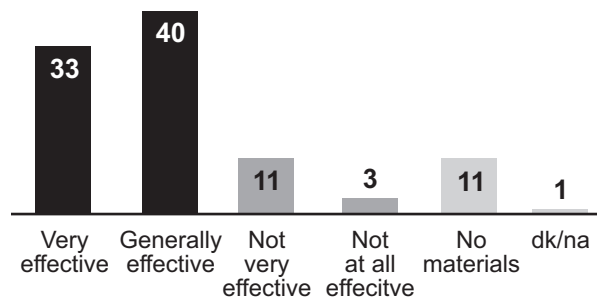
Positive attitudes in this regard are again more prevalent in Ontario and Quebec.

Ineffective day to day management is more than twice as likely (21%) to be reported by owners who feel that the historic designation is of no value to their site.

EFFECTIVENESS OF COMMUNICATIONS

More than seven in ten owners believe that their communications and presentation materials are effective at conveying the historic importance of their site.

Effectiveness of materials for conveying historic importance of site



Q.21

How effective do you believe the communication and presentation materials are in terms of conveying the historic importance? Would you say they are very, generally, not very or not at all effective?

Effectiveness of communications in conveying historic importance

Nearly three quarters of owners believe that their communications and presentation materials are effective in terms of conveying the historic importance of their sites. However unlike in the case of effectiveness of management, here more owners say “generally effective” (40%) rather than “very effective” (33%).

Again positive attitudes are more likely in both Ontario (84%) and Quebec (82%).

Perhaps surprisingly, more than one in ten sites (11%) indicate that they have no communications and presentation materials at all. These sites are mostly either primarily used for non-heritage purposes or are not open to the public. Nearly one third of the sites surveyed in Manitoba and Saskatchewan report having no communications materials

Evaluating communications effectiveness

Informal methods for evaluating the effectiveness of communications or presentation materials are more common than formal methods, and four in ten sites use no evaluation methods at all.

Methods of evaluating effectiveness of materials



Q.22

In what ways, if at all, do you measure or independently evaluate the effectiveness of communications or presentation materials? Anything else?

A plurality of owners (40%) indicate that they have no method of evaluating the effectiveness their communication materials. The two major methods used in this regard are informal visitor feedback and visitor surveys.

No evaluation method occurs in the majority of sites in Manitoba/ Saskatchewan (63%) and B.C./Yukon (56%).

Almost two thirds of sites in Quebec (64%) report using visitor feedback to evaluate their materials.

Visitor surveys are more likely to be used at those locations that are primarily heritage sites (37%).

CONDITION OF SITES

When owners were asked whether their sites are in excellent, good, only fair or poor condition, more than seven in ten report that they consider their site to be in one of the top two categories.

Three quarters of all sites state that they consider the site to be in Excellent (26%) or Good (48%) condition. One in four sites are said to be in Only Fair (16%) or Poor (7%) condition.

The sites which report that their structure, features or materials are in Only Fair or Poor condition are more likely to be found in B.C./Yukon (42%) and Manitoba/Saskatchewan (37%). They are also more likely to be “primarily heritage” sites (33%) or “not open to the public” (32%), rather than sites which are “primarily for another purpose” (10%) or “equally as a heritage attraction and other purpose” (12%).

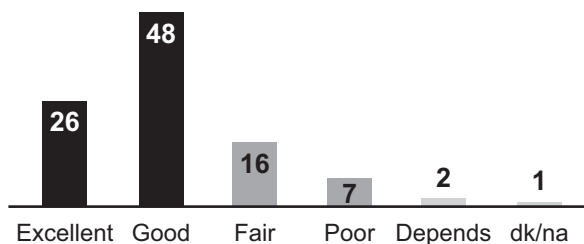
Perhaps not surprisingly, the incidence of sites in Only Fair or Poor condition increases as the effectiveness of management decreases. Forty-five percent of the sites where management is considered not very or not at all effective in respecting the historic value of the site are said to be in Only Fair or Poor condition. There are no major differences based on the sites’ ownership categories or their involvement with Parks Canada.

In most instances the deteriorated state of a site’s structure, features or materials has existed for a number of years. This is consistently the case across all types and locations of sites. Seven out of ten sites in Only Fair or Poor condition have been this way for more than five years, and almost half of the remainder have been in this state for a period of three to five years.

Half of these sites (in Only Fair or Poor condition) report that they expect the condition of their sites to improve in the foreseeable future, whereas slightly less than one quarter (23%) expect the condition to deteriorate further.

Seventeen percent expect the condition of the sites to remain about the same.

Condition of historic structure, features or materials at site



Q.23

Would you say that the historic structure, features or materials at your site is/are currently in excellent, good, only fair, or poor condition?

The major reasons for optimism (i.e. an expectation of improvement in conditions in the foreseeable future) are:

- The improvement work is already underway (39%)
- They have a plan to make improvements (36%)
- They are currently seeking funding or resources for improvements (30%), and
- They have funding for improvements (21%)

The reason given by most of the sites with pessimistic expectations (i.e. an expectation of further deterioration in the foreseeable future) is that they “do not have access to the capital or resources necessary to make the needed improvements” (81%).

INVESTMENT AND FUNDING

Investment required

Although a wide range is reported in terms of typical annual investment in conservation, the majority of sites spend less than \$70,000 annually.

When owners were asked about the investment required to maintain the historic/heritage aspect of the site, one third of contacts indicate that less than \$10,000 would be spent in a typical year on the conservation of historic resources.

Another third are unable to provide a figure either through lack of knowledge or refusing to provide the information.

Less than one in five sites spend between \$10,000 and \$69,999.

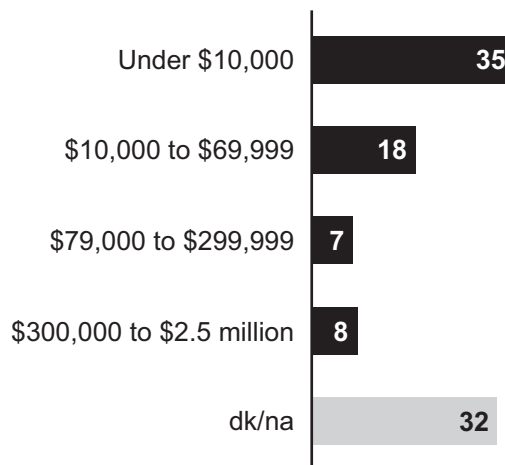
Fifteen percent of sites spend more than \$70,000 on conservation annually, with these being almost evenly split between those spending up to \$299,999 and the others who spend over this amount. The highest annual investment mentioned was \$2,500,000.

In Quebec three in five sites spend less than \$10,000 in a typical year.

The sites with substantial investments on conservation are likely to be in Ontario and BC/Yukon.

Those sites which spend less than \$10,000 in a typical year are more likely to be in only fair or poor condition and suffer from ineffective management and communications.

Spending on conservation in a typical year



Mean: \$231,700

Q.25

I would now like to ask you about the investment required to maintain the historic/heritage aspect of the site. In a typical year, how much would be spent on the conservation of historic resources at your site?

Sources of funds

When owners were asked, on an unaided basis, for their sources of funding, a number of different sources are mentioned, with grants from the various levels of government playing a key role.

Government grants are the major sources of funding, with both provincial and municipal grants being mentioned by at least one-third of the sites surveyed.

Voluntary contributions are a significant source of funding at one in four sites.

Admission fees and fundraising activities are the next most frequently reported sources, and although sixteen other sources were mentioned, none of these was reported by more than one in ten sites.

Provincial grants are mentioned by seven in ten of the Alberta locations. These grants are much more likely at sites owned by historical societies (67%) and, not surprisingly, those sites owned by provincial governments (76%).

Municipal grants are reported by 44% of the Ontario sites. As one would expect this is a major source of funding for municipally owned sites (63%).

Voluntary contributions are a major source of funds for those sites owned by religious groups (72%) or by historical societies (56%).

Federal government grants are much more likely to be a means of support among those sites which have regular contact with Parks Canada (31%).

Fundraising activities are twice as likely to be a source of funds in Quebec.

Sources of funding

Government grant – provincial	39
Government grant – municipal	32
Voluntary contributions	25
Admission fees	20
Government grant – federal	17
Fundraising activities	16
Support from business	9
Endowments from foundations	8
Business revenue	8
Rental space income	5
Support from non-profit orgs	5
Gift shop sales	5
Municipal taxes	5
Our own money	4
Membership fees	3
Nothing/none/no help	3
Other	11
dk/na	1

Q.26

What sources of funds or support do you rely on to operate and maintain your site?

Other potential sources of funds

Owners were asked if there are other potential sources of revenue or funding that they are considering for the next year or so. Two of five sites mention that this is the case. A majority of sites in B.C./Yukon (56%) report that they are looking at other sources.

Sites in Quebec are the least likely to be considering other potential sources (28%).

There is a greater likelihood that those sites owned by historical societies or private enterprise are seeking new sources of funding.

New avenues for funding being investigated are headed by federal and provincial government grants.

Foundation endowments are mentioned by almost one in five owners.

Other sources of funding

Government grant – provincial	29
Government grant – federal	29
Endowments from foundations	18
Voluntary contributions	13
Government grant – municipal	12
Fundraising activities	10
Admission fees	8
Partnership ventures	7
Business revenue	6
Renting out facilities	5
Corporate sponsors	4
Government grant – non -specific	3
Concerts and events	3
Other	11
dk/na	2

Q.28

What are these other potential sources of funding that you are considering?

Subsample: Those who are considering other potential sources of revenue or funding for the next year or so (n=118)

BEST PRACTICES

Nearly two thirds of owners report that they have access to best practices information about preserving, presenting or managing a national historic site, and Parks Canada is far and away the major source of this information.

Access to best practices

Almost two thirds of those interviewed suggest that they currently have access to information on best practices about preserving, presenting or managing a national historic site.

Eight in ten of the Ontario sites claim to have access to best practices information as do a similar proportion of those sites receiving in excess of 10,000 visitors per year.

More than three quarters of the sites which report having very effective management have access to best practices information.

Those sites which have access to best practices information are more likely to be in the higher groups in terms of annual investment in conservation.

Sources of information

Despite a long list being mentioned when owners were asked on an unaided basis to indicate their sources of best practices information, Parks Canada is the dominant source.

Sources of information

Parks Canada	33
Provincial government sources	13
Books/literature/libraries	11
CCI (Canadian Conservation Institute)	11
Archeological/historical groups/museums	11
Internet	10
Architects/engineers/contractors	10
Ministry of Culture & Heritage Canada	6
Heritage groups	6
Workshops/conferences/courses	5
Ontario Museum Association	5
Staff	4
Canadian Museum Association	4
Private consultant/experts	4
International sources	3
CIS (Commemorative Integrity Statement)	3
Federal government sources	3
Internal sources	3
Other	17
dk/na	6

Q.30

What sources of information on this topic do you currently have access to?

Subsample: Those who currently have access to information on best practices about preserving, presenting or managing a national historic site (n=187)

More than twenty-five sources of information on best practices are mentioned.

Parks Canada is by far the leading source for this information.

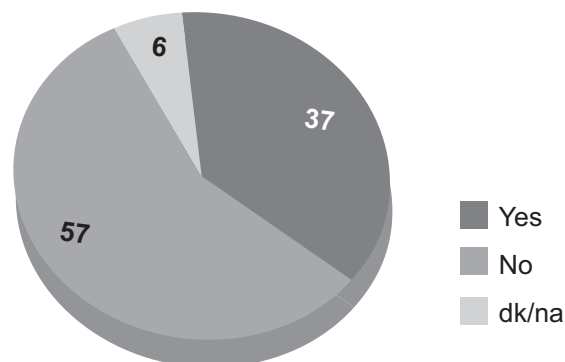
Information from Parks Canada

When they are specifically asked if they have received information from Parks Canada about retaining the heritage character of their sites, more than one in three of those owners not previously mentioning Parks Canada as a source of information, do in fact mention the Agency.

When specifically prompted, slightly more than one third of the sites which had not spontaneously mentioned Parks Canada as a source of best practices indicate that they have in fact received information from Parks Canada about preserving, presenting and managing sites to retain their heritage character.

These sites are more likely to be in B.C./Yukon (54%) and Ontario (43%) and to be sites with more than 10,000 visitors annually (58%).

Received information from Parks Canada about retaining heritage character of site



Q.31

Have you received information from Parks Canada in the past three years specifically about preserving, presenting and managing sites to retain their heritage character and communicate the reasons behind their national significance?

Subsample: Those who currently do not have access to information on best practices about preserving, presenting or managing a national historic site, or who are unsure – or who did not mention Parks Canada in Q. 30 (n=230)

Sources of advice

Consultants or contractors are given as the source of advice by a third of owners, as are on-site personnel, staff or volunteers. Parks Canada is mentioned by one in six sites.

The two primary sources of professional or technical advice to sites in terms of conservation and presentation are contractors/consultants and on-site staff or volunteers. Parks Canada is the third most common source, being mentioned by nearly one in five sites.

Additionally one in five sites indicated that no one provides advice on conservation and presentation at their locations.

With the exception of Manitoba/Saskatchewan (17%), all other provinces indicated that contractors or consultants were used in approximately 30% to 40% of the sites.

On-site staff or volunteers are the main source of advice in Ontario (44%) and also at sites owned by municipal governments (45%).

Amongst types of sites, Parks Canada is more likely to be a source of advice for those sites that are primarily heritage usage.

Contractors or consultants are more likely to be used for advice at those sites where the typical annual investment in conservation is over \$70,000.

The sites that reported that no one provides advice in terms of conservation and presentation tend to have little or no contact with Parks Canada.

Providers of advice for conservation and presentation



Q.32

Who, if anyone, provides professional or technical advice to your site in terms of conservation and presentation? Anyone else?

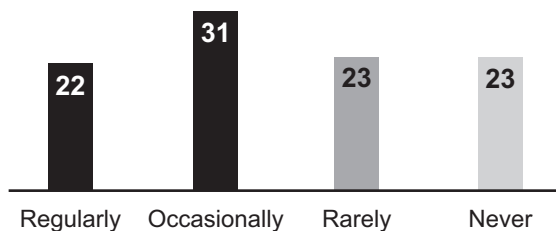
INVOLVEMENT WITH PARKS CANADA

In this section we look at the level of involvement that owners have with Parks Canada in terms of frequency of contact, type of interaction, familiarity with products and services and satisfaction with the Agency. Parks Canada seems to have developed a good rapport with many sites and fewer than one in four states that they have had no contact with the Agency during the previous three years.

Frequency of contact

Slightly more than half of the sites have had contact with Parks Canada over the past three years.

Frequency of contact with Parks Canada in past three years



Q.33

How frequently have you had contact with Parks Canada in the past three years? Would it be ...?

A majority of sites contacted report regular or occasional contact with Parks Canada over the past three years. Almost a quarter indicated that they rarely had contact with Parks Canada during this time, while the remaining sites, also almost a quarter, stated that they had had no contact with Parks Canada during this period.

Those which have had more contact with Parks Canada are more likely to be in B.C./Yukon (69%), Manitoba/Saskatchewan (60%), Atlanta (59%) and Ontario (55%).

While sites in Alberta and Quebec have had less contact with Parks Canada, more than one third of Quebec sites (36%) have had no contact whatsoever in the past three years.

As one would expect, the sites which have had more frequent contact with Parks Canada are more likely to be primarily heritage sites or dual usage sites (heritage plus other use).

Sites which have had regular or occasional contact with Parks Canada are more likely to have effective management, effective communications, and access to best practices, be in only fair or poor condition, and require annual investments in excess of \$10,000.

In terms of ownership of sites, those which have little or no contact with Parks Canada are more likely to be sites owned by educational institutions, private enterprise, municipal governments or religious groups.

Familiarity with Parks Canada products & services

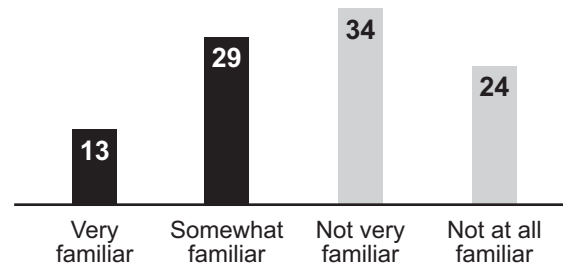
There is room for improvement in terms of informing these owners of the products and services of Parks Canada, as nearly three in five owners have little or no familiarity with the products and services of the Agency.

A majority of sites have little or no familiarity with the products and services provided by Parks Canada.

In both Quebec and Alberta at least seven in ten sites are not familiar with Parks Canada's products and services.

Familiarity with Parks Canada's products and services is much higher among those sites with effective management, effective communications and access to best practices.

Familiarity with products and services provided by Parks Canada



Q.34

How familiar are you with the products and services provided by Parks Canada for national historic sites? Would you say you are very, somewhat, not very or not at all familiar?

Interaction with Parks Canada in the past three years

No single form of interaction with Parks Canada is dominant, as owners make use of different types of involvement according to their specific needs.

Manner of interaction with Parks Canada in past three years



Q.35

In which of the following ways have you been interacted with Parks Canada in the past three years ... Belong to an alliance of historic sites organized by Parks Canada ... Benefited from a contribution agreement (includes cost-sharing program) ... Participated in the new program called the Commercial Heritage Properties Incentive Fund ... Received advice by telephone ... Received advice through personal on-site visits ... Participated in shared or cooperative marketing ... Participated in Cultural Resource Management (CRM) training provided by Parks Canada ... Received assistance in the preparation of a Commemorative Integrity Statement?

Owners were asked on an aided basis which forms of interaction they had with Parks Canada in the past three years. More than one third of the sites had received advice either by phone or through on-site visits. Three in ten sites had enjoyed interaction with Parks Canada through an alliance of historic sites, and nearly one in four received assistance in preparing a Commemorative Integrity Statement (CIS).

In Manitoba/Saskatchewan a majority of sites had received advice by telephone whereas in Ontario a majority had interacted with Parks Canada through an alliance of historic sites.

Personal on-site visits were more prevalent in B.C./Yukon and at primarily heritage and dual usage sites.

The likelihood of receiving assistance from Parks Canada in the preparation of a CIS was greatest in Manitoba/Saskatchewan and lowest in the Atlantic region.

Participation in Cultural Resource Management (CRM) training provided by Parks Canada was mentioned by sites mostly in Ontario, Manitoba/Saskatchewan and the Atlantic region.

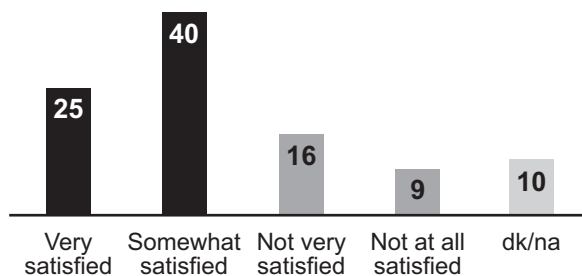
Participation in shared or cooperative marketing was reported at a consistent level across the country, with the exception of Quebec where it was minimal. One third of sites contacted which are owned by historical societies indicated that they have participated in cooperative marketing with Parks Canada

No interaction whatsoever with Parks Canada was more likely in Manitoba/Saskatchewan, Quebec, Atlantic, and in primarily other usage sites, those not open to the public and those with free admission.

Satisfaction with Parks Canada

Parks Canada enjoys positive levels of satisfaction with those who have had some involvement with them during the past three years.

Satisfaction with products and services provided by Parks Canada



Q.36

How satisfied are you with the products and services provided by Parks Canada to national historic sites during the past three years? Would you say you are very, somewhat, not very or not at all satisfied?

Subsample: Those who have interacted with Parks Canada in the past three years by any of the methods mentioned in Q.35 (n=187)

Two thirds of those sites which have had interaction with Parks Canada in the past three years are satisfied with the products and services provided. Less than one in ten report being not at all satisfied.

Satisfaction levels are higher in the Atlantic region (81%), Manitoba/Saskatchewan (78%) and Ontario (71%). Half of the Ontario owners are very satisfied.

Satisfaction with Parks Canada’s products and services correlates with a very positive view of the historic designation for the site.

The more contact owners have had with Parks Canada the more likely they are to be satisfied with the products and services provided. Ninety percent of sites owned by historical societies are very or somewhat satisfied.

Reasons for satisfaction/dissatisfaction

The major reasons given for being satisfied with Parks Canada’s products and services are:

- Very helpful/good advice – 35%
- Availability of information/advice – 32%
- Professional/friendly staff – 16%
- Supportive – 12%

The major reasons given for being dissatisfied with their products and services are:

- Lack of communication – 47% (77% in Quebec)
- Lack of funding – 36%
- Lack of support – 21%

COMMEMORATIVE INTEGRITY

This section deals with the concept of Commemorative Integrity in terms of the owners' awareness and understanding of it, its relevance to them, whether the concept is implemented at their sites, and if they have a Commemorative Integrity Statement. Overall, the concept would appear to be fairly well known, understood and implemented at historic sites.

Awareness of the term CI

Close to half (46%) of all owners are aware of the term 'commemorative integrity'. Awareness was higher in Ontario (59%), Manitoba/Saskatchewan (53%) and B.C./Yukon (50%). Only 24% of owners in Quebec had ever heard of the term.

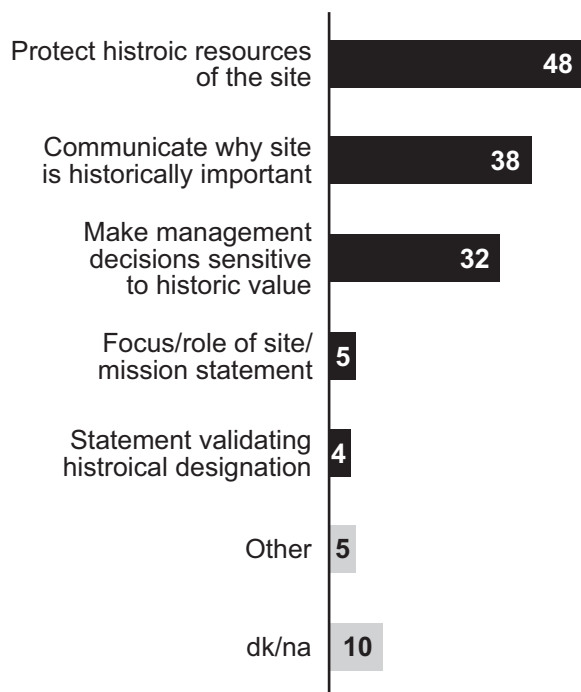
There are no significant differences in awareness based on ownership types.

Meaning of CI

Half of the owners mention protecting the historic resources of the site as a meaning of the term CI. The communications and management components of the concept of CI are less likely to be mentioned.

On an unaided basis the most common understanding of the meaning of commemorative integrity is protecting the historic resources of the site. More than two thirds of the owners in the Atlantic region mentioned this meaning.

Perceived meaning of term "Commemorative Integrity"



Q.39

What do you understand the term "Commemorative Integrity" to mean?

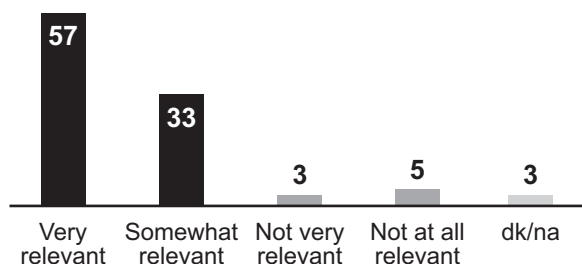
Subsample: Those who have ever heard of the term "Commemorative Integrity" (n=133)

Relevance of CI

Fully nine out of every ten owners interviewed consider the concept of commemorative integrity to be relevant to their sites.

After hearing the three conditions that a site must meet in order to possess commemorative integrity, owners were asked the relevance of this concept to their site. Nine out of ten owners consider the concept relevant.

Relevance to site of concept of “Commemorative Integrity”



Q.40

A national historic site possesses Commemorative Integrity when it meets each of three conditions: 1) The resources directly related to the reasons for designation as a national historic site are not impaired or under threat; 2) The reasons for designation as a national historic site are effectively communicated to the public; and 3) The site’s heritage values are respected in all decisions and actions affecting the site. Would you say this concept of Commemorative Integrity is very relevant, somewhat, not very or not at all relevant to your site?

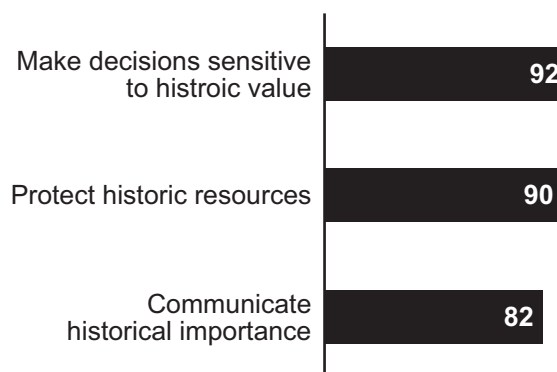
Implementation of CI

Most owners claimed that their site implements the concept of CI through each of the three component activities.

When asked on an aided basis if their sites implement the concept of CI, at least four out of five owners claimed that their site actively implements the concept of commemorative integrity through each of the three component activities.

Many of the sites that are not actively implementing the concept of commemorative integrity are either not open to the public or are primarily used for something other than heritage purposes.

Implementing Commemorative Integrity



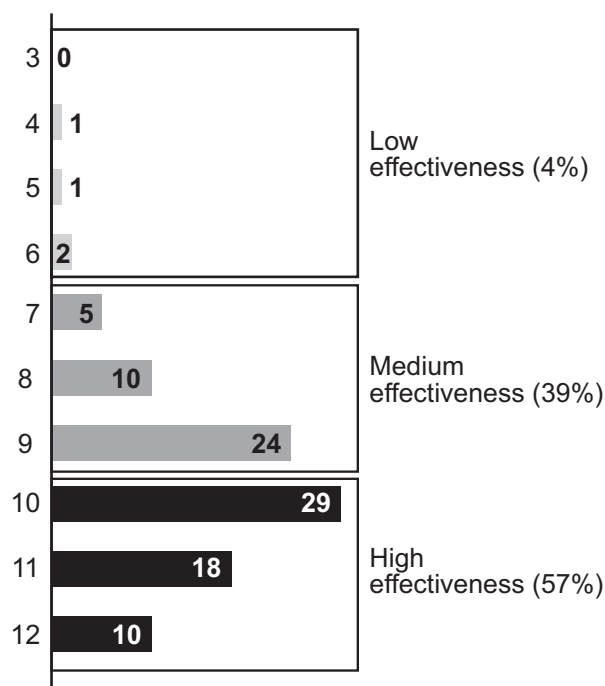
Q.41

Does your site actively implement the concept of Commemorative Integrity in any of the following ways ... Protecting the historic resources of the site ... Communicating why the site is historically important ... Making management decisions that are sensitive to the historic value of the site?

CI Effectiveness

Apart from measuring what site operators are indicating about their implementation of commemorative integrity into their operations, the analysis also included the development of a broader measure of the effectiveness or progress in realizing CI objectives. This was accomplished by combining the data from three key survey questions – management effectiveness, communications effectiveness, and conditions of the site – into a single index of CI effectiveness. This index ranges from a value of “3” (lowest effectiveness) to “12” (highest effectiveness), based on the combined responses to the three questions. These scores are then collapsed into three broad groups, representing “low”, “medium” and “high” levels of CI effectiveness.

CI effectiveness index



Note: Index based on Q.20, 21 & 23

The results show that a majority (57%) of site operators rate their overall CI effectiveness to be in the high category, based on their responses to the individual questions about management, communications and site conditions (this is consistent with the fact that most gave positive responses to all three questions). Only 10 percent, however, rate a perfect score of “12” out of 12, meaning they gave themselves top marks on all three aspects of CI.

By comparison, only four percent of site operators surveyed rated themselves in the “low” category of CI effectiveness. This would indicate that operators that give low scores on one of the three indicator questions are not likely to do so on either of the others.

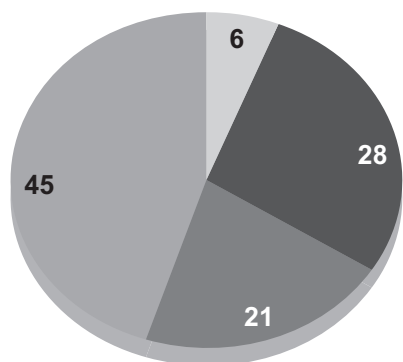
CI effectiveness ratings tend to be generally similar across the country and types of historic sites, but with some notable variation in the likelihood of falling into the high effectiveness category. High effectiveness ratings are more prevalent among sites in Ontario (71%) those that are both a heritage and another type of site (70%), and less so among those in B.C./Yukon (33%), Manitoba/Saskatchewan (30%), those not open to the public (47%), seasonal operations (48%), ones that include both free and paid admission (42%), and those that do not have access to best practices (46%).

In no group does more than one in ten of the sites fall into the low effectiveness category. These are most likely to be sites in Manitoba/Saskatchewan (10%), those not open to the public (11%), those that identify neutral to negative benefits from historic designation (10%) and those who identify an investment requirement of less than \$10,000 (8%).

CI Statement

Three in ten sites currently have a Commemorative Integrity Statement (CIS) and a further one in five say they have plans to establish one.

Commemorative Integrity Statement



- Yes, currently have statement
- No, but have plans to establish one
- No, no plans to establish one
- dk/na

Owners were asked if their site currently has a commemorative integrity statement or plans to establish one. Half the sites (49%) either have a CIS or plan to establish one. It has subsequently been established, by comparing with Parks Canada records, that of those claiming to have a CIS, slightly more than half (55%) actually have this. The remainder may be in the process of establishing one or do not have a clear understanding of the CIS.

Those sites that currently have a CIS are more likely to be primarily heritage (39%) or dual use (38%), and located in Ontario (37%) and Manitoba/Saskatchewan (37%). They also more likely to have regular contact with Parks Canada.

The sites which do not have a CIS, and have no plans to establish one, are primarily other use sites (59%), or not open to the public (49%), and have no contact with Parks Canada (67%).

Q.42

Does your site currently have a Commemorative Integrity Statement (CIS), or have plans to establish one?

SITE OPERATIONS

This section deals with site operations elements at locations which indicate that they are either a “primarily heritage” site or a dual purpose (“heritage and other”) site (159 of the 291 sites surveyed).

It covers the services offered, languages spoken, when the site is open (year round or seasonal, days of the week, and daily opening hours), whether admission is paid or free, the number and profile of visitors, and the site’s ability to handle these visitors (Questions 2 to 11 in the questionnaire).

Services offered

When owners were asked on an unaided basis what services they offer at their site, more than twenty-five different services were mentioned. However, only five of these services were mentioned by more than one in five of those interviewed.

Services offered at historic sites

Guided tours or other personal interpretations	79
Displays/exhibits	54
Gift shop	38
Food/beverage service	23
Educations/school programs	21
Library/literature/archives/research facilities	15
Facilities rental (general)	11
Special events	10
Washrooms	6
Performances/re-enactments	5
Meeting/conference halls for rent	5
Public/community programs/events	4
Space for parties/weddings	4
Heritage/archeological programs/facilities	4
Religious ceremonies	3
Accommodations/camp grounds	3
Speakers/lectures	3
Non-guided tours	3
Film locations	3
Nature trail/reserves	3
Other	17
None	3

Q.2

What services do you offer at your historic site, including those directly related to the historic features and any additional services for the benefit of visitors?

Subsample: Those who are open to the public as a heritage attraction (n=156)

Guided tours or other personal interpretations were more prevalent in Quebec, Ontario and B.C./Yukon than in other regions.

Displays/exhibits were mentioned by more than three quarters of the Quebec sites.

Gift shops were more frequently mentioned in B.C./Yukon and Quebec.

Educational/school programs were almost twice as likely to be mentioned in Ontario as they were nationally.

The five most popular services offered (guided tours, displays, gift shop, food and beverage service and educational programs) are all more likely to be found where admission is either charged or there is a combination of fees and free admission.

Languages

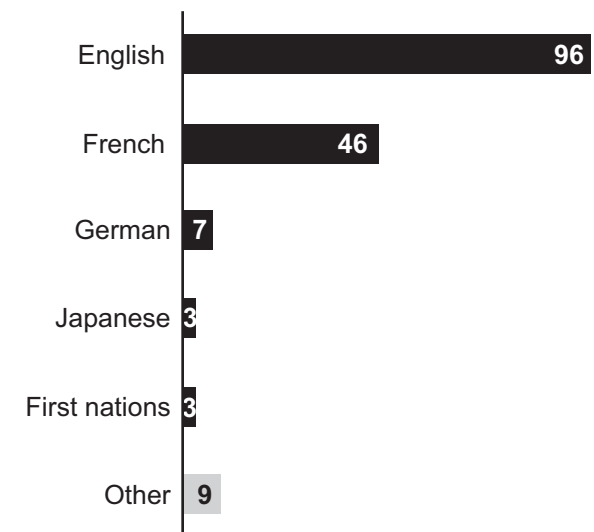
There appears to be little use of languages other than Canada's two official languages, with English being offered at almost every site and French at almost half of all sites.

English language services are offered at almost all sites across Canada with the exception of a few in Quebec.

French language services are offered to some degree in all regions, but as one would expect at all sites in Quebec.

German is the only other language spoken at more than a handful of historic sites and most of these are in Ontario and B.C./Yukon.

Languages in which services offered



Q.3

In which language are these services offered?

Subsample: Those who are open to the public as a heritage attraction (n=156)

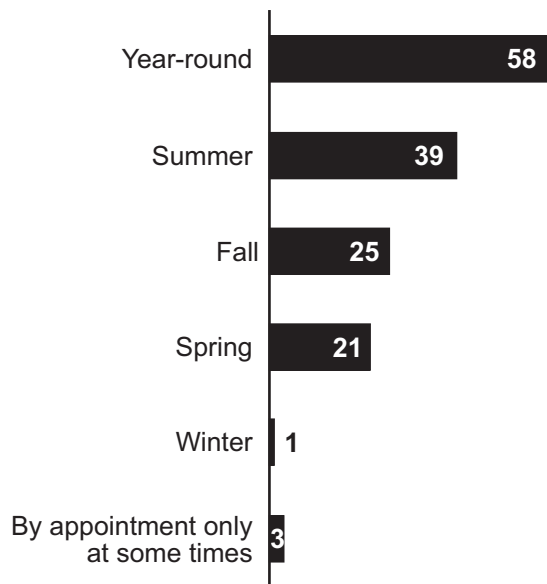
Year round or seasonal opening

Nearly three in five sites are open year round, while others are only open on a seasonal basis.

Almost three out of five sites contacted are open year round with a slightly greater proportion in Ontario and B.C./Yukon.

In the Atlantic region more sites (60%) are open in the summer than year round.

Open year round or seasonally?



Q.4

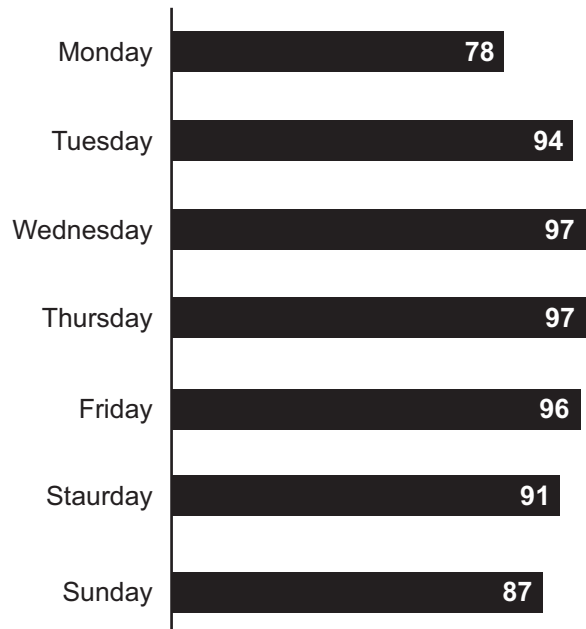
Is your site open to the public year round or seasonally? Which specific seasons?

Subsample: Those who are open to the public as a heritage attraction (n=156)

Days of week open

While most sites are open mid-week, Monday is generally a more common day to be closed than are the weekends.

Days of week open



Q.5

Which days of the week are you open to the public as an historic site?

Subsample: Those who are open to the public as a heritage attraction (n=156)

More than nine out of ten sites are open from Tuesday through Saturday

Some regional variations noted are:

- All sites contacted in Alberta are open Monday through Saturday with all but one open on Sunday
- All sites contacted in Manitoba/Saskatchewan are open to the public on both Saturday and Sunday
- In the Atlantic region sites are slightly less likely to be open on the weekend

Hours open to public

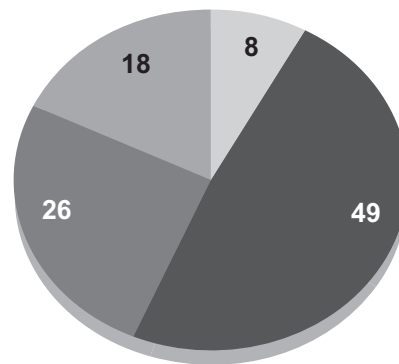
Over 70% of heritage sites contacted generally open to the public at some time between 8:30 a.m. and 10:00 a.m. on weekdays, but this drops at the weekend (Saturday 65% and Sunday 58%). On Sundays nearly one fourth of the sites open at noon or 1 p.m.

Regardless of the day of the week, over 80% of heritage sites close to the public at some point between 4:00 and 6:00 p.m.

Access/admission

When asked if access to their site is by paid admission or not, half of the owners report that paid admission is the norm for public access to their site.

Access to historic site



- Paid admission
- Free admission
- Both free and paid admission
- Voluntary donations

Q.7

Is access to the historic site free, by paid admission or some combination of both?

Subsample: Those who are open to the public as a heritage attraction (n=156)

Entrance to almost half of the heritage sites is by paid admission. A greater proportion of sites in Ontario (62%) and B.C./Yukon (60%) charge admission.

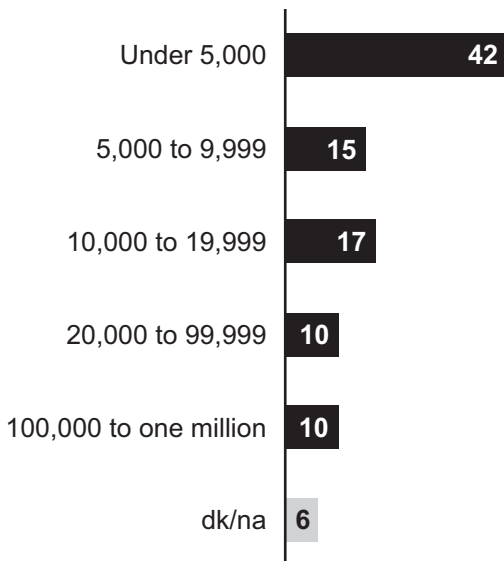
Entrance to one quarter of the sites is free. Free admission is more common in the Atlantic region (43%) and at municipally owned properties (35%).

At all remaining sites admission is either through a combination of both free and paid admission (depending on season and visitor type) or by voluntary donations. A combination of both free and paid admission is more likely in Quebec (36%).

Number of visitors

Three out of every four sites receive fewer than 20,000 annual visitors.

Number of visitors annually



Q.8

Approximately how many visitors do you have annually to your location as an historic site?

Subsample: those who are open to the public as a heritage attraction (n=156)

A majority of the sites that are open to the public (57%) have fewer than 10,000 visitors a year, and three quarters of all sites contacted receive fewer than 20,000 annually. One in ten sites reported a large number of annual visitors ranging from 100,000 to as many as one million. The latter sites are found in all regions except Manitoba/Saskatchewan, where none of the sites contacted received more than 20,000 visitors per year.

A majority of sites in Alberta, Manitoba/Saskatchewan and Quebec are in the lowest category for the number of visitors.

Quebec sites tend to be either in the under 5,000 category or the over 100,000 category.

Sites that are only open seasonally rather than year round are more likely to have fewer than 5,000 annual visitors (57%).

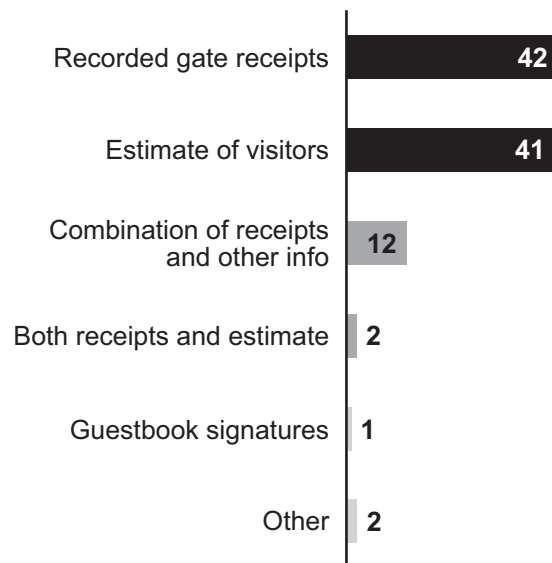
The low visitor category sites are more likely to spend less than \$10,000 per annum on conservation (54%). In contrast, those sites with the highest number of visitors are more than twice as likely to spend over \$70,000 annually on conservation.

Those sites with fewer than 5,000 visitors per annum are more likely to have a lack of familiarity with the products and services of Parks Canada, although they do not have less contact with Parks Canada.

Gate receipts or estimate

Four in ten sites report using recorded gate receipts as the basis for establishing the number of annual visitors, and a similar proportion simply use estimates.

Basis for estimate of visitor numbers



Q.9

Is this figure based on gate receipts for an estimate of visitors?

Subsample: Those who are open to the public as a heritage attraction and who provided an approx number of visitors in Q.8 (n=147)

The basis used by sites for establishing the number of visitors is evenly split between recorded gate receipts and estimates. In more than one in ten instances a combination of gate receipts and other information is used.

Those sites using gate receipts as a means of quantifying the number of annual visitors are more likely to be primarily heritage sites (46%), whereas those using an estimate are more likely to be dual purpose sites (63%) and have fewer than 10,000 visitors per year.

Visitor types

At more than six in ten sites the majority of visitors are individuals and family groups. However, school groups and commercial tour groups are a significant contributor to visitor traffic at a number of sites.

Percentage of different types of visitors

	Individual and Family Groups	School Groups	Commercial Tour Groups
0 to 10%	3	46	59
11% to 20%	3	20	12
21% to 30%	6	12	7
31% to 40%	6	6	3
41% to 50%	12	4	3
51% to 60%	14	3	3
61% to 70%	12	–	1
71% to 80%	15	1	–
81% to 90%	12	–	–
91% to 100%	9	–	–
dk/na	8	10	12

Q.10

Approximately what percentage of the annual visitors to your historic site is accounted for by each of the following groups ...?

Subsample: Those who are open to the public as a heritage attraction (n=156)

Individuals and family groups make up the majority of visitors at nearly two thirds of the sites (62%). In almost one in ten sites this type of visitor accounts for between 90 and 100% of all visitor traffic.

School groups account for less than 30% of all visitors at more than three quarters of the sites, and at a plurality of locations (46%) they make up no more than 10% of visitors.

Sites at which school groups account for no more than 10% of all visitors are more likely to occur in the Atlantic region (60%), Alberta (58%) and at sites where admission is free (63%).

At a majority of sites commercial tour groups account for no more than 10% of visitors. However there are some sites where commercial tour groups are an important contributor to the number of visitors. At one in ten sites they account for over 30% of visitors and can be as much as 50% or more at some sites.

Tour groups do not account for more than 30% of visitor traffic at any of the sites surveyed in B.C./Yukon, Alberta or Manitoba/Saskatchewan.

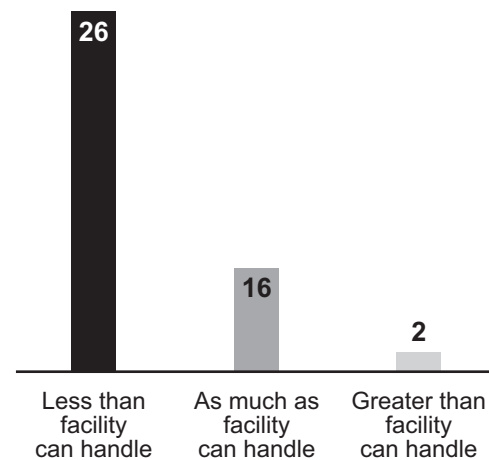
Ability to handle number of visitors

Almost three in four sites report that the number of visitors they receive is less than the location is capable of handling. Very few sites experience more visitors than they can reasonably handle.

Almost three quarters of sites reported the number of annual visitors is fewer than the facility can handle, while one in five sites indicated that the number of visitors is in line with the capacity of the site. Sites in Quebec were twice as likely to be in this latter category (43%). Only a few sites stated that their typical annual visitor traffic has been greater than the facility can handle.

Greater proportions of sites owned by historical societies (88%) and provincial or territorial governments (83%) receive fewer visitors than they are able to handle.

Number of visitors compared to capacity



Q.11

Thinking about the last three years and the number of visitors, would you say the typical number of visitors has been greater than the facility can easily handle, about as much as the facility can handle, or less than the facility can handle?

Subsample: Those who are open to the public as a heritage attraction (n=156)

METHODOLOGY

The universe of other owners of historic sites is 755. Parks Canada provided a database of 559 sites and of these 18 were archaeological sites (and not appropriate for the survey) and another was Africville which was to be omitted from the survey, leaving an effective sample of 540 sites. Some of these sites had contact information including a telephone number and / or a contact person.

In those instances where there was no telephone number provided in the Parks Canada database (183 sites) Enviro-nics used various look-up methods including Internet and hard copy telephone directories to try to obtain a relevant telephone number. Where no telephone number could be found (many sites do not have listings in the site name) the owner organization, such as a municipality or university, was contacted. Using the telephone numbers provided by Parks Canada, or those obtained through look-ups or calls as described above, initial interviews were conducted using a screening questionnaire which was developed, with Parks Canada's approval, to assist in the process of locating a suitable respondent at each site.

Those people answering these initial calls were asked if this was the correct telephone number for the historic site and if not they were asked for the correct number and the name of the person responsible for operations management. If the correct number was reached, but the person was not available, arrangements for a callback were made. In some instances up to 27 callbacks were made in an attempt to reach the person to be interviewed. Once the correct person (owner/manager) was reached, the purpose of the study was explained to them. As they would need to gather specific information for the interview a date and time for the interview was scheduled. A letter detailing this information was e-mailed or faxed to them so that they could have these details available at the time of the interview. The letter also included confirmation of the date and time of the scheduled interview.

The findings are based on interviews conducted by telephone with people responsible for the operations management of 291 historic sites across Canada between October 7 and December 10, 2004. This represents an effective sample of 56%. The results of the survey can be considered representative of those historic sites for which contact information could be obtained.

During the telephone interviews, which were conducted by Environics from its dedicated facilities in Toronto or Montreal, field supervisors were present at all times to ensure accurate interviewing and recording of responses. Ten percent of each interviewer's work was unobtrusively monitored for quality control in accordance with the standards set out by the Marketing Research and Intelligence Association (MRIA).

Owners contacted to participate in the survey were informed on how the information being collected will be used and stored, consistent with current *Personal Information and Electronic Documents Act* (PIPEDA) requirements. Environics also took steps to clarify how this project is different from another concurrent Parks Canada exercise involving listing on the Canadian Registry of Historic Places.

Profile of sites surveyed

Owner Type	TOTAL	BC/YT	AB	MB/SK	ON	QC	ATL
Aboriginal group/band	7	4	–	–	2	1	–
Educational institution	12	1	1	1	3	2	4
Government related	9	–	2	–	4	2	1
Historical society	27	2	4	5	4	1	11
Incorporated enterprise	51	1	3	7	18	13	9
Municipal government	82	9	3	6	38	12	14
Other federal government	10	1	–	1	4	2	2
Provincial/territorial government	45	13	5	9	8	4	6
Religious group	36	2	2	1	6	13	12
Refusal	12	3	–	–	5	–	4
TOTAL	291	36	20	30	92	50	63

Completion results

A total of 291 interviews were completed between October 7 and December 10, 2004.

The effective response rate is 56 percent: the number of completed interviews (291) divided by the total dialled sample (559) minus the numbers not in service and language barrier (36). The completion rate is 76 percent: the number of completed interviews (291) divided by the number of qualified owners contacted directly (385). The following table presents the detailed completion results:

Completion results

	N	%
A. Total sample dialled	559	100
Not in service/fax number	35	6
Language barrier	1	*
B. Subtotal	36	6
C. New Base (A – B)	523	100
D. Not available for duration	101	19
Callbacks	37	7
Refusals	68	13
Duplicate listing	26	5
E. Subtotal	232	44
Effective response rate	291	56

* Less than one percent

