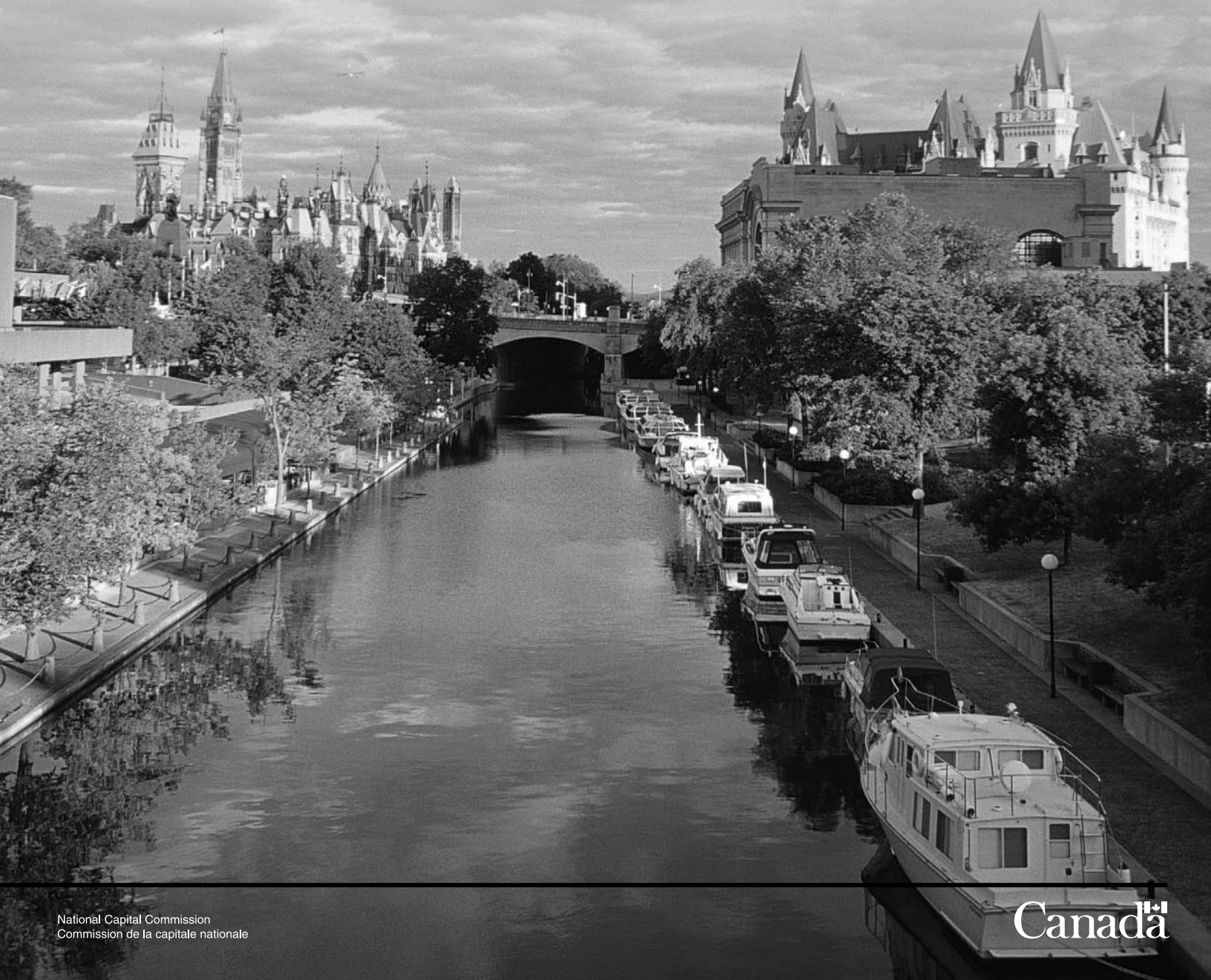


# CAPITALizing on Research

A Compilation of Findings on  
Canada's Capital Region

2004








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Canada's Capital Region

2004

National Capital Commission  
Ottawa, Canada  
September 2004



*At the National Capital Commission (NCC), we use information about Canada's Capital Region (CCR) and about Canadians to guide us in our decisions. Here in this document, you'll find a collection of facts and numbers that provide a fascinating and useful snapshot of both residents and visitors — the human face of the Capital Region. The information was gleaned, in 2003 and 2004, from the following eleven studies:*

- 1. Canada Day 2003*
- 2. Parliament Hill Visitor Study*
- 3. Winterlude 2004*
- 4. Christmas Lights 2003*
- 5. Fall Rhapsody 2003*
- 6. The Canada and the World Pavilion Visitor Survey*
- 7. Confederation Boulevard Pedestrian Orientation Tools and Interpretation Panels*
- 8. The Capital Infocentre User Survey*
- 9. NCC Public Accountability Survey*
- 10. NCC Web Evaluation Survey*
- 11. New Corporate Identifier Focus Group*



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## The National Capital Commission Your Capital — Our Passion, Our Mission!

**T**he mandate of the National Capital Commission (NCC) is to build a capital that will foster pride and unity among Canadians. We rely on the results of research intelligence to guide us in planning, programming and promoting Canada's Capital Region. Our goal is to make the Capital a stimulating place to work and live for residents, and a destination of choice for travellers.

Each year, the NCC conducts studies on various topics in order to meet the changing needs of our social, economic and cultural environment. In the spirit of partnership and corporate accountability, we want to share with you, once again this year, a summary of some of our research conducted in 2003 and 2004.

We hope that you will find this information both pertinent and interesting.



Marcel Beaudry  
Chairman

The Census of Population has been conducted every five years since 1951, with 1956 being the first nationwide census. The following demographic data, obtained from Statistics Canada, are of the Ottawa-Gatineau Census Metropolitan Area (OGCMA), which includes Canada's Capital Region (CCR). CCR's land area of 4,715.25 square kilometres is smaller than that of the OGCMA.

### Population of the OGCMA

(Based on census results from 1996 and 2001; population for 2006 is a projected figure)

1996*	2001	2006
998,718	1,063,664	1,186,981
	(up 6.5% from 1996)	(up 11.6% from 2001)

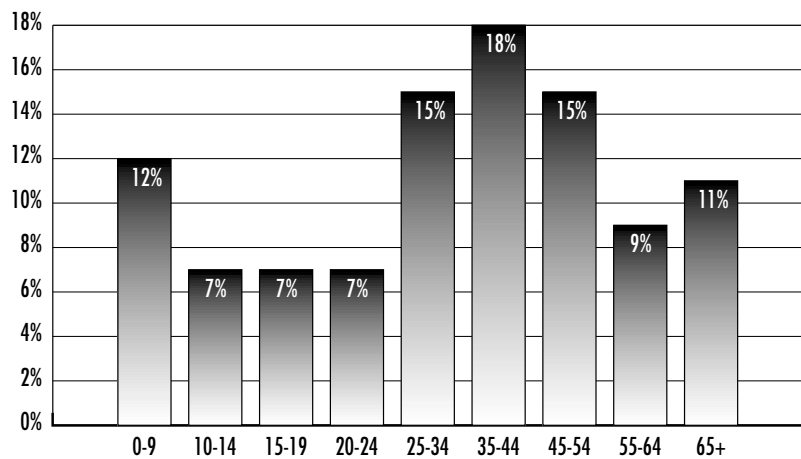
\*(Counts have been adjusted to reflect 2001 census boundaries)

**OGCMA's land area:** 5,318.36 square kilometres

**OGCMA's population density per square kilometre in 2001:** 200 per square kilometre

(The following data are from the 2001 census)

### Breakdown of Age in CCR



### Gender

Male	Female
49%	51%



## Population Profile –

### Diversity of Residents of Ottawa-Gatineau

	2001	1996
Non-immigrant population	857,090 (81%)	832,595 (83%)
Immigrants*	185,010 (18%)	161,885 (16%)
Non-permanent residents**	8,660 (1%)	6,455 (1%)

\*Residents born outside of Canada.

\*\*Non-permanent residents living in Canada (together with family members who live with them) who, at the time of the census, had a minister's permit, a student or employment authorization, or who were claiming refugee status.

## Profile of Immigrant Population –

### Place of Birth of Residents of Ottawa-Gatineau

Total number of immigrants living in CCR: 185,010

	2001	1996
United Kingdom	20,965 (11%)	22,745 (14%)
People's Republic of China	13,285 (7%)	6,790 (4%)
Lebanon	11,245 (6%)	10,025 (6%)
United States	8,070 (4%)	7,815 (5%)
Italy	7,040 (4%)	7,580 (5%)

## Occupation

The top employer in OGCMA is the federal government, followed by the professional, scientific and technical services sectors.

Industries	Labour Force
Public administration	111,735
Professional, scientific and technical services	61,360
Retail trade	58,660
Health care and social assistance	53,325
Manufacturing	44,595
Educational services	39,480
Accommodation and food services	34,485
Construction	26,970
Other services (except public administration)	26,175
Administrative and support, waste management and remediation services	25,830
Information and cultural industries	21,685
Transportation and warehousing	20,610
Finance and insurance	19,015
Wholesale trade	14,225
Arts, entertainment and recreation	11,620
Real estate, rental and leasing	9,640
Agriculture, forestry, fishing and hunting	4,010
Utilities	1,915
Management of companies and enterprises	290
Mining and oil and gas extraction	290
<b>All industries</b>	<b>585,930</b>

## Income

(Based on population 15 years old or over; individual income; 2001 census)

\$0 to \$19,000	339,720 (40%)
\$20,000 to \$29,999	110,955 (13%)
\$30,000 to \$39,999	106,140 (13%)
\$40,000 to \$49,999	85,260 (10%)
\$50,000 to \$59,999	61,650 (7%)
\$60,000 or more	141,345 (17%)

## Education

(Based on population 15 years old or over; 2001 census)

Less than Grade 9	52,045 (6%)
Grades 9 to 13	139,485 (17%)
High school graduation certificate only	110,600 (13%)
Some post-secondary education	99,220 (12%)
Trades certificate or diploma	63,140 (8%)
College certificate or diploma	140,555 (17%)
University certificate or diploma (below bachelor level)	21,475 (3%)
University degree	218,525 (26%)

## Population of Canada

(Information from Statistics Canada, based on census results from 1996 and 2001; population for 2006 is a projected figure)

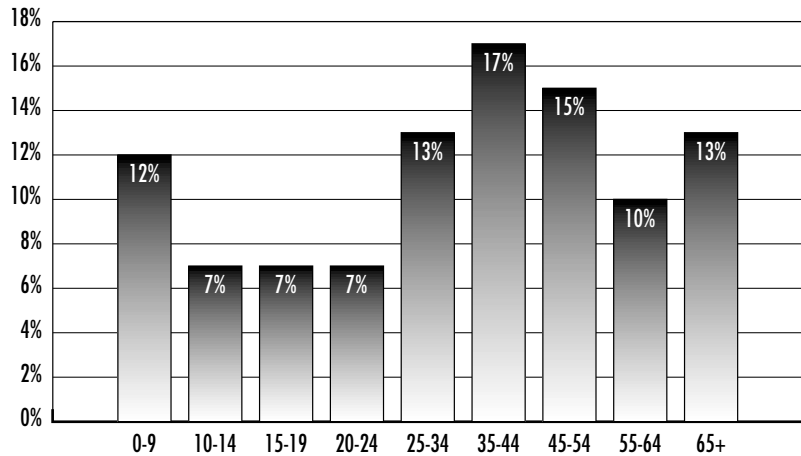
1996*	2001	2006
28,846,761	30,007,094	32,228,600
	(up 4.0% from 1996)	(up 7.4% from 2001)

\*(Counts have been adjusted to reflect 2001 census boundaries)

**Canada's land area:** 9,012,112.20 square kilometres

(The following data are from the 2001 census)

## Breakdown of Age in Canada



## Gender

Male	Female
49%	51%

## Population Profile — Diversity of Canadians

	2001	1996
Non-immigrant population	23,991,905 (80%)	23,390,340 (82%)
Immigrants*	5,448,480 (18%)	4,971,070 (17%)
Non-permanent residents**	198,645 (1%)	166,715 (1%)

\*Residents born outside of Canada.

\*\*Non-permanent residents living in Canada (together with family members who live with them) who, at the time of the census, had a minister's permit, a student or employment authorization, or who were claiming refugee status.

## Profile of Immigrant Population — Place of Birth of Canadians

Total number of immigrants: 5,448,480

	2001	1996
United Kingdom	605,995 (11%)	655,535 (13%)
People's Republic of China	332,825 (6%)	231,050 (5%)
India	314,690 (6%)	235,930 (5%)
Italy	315,455 (6%)	332,110 (7%)
United States	237,920 (4%)	244,695 (5%)

## Occupation

The top employer in Canada is the manufacturing sector, followed by the retail trade sector.

Industries	Labour Force
Manufacturing	2,174,285
Retail trade	1,754,885
Health care and social assistance	1,511,360
Accommodation and food services	1,046,045
Educational services	1,021,020
Professional, scientific and technical services	982,300
Public administration	904,485
Construction	879,245
Transportation and warehousing	774,220
Other services (except public administration)	748,395
Wholesale trade	686,530
Finance and insurance	635,630
Administrative and support, waste management and remediation services	605,910
Agriculture, forestry, fishing and hunting	567,660
Information and cultural industries	417,285
Arts, entertainment and recreation	303,860
Real estate, rental and leasing	259,360
Mining and oil and gas extraction	169,970
Utilities	118,790
Management of companies and enterprises	15,320
<b>All industries</b>	<b>15,576,565</b>

## Income

(Based on population 15 years old or over; individual income; 2001 census)

\$0 to \$19,000	11,609,560 (49%)
\$20,000 to \$29,999	3,565,420 (15%)
\$30,000 to \$39,999	2,974,550 (12%)
\$40,000 to \$49,999	2,022,035 (8%)
\$50,000 to \$59,999	1,338,810 (6%)
\$60,000 or more	2,390,990 (10%)

## Education

(Based on population 15 years old or over; 2001 census)

Less than Grade 9	2,350,490 (10%)
Grades 9 to 13	5,126,405 (21%)
High school graduation certificate only	3,367,900 (14%)
Some post-secondary education	2,590,165 (11%)
Trades certificate or diploma	2,598,925 (11%)
College certificate or diploma	3,578,400 (15%)
University certificate or diploma (below bachelor level)	601,425 (3%)
University degree	3,687,645 (15%)

# The 2001 Aboriginal Peoples Survey

## **Initial Findings on the Well-being of the Non-Reserve Aboriginal Population**

Statistics Canada, in partnership with several Aboriginal organizations, conducted the 2001 Aboriginal Peoples Survey (APS) to collect information on the lifestyles and living conditions of Aboriginal people in Canada. The APS, which takes place after the census, was previously conducted in 1991. The latest APS was conducted between September 2001 and January 2002 from a sample of about 117,000 people, and initial findings were released in September 2003. Results from Aboriginal people living on-reserve are only available at the community level, whereas more complete findings from the non-reserve population are available at the national/provincial and urban/rural levels. Only non-reserve key findings from 2001 are presented below.

- 69% of Aboriginal people aged 15 to 24 in non-reserve areas rated their health as very good or excellent, virtually on par with 71% of the total Canadian population in the same age group.
- 45% of all Aboriginal adults reported the presence of one or more chronic conditions. Arthritis or rheumatism was the top chronic condition among those aged 15 and over, with 19% of Aboriginal adults reporting this diagnosis.
- For every 10-year age group between 25 and 64, the proportion of Aboriginal people who reported their health as fair or poor was about double that of the total Canadian population.

- 41% of Aboriginal women aged 55 to 64 reported fair or poor health; this is more than double the proportion of 19% of women in the same age group in the total Canadian population.
- In 1996, 52% of Aboriginal youth aged 20 to 24 had incomplete secondary school as their highest level of schooling. This declined to 48% in 2001.
- In 1996, 32% of non-reserve Aboriginal people aged 25 to 34 had completed post-secondary studies. By 2001, this figure had increased to 37%.
- In 2001, about 17% of non-reserve Aboriginal people lived in crowded conditions. This was down from 22% five years earlier.
- In general, the vitality of many of the Aboriginal languages spoken by two of the three main Aboriginal groups — North American Indian and Métis — in non-reserve areas declined between 1996 and 2001.
- 59% of non-reserve Aboriginal adults stated that keeping, learning or relearning an Aboriginal language was somewhat or very important.

*The following key highlights are intended to provide the reader with a quick glimpse of NCC research studies that were conducted during 2003 and 2004. For more detailed information, please refer to the “Summaries” section of the report.*



## **1. Canada Day — What is the Impact in the Capital Region?**

- Of the estimated 302,597 people who attended the 2003 Canada Day celebrations, 38% were visitors from outside the Capital Region.
- 62.2% of the 74,816 tourists stated that the 2003 Canada Day celebrations accounted for 100% of their decision to visit the region.
- 77.6% of all visitors stated that the 2003 Canada Day celebrations had somewhat, to very much, enhanced their image of the Capital Region.
- Total spending attributable to the 2003 Canada Day celebrations by visitors is estimated to be \$11.89 million.

- The gross-economic impact resulting from visitor spending attributed to the 2003 Canada Day celebrations was \$19.36 million.
- Total employment supported by visitor spending was 239 full-year jobs.

## **2. What is the Parliament Hill Experience?**

- Most visitors to Parliament Hill were Canadian citizens who live more than 80 km outside of CCR (58% in the summer, 48% in the fall); followed by non-Canadian visitors (28% in the summer, 39% in the fall); and residents of the region (14% in both the summer and the fall).

- In the summer, 60% of Canadian visitors were from Ontario, compared to 19% from Quebec. In the fall, 61% of Canadian visitors were from Ontario, compared to 11% from Quebec.
- Roughly half of all visitors were making their first visit to Parliament Hill (52% in the summer, and 56% in the fall). In the summer, 65% of visitors to Parliament Hill have visited CCR in the past, and 69% of fall visitors.
- Parliament Hill succeeded in meeting the expectations of visitors in both the summer (90%) and the fall (88%), as the vast majority agreed that their expectations were mostly or completely met.
- A visit to the Capital helped to instill a sense of pride in a majority of Canadian visitors. Similarly, a visit to Parliament Hill most often left Canadian visitors with feelings of pride and patriotism (39% in the summer, and 34% in the fall).
- When asked, one-quarter of visitors in the summer gave the unprompted response that they felt Parliament Hill symbolized Canadian heritage or law and order. When asked, the vast majority of Canadian visitors in both the summer (90%) and fall (85%) agreed that Parliament Hill is a symbol of our system of government.
- A visit to Parliament Hill was an educational experience for many. Roughly half of Canadian visitors to the Hill, in both the summer and fall, learned something new during their visit.
- Overall, visitors rate their satisfaction (87% in the summer, and 84% in the fall) with their visit to Parliament Hill highly.

- A visit to Parliament Hill was a part of most visitors' trip planning prior to their visit to CCR (81% in the summer, and 70% in the fall), suggesting that it is an important component of a visit to CCR.

- Attendees are satisfied overall (97%) with their Winterlude experience.
- 23% of attendees had their expectations exceeded and 69% had their expectations met.



### 3. Winterlude — A Hot Event?

- In 2004, Winterlude drew over 616,000 attendees who made close to 1.3 million visits to the three official sites.
- Winterlude attracted attendees from outside of CCR (36%, up by 5% from 2000), from the City of Ottawa (46%), and from the City of Gatineau (18%).
- The majority of attendees visited the event in groups (92%) and with children (60%).
- While many attendees were repeat visitors, about one quarter are first-time visitors.
- Spending attributed to Winterlude is \$69.1 million, down slightly from 2000.
- Total economic activity generated by Winterlude throughout Ontario and Quebec is expected to reach \$151.7 million in 2004 — up from 2000.
- On an unaided basis, more than 40% of respondents were aware of the NCC being the event organizer. They were also aware of Winterlude partners on an aided basis, including the City of Ottawa (66%), OC Transpo (57%) and the City of Gatineau (51%).
- Casino du Lac-Leamy, Via Rail Canada, Teletoon and RBC Financial Group were the most recognized Winterlude sponsors on an aided and unaided basis.
- Attendees recalled seeing Winterlude advertisements on television (34%), in newspapers (37%) and on the Internet (17%). The Internet has become more important in delivering information about Winterlude, with more people using it in 2004 compared to 2000.

#### 4. Did the Christmas Lights Ceremony Shine Through This Year?

- Almost nine out of 10 of those attending the opening illumination ceremony of Christmas Lights Across Canada on Parliament Hill were Ontario residents of Canada's Capital Region.
- The majority of attendees (85%) went to the ceremony with others, in most cases with family only, or with friends only.
- For most attendees (72%), this was their first time at the ceremony. In general, the principal factor influencing the decision to attend was "to see the show itself."
- Six out of 10 identified the NCC as the organizer of the Christmas Lights Across Canada opening ceremony, whereas one in four attendees correctly identified Canada Post as the sponsor of the 2003 event, including 16% of those interviewed prior to the ceremony and 38% afterward.
- Those interviewed following the ceremony expressed a high level of satisfaction with the event, including 60% who were very satisfied and 35% who were generally satisfied.
- The specific elements that received the highest satisfaction ratings were the Christmas songs and the celebrity artist performance.
- Nine out of 10 ceremony attendees who are residents of Canada indicated that the event increased their sense of pride in the Capital, while slightly fewer (78%) said it increased their pride in being Canadian.



#### 5. Gatineau Park in the Fall — What's Happening?

- Survey findings indicate that the majority of visitors to Gatineau Park during Fall Rhapsody were either from Ottawa (45.1%) or Gatineau (27.2%), and most visitors travelled to the Park by car, sports utility vehicle (SUV), or truck (85.9%).
- 76.3% of on-site respondents stayed in Gatineau Park between one and three hours; whereas a much smaller proportion of visitors (8.3%) made trips to the Park that lasted for less than one hour.
- 85% of all respondents interviewed on-site stated that they were either very satisfied (48.6%), or extremely satisfied (36.4%) overall with their experience in Gatineau Park.
- Findings from the local telephone survey indicate that 23% of CCR residents visited the Parkways during October of 2003, compared to 26% in 2002. Of those who claimed to have visited the Parkways during the month of October of 2003, 95% said they enjoyed the drive somewhat (24%), or very much (71%).
- Respondents from both the on-site and telephone surveys express a preference for leaving their car in a parking lot and using a shuttle bus to commute to Gatineau Park instead of closing the Parkways. If a shuttle-bus service were implemented, a large majority of those surveyed would prefer to be picked up in Gatineau Park instead of a downtown location.
- The on-site survey suggests that the most-visited sites during Fall Rhapsody in 2003 were the Champlain, Huron and Étienne-Brûlé lookouts (22.8%).
- Car counts taken in the Park indicate that car traffic in 2003 increased over the second weekend (+55%), but decreased during the first (-49%) and third (-6%) weekends compared to 2002. Overall, this translates to an increase of six percent in car traffic in 2003 in comparison with the previous year's figures.



## 6. The Canada and the World Pavilion — An Effective Attraction?

Results from the on-site survey:

- 47% of all Canada and the World Pavilion (the Pavilion) users are Canadian residents who live outside the region.
- 43% of visitors indicated their main reason for visiting was just to see what the Pavilion was about, although 25% also specifically mentioned their interest in the subject of the Pavilion (the role Canadians play internationally).
- 97% of visitors were satisfied with their visit to the Pavilion.
- 95% of visitors agreed that they learned something new at the Pavilion about Canada's contribution to the world.

Furthermore, 64% of visitors said their opinion of Canada's international role had improved following their visit.

- Among all Canadians, 52% said their visit to the Pavilion enhanced their feeling of pride in being Canadian.
- 75% of visitors said they are likely to revisit the Pavilion in the future. Interest is higher among CCR residents.
- 77% of visitors recognized the role of the NCC as the agency responsible for the Pavilion.

Results from local telephone survey:

- Almost a third of CCR residents are aware of the Canada and the World Pavilion. Compared to 2002, awareness in 2004 has almost doubled.

- Newspapers are still the primary source of information on the Pavilion as 25% of CCR residents heard about the Pavilion from this source.
- Of the 32% of residents who were aware of the Pavilion, 11% said that they had visited this year.
- Of the residents who were aware of the Pavilion but had not yet visited, the two top reasons given were the fact that they hadn't yet had time (27%) and that they did not know enough about it (24%).
- Two percent of CCR residents have said that they plan to visit the Pavilion — consistent with the results from previous years.

## 7. Confederation Boulevard — An Informative Experience?

- 57% of map-model users are visitors to CCR and 66% of the users of the interpretation panels are visitors from outside the region.
- Visitors to the region spend more time at the map models and interpretation panels than local residents do, and users in groups also spend more time than those who are alone.
- The interpretation panels are attractive to users who like historical monuments or information (24%), those who are curious (22%), or those who like the "look" of the panels (21%).
- 84% of users agree that the information presented in the map models is useful. When asked to describe why the information is useful, 44% stated that it provided them with a



sense of the downtown and its geography. 88% of users of the interpretation panels said they learned something from them.

- 54% of respondents would like to see more maps and other orientation tools in the city, whereas almost all panel users said the panels enhanced their visit to the Capital (88%) and 91% said that there should be more of them.

## 8. The Capital Infocentre — Let's Hear from the Visitors

- 50% of all Capital Infocentre (CIC) users are visitors from other parts of Canada outside CCR. Another 28% are from other countries, and the remaining 21% of users reside in CCR.

- Ticketing for venues (46%), and pre-packaged tours (36%) are the services users are very likely to use if they were made available at the CIC.
- The personal service at the front counter (77%), and the map-model exhibit (66%) are the features of the CIC that are deemed very important by users.
- Almost all CIC users (99%) are satisfied overall with the Capital Infocentre, including 77% who are very satisfied and 22% who are generally satisfied.
- The majority of users mentioned additional information centres (24%), or the provision of more information, maps, and orientation tools (11%) as possible services or information that could be made available in

addition to the CIC to improve visitor trips to the Capital.

- About two-thirds of CIC users who were visiting from an area of Canada outside CCR indicated that they had learned something about the Capital while at the CIC.
- When asked to what extent their pride in being Canadian increased as a result of their visit to the Capital, two-thirds of CIC users said it increased to a great extent (33%) or to some extent (34%).

## 9. How do Residents of the Capital Region Perceive the NCC?

- Almost eight out of 10 (78%) residents believe they personally benefit from the NCC's presence in the community.
- Over nine out of ten residents describe the quality of life in CCR as excellent (41%) or good (50%). 89% express a clear sense of pride in living in the nation's capital.
- 39% of local residents are able to correctly identify the NCC's mandate without prompting, whereas 93% of residents say when specifically prompted they are aware of the NCC.
- The public's general impression of the NCC remains positive, with almost two in three residents describing their attitude as very positive (11%) or positive (54%).
- The majority of respondents consider the development and maintenance of green spaces and the Greenbelt as the NCC's most important contribution to the region, followed by festivals and events.





- In terms of the NCC’s performance in specific roles, residents continue to be most positive about the job the Commission is doing to organize events that animate the Capital (86% excellent or good ratings), develop federal government property (63%) and promote the Capital Region across Canada (62%).
- 80% of residents who have had direct contact with NCC staff or officials say they are satisfied with this experience, with 40% of this group indicating they are “very satisfied” (up from 32% in 2002).

## 10. The NCC Website — Are We Accessible?

- The typical visitor who responded to the on-line survey of the visitor section of the NCC website ([www.canadacapital.gc.ca/index\\_e.asp](http://www.canadacapital.gc.ca/index_e.asp)) was an Ontario resident of CCR (61%); English-speaking (83%); of British (45%) or European descent (29%); between 25 and 45 years of age (60%); uses the Internet daily (92%); and makes on-line purchases (67%).

- The typical visitor who responded to the on-line survey of the corporate section of the NCC website ([www.canadacapital.gc.ca/corporate/index\\_e.asp](http://www.canadacapital.gc.ca/corporate/index_e.asp)) was an Ontario resident of CCR (56%); English-speaking (71%); of British (23%), or Canadian (16%) descent; between 16 and 44 years of age (78%); uses the Internet daily (90%); and seems slightly inclined towards making on-line purchases (57%).
- Most website visitors came to the visitor section of the NCC website to find information on events in the Capital (76.2%); whereas almost half of visitors to the corporate section of the NCC website were looking for information on career opportunities.
- Most visitors to both sections of the NCC website agreed that they were able to find the information that they were looking for (82.5% for the visitor section, and 69.4% for the corporate section); and that the information was extremely to somewhat useful (94.2% for the visitor section and 78.9% for the corporate section).

- Respondents were quite satisfied with the visitor section of the NCC website, reporting an average satisfaction score of 3.99 on a scale of one to five (where one was “not at all satisfied” and five was “completely satisfied”). As for the corporate section of the NCC website, respondents were reasonably satisfied, reporting an average satisfaction score of 3.64 out of five.
- For those respondents who indicated a preference for providing on-line feedback to the NCC, the majority of respondents preferred to do so via e-mail.
- Findings confirm that the two sections of the NCC website are comparable, if not stronger in some cases, to the other ten peer sites that were reviewed.

## 1. Canada Day 2003

The NCC offers many things to help accomplish its mission. Among these: public programs and events such as Winterlude and Canada Day; and interpretation of sites such as the Canada and the World Pavilion, Parliament Hill and Confederation Boulevard. The Canada Day celebrations represent a major undertaking for the NCC.

The findings for Canada Day 2003 are part of the Ottawa Tourism and Convention Authority's study of 21 festivals that took place in the Capital Region between May and August 2003. The data used to estimate the attendance and economic impact of participating festivals come from both an on-site intercept and telephone survey.

It is estimated that the 2003 Canada Day celebrations attracted over 300,000 people to their activities. Of the total attendance to the 2003 Canada Day celebrations, just over 40,000 were from outside the City of Ottawa, but less than 80 kilometres away. One-quarter of visitors originated

from more than 80 kilometres from the city; whereas local residents accounted for the majority of all attendees.

Most of the out-of-town visitors stated that the 2003 Canada Day celebrations accounted for 100% of their decision to visit the region, and more than half of all visitors stated that the 2003 Canada Day celebrations had very much enhanced their image of the Capital Region. As a result of the \$11.9 million in Canada Day spending, the total economic activity in Ottawa attributable to Canada Day was \$19.4 million.

## 2. Parliament Hill Visitor Study

In order to provide visitors with an opportunity to learn about Parliament Hill, the NCC and the Library of Parliament developed a new thematic framework for outdoor activity and event programming following a 1993 visitor survey. This current research is an assessment of the effectiveness of the programming in meeting the needs and expectations of visitors to the Hill. In



addition to developing a profile of visitors to the Hill, the research addressed key issues: measuring program impact and perceived meaning of programs, visitor satisfaction, and factors affecting visitation practices.

The largest group of visitors to Parliament Hill were Canadian visitors, residents of Ontario and Quebec, who were making their first visit to Parliament Hill. The majority of visitors to the Hill had their expectations met.

Visiting Parliament Hill and CCR had a significant and lasting impact on Canadians. A visit to the Capital helped to instill a sense of pride in a majority of Canadian visitors. Furthermore, a visit to Parliament Hill had a significant impact on an overall visit to CCR by Canadians, suggesting that it is an important factor in their visit to the Capital. When asked, many summer visitors replied, without prompting, that they felt Parliament Hill symbolized Canadian heritage, or law and order. A visit to Parliament Hill was also an educational experience for many. Visitor satisfaction, both overall, and with activities and attractions on the Hill, is high.

Most visitors arrived with certain expectations of their visit. Visitors arrived planning to participate in a number of activities: walking around the grounds, taking part in a tour, seeing buildings, and taking pictures. These were also the four most common expectations of visitors in the fall. The proportion who came expecting to learn something about Canadian history, learn about Parliament, see “where the action” takes place, and learn something about the political system of Canada was consistent from summer to fall. Parliament Hill succeeded in

meeting the expectations of visitors in both the summer and the fall, as the vast majority agreed that their expectations were mostly or completely met.

A visit to Parliament Hill was also an educational experience for many, as roughly half of Canadian visitors to the Hill in both the summer and fall learned something new during their visit. First-time visitors to Parliament Hill or CCR in the summer were even more likely to gain new knowledge from their visit (two-thirds of the visitors). Many visitors learned something about the Parliament buildings, the history of Parliament Hill, how Canadian government works, or the history of Canada.

Visitor satisfaction, both overall and with activities and attractions, is high. The vast majority of visitors in the summer were satisfied with the tours, activities and visitor information sources they encountered on Parliament Hill. The weakest area of overall satisfaction was with amenities. This trend continued among visitors in the fall.

In the summer, Canadian visitors, visitors travelling with children and visitors travelling in groups were all more likely to plan to participate in organized activities on Parliament Hill; while in the fall it was mainly Canadian and foreign visitors, large groups and first-time visitors to the site.

In both the summer and the fall, almost half felt that they missed opportunities during their visit, and that their visit to Parliament Hill was incomplete. In the summer, many did not participate in the Centre Block or East Block tour as planned; visit the Library (which was closed for renovations), or the Peace Tower; or view the Changing of the Guard. The largest disappointment among

fall visitors, when Parliament was in session, was an inability to tour Centre Block. In the summer, many visitors ran out of time to complete the activities, or they reported that public access was restricted or unavailable. In the fall, however, the main reason for missed opportunities was restricted access to the planned activity. Most visitors, from both the summer and fall, planned to return to Parliament Hill for another visit to complete the planned activities. Based on the number of visitors who were making repeat visits to Parliament Hill during their stay in CCR, it seems many visitors return to complete their visit.

### **3. Winterlude 2004**

The NCC has a mission to create pride and unity by making the Capital a meeting place for all Canadians. To this end, the NCC offers public programs such as the Canada Day celebrations and Winterlude. As one of the NCC’s core programs, Winterlude is a festival showcasing the Capital as one of the world’s premier winter destinations. In its 26th season, Winterlude took place across the Capital Region (in both Ontario and Quebec) between February 6 and 22, 2004.

Recent changes in the use of some of the venues has prompted the need for research to study the impact of these changes on participants’ satisfaction with the festival and its amenities, as well as its economic impact on the Capital Region. The primary objectives of this research are to update the research previously conducted in 2000 in terms of the level of participation in Winterlude, as well as participants’ satisfaction with the festival.

In 2004, Winterlude drew over 616,000 attendees, most of whom reside in CCR. This translates into 1.3 million visits. First-time visitors account for about one-quarter of attendees.

in newspapers and on the Internet. The Internet has become more important in delivering information about Winterlude, with more people using it in 2004 compared to 2000.



Winterlude provides a significant boost to the economic prosperity of residents, businesses, and government within CCR, as well as in other parts of Ontario and Quebec. In 2004, Winterlude total level of economic activity generated throughout Ontario and Quebec was \$151 million.

Attendees are satisfied overall with Winterlude and 23% had their expectations exceeded. There is good recognition of the NCC as Winterlude organizer, and of Winterlude partners and sponsors. Attendees recalled seeing Winterlude advertisements on television,

#### **4. Christmas Lights 2003**

One way the NCC fulfills its mission and mandate of building the Capital Region as a source of pride and unity for Canadians is by overseeing the Christmas Lights Across Canada illumination ceremony on Parliament Hill. The NCC set out to obtain feedback from ceremony attendees on December 4, 2003, the night of the event. The objectives of the survey included determining future strategic orientations for the programming of the opening

ceremony by identifying who attends the event, and determining whether or not attendees' expectations were met.

Almost all ceremony attendees were Ontario residents of CCR (64%). In general, the principal factor influencing the decision to attend was "to see the show itself." The two principal sources from which attendees first heard about the ceremony were friends, and local news on television or radio. Most respondents identified the NCC as the organizer of the Christmas Lights Across Canada opening ceremony on Parliament Hill and one-quarter of attendees correctly identified Canada Post as the sponsor of the 2003 event.

Those interviewed following the ceremony expressed a high level of satisfaction with the event. The specific elements that received the highest satisfaction ratings were the Christmas songs and the celebrity artist performance.

The great majority of attendees who are residents of Canada indicated that the event increased their sense of pride in the Capital and most said it increased their pride in being Canadian. Two-thirds also indicated that attending the ceremony increased their sense of unity with other regions of Canada.

#### **5. Fall Rhapsody 2003**

Every year in October, Fall Rhapsody, through a program of exhibits and activities, encourages Canadians to increase their knowledge and appreciation of autumn traditions as a fundamental part of our culture. In order to better understand and manage vehicle traffic during peak periods and gather intelligence regarding

visitor satisfaction, the NCC conducted various initiatives to gather information on Fall Rhapsody.

The majority of visitors to Gatineau Park during Fall Rhapsody were from the local region with more than 45% residing in Ottawa, 27% in Gatineau, and just over 18% visiting from outside the Capital Region. Most visitors travelled to the Park by car, SUV, or truck, and had four or more passengers in their vehicle. The most-visited sites were the Champlain, Huron and Étienne-Brûlé lookouts. Respondents expressed high levels of satisfaction with their trip to the Park.

Findings indicate that respondents express a preference for leaving their car in a parking lot and using a shuttle bus to commute to the Park instead of possibly closing the Parkways. If a shuttle-bus service were implemented, a large majority of those surveyed prefer to be picked up in Gatineau Park instead of a downtown location.

In 2003, car traffic was down during the first and third weekends of Fall Rhapsody compared to 2002. However, the increase in overall car traffic during the second week compared to the previous year, was probably related to the warm temperatures.

Results from Decima's 2003 Ottawa metroVox are similar to those of 2002. Roughly the same proportion of respondents visited the Parkways in October of 2002 (26%) compared to October 2003 (23%). Of those who claimed to have visited the Parkways during the month of October 2003, 95% said they enjoyed the drive somewhat (24%) or very much (71%). Of the respondents who did not enjoy their time on the Parkways in 2002 and 2003, most claimed that traffic and

road congestion hindered their enjoyment. Respondents enjoyed most the beautiful countryside and natural scenery during their drive. If the Parkways were to be closed to private motorized traffic during Fall Rhapsody, most respondents prefer the option of leaving their car in a parking lot and travelling to the Park via shuttle bus, as well as having designated parking spots inside Gatineau Park where they could access the shuttle bus.

## **6. Canada and the World Pavilion Visitor Survey**

To help achieve the NCC's mandate to create a meaningful Capital for all Canadians and create a feeling of pride, the Canada and the World Pavilion was built to promote the contributions of hundreds of Canadians who have distinguished themselves on the international stage.

As part of the Performance Management Framework, research is needed on visitors' feedback on their experiences visiting the Canada and the World Pavilion (the Pavilion). The objectives of this study: gauging visitor satisfaction with the Pavilion; determining if and how the Pavilion contributes towards visitors learning about Canada and the role Canadians play internationally; assessing the impact of a Pavilion visit on perceptions of and pride toward Canada; determining the level of visitors' awareness of the NCC's role in managing the Pavilion; and developing a socio-demographic profile of visitors to the Pavilion.

Findings show that visitors, half of whom are residents of CCR, were generally satisfied with those service features they felt to be important. Almost all visitors

expressed high levels of satisfaction with their visit to the Pavilion. They seem to be getting what they want and expect.

While at the Pavilion, the most popular activities were viewing the main exhibits (91%), and spending time in the park, or seeing Rideau Falls (58%). In terms of specific exhibits, adults were most interested in the Medical Science display (21%). Those accompanied by children reported that the most popular exhibit with their kids was Sports (16%).

The great majority of visitors agreed that they learned something new at the Pavilion about Canada's contribution to the world. Furthermore, most visitors said their opinion of Canada's international role had improved due to their visit. Among all Canadian visitors to the Pavilion, about half said their visit to the Pavilion increased their sense of pride in being Canadian.

Among all Canadians, there was also no clear consensus on the specific impact of their Pavilion visit, with about half (52%) saying it increased their feeling of pride about being Canadian and a similar proportion (45%) saying there was no change in their sense of pride. The Humanitarian Aid and the Medical Science displays were most likely to be identified as the exhibits that most influenced visitors' sense of Canadian pride.

In terms of the local telephone survey, awareness of the Pavilion among CCR residents was high. In fact, compared to 2002, awareness in 2004 has almost doubled. Of the residents who were aware of the Pavilion, a small proportion said that they had visited within the past year. Newspapers are still the primary source of information about the Pavilion.

Although awareness of the Pavilion has generally increased, 56% of residents lacked familiarity with the attraction's programming (up from 43% in 2002). Of the residents who were aware of the Pavilion but who had not yet visited, the top reasons given were the fact that they had not yet had time, and that they did not know enough about it. Consistent with the results from previous years, a small proportion of CCR residents have said that they are planning to visit.

## 7. Confederation Boulevard Pedestrian Orientation Tools and Interpretation Panels

As part of the NCC's mission to help visitors discover the institutions, heritage and symbols of the Capital Region, a system of signs and maps is in place to help visitors find their way along Confederation Boulevard, the Capital's ceremonial route.

The NCC set out to evaluate the use and the effectiveness of both the bronze map models and the interpretation panels that are situated along Confederation Boulevard. The objectives of the research were to find out how pedestrians orient themselves when visiting a city and what tools they use; who uses the map models and interpretation panels; how the map models and panels are used; what draws people to these tools; and if the tools are deemed to be useful by users. Findings from this research will be used as baseline data for Phase Two of the Interpretation and Orientation Tools study.

In general, the map models and interpretation panels are evaluated positively by users, and are found



to be interesting, helpful, and attractive. The surveys reveal that these tools are used more by visitors to the region than by local residents.

Perhaps not surprisingly, visitors to the region spend more time at the map models and interpretation panels than local residents do; and users in groups also spend more time than those who are alone.

Map-model users think that the information presented is useful, because it provides a sense of the downtown and its geography, and it helps people find their way. Most users of the interpretation panels say they learned something from them. While slightly more

than half of the map-model users think there should be more map models or other orientation tools around the city, almost all panel users say the panels enhanced their visit to the Capital and that there should be more of them.

Findings indicate that most users found their way easily around the Capital. However, the majority of users of these way-finding tools would like to see more map models and panels around the Capital. This appears to be a result of the tools' social and aesthetic appeal, rather than out of necessity. That is, users like the look of the tools and use them as a forum for discussion.



## 8. Capital Infocentre User Survey

The NCC's mission is to communicate Canada to Canadians through the Capital Region. The Capital Infocentre (CIC) is a unique visitor-orientation centre that introduces visitors to Canada's Capital, its national symbols and treasures. It also provides them with products and services that will enable them to have a positive experience in the Capital Region.

The NCC is currently exploring several options to enhance the CIC and/or reorient its present programs and services. This study was designed to draw upon visitors' past travel experiences, and determine their needs and expectations of a visitor centre serving a capital city.

Findings show that most CIC users are visitors from other parts of Canada outside the CCR. Most CIC users are either seeking

information on the attractions and activities in the area; or are looking for assistance with orientation, including finding out where things are, obtaining maps and directions. Perhaps not surprisingly, the majority of those seeking to get oriented are visitors to the region.

The great majority of CIC users expressed high levels of overall satisfaction with the CIC. The survey results reveal that users are getting what they need. The research points to a need for satellite centres at different locations throughout the Capital Region, including on the outskirts; and the provision of more information, maps, and orientation tools at additional locations to improve visitors' trips to the Capital.

Among the individual services offered, the personalized service at the front counter and the map-model exhibit are deemed most important by users; and

satisfaction with these services is high. Other services, such as the boutique, upstairs exhibit and video, were unknown to a majority of CIC users. The accommodation-reservation desk was considered important by almost half (46%) of CIC users.

About two-thirds of CIC users who were visiting from an area of Canada outside of CCR indicated that they had learned something about Canada's Capital while at the CIC. The same proportion said that their sense of pride in being Canadian increased because of their visit to Canada's Capital.

## 9. NCC Public Accountability Survey

The NCC consults with a broad range of stakeholders both nationally and across the Capital Region who may have an interest in the various activities covered under the NCC's mandate.

Among these stakeholders, CCR residents form a key constituency, both as clients or users of NCC venues and activities, and as citizens with an interest in planning and development decisions within their community.

One of the ways in which the NCC solicits input from CCR residents is through public-opinion research. This research provides an established and systematic basis for ensuring that that the NCC captures views from all segments of the population. Since 2000, the NCC has been conducting public opinion research on an ongoing basis, to gauge residents' awareness and attitudes about a number of key issues pertaining to the NCC and its role in the community.

Findings from a fourth wave of this research program show that



the NCC continues to be well regarded by a strong majority of residents of CCR and residents are very positive about the quality of life in the Capital Region. Most respondents express a clear sense of pride in living in the Capital.

As before, the public is most likely to value the region for its parks, recreational opportunities and cultural amenities, all of which figure prominently in the NCC's mandate and areas of activity.

Traffic and road congestion continue to be the most prominent concerns among CCR residents in terms of affecting their personal quality of life. By comparison, land-use planning and green-space preservation do not register as top-of-mind concerns among the general public.

Close to four out of 10 residents are able to correctly identify the NCC's mandate without prompting; almost all respondents stated they are aware of the NCC when specifically prompted.

The public's general impression of the NCC remains positive and the majority of residents believe they personally benefit from the NCC's presence in the community.

The public's assessment of the NCC's performance varies significantly across specific aspects of its mandate, but residents continue to be most positive about the job being done to organize events that animate the Capital.

The 2003 survey of public opinion shows that the public's awareness of, and attitudes toward the NCC have changed very little over the past 12 months. The NCC continues to be well regarded by a strong majority of residents of CCR, mostly because of the contribution they see it making to the region's quality of life in the form of green spaces, recreational

opportunities and cultural events that animate the Capital. The NCC's current public image remains strong for a public-sector organization, and despite controversies around specific policy and development activities, the NCC enjoys a broad base of public support for its overall role in the community.

This strong foundation notwithstanding, the survey reveals the NCC has made no measurable progress over the past year in building upon the public's limited awareness of its specific roles and responsibilities. As well, residents continue to be divided on how effectively the NCC works with local municipalities and consults with the public. These areas seem to remain the principal challenges facing the NCC in its communications and outreach initiatives over the coming years.

## 10. NCC Web Evaluation Survey

In late 2002, the NCC undertook a review of its on-line initiatives vis-à-vis the NCC's Corporate Web Technology Strategy. The ultimate goal of the evaluation was to determine the extent to which the original strategy is being realized and to help prioritize future steps.

The typical visitor who responded to the on-line survey of the visitor section of the NCC website ([www.canadascapital.gc.ca/index\\_e.asp](http://www.canadascapital.gc.ca/index_e.asp)) can be described as an Ontario resident of CCR (61%); English-speaking (83%); of British (45%), European (29%), Canadian (26%) or French (24%) descent; between 25 and 45 years of age (60%); slightly more likely to be female (59%); has at least some post-secondary education (92%);

works in a professional occupation (31%); uses the Internet daily (92%); and makes on-line purchases (67%). Most of these visitors came to find information on events in the Capital (76.2%).

The typical visitor who responded to the on-line survey of the corporate section of the NCC website ([www.canadascapital.gc.ca/corporate/index\\_e.asp](http://www.canadascapital.gc.ca/corporate/index_e.asp)) can be described as an Ontario resident of CCR (56%); English-speaking (71%); of British (23%), Canadian (16%) or French (16%) descent; between 16 and 44 years of age (78%); slightly more likely to be female (56%); has at least some post-secondary education (92%); works in a professional or management occupation (44%); uses the Internet daily (90%); and slightly inclined toward making on-line purchases (57%). Almost half of all corporate-section visitors surveyed were looking for information on career opportunities.

Most respondents agreed that they were able to find the information that they were looking for (82.5% for the visitor section of the NCC website, and 69.4% for the corporate section), and that the information was extremely to somewhat useful (94.2% for the visitor section of the NCC website, and 78.9% for the corporate section).

For those respondents who indicated a preference for providing on-line feedback to the NCC, the majority of respondents preferred to do so via e-mail.

Generally speaking, respondents to the on-line surveys were quite satisfied with both the visitor and corporate sections of the NCC website. In fact, the findings confirm that the website is comparable, if not stronger in some cases, to the 10 peer sites that were reviewed.

## 11. New Corporate Identifier Survey

The NCC consults with a wide range of stakeholders, both nationally and across the region, who may have an interest in the

test this identifier with members of CCR to obtain feedback on the graphics and design. As a result, GPC Research was commissioned to conduct four focus groups with residents of CCR on August 26 and August 28, 2003.

logo. Both the choice of colours and the new website design met with general approval. The designs were found to be traditional, official and conservative. Participants said that the new identifier on the brochures stood out more than the design which had been in use.

When the ring-of-leaves identifier was coupled with the NCC lettering, most participants recognized that NCC stood for the National Capital Commission but several did not recognize the logo and felt that it was out of context (i.e. needed text to have meaning).

A number of participants felt it was important to know that events held in CCR were supported by the NCC because of the assurance of quality, safety standards, and obedience of rules and regulations.



various activities covered under the NCC's mandate. Since 2000, the NCC has commissioned Decima Research Inc. to conduct public-opinion research on an ongoing basis. CCR-wide surveys were conducted in 2000, and again in 2001 and 2002. The NCC developed a new corporate identifier and was looking to

Almost all of the participants identified the ring-of-leaves symbol with the Government of Canada, however, very few linked this symbol with the NCC. Most participants were aware that the NCC stood for the National Capital Commission.

Participants in all groups initially felt very positive about the new

### ***Tell Us What You Think!***

*If you have any questions or comments about this report, please contact Yves Néron (613) 239-5419 or by e-mail at [yneron@ncc-ccn.ca](mailto:yneron@ncc-ccn.ca).*

