

Executive Summary

Background

The National Capital Commission (NCC) is the Crown Corporation of the Government of Canada responsible for the planning, development, animation and promotion of Canada's Capital. The NCC has a mission to enhance pride and unity by making the Capital an attractive, dynamic meeting place for all Canadians.

The NCC is continually working to improve the services and resources it offers to visitors and residents of the Capital. The *2012 NCC Visitor Experience Research Study* was designed to examine the NCC's services to ensure visitors' needs and expectations are being met. Its findings will be used to guide future development of the NCC's visitor services and interpretive programs.

Survey Objectives, Scope and Methodology

The overall objectives of the 2012 NCC Visitor Experience Research Study were to:

- Inform whether the NCC's approaches are successful and whether they should be eliminated, maintained and/or augmented;
- Inform the NCC where gaps exist in visitor services and interpretive offerings;
- Test various approaches and types of media used to deliver information to visitors;
- Examine wayfinding behaviour, visitor orientation, and identify what wayfinding tools visitors are currently using; and,
- Identify visitors' needs and expectations with regard to wayfinding tools, information services, and interpretation.

From July 17th to September 1st, 2012, Harris/Decima conducted a total of 1,378 on-site interviews with residents and visitors to the National Capital Region (NCR), aged 18 and over. In order to get good coverage of the area and a well-rounded sample of residents and visitors, interviews were conducted at six different locations:

Parliament Hill (n=505)
Capital Information Kiosk (n=224)
Plaza Bridge (n=156)
ByWard Market (n=172)
National Gallery of Canada (n=174)
Canadian Museum of Civilization (n=147)

Survey Results

NCR Wayfinding and Planning

- Most visitors to the region came in pairs or as part of a larger group. Four out of five *NCR visitors* (81%) said they were accompanied on their trip. The mean group size was 2.8 people, excluding large tour groups.
- The Internet is the most prominent source of travel information for NCR visitors. Well over half of *NCR visitors* (55%) said they used the Internet to research their trip to the Capital. About one in five *NCR visitors* (22%) used word of mouth information when planning their trip.
- The NCC's website has a low profile among NCR visitors. Only 6% of *NCR visitors* used the NCC's website to plan their trips. The website saw top-of-mind recall for 4% of Canadian visitors.
- The majority of visitors to the NCR are travelling here by car. Seven in ten (70%) *NCR visitors* come to the region by car, with airplane travel coming in a distant second-place at 18%.
- Directional signs are useful, but may not be noticeable to some travellers. Just over half of *NCR visitors* (52%) noticed directional signs on the highway, in the city, or both. *Visitors who drove to the Capital* were somewhat more likely to notice the signs (60%), and nearly half of them (47%) used the signs to navigate.

Capital Experience and Orientation

- Attractions in the NCR's downtown core are most popular with visitors. The top five attractions for *NCR visitors* were Parliament Hill (77%), the ByWard Market (47%), the Canadian Museum of Civilization (30%), the National Gallery of Canada (29%), and the Rideau Canal Waterway (26%).
- Visitors have low awareness of Confederation Boulevard. Just 23% of *NCR visitors* were aware of this ceremonial route when asked.
- Respondents generally preferred traditional ways of touring a city. Overall, 42% said they prefer to tour a city at their own pace, 24% like to be guided by a map or brochure, and 19% like guided tours.
- People aren't using the bronze map models or map columns. Among those who had used an orientation tool to get around the Capital, road maps were the most popular choice at 26%. The on-site maps were mentioned by only a few.
- Visitor centres are still important to travellers. Six in ten (59%) respondents use visitor centres when they travel. Most of the respondents who don't use them (41%) indicated that it was because they plan their trips in advance (68%).
- People are having trouble finding the Capital Information Kiosk. Only 24% of respondents had visited the Capital Information Kiosk. Those who didn't use it mostly

said they didn't need it (68%), but some respondents didn't know it existed (12%), didn't know where it was located (11%) or had trouble finding it (3%).

- Information Agents are well-received by those who interacted with them. The Information Agents received high top 2 Box scores in terms of providing needed information (94%), providing interesting information (83%), and their pleasant and helpful manner (99%).
- Canadian NCR visitors may not be connecting with the Capital to their full potential. Top 2 Box scores for the NCC's mandate questions suggest room for improvement. Among Canadian *NCR visitors*, 46% were in strong agreement with the statement "From this visit, I have gained a greater sense of pride in being Canadian." The statement "From this visit, I feel that the Capital is a vibrant and enjoyable place" resonated strongly with 59% of Canadian NCR visitors. Just 38% were in strong agreement with the statement "Overall, my visit to Canada's Capital region has given me a better recognition of the Capital's significance."

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Smart Technology

- Some travellers are using Smartphones to navigate and find information, but this has yet to catch on with many. More than half of respondents didn't have a Smartphone (47%). Among those who did, maps and GPS were the most common uses of their Smartphones while travelling. Barriers to Smartphone use included cost, and user confusion.
- Smartphone users had low awareness of the Parliament Hill App. Only 12% of respondents with Smartphones had heard of the App when asked. Tourism magazines, Parliament Hill brochures, and Parliament Hill staff are top sources of information about the App.
- Very few Smartphone users are taking advantage of QR codes around the Capital. Only 10% of Smartphone users had used QR codes to learn about different sites. A quarter (26%) of Smartphone users didn't know what a QR code is.

Capital BIXI Bikes

- Awareness of the Capital BIXI Bikes program is high among residents, but lower among visitors. While nine out of ten *NCR residents* (89%) were aware of the program, 58% of *NCR visitors* knew about it. Actual use of BIXI Bikes was low – among those aware of the program, 3% had used the bikes.