



RESEARCH IN REVIEW

2009-2010

National Capital Commission
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RESEARCH IN REVIEW 2009-2010

EXECUTIVE SUMMARY

The National Capital Commission (NCC)'s research function provides management with accurate, timely and relevant information to facilitate reporting, planning, stakeholder relations and the continuous improvement of programs, services, and products.

The following report provides an overview of the NCC's research findings for the period of April 1, 2009 to March 31, 2010. The results from each study are summarized and identify both areas of strength and areas for improvement.

Research findings and on-site surveys of major NCC sites and programs generally indicate high overall satisfaction levels, and a strong impact on pride in the Capital Region.

DETAILED FINDINGS

The following sections of this report provide an overview of the NCC's research findings for each of the studies conducted in 2009 and 2010. A copy of all research reports completed by the NCC can be found in its library.

1. STRATEGIC MARKET RESEARCH - PHASE II

Background

As part of a three-phase approach, Phase II of the Strategic Market Research study consisted of an online survey to learn more about the perceptions, experiences and attitudes that Canadians have with respect to the nation's capital. Along with the other phases of research, results from Phase II are intended to aid the NCC's efforts to ensure that the Capital continues to be an important symbol of Canadian pride and identity, and that its programs continue to be of relevance to Canadians.

Methodology

Ipsos-Reid conducted online interviews from November 19 to December 3, 2009, with the Canadian general population, youth aged 16-17 years of age, young adults aged 18-25 years and new Canadians. Respondents were identified from among Ipsos Reid's Online Household Panel.

Key Findings

Top of Mind Associations with the Capital

- Near the beginning of the survey respondents were asked to name the three things that come to mind when asked to think about the capital. The most popular mentions were either Parliament or the House of Commons.

Overall Perceptions of Canada's Capital

- Among the general public, four in five respondents (80%) rate their view of the capital as positive. Among Canadian youth, 77% express a positive view of the capital, while 83% of New Canadians rate their view of the capital as positive.

Visiting the Capital

- When asked how interested they would be in visiting the capital in the future for purposes other than business, nearly three in four (72%) among the general public say they would be interested in doing so.
- Nearly four in five Canadians (78%) agree that every Canadian should visit the capital at least once in their life.
- About two in three Canadians (64%) indicate that they have visited the capital in the past. When asked about the impact of visiting the capital, two in three agree that their last visit gave them a better sense of the country's heritage, culture and achievements (67%) and that their visit increased their sense of pride in Canada (66%).

Engagement with the Capital

- About one in four respondents (25%) believe they have a say in future plans for the capital, while three in five (60%) disagree.
- About half of Canadians (47%) say they would like to be involved in

shaping activities and initiatives designed to shape the future of the capital, although only 7% say they are very interested.

Regional Perspectives on the Capital

- Members of the general public (39%), young Canadians (42%) and New Canadians (49%) are all most likely to mention locations in Ontario as best symbolizing Canada.

Culture, Heritage and the Capital

- Majorities among the general public (58%), young Canadians (58%) and New Canadians (64%) agree that the capital represents the essence of Canada's culture and heritage.

The Capital as an Example of Environmental Responsibility

- About four in ten among the general public (41%) and young Canadians (45%) agree that the capital is an example on environmental responsibility, while New Canadians are more likely to think so (52%).

2. LEBRETON FLATS STUDY 2009

Background

The recently redeveloped LeBreton Flats is a versatile outdoor space located in the heart of Canada's Capital Region. This redevelopment included the building of the new Canadian War Museum, the construction of LeBreton Flats Park specifically for festivals and large gatherings, and the construction of the Riverfront Park between the War Museum and the shore - including the pathways and historical panels. Research was conducted with users

about their use of and satisfaction with the LeBreton Flats, specifically regarding the NCC's revitalization of the area, and awareness of the NCC's sponsorship of the redevelopment project.

Methodology

A total of 600 visitors to the LeBreton Flats were interviewed at various locations between August 18 and September 3, 2009, and on September 13, 2009. Participants were intercepted at six different locations across LeBreton Flats, including the path north of the War Museum, and the intersection of Wellington and Booth Streets.

Key Findings

Usage and Satisfaction

- Residents are most likely to use the Flats for regular outdoor recreation (59%), whereas non-residents are most likely to visit the site for the Canadian War Museum (40%).
- Visitors were generally very satisfied with the LeBreton Flats and hold positive perceptions of it. In particular, visitors are satisfied with their visit to the Riverfront Park, feel safe while at the LeBreton Flats, and perceive the Flats to be an appropriate setting for national events and institutions.
- Most visitors feel their visit to the Flats made their experience in the Capital more informative and enjoyable, and perceive the revitalization of LeBreton Flats to have improved the heart of the Nation's Capital.



Access and Transportation

- A large portion (72%) of visitors to the LeBreton Flats access the site by bike, rollerblade, or foot, and most of these visitors rely on the Capital Pathway to do so, while a smaller proportion access the site by car (17%) or bus (10%). Access to the site is perceived to be very good.

Awareness of the Redevelopment Project and the NCC's Role

- Awareness of the LeBreton Flats redevelopment project was moderate, at approximately 50%. The visitors who were most likely to be aware of the project include those who live in CCR, use the pathways and tunnels, and who cycle through the Flats.
- Although awareness was moderate, satisfaction with the redevelopment project was very high (90%).
- On an unaided basis, 36% of visitors were aware of the NCC's involvement in the LeBreton Flats redevelopment project and another third, with help, could identify the NCC's role. Those aware of the redevelopment project were more likely to be aware of the NCC's role than were visitors unaware of the project. Also, visitors dissatisfied with the project were more likely to be

aware that the NCC is responsible for the redevelopment of LeBreton Flats.

3. HAMPTON PARK SURVEY 2009

Background

The Hampton Park Dog Owner Group has presented a proposal to officially allow dogs off-leash in a designated area within the park boundaries. A telephone survey of local Hampton Park area residents was conducted to assess the level of community support for this proposal.

Methodology

The quantitative survey used postal code mapping to contact 400 random and representative respondents within the Hampton Park area for a 5-minute interview to gauge public opinion about the proposal. The survey was conducted between April 15 and 17, 2009 by random dialing within the designated area.



Key Findings

- While 65% of the survey respondents do not own a dog, dog owners were more likely to visit the park in the last 12

months than those who do not own a dog.

- A large majority of both groups (dog owners and non dog owners) support the “off-leash area” in Hampton Park.
- A majority (63%) of respondents owning a dog indicated that they would increase their use of the park if the off-leash area went into effect.
- The primary reasons given for support of the off-leash area proposal are that it is healthy for dogs to be allowed to run free (47%); there are not enough off-leash areas, or they are too far away (24%); and that the park has enough space to accommodate such an area (20%).
- The reasons for opposition of the off-leash area proposal centered around the need for dogs to be on leashes (46%), and the risk of dogs misbehaving (43%), particularly towards children or seniors (34%).

4. GENIE AWARDS STUDY 2009

Background

The Genie Awards (Canada’s national cinema awards), in addition to other activities leading up to the awards ceremony, were held in Ottawa on Saturday April 4, 2009. A survey was conducted to gauge awareness of the Genie Awards and Genie Week; explore sources of information on the Genie Awards and Genie Week; and to measure perceptions of CCR as a result of it hosting the awards ceremony.



Methodology

A total of 462 onsite surveys were conducted prior to and following each of the featured film screenings, between March 28 and April 3, 2009. In addition, 501 telephone interviews were conducted with National Capital residents (400 from Ontario and 101 from Quebec) between April 5 and 7, 2009.

Key Findings

Awareness of Genie Awards

- The vast majority (85%) of residents in the Capital Region claimed to have heard of the Genie Awards.
- One in three CCR residents (33%) accurately named Ottawa as the location of the 2009 Genie Awards show. On an aided basis, an additional quarter (26%) indicated they had seen or heard something about the 2009 show being held in Ottawa-Gatineau. Therefore, a total of 59% of residents claimed to have heard about the 2009 show being held in CCR .
- Radio and newspapers, followed by television, were the main sources for information about the Genie Awards.

Awareness of Genie Week Activities

- Awareness of Genie Week activities leading up to the Awards ceremony was not high among telephone respondents (20%). Telephone respondents that did see or hear anything about Genie Week claimed to have seen it on TV, followed by the Ottawa Citizen, the radio and in newspapers. Onsite respondents were most likely to have heard about Genie Week through word-of-mouth, followed

by the Ottawa Citizen, the radio, and the Metro.

Genie Week Attendance

- Half of those who went to a screening attended just one. Among the half who attended multiple screenings, most said they would attend two or three screenings. Only 7% of attendees said they would be attending more than three screenings.

Perceptions of the Capital Region

- The vast majority (84%) of CCR respondents said that their perception of the Capital did not change as a result of the Capital hosting the Genie Awards and Genie Week.
- However, majorities of telephone (54%) and onsite (81%) respondents did indicate that their pride in the Capital increased to some extent as a result of the Capital hosting the Genie Awards and Genie Week.

5. SOUND AND LIGHT FOCUS GROUPS 2009

Background

During the production of the new Sound and Light Show, focus groups were conducted to test the appeal of the new concepts and content for the 'Mosaika' show.

Methodology

GH Consulting held four focus groups with National Capital residents and visitors to CCR in August 2009 with a total of 37 participants. Participants in all focus groups had attended the Sound and Light show projected on Parliament buildings in the summer of

2009. The concepts for the new show were presented to them in the form of black and white storyboards and explained by a representative from the production company.

Key Findings

- Overall, participants were very supportive of the plans for the new show.
- The show was found to be entertaining and had a number of key elements that appealed to all of the groups. The new show reflects Canadian values that were important to the participants. It also encapsulates many phenomena that make participants particularly proud to be Canadians, such as Canada's diversity, Canadian systems, its multiculturalism, sport achievements, Canadian icons, its military tradition, international presence, natural resources and technology.



- Aspects that participants particularly appreciated were introducing the show with an acknowledgement of Canada's First Nations heritage, and the interviews with Canadians that personalized the show.
- Suggestions for improvement included making 'Act 2' more

chronological; including Canada's World War II contributions and its agricultural roots; and the inclusion of Northern Canada.

6. ALCATEL-LUCENT SUNDAY BIKEDAYS RESEARCH STUDY 2009

Background

Every Sunday from Victoria Day to Labour Day, certain parkways in the Ottawa-Gatineau area are closed to automobiles to allow the roadways to be used by cyclists, pedestrians, inline skaters and others. Research was conducted to estimate the amount and frequency of use among CCR residents, and to gauge the population's awareness of the program.

Methodology

The Harris-Decima research was based on a sample of 504 telephone respondents, and 979 intercepts. The data was collected by telephone between September 8 and 15, 2009.



Key Findings

Attendance and Frequency of Use

- Based on a sample result of 20% attendance, it is estimated that approximately 229,000 of the Capital Region's 1.1 million residents attended Sunday Bikedays. Additionally, there were approximately 25,000 visitors to CCR who took part in the program.
- The average number of times people attended was 5.47 times/year.
- Therefore, there were an estimated 1,251,897 visits by residents to the Sunday Bikedays program.
- The most frequently used parkways were Colonel By Drive (54%), and the Ottawa River Parkway (42%).

Awareness of and Satisfaction with Alcatel-Lucent Sunday Bikedays

- A large majority (79%) of respondents were aware that certain parkways in the Capital Region are closed on Sundays for recreation.
- Just under half (48%) of respondents could correctly identify the name of the activity as 'Alcatel-Lucent Sunday Bikedays'.
- The vast majority of respondents who had participated in the Sunday Bikedays program were 'very satisfied' (48%) or 'satisfied' (40%), for an overall satisfaction rate of 88%.

7. GATINEAU PARK MOUNTAIN BIKING STUDY 2009

Background

Since the early 1990s, the NCC has provided mountain biking enthusiasts with an extensive 90-kilometer-long

network of shared trails. As part of its efforts to preserve Gatineau Park's natural environment, the NCC has opted to limit expansion of the trail network and instead encourage users to share the trails. Mountain biking is an activity that can have a significant impact on the environment and resources of Gatineau Park. The objective of the study was to provide the NCC with an understanding of the current base of mountain biking visitors to Gatineau Park.

Methodology

Ipsos-Reid conducted the study, involving intercept surveys in Gatineau Park and focus groups in Ottawa. 359 mountain bikers were interviewed between May 16 and October 25, 2009. Additionally, two 'mini focus groups' were conducted with a total of 7 male mountain bikers on December 16 and 17, 2009.



Key Findings

Profile of Trail Users

- One in ten mountain bikers (11%) were mountain biking in Gatineau Park for the first time.
- Almost two in five (39%) have been mountain biking in Gatineau Park for

less than 5 years, while 61% say they have been biking there for 5 or more years.

- Three in five mountain bikers (62%) mountain bike in Gatineau Park once a week or less. Almost two in five (37%) say they mountain bike in Gatineau Park at least twice a week.
- The days during which mountain bikers use Gatineau Park most often are weekend days: Saturdays (60%) and Sundays (52%). Over two in five mountain bikers (43%) are accompanied by between two and five other bikers when mountain biking in Gatineau Park. One in three (34%) are accompanied by one other biker, and fewer than one in five (16%) usually bike alone.
- One in five mountain bikers (21%) say they have mountain biked off the official trail network in Gatineau Park.

Mountain Biker Satisfaction

- In the focus groups, those with less experience with Gatineau Park/less experienced mountain bikers were pleased with the Park and the work of the NCC, whereas those who had been biking longer strongly felt that the NCC was unwelcoming of mountain bikers because of the environmental impact this activity has on the Park.
- Several participants mentioned their feeling that the NCC hides behind its conservation role and that it should study the best practices of other parks.
- Most focus group participants mentioned that they too are interested in conserving the Park. They suggested that if the NCC understood their sport better and established appropriate trails, there would be a better relationship between the NCC and

mountain bikers, and an opportunity to establish an ethos of shared conservation goals and responsibility.

- Participants suggested constructing an official network of mountain bike trails designed specifically for that purpose. Many participants mentioned their willingness to pay a user fee if this would help the NCC to establish and maintain a proper network.



- Despite complaints about the NCC and the trails, focus group participants did acknowledge that they were very lucky to have such a park as Gatineau Park so close to the city and easily accessible.

8. NCC OPEN HOUSE SURVEY 2009

Background

As part of the Doors Open Ottawa event, the NCC held its first Open House in 2009 at 40 Elgin Street, with 1,200 visitors attending. The idea was generated in support of NCC's objective to address openness and transparency to the public. It aimed to enhance a positive perception of the NCC by the community, and increase

the community's awareness and knowledge of the NCC. An exit survey was conducted with visitors to gauge whether the public had a positive experience at the Open House, and if they learnt something positive about the NCC as a result of attending the event.

Methodology

The survey was administered by NCC volunteers with visitors to the Open House as they exited the building. 143 questionnaires were completed over June 6 and 7, 2009.

Key Findings

Knowledge and Perceptions of the NCC

- The Open House had an impact on increasing the knowledge of the NCC with those that participated. Seventy percent of the visitors indicated that attending the Open House increased their knowledge of the NCC to a great extent.
- The overwhelming majority (91%) of the Open House visitors stated attending this event had a positive effect on their perceptions of the NCC.
- The overall event received high satisfaction ratings, with 87% of visitors stating that they were very satisfied. Further, the majority (83%) of the visitors stated that they were very satisfied with the quality of the exhibits, 82% were very satisfied with the range of information, and 90% were very satisfied with answers to their questions.

Interests of Visitors

- In terms of floors most visited, 92% of participants explored the lobby, as well

as the twelfth floor. Those who explored the lobby stated that their favorite exhibit was the Capital floral vision (44%), followed by the NCC's environmental strategy (36%).

- The majority of the visitors who explored the twelfth floor stated that Capital Planning was their favorite exhibit.

- The Open House had an impact on visitors' interest to get involved in future NCC activities. Sixty-five percent stated that they were more likely to get involved with the NCC after attending the event. Public consultations was the most popular activity (61%) that visitors would like to be involved in, followed by volunteering for events (51%).

Open House Marketing

- Although there were many marketing mediums used to advertise the event, the majority (42%) of visitors stated that they had heard about the Open House from newspapers, followed by the 'Open Doors Ottawa' event guide (28%).

- The main factor that motivated visitors to attend the event was the fact that they were already touring other buildings as part of 'Doors Open Ottawa'. This was followed by the motivation to see the architecture of the Chambers building, and see the NCC from the inside.

9. 2009 TULIP LEGACY EXHIBIT RESEARCH STUDY

Background

The Tulip Legacy Exhibit in Commissioners Park and Major's Hill Park described the events leading up

to the 'Gift of Tulips' from the Dutch Royal Family, and the contribution of Canadian soldiers to the liberation of the Netherlands. The goal of the research study was to gauge visitor expectations and interest in the exhibit, as well as determining visitors' motivation for visiting the exhibit and their awareness of the NCC's horticultural role in the Capital.



Methodology

An onsite survey was conducted among visitors to Commissioners Park and Major's Hill Park during the first three weeks of May, 2009. A total of 439 onsite surveys were conducted during the Exhibit – 220 at Major's Hill Park and 219 at Commissioners Park.

Key Findings

Demographics and Motivation

- In general, visitors to Commissioners Park were older than visitors to Major's Hill Park, less likely to be there with their families and were more likely to be there expressly for the flowers. Visitors to Major's Hill, in contrast, were there with their families on a family outing. Visitors to Commissioners Park were more likely to have cited "viewing the flower beds" as the reason for their visit (42% vs. 15% at Major's Hill Park), while the relatively younger crowd at Major's Hill Park were more likely to be there for a family outing (53%).

Visitor Satisfaction

- Regardless of the location or the reason for their visit, a significant majority (88%) of visitors indicated being very satisfied with the setting and said that they gained a greater sense of pride in Ottawa as Canada's capital as a result of their visit (85%).
- The majority of visitors to the Tulip Legacy Exhibit were very satisfied with the natural beauty of the tulip display (88%).

Awareness of the NCC's Role

- On an unaided basis, just under half of the visitors to either park named the NCC as the organization that is responsible for the planning and upkeep of significant gardens and parks, as well as planting the tulips in the Capital. At Commissioners Park, 48% named the NCC, and at Major's Hill Park, 44% did so. When respondents were informed that it was the NCC's responsibility, awareness jumps to 71% among visitors to Commissioners Park

and 77% among visitors to Major's Hill Park.

10. GATINEAU PARK EXHIBIT RESEARCH STUDY 2010

Background

One of the NCC's main interpretation sites in the Capital Region is at Gatineau Park's Visitors' Centre Exhibit. The purpose of the study included measuring the NCC's performance and obtaining detailed information about who is visiting the Exhibit, how well it is appreciated and its impact on learning and retention.

Methodology

The research consisted of on-site surveys with 445 visitors to the Gatineau Park Visitor Centre Exhibit. Both local residents and Canadian tourists to the Capital were included in the survey sample. Interviewing for the survey was conducted during two periods: Fall (between October 2 and 25, 2009, during Fall Rhapsody) and Winter (between January 23 and February 27, 2010, during the cross-country skiing and snowshoeing season).



Key Findings

Profile of Visitors

- Three-quarters (75%) of Exhibit visitors in Fall and Winter are local to CCR. Two-thirds of local visitors are from Ottawa. Half had been in the Park before coming to the Exhibit, and half were just arriving. Repeat visitors are more likely to have gone into the Park before visiting the Exhibit, while the reverse is true of first-time visitors.

Exhibit Activities and Messages

- Visitors spent an average of 16 minutes viewing the Exhibit. Almost all visitors spent time viewing the models, and reading the interpretative panels. Seven in ten experimented with the touch screens. Smaller majorities did the activities that take more time: the discovery activities and the audio sequence. The animals are the favourite part of the exhibit for 40% of visitors, and this is also where people spent the most time.
- Eight in ten (80%) Exhibit visitors learned something new at the Exhibit, usually with regard to differentiating animals and biodiversity, or about animal characteristics or habitat.
- The main messages visitors took away from the Exhibit pertained to conservation and the animals of the Park. Three in ten also retained a message about biodiversity.

Visitor satisfaction

- Close to eight in ten visitors were *very* satisfied with their overall Exhibit experience, and the remainder were *generally* satisfied – none were unsatisfied.

- Close to nine in ten who have visited Gatineau Park prior to coming to the Exhibit said they were very satisfied with their overall Park experience. The few who were unsatisfied generally mention weather or signage issues.
- Around nine in ten Gatineau Park visitors agreed (rating 8, 9 or 10 on a 10-point scale) that the Park is one of the features that makes CCR unique; that visiting the Park increases their pride in the Capital; and that their trip to the Park enriched their Capital visit.

11. TEACHERS SURVEY RESEARCH STUDY 2010

Background

CCR is an important educational destination for school groups in the Quebec-Windsor corridor, and the majority of the NCC's youth programming has been school-based educational programs. On-site and in-classroom programs have been developed with the aim of increasing the level of knowledge about Canada's Capital among young people. The NCC has identified the need for research to update its knowledge of the market for students travelling to the capital, the results of which will be used to guide the new NCC Youth Programs Plan 2009-2014.



Methodology

The research consisted of two phases: an on-line survey of 436 teachers in the Quebec-Windsor corridor, and other locations in Ontario and Quebec within a reasonable driving distance of CCR; and in-depth telephone interviews with 26 school principals, 11 school board administrators, and 18 educational tour operators. The teacher surveys were drawn from an on-line panel and conducted between February 4 and 17, 2010. The interviews with principals, school administrators, and educational tour operators were conducted between February 25 and April 20, 2010.

Key Findings

Class Trip Destination Considerations

- Educational opportunities are paramount when considering a school trip destination, but culture, history, and a good mix of activities are also important for many. The interviews underlined that the link between the destination's offerings and the curriculum must be made explicit.
- Six in ten teachers who have not yet escorted a class to CCR believe it is possible that they will do so in the future.

The Capital Region as an Educational Destination

- Relevance to curriculum is the top reason for organizing a school trip to CCR (or to any other destination). However, the Capital's interest to students and its wealth of attractions are also factors.
- About half of teachers who have escorted trips to CCR also said they have visited because it is an affordable destination, or that it is a reasonable travel distance from their school.
- The main reasons for not yet organizing a trip to CCR are cost and lack of opportunity. Few cited lack of interest as a reason.
- Interviews revealed some additional barriers, such as school tradition, or the fact that Ottawa is perceived as not offering a French cultural experience, which is the curriculum link required for Ontario French immersion classes. On the other hand, Ottawa's ability to provide an English language experience is seen as an advantage by some Quebec educators.

Trip Characteristics and Activities

- A typical school trip to the Capital is in May or June, with about 40 grade seven or eight students, and of one or three days' duration.
- Close to six in ten classes did at least one free NCC program on their last trip, usually 'Discover the Hill' or 'Canada's Capital Walking Tour'.
- Lack of awareness is the major barrier to increased use of the free NCC programs.
- The majority of educators strongly agreed that the Capital is an important symbol of the country, that every

student should visit it at least once, and that it is a must-see destination.

The NCC's Educational Services

- Use of NCC trip-planning tools and services is not widespread among those who have already visited.
- A downloadable pre-trip guide would be the most helpful trip-planning tool, and on-line student activities are the in-classroom tool most likely to be used.
- Many educators are not aware of the role of the NCC and awareness of existing services is low.

PHOTO CREDITS

Hampton Park photo: http://en.wikipedia.org/wiki/Hampton_Park,_Ottawa

Genie Award photo : <http://www.genieawards.ca/>

CONTACT INFORMATION

Complete research documents are accessible at the NCC's library located in room 202 at 40 Elgin Street. Library hours and information can be found at www.canadascapital.gc.ca or by calling (613) 239-5123. Specific questions can be directed to the NCC's Corporate Planning Branch at research-recherche@ncc-ccn.ca

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