

National Capital
Commission

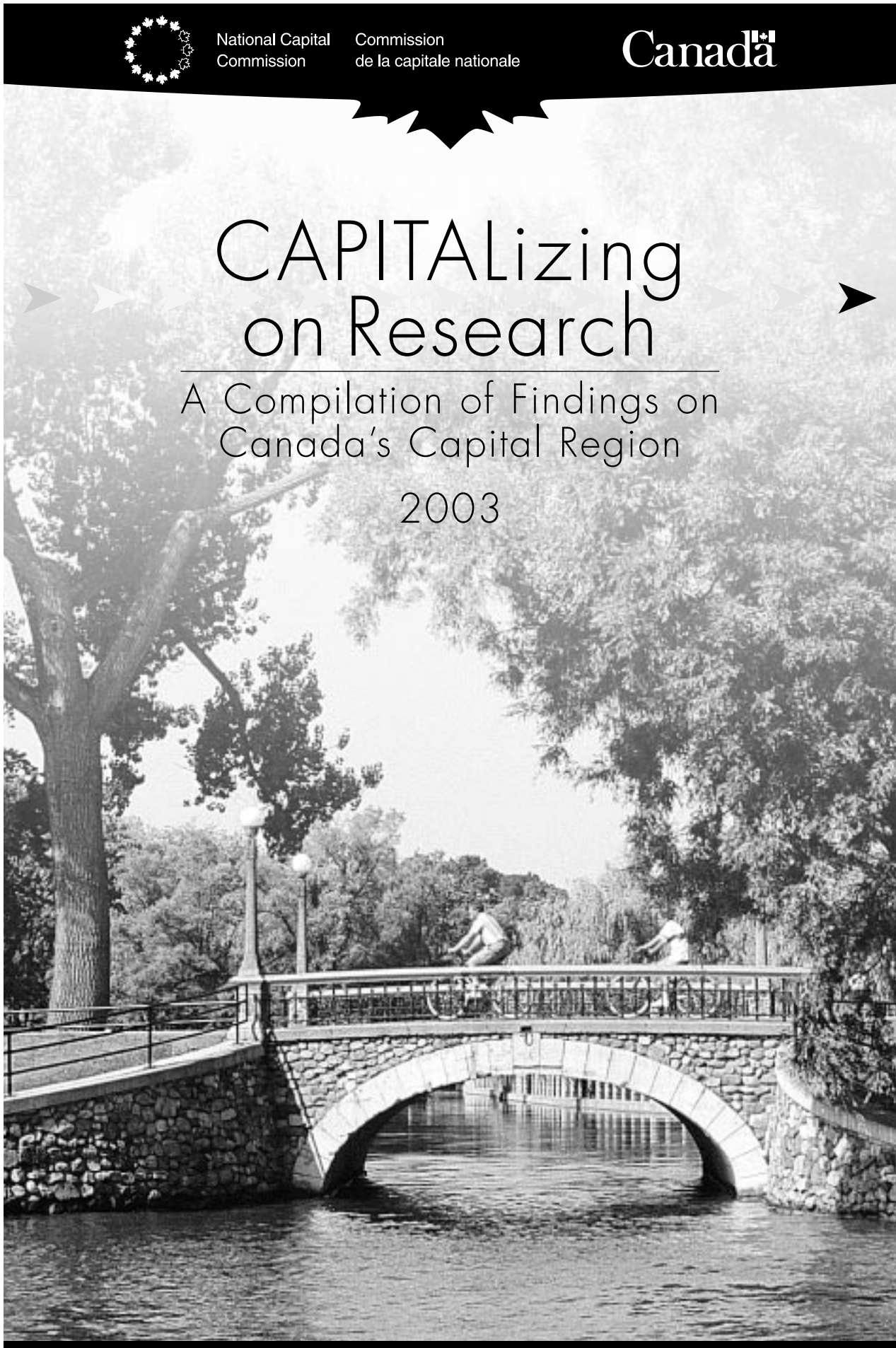
Commission
de la capitale nationale

Canada

CAPITALizing on Research

A Compilation of Findings on
Canada's Capital Region

2003






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National Capital Commission
Ottawa, Canada
September 2003



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 provides a fascinating and useful snapshot of the human face of the Capital Region — including both residents and visitors. The information was gleaned, in 2002 and 2003, from the following seven studies:

- 1. National Perceptions of the Capital*
- 2. NCC Public Image Survey of CCR Residents*
- 3. Juno Awards National Survey*
- 4. Canada and the World Pavilion*
- 5. The Green Capital (Module III)*
- 6. Capital Pathway and Vincent Massey Park*
- 7. Rideau Canal Skateway User Survey*



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

The mandate of the National Capital Commission (NCC) is to foster pride and build a great capital for 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 — with the support of the region's business, tourism and cultural sectors.

Each year, the NCC launches studies on various topics in order to meet the changing needs of our social, economic and cultural environment. In the spirit of cooperation, we want to share with you once again this year a summary of some of the NCC's research conducted in 2002–03: *CAPITALizing on Research*.

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



Marcel Beaudry
Chairman

Canada's Capital Region at a Glance

Population

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

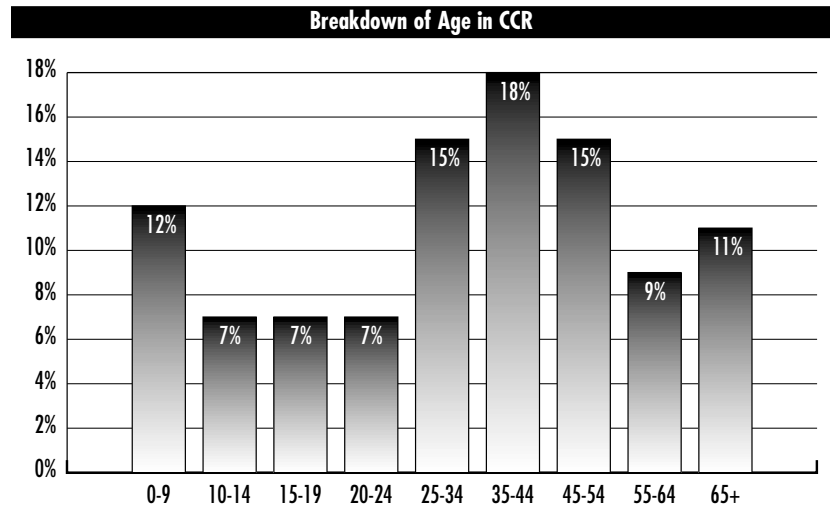
1996	2001	2006
998,718*	1,063,664	1,186,981
	+6.5%	+11.6%

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

CCR's land area: 5318.36 square kilometres

The following data is from the 2001 census:

Age



Gender

Male	Female
49%	51%

Diversity

	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.

** Persons who, at the time of the census, held a student or employment authorization or minister's permit, or who were refugee claimants (as well as family members living with them).

Profile of immigrant population

Total number of immigrants living in Canada's Capital Region:
185,010

Place of Birth	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 CCR 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 sales and rentals	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
All industries	585,930
Other (non applicable)	9,015
Total labour force	594,945

Income

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

\$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 a population 15 years old or over)

Less than Grade 9	52,045 (6%)
Grades 9 to 13	139,485 (17%)
High school graduation certificate only	110,600 (13%)
Some postsecondary education	99,220 (12%)
Trades certificate/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%)

Canadians at a Glance

Population

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

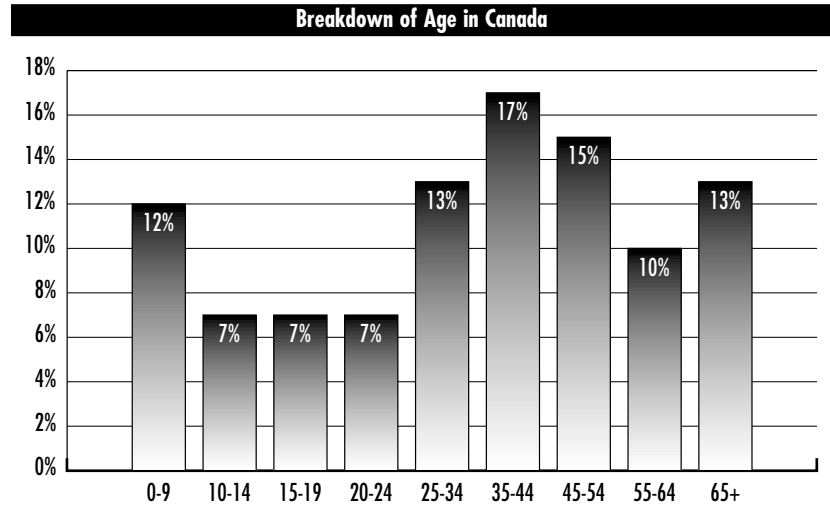
1996	2001	2006
28,846,761*	30,007,094	32,228,600
	+4.0%	+7.4%

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

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

(The following data is from the 2001 census.)

Age



Gender

Male	Female
49%	51%

Diversity

	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.

** Persons who, at the time of the census, held a student or employment authorization or minister's permit, or who were refugee claimants (as well as family members living with them).

Profile of immigrant population

Total number of immigrants: 5,448,480

Place of Birth	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 sales and rentals	259,360
Mining and oil and gas extraction	169,970
Utilities	118,790
Management of companies and enterprises	15,320
All industries	15,576,565
Other (non-applicable)	295,505
Total labour force	15,872,070

Income

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

\$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 a population 15 years old or over)

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 postsecondary education	2,590,165 (11%)
Trades certificate/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%)

Past projections on the growth of Canada's population have not been realized. In fact, population growth has slowed to an all-time low. For the first time in 100 years, Canada's growth rate is slower than that of the United States. Canada's population grew by 1,160,000 (a 4% increase) since the 1996 census, which is the lowest growth rate in Canadian history. This is being attributed primarily to the low birth rate. It is being said that in order to accelerate the growth rate, Canada will have to increase its immigration every year.

Nationally, there has been a move of the population to urban centres. Of the total population, 80% lives in urban centres. Canada is becoming a nation of large metropolitan areas. In Canada's Capital Region, there has been a 6.5% increase in the population, to 1,064,000. As a result, the region retained its 1996 rank as the fourth largest metropolitan area in Canada. This growth is seen as the result of a mix of internal and international migration, as well as an increase in the local birth rate.

In-Depth Data on Canadians

Marital status, common-law status, families, dwellings and households

- The proportion of “traditional” families — mom, dad and kids — continues to decline, whereas families with no children at home are increasing.
- An increasing proportion of couples are living common-law. Common-law families accounted for 14% of all families in 2001, up from 6% in 1981. More children are living with common-law parents.
- A total of 34,200 same-sex common-law couples were counted in Canada, representing 0.5% of all couples in the country. More same-sex couples live in Canada’s Capital Region (0.9% of CCR’s population) than in any other region in the country.
- The size of households has dropped in the last two decades, as fewer people live in large households and more people live alone. In 2001, there were about as many one-person households as there were households with four or more people.
- The census indicated a growing trend among young adults to remain in their parents’ home. About 41% of the 3.8 million young adults aged 20 to 29 lived with their parents in 2001, up from 27% in 1981.
- More people aged 65 and over are living with a spouse, with adult children or alone, and fewer are living in health care institutions. In 2001, 35% of senior women and 61% of senior men lived with

a spouse or partner (and no children).

Composition of Canada’s language groups and migration patterns

- Canada is becoming a more and more multilingual society in the wake of increasing immigration by people whose mother tongue is neither English nor French.
- In 2001, almost 5,335,000 individuals, about one out of every six people, were allophones (they reported having a mother tongue other than English or French). This was up 12.5% from 1996, three times the growth rate of 4.0% for the population as a whole.
- Chinese is Canada’s third most common mother tongue. Almost 872,400 people reported Chinese as their mother tongue, up 17.9% from 1996. They accounted for 2.9% of the total population of Canada, compared with 2.6% five years earlier.
- Just over 5.2 million people reported that they were bilingual, compared with more than 4.8 million five years earlier, an 8.1% increase. In 2001, bilingual people represented 17.7% of the population, up from 17.0% in 1996.
- From 1996 to 2001, about 11,710,300 people aged five and over changed residence. The overall rate at which Canada’s population moved during this five-year period, while significant, declined to its lowest level in more than two decades. Movers represented 41.9% of the



total population aged five and over in 2001, down from 43.3% in 1996 and down sharply from 46.7% in 1991.

- By far, the largest net gain from migration was the 119,400 net gain that occurred in the booming, oil-rich province of Alberta. Some 242,200 people moved into Alberta, and 122,800 moved out.

Canada's immigration and ethnic origin

- The proportion of Canada's population that was born outside the country has reached its highest level in 70 years, according to new data from the 2001 census.
- As of May 15, 2001, 5.4 million people, or 18.4% of the total population, were born outside the country. In 1996, the proportion was 17.4%.
- For the first 60 years of the past century, European nations such as the United Kingdom, Italy, Germany and the Netherlands, as well as the United States, were the primary sources of immigrants to Canada. Today, immigrants are most likely to be from Asian countries.
- About 1.8 million people living in Canada in 2001 were immigrants who had arrived during the previous 10 years, between 1991 and May 15, 2001. They accounted for 6.2% of the total population in 2001.
- Of those who immigrated in the 1990s, 58% were born in Asia, including the Middle East; 20% in Europe; 11% in the Caribbean and Central and South America; 8% in Africa; and 3% in the United States.
- Nearly three-quarters (73%) of the immigrants who came in the 1990s lived in three census metropolitan areas: Toronto, Vancouver and Montréal.
- Canada was home to almost 4 million people who identified themselves as members of visible minority groups in 2001, accounting for 13.4% of the total population. The *Employment Equity Act* defines visible minorities as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour."
- In 2001, a total of 976,300 people identified themselves as members of at least one of three Aboriginal groups: North American Indian, Metis or Inuit. This was 22% higher than the 1996 figure of 799,000.

- People who identified themselves as Aboriginal accounted for 3.3% of the nation's total population in 2001, compared with 2.8% in 1996.

Canada's labour force activity, occupation, industry, mode of transportation and language of work

- From 1991 to 2001, the number of people in the labour force increased by 1.3 million (+9.5%) to 15.6 million. Almost half of this growth occurred in highly skilled occupations that normally require university qualifications.
- At the same time, the workforce has become much "greyer" — the average age of the labour force rose from 37.1 years in 1991 to 39.0 years in 2001.
- By the end of the 1990s, 15% of the labour force was within 10 years of retirement age. By 2011, when almost one-fifth of the baby boom generation will be at least 61 years of age, there will be a potential for shortages in certain occupations.
- Boomers — people aged 37 to 55 in 2001 — made up 47% of the labour force. Ten years from now, half of them will be 55 or over, and 18% will be over the age of 60.
- Canada has increasingly turned to immigration as a source of skills and knowledge. Census data show that immigrants who landed in Canada during the 1990s, and who were in the labour force in 2001, represented almost 70% of the total growth of the labour force over the decade.

- A gap in labour market conditions persisted between immigrants who landed between 1996 and 2000 and the Canadian-born population. In 2001, 65.8% of recent immigrants aged 25 to 44 were employed, compared with 81.8% of Canadian-born people in the same age group. The unemployment rate of recent immigrants (12.1%) was still nearly twice that of the Canadian-born population (6.4%).
- A higher proportion of recent immigrants were in highly skilled occupations. For example, recent immigrants made large gains in information technology occupations and accounted for two-fifths of the labour force growth in this field.
- Workers are no longer concentrated primarily in core municipalities, but are spreading across suburban municipalities. Many more workers are now located in these surrounding municipalities. As a result, urban dynamics, including commuting patterns, are changing.
- The number of workers in suburban municipalities has been growing at a much faster pace over the last 20 years than the number of those working in city centres.
- In 1981, about 1.8 million people worked in suburban municipalities. By 2001, this number had jumped 63% to 3.0 million. In contrast, the number of workers in the central municipalities increased only 7%, from 4.6 million in 1981 to 4.9 million in 2001.

- About 1,175,000 people reported working at home during the week before the census, compared with just over 1 million five years earlier. They made up 8% of all workers, unchanged from 1996.
- The 2001 census showed that 2.5 million Canadians reported using more than one language (French and English) at work. Outside Quebec, 67% of francophone workers used French on the job in 2001.

Canadians' earnings, level of schooling, fields of study and school attendance

- Average earnings among the more than 16.4 million people aged 15 and over who had employment income in 2000 were \$31,757 each (first time above \$30,000), up from \$29,596 in 1990 and \$29,229 in 1980.
- The number of earners in higher income brackets — those who made \$80,000 or more a year, and especially those who made \$100,000 or more — soared during the 1990s.
- In 2000, women aged 15 and over who had employment income made 64 cents for every \$1 earned by their male counterparts (the gap was smaller for younger women). In 1980, this gap was much larger, at 52 cents.
- More than 60% of people in the lowest earnings category did not have more than a high school education in 2000, while more than 60% of those in the top category had a university degree.

- Recent immigrants earned substantially less than their Canadian-born counterparts even after 10 years in the country. This was true for both immigrants with a low level of education and those with a university degree.
- 61% of people aged 25 to 34 had qualifications beyond high school. In comparison, at the time of the 1991 census, 49% of people aged 25 to 34 had post-secondary credentials.
- Education levels rose for both men and women. The proportion of university graduates among adult women (aged 25 and over) jumped from 14% in 1991 to 20% in 2001. About 18% of adult women had college credentials in 2001, up from 14% in 1991.
- The number of Canadians aged 25 and over with university, college or trade credentials grew by 2.7 million, a 39% increase and more than 2.5 times the population growth for that same age group.

- Of the 1.2-million increase in university graduates from 1991 to 2001, about 12%, or 154,000, had graduated in business and commerce. Another 11%, or 133,000, had studied engineering.

Income of Canadian families

- The median income before taxes of Canadian families, at \$55,000, remained essentially unchanged from 1990 to 2000 (after adjusting for inflation), according to new data from the 2001 census.
- In 2000, the combined income before taxes of the 10% of families with the highest incomes accounted for 28% of total family income; in 1990, they accounted for 26% of all family income.
- Based on before-tax income, an estimated 19% of children were living in low-income families in 2000.
- In 2000, the median income of lone-parent families with children aged 17 and under

was \$26,000, up 19% from \$21,800 in 1990.

Religion in Canada

- The number of Canadians who reported belonging to religions such as Islam, Hinduism, Sikhism and Buddhism has increased substantially.
- Canadians who reported that they had no religion accounted for 16% of the population in 2001, compared with 12% a decade earlier.
- In 2001, Roman Catholics were still the largest religious group, at just under 43% of the population, down from 45% in 1991.
- The proportion of Protestants, the second largest group, declined from 35% of the population to 29%.
- Combined, the two groups represented 72% of the total population in 2001, compared with 80% a decade earlier.

Some Quick Facts



1. National perceptions: does a visit to the Capital increase pride?

- Almost half of Canadians who have visited Canada's Capital Region (CCR) agree that their visit increased their level of pride in the Capital.
- 76% of Canadians agreed or strongly agreed that Canada's Capital is a source of pride for them.
- Canadians were asked what image comes to mind when they think of Canada's Capital Region. Parliament Hill was mentioned the most (43%).
- Residents from Ontario (37.8%) and Quebec (36.7%) are the most likely to have visited CCR within the past two years, while residents from British Columbia (14.8%) are the most likely to have visited more than 20 years ago.
- 31% of Canadians most recently visited CCR to see friends and family.

- Canadians tend to think that it is very important for Canada's Capital to project an image as a city of tolerance, openness, diversity and green spaces.

2. Do local residents think the NCC is doing a good job?

- More than six in 10 described their attitude towards the NCC as positive (51%) or very positive (12%).
- The public is generally positive about the NCC's performance in developing federal lands, but is divided in its assessment of the job being done in land use planning and consulting the public.
- 83% of residents believe they personally benefit from the NCC's presence in the community.
- The development and maintenance of green spaces and the Greenbelt is most widely seen as the NCC's greatest contribution to the region.

- Close to nine in 10 residents described the quality of life in CCR as excellent (33%) or good (56%).
- 86% of CCR residents expressed a clear sense of pride in living in the Capital Region.
- 36% of residents were able to correctly identify the NCC's mandate.
- 93% of residents expressed at least some awareness of the NCC when specifically prompted.

3. Did hosting the Junos influence Canadians' pride in their Capital?

- 22% of adult Canadians indicated that their perceptions of CCR had changed as a result of the Junos being held in the Capital Region, while the remainder said they had not changed.
- 33% of Canadian adults said their pride in CCR increased as a result of it hosting the Junos.
- Unprompted Canadians who knew that the 2003 Junos were held in Ottawa were more likely than others to agree that CCR is a source of pride.
- The group whose perceptions of CCR did not change in response to Ottawa hosting the Junos are likely to be residents of Manitoba, Saskatchewan or British Columbia, male, English speaking, 25 to 54 years of age, and at higher levels of socio-economic status.
- The results also show that the Junos were unlikely to change either the perceptions of CCR or the sense of pride

in CCR of those Canadians who don't consider CCR a source of Canadian pride.

- About one-quarter of Canadians — more than 6 million — aged 18 and older were aware that the 2003 Juno Awards were held in CCR.
- When asked whether CCR is a source of Canadian pride for them, almost three in four agreed or strongly agreed.
- 47% of Canadian adults are either very (23%) or somewhat (24%) likely to consider visiting CCR within the next three years.

4. Did visitors to the Canada and the World Pavilion learn something about Canada?

- 95.4% of those surveyed agreed or strongly agreed that they learned new things about Canada's contributions worldwide as a result of their visit to the Pavilion.
- 96.5% of the visitors surveyed stated that they were satisfied or very satisfied with their overall visit experience at the Pavilion.
- 92.6% of the visitors surveyed claimed that it was likely or very likely that they would recommend the Pavilion to their friends and family.
- The Pavilion reported 98,241 visits in 2002. This marked a 63% increase in attendance from the 2001 season.
- Respondents visited the Pavilion "to see what the Pavilion is all about" (51%) or "to learn more about what Canadians are doing internationally" (19.2%).

- CCR residents' awareness of the Canada and the World Pavilion remained unchanged from February 2002: 17% of CCR residents recalled seeing or hearing something about the attraction.
- Of the 17% of the respondents that were aware of the Pavilion, 16% had actually visited and 84% had not.
- The most-mentioned marketing source was still newspapers (33%).
- More than a third of the respondents who were aware of the Pavilion were unable to give details about it.
- Overall, 69% of surveyed visitors to CCR stated that they were somewhat/very likely to visit the Pavilion.

5. Do Gatineau Park users support preservation?

- The majority of visitors to Gatineau Park agreed that the NCC should take further action to preserve the Park's natural resources for future generations, but disagreed with the proposal to charge fees to visitors in order to help maintain services.
- There were 501,500 visits to the summer trails of Gatineau Park's Parkway Sector between May 15 and November 30, 2001.
- 79% of the visitors were hikers and 26.6% were families.
- The highest rate of visits for the summer trails was recorded in July (27.2%).
- Just over 85% of visitors to the trails were from CCR. Another 8.4% were from elsewhere in Quebec or Ontario.



- 49.1% of users visited the Park to participate in outdoor activities; the most-visited site was the Champlain Lookout (28.7%).
- 90.9% of those surveyed were repeat visitors, whereas 8.6% of survey participants were on their first visit.
- About 80% of visitors said they were satisfied or very satisfied with each of the 13 items that they were asked about, including site cleanliness, the Gatineau Park Visitor Centre, and the state and maintenance of the trails.
- 81.2% of visitors knew that the NCC was responsible for managing the Park.

6a. Can people find their way along the pathways?

- Almost nine users in 10 were able to easily find their way around the Capital Pathway network.
- Gap analysis suggests that priority should be given to improving the Pathway's entrance signs, identifying network access points and enhancing attraction/direction signs.
- Two-thirds of those surveyed reported being aware of the wayfinding system itself (23%) or of some of its features (44%).
- Overall, eight in 10 users were very or somewhat satisfied with the wayfinding system.
- Overall usage of the Capital Pathways peaked in August (83%) and was lowest in

November through March (ranging from 2% to 4%).

- Cycling was the most popular activity among Capital Pathway users (66%).

6b. What needs to be in Vincent Massey Park's future?

- Gap analysis suggests that priority should be given to upgrading the washroom facilities, drinking fountains and signage at the Park.
- A playground or play structure for children and additional recreation facilities were the amenities that most users said they would like to see added to Vincent Massey Park.
- The most common reasons for visiting Vincent Massey Park were picnics and barbecues (81%).

- More than nine in 10 users of Vincent Massey Park were somewhat or very satisfied overall.

7. Are Rideau Canal Skateway users satisfied?

- Almost all users said they were either very satisfied (72%) or generally satisfied (26%) overall with the Skateway.
- The Skateway received 1,078,994 visits; 76% of these visits were made outside of Winterlude and 24% were made during the three weekends of the winter festival.
- About three-quarters of Skateway users (73%) were CCR residents, while one-quarter (27%) were visitors.
- Three-quarters used the Skateway at least four times this season, including one-quarter — heavy users — who used it more than 10 times over the season.
- Most users (72%) said the main reason was to skate.
- Other than skating, the most common winter outdoor activities in which Skateway users generally participate are cross-country skiing (40%), downhill skiing (39%) and walking (35%).
- When the unprompted and prompted responses are combined, over eight in 10 (85%) users were aware that the NCC is responsible for the Skateway.
- Users were asked (without prompting) what Skateway sponsors they recalled. The top mention was the Royal Bank of Canada (33%).
- Of those aware of the contribution boxes (69%), over half (59%) indicated that they had contributed.
- Most Skateway users indicated that they hadn't heard or read anything about the Skateway, but knew about it from their own previous experience (52%).
- Users seeking information about winter activities on the Canal were most likely to use the newspaper (22%) or the NCC website (22%).

1. National Perceptions of the Capital

The National Capital Commission (NCC) plays a leadership role within the public sector, as well as with tourism organizations that share a vested interest in the promotion of Canada's Capital Region (CCR) as a tourism destination. This is achieved through the production of communication vehicles and broadcast initiatives, which serve as effective tools to promote pride and unity.

Through cooperative initiatives, NCC Marketing has built awareness and recognition in the Capital Region. NCC events and programs target the local and the "visiting friends and relatives" markets. A need for baseline data on the level of pride of visitors following a visit to CCR and local residents spearheaded this national survey.

Objectives of the survey included determining where the Capital Region stands among other Canadian cities in terms of increasing Canadians' sense of pride in their country. Also, the research findings will assist the NCC in determining the degree to which CCR is a source of pride for Canadians and which image Canada's Capital should project. Research results will guide NCC Marketing in orienting marketing initiatives on a regional and/or national scale.

Of those surveyed, 76% agreed or strongly agreed that Canada's Capital was a source of pride for them. Meanwhile, 60% of respondents thought it important for Canada's Capital to project an image of a place of tolerance, openness, and diversity. And 47% of Canadians claimed that their visit to the Capital Region increased their

pride in being Canadian to some extent or to a great extent.

2. NCC Public Image Survey of CCR Residents

In 2002, the NCC conducted a review that explored opportunities for enhancing its relations. The NCC conducted a telephone survey of CCR residents to gauge their awareness and attitudes across a number of key issues pertaining to the NCC and its role in the community. Portions of this research were updated in September 2001, shortly after the NCC's first-ever public Annual General Meeting, to identify relevant changes since the 2000 survey.

A third wave of this research program was commissioned in mid-2002 by the NCC to provide a further update on how CCR residents view the NCC. The purpose of this latest survey was to measure CCR residents' awareness of the NCC and its mandate, public attitudes about the NCC's responsibilities and performance to date, and how opinions have changed over the past two years. Another objective of the survey was to measure how awareness and attitudes differ across relevant segments of the community.

Findings indicate that the NCC is well regarded by a clear majority of residents of CCR and that residents are decidedly positive about the quality of life in the Capital Region. The public is most likely to value the region for its parks, recreational opportunities and cultural amenities.

3. Juno Awards National Survey

The NCC carries a corporate mission to build CCR as a source of pride and unity for Canadians. This includes promoting activities and events in CCR that enrich Canada's culture and society. Most recently, CCR played host to the 2003 Juno Awards.

A national telephone survey was conducted by the NCC to assess the impact of hosting the Juno Awards on Canadians' pride in and perceptions of CCR. Although not all Canadians are fans of Canadian music or followers of the Juno Awards, hosting this event was a step in the right direction for increasing Canadians' pride in their national capital.

About one-quarter of adult Canadians were aware that the 2003 Juno Awards were held in the Capital Region. When asked whether CCR is a source of pride for them, almost three in four agreed or strongly agreed. Of surveyed Canadians, 22% indicated that their perceptions of CCR had changed as a result of the Junos being held in the Capital Region; the remainder said they had not changed. Meanwhile, 33% of Canadians said their pride in CCR increased as a result of it hosting the Junos. Thus, the event appears to have had a positive impact on pride in CCR, despite the difficulties inherent in attempting to improve upon the already high proportion of Canadians who are proud of their Capital.

4. Canada and the World Pavilion

The Canada and the World Pavilion reopened for its second season of public operations



from May 10 to October 20, 2002. Crowned best new attraction in Canada by Attractions Canada, the Pavilion is a unique tourist attraction in Ottawa showcasing Canadians' accomplishments and contributions around the world. Strategic objectives of the Pavilion include contributing to the international positioning of Canada's Capital and enhancing pride among Canadians with respect to Canadian accomplishments and Canada's presence around the world.

In order to enhance the performance management of the Canada and the World Pavilion and assist in the establishment of benchmarks, many lines of evidence were utilized: a local survey was conducted to gauge residents' awareness of the Pavilion, and intercept surveys were conducted to assess whether visitors to CCR are aware of the Pavilion. Also, on-site surveys were conducted to assess visitor satisfaction with the content of the exhibits.

Nearly 97% of those who were surveyed were satisfied or very

satisfied overall with the Pavilion and just over 95% agreed that they learned something new about Canada. Of the visitors who were surveyed, 40% were residents of CCR and 60% were from out of town.

5. The Green Capital (Module III)

In 1997, the NCC undertook a series of studies focusing on the green Capital. Multi-branch efforts ensued, one of which was the establishment of a steering committee for green Capital marketing. The committee identified the need for research so that decisions would be based on concrete information.

In 1999, based on the recommendation of the marketing steering committee, the NCC began carrying out a series of studies to determine how the green spaces of CCR are used by local residents and visitors. Research objectives included creating a profile of visitors to Gatineau Park, identifying visitors' views on Park preservation, as well as measuring user satis-



faction. Module I focused on Stony Swamp and Gatineau Park, and Module II on Mer Bleue, Philippe Lake and La Pêche Lake. In the summer of 2001, the focus turned to the summer trails of Gatineau Park for Module III. The study also provided details about the level of satisfaction of visitors and their opinions on certain management proposals and activities offered in Gatineau Park. This document presents the results of the third phase of this study.

The frequency of visits to the summer trails during the period from May 15 to November 30, 2001 was high, at around 501,500 visits. There was a high level of satisfaction among visitors with site cleanliness and the state and maintenance of the trails. Consistent with findings from the previous phases of the green Capital study, most visitors agreed, when asked whether the NCC should take further action to preserve the Park's natural resources for future generations.

6. Capital Pathway and Vincent Massey Park

An important part of the work of the NCC is the management and interpretation of various green spaces in the Capital, including the Capital Pathway and the various urban parks, such as Vincent Massey Park. The Pathway is used primarily by residents of CCR between June and September for cycling and is one of the many features promoting natural landscapes and outdoor activities in the region. Vincent Massey Park is often used for gatherings such as family reunions. In summer 2002, the NCC undertook a survey of users of the Capital Pathway (as part of its evaluation of the "wayfinding system") as well as a survey of users of Vincent Massey Park (in relation to an urban redevelopment initiative).

By identifying areas of improvement, this research will influence the NCC in terms of its redevelopment priorities and will help inform management on

future resource allocation. More specifically, the research objectives for the Pathways were to determine the level of awareness of the various elements of the wayfinding system and to establish which of its aspects are functional and considered useful. Along with determining the level of user awareness and understanding of the signage system, research findings will help in identifying ways of improving the available wayfinding information, and in ascertaining which information, if any, is lacking. The findings from this survey will further assist the NCC in the implementation of the Cycling and Recreational Pathways Network Strategic Plan. Research objectives for the Park include obtaining a profile of users and gauging satisfaction with the Park's amenities and reservation system.

Two-thirds reported being familiar with the wayfinding system itself and 83% were at least somewhat satisfied with

the system. Almost nine users in 10 (89%) were able to easily find their way around the Capital Pathway network. Overall satisfaction with both the Pathway wayfinding system and Vincent Massey Park is high, as more than nine in 10 users of the Park were at least somewhat satisfied overall. A lack of signs and clarity on existing signs was an issue with both the Park and the Pathway. A playground or play structure for children and additional recreation facilities are the amenities that most users would like to see added to the Park.

7. Skateway User Survey

The Rideau Canal Skateway promotes a unique outdoor recreational skating experience on the world's longest skating rink and offers a family winter outing. In order to deal with issues such as the site capacity problem around the NAC, the transformation of Dows Lake into a gateway, the positioning of the Skateway in the marketplace and the creation of a better experience for users, service themes have been designed as a framework to guide product development and implementation.

The objectives of this research were to document user profiles, measure Skateway user satisfaction levels relative to the services provided, determine users' awareness of the organization responsible for the Skateway and establish the frequency of contributions.

About three-quarters of Skateway users were CCR residents, while one-quarter were visitors. The average Skateway user was female (53%), between the ages of 25 and 44 (48%), and



accompanied by other people (80%). The great majority of users indicated that they were generally or very satisfied overall with the Skateway. When the unprompted and prompted responses were combined, over eight in 10 users were aware that the NCC is responsible for the Skateway.

1. National Perceptions of the Capital

The National Capital Commission (NCC) plays a leadership role with public sectors, as well as with tourism organizations that share a vested interest in the promotion of Canada's Capital Region (CCR) as a tourism destination. This is achieved through the production of communication vehicles and broadcast initiatives, which serve as effective tools to promote pride and unity. Through cooperative initiatives, NCC Marketing has built awareness and recognition in the Capital Region. NCC events and programs target the local and the "visiting friends and relatives" markets. A need for baseline data on the level of pride of visitors to CCR (following a visit) and local residents spearheaded this national survey.

When Canadians were asked which Canadian city, besides their own, came to mind that increased their sense of pride in Canada, Ottawa was the most popular answer. Canadians were generally more likely to mention cities within their own region first, which is evidence of regional pride. Exceptions were the Atlantic region, Manitoba and Saskatchewan, in which everyone mentioned Ottawa first. In fact, 56% agreed and 20% strongly agreed that Canada's Capital was a source of Canadian pride for them. Parliament Hill was the image that came to mind the most when Canadians thought of CCR.

Almost half of Canadians who visited CCR stated that their level of pride increased. One-third of Canadians visited CCR to see friends and relatives. There was an even split between

the respondents who were somewhat likely to visit CCR again within the next two or three years and the respondents who were not at all likely to revisit the Capital. The most popular reasons for the unlikelihood of Canadians visiting CCR within the next few years were lack of interest and the perception that it was too expensive. The survey presented respondents with a set of five statements and asked them to rate how important each one was to them. The majority of Canadians surveyed thought it was very important for Canada's Capital to project an image as a place of tolerance, openness and diversity (60%), a city of green spaces (55%) and a cultural centre (50%).

2. NCC Public Image Survey of CCR Residents

Decima Research designed a survey to gauge CCR residents' awareness of the NCC, its mandate and public attitudes about the NCC's responsibilities and performance to date. The survey was based on telephone interviews with a representative sample of 602 CCR residents (18 years or older) and was conducted between July 10 and 14, 2002. This latest survey of public opinion reveals that the NCC is well regarded by a clear majority of residents of CCR. Residents value the NCC 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.

Residents are decidedly positive about the quality of life in CCR, with close to nine in 10 describing it as excellent (33%)

or good (56%). 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 is the number one quality of life concern among CCR residents in terms of affecting their personal quality of life.

Public awareness of the NCC's overall role in the region has declined over the past two years, with little more than one in three (36%) residents now able to correctly identify the NCC's mandate. The NCC maintains strong name recognition, with more than nine in 10 (93%) residents expressing at least some awareness of the NCC when specifically prompted.

The public holds a generally positive overall impression of the NCC, with more than six in 10 describing their attitude as very positive (12%) or positive (51%). Residents hold a positive view of the NCC largely because of the benefits they see it provides, both to the region and to their own quality of life. The public is generally positive about the NCC's performance in developing federal lands, but is divided in its assessment of the job being done in land use planning and consulting the public.

The development and maintenance of green spaces and the Greenbelt is most widely seen as the NCC's greatest contribution to the region. Of residents, 83% believe they personally benefit from the NCC's presence in the community. Residents are most positive about the job being done to organize events that animate the Capital (87%

excellent or good ratings). By comparison, fewer than half (48%) give the NCC positive marks for its performance in planning land use for the federal government in the region, and this rating has declined from 58% two years ago. The public is most divided on the job the NCC is doing to consult the public on planning and development issues relating to federal land and property. Less than three in 10 (28%) give excellent or good ratings in this area.

3. Juno Awards National Survey

Within its general mandate, the NCC carries a corporate mission to build the Capital Region as a source of pride and unity for Canadians. This includes promoting activities and events in CCR that enrich Canada's culture and society. Most recently, CCR played host to the 2003 Juno Awards.

The NCC commissioned Decima Research Inc. to assess the impact of CCR hosting the Juno Awards on Canadians' pride in and perceptions of the Capital Region. The survey was based on telephone interviews with a representative sample of 2,011 Canadians (18 years or older) conducted between April 10 and 20, 2003. A sample of this size can be expected to provide results accurate to within plus or minus 2.2% (in 95 out of 100 samples).

The results from this public opinion survey revealed that Canadians feel a sense of pride in their Capital, and that knowing that the Juno Awards were held in Ottawa increased this sense of pride for some. However, there was also a

group whose overall perceptions and sense of pride in CCR did not change. This is not surprising, however, for two reasons: (1) given the already high level of pride in CCR, it will not be easy to increase those levels; and (2) no single event will appeal to all Canadians.

A significant change in perceptions will require a longer-term and sustained commitment, involving different sorts of activities and/or programs that will appeal to different groups of Canadians. Although not all Canadians are fans of Canadian music or followers of the Juno Awards, hosting this event was a positive step toward increasing Canadians' pride in their national capital.

About one-quarter of respondents — representing more than 6 million Canadians aged 18 and older — were aware that the 2003 Juno Awards were held in the Capital Region. Awareness of Ottawa's hosting duties was highest in Ontario and lowest among residents of British Columbia and Quebec.

Most Canadians feel a sense of pride in the Capital Region. When asked whether CCR is a source of Canadian pride for them, almost three in four agreed or strongly agreed. Those who disagreed that CCR is a source of pride were more likely to be residents of Quebec or the western provinces, French speaking, male, and to have begun or completed a college education.

Canadians who knew (without being prompted) that the 2003 Junos were held in Ottawa were more likely than others to agree that CCR is a source of Canadian pride, whereas one in three Canadians (representing more

than 8 million Canadian adults) said their pride in CCR increased as a result of it hosting the Junos. Thus, the event appears to have had a positive impact on pride in CCR, despite the difficulties inherent in attempting to improve upon the already high proportion of Canadians who are proud of their Capital (almost three-quarters agreed or strongly agreed that CCR is a source of Canadian pride for them). The group who said that their sense of pride in CCR did not change was most likely to be from Alberta or British Columbia, male, 25 to 54 years of age, with higher levels of income and education.

Almost half of Canadians (47 percent, or 11.4 million Canadian adults) were either very (23%) or somewhat (24%) likely to consider visiting CCR within the next three years. Canadians who were less likely to visit CCR in the next three years also tended to disagree that their sense of pride increased because the Junos were held in the Capital Region.

Canadians were asked whether their overall perceptions of CCR changed as a result of Ottawa hosting the 2003 Junos. Almost one in four (representing approximately 5.4 million adult Canadians) indicated that their perceptions had changed, while the remainder said they had not changed.

For those whose perceptions of CCR did change, the change was mostly positive. Not surprisingly, another 45 percent were unable to explain how their perceptions had changed. This is likely because long-held perceptions do not tend to change in response to a single event, but rather change

gradually with time, making it difficult for people to pinpoint the source of this change.

One event is unlikely to appeal to all Canadians, and the implication is that bringing about a major change in perceptions will require sustained effort that includes programs of interest to large and varied groups of Canadians. Increasing the already high levels of pride felt by Canadians about their national capital may also require effort that is specifically directed toward those groups who are currently the least proud.

4. Canada and the World Pavilion

The Canada and the World Pavilion reopened for its highly successful second season of public operations from May 10 to October 20, 2002. The Pavilion provides an opportunity for visitors to gain valuable insight into Canadians' many accomplishments on the international scene. In order to enhance the performance management of the Pavilion and assist in the establishment of benchmarks, an evaluation framework was developed in consultation with the Pavilion stakeholders. The framework builds on a Balanced Scorecard model, which addresses finances, target audiences, processes and the capability of a program.

Measurement mechanisms were put in place, and five lines of evidence were produced. Attendance counts were conducted every day, and a survey was administered randomly to every 10th visitor during the months of July and August. A telephone survey was conducted to gauge residents' awareness of the Pavilion and intercept

surveys were conducted to assess whether visitors to CCR were aware of the Pavilion. Finally, a guest book was on display throughout the entire season where guests could elaborate on how they felt about their visiting experience.

The on-site survey yielded 504 completed questionnaires. The total number of visits between May 10 and October 20 was 98,241, with the most visits occurring in May and July. Of the visitors, 60% were residents of CCR, between the ages of 35 and 54, and more than half had at least a university degree. The majority of the surveyed visitors stated that they were satisfied or very satisfied with their visit overall and that they learned new information about Canada's contributions worldwide; 92.6% claimed that they were likely or very likely to recommend the Pavilion to friends or family.

A local telephone survey was administered from September 11 through 18, 2002, with a sample of 503 CCR residents. Awareness of the Pavilion remained unchanged from February 2002: 17% of CCR residents recalled seeing or hearing something about the attraction. The most mentioned marketing source was still newspapers. Of the 17% of the respondents who were aware of the Pavilion, 16% had actually visited and 84% had not. Awareness among French-speaking residents of CCR increased from 17.5% in February to 20.4% in September.

In order to assess CCR visitors' level of awareness of the Pavilion, a survey with a sample size of 1,225 visitors to the Capital was administered by the Ottawa



Tourism and Convention Authority from June 1 until August 27. Visitors were asked randomly whether they recalled seeing or hearing anything about this new attraction. In total, 18% of the respondents recalled seeing or hearing about the Pavilion. Awareness of the Pavilion is relatively higher among Canadian tourists than American and other tourists: 22% of Canadian respondents recalled seeing or hearing about the Pavilion, and 74% of Canadian visitors stated that they were very or somewhat likely to visit the Pavilion. Overall, 69% of the respondents stated that they were very or somewhat likely to visit the attraction. Of the respondents that were aware of the Pavilion, only 15% had visited it before; 86% of visitors to CCR had not visited the Pavilion before — however, 30% were planning to visit.

5. The Green Capital (Module III)

Since 1999, the NCC has been carrying out a series of studies to

determine how green spaces in CCR are used. Research objectives included creating a profile of visitors, measuring visitor satisfaction and identifying the values of visitors as they relate to Park preservation. Sodem Recherche et Développement, the agent for the study on summer trail visitors in the Parkway Sector of Gatineau Park, used face-to-face interviews with visitors between May 15 and November 30, 2001. A total of 383 questionnaires were filled out. The upper margin of error is plus or minus 4.8%. Direct observation of the number of visitors was also used to compile the required information.

The number of visits to the summer trails during the period from May 15 to November 30, 2001 was determined to be 501,500, and 79% of the visitors were hikers. The majority of visitors were males between the ages of 25 and 44, originating from CCR. Just over a quarter of visitors were families and the most-visited site was the Champlain Lookout. More than 90% of those surveyed

were repeat visitors to the Park and only 8.6% were actually on their first visit.

About 80% of visitors said they were satisfied or very satisfied with each of the 13 items that they were asked about (including site cleanliness, the Gatineau Park Visitor Centre, and the state and maintenance of the trails). In terms of the level of knowledge, 79.1% of the surveyed visitors became aware of Gatineau Park sites and activities as a result of a previous visit, whereas 30% gained their knowledge through word of mouth. Of survey participants, 81.2% could successfully identify the NCC as being responsible for the management of Gatineau Park.

The majority of those surveyed agreed when asked if the NCC should take further action to preserve the Park's natural resources for future generations. In fact, on a scale of 1 to 4 (1 being "strongly disagree" and 4 being "strongly agree"), the average surveyed visitor answered with 3.24. Visitors answered with 3.21 when asked

whether the NCC should limit or prohibit access to fragile areas of the Park. Most visitors disagreed when asked whether the NCC should allow tasteful promotional signs in the Park to help maintain services (1.97) and whether the NCC should charge fees to more visitors in order to help maintain services (1.99).

6. Capital Pathway and Vincent Massey Park

The NCC conducted a survey of users of the Capital Pathway as part of its evaluation of the “wayfinding system” to gauge user satisfaction and awareness of the system; it also surveyed users of Vincent Massey Park.

The survey of Capital Pathway users was conducted on-site from August 10 through 25, 2002. A total of 532 interviews were completed.

Two distinct audiences were identified for the Vincent Massey Park survey. Drop-by users of the Park were surveyed on-site, while those who had made a reservation for one of the group areas were surveyed by telephone. The on-site fieldwork was conducted over three weekends between August 10 and 25, 2002, and the telephone survey was conducted between August 8 and September 13, 2002. On-site surveys were completed by 114 drop-by users at Vincent Massey Park, while 90 by-reservation users completed the telephone survey.

The Capital Pathway is used predominantly by residents of Canada’s Capital Region (CCR), primarily between June and September. The Pathway also appears to be used by more men than women. Cycling is



the most popular activity for Pathway users, followed by walking, in-line skating, running and cross-country skiing.

Almost nine users in 10 are easily able to find their way around the Capital Pathway network, and this familiarity increases with the frequency of use. About one-quarter of users were aware of the wayfinding system, and another four in 10 had seen some of its features. Depending on the location of interviewing, between one-quarter and two-thirds of users were able to correctly identify the name of the pathway they were using. The Lac-Leamy Pathway was correctly identified by the highest proportion, followed by the Ottawa River Pathway.

Overall satisfaction with the Capital Pathway wayfinding

system is high. Eight in 10 users were either very satisfied (42%) or somewhat satisfied (41%), and only about one in 20 was dissatisfied.

Gap analysis was conducted to identify the groups of users who considered each wayfinding system feature to be important, but who were not satisfied with that feature. This analysis suggests that priority should be given to improving the pathway entrance signs, the identification of network access points, and the attraction/direction signs. These findings are substantiated by respondents’ comments about the lack of signage in the system and about the lack of clarity on existing signs.

Most use of Vincent Massey Park takes place between June and September, although there

is some potential interest in winter usage among drop-by users. The Park is most often used for picnics and barbecues, followed by family gatherings and birthday parties, leisure and recreation, physical exercise and enjoying nature.

Almost all users were satisfied with Vincent Massey Park, with nearly half saying that overall they were very satisfied and another four in 10 reporting that they were somewhat satisfied. This degree of satisfaction is evident across all user groups. While most of the facilities and services related to the Park are important to most users, the recreational facilities and the bandstand/gazebo are relatively less important.

The satisfaction ratings and gap analysis of the individual facilities and services indicate that priority should be given to upgrading the washroom facilities, drinking fountains, and

signage at the Park. The cost of parking is also an issue for some users. The washroom facilities represent the largest service gap for both types of Park users.

The users that were less than satisfied indicated that cleanliness and hygiene are the biggest issues leading to concerns about the washroom facilities, picnic areas and general cleanliness of the Park. Those who were less than satisfied with the ease of finding the Park or finding their way in and around the Park commented on the lack of signs and the lack of clarity on existing signs. A playground or play structure for children is the amenity that the largest number of users would like to see added to Vincent Massey Park.

7. Skateway User Survey

The 2003 survey took place in person on the Rideau Canal

Skateway between January 8 and February 16, 2003. Overall satisfaction with the Skateway is very high. Nonetheless, the results revealed specific areas where improvement may be possible. A majority of residents recognized the NCC as the agency responsible for the Skateway, and this became a large majority when aided recall was included.

Three-quarters of Skateway users reside in CCR. This group is predominantly from Ottawa, while about one in six are from Gatineau. The remaining one-quarter of users resides outside CCR — primarily in Ontario and Quebec, with smaller proportions elsewhere in Canada, in the United States, and outside North America. Most respondents indicated that they visited CCR for pleasure, visiting friends and/or family, or to use the Skateway. They stayed an average of two nights



in the region, and three-quarters said that the Skateway was at least somewhat important in their decision to visit.

Visitors to the region used the Skateway three times on average, compared to an average of nine uses over the season for local residents. Users generally came to the Skateway in groups, usually of two or three people, including family, friends, and/or boy or girlfriends. About one-third of groups included children under the age of 12.

There is a very high level of satisfaction with the Rideau Canal Skateway this year, and this is unchanged from 1996. Overall, less than 1% of users in 2003 were not satisfied, while three-quarters were very satisfied. Users interviewed at Fifth Avenue were the most satisfied, compared to those at the National Arts Centre or Dows Lake.

Satisfaction was also measured in relation to a number of services and amenities related to the Skateway. The lowest levels of satisfaction were observed in relation to the maintenance of the ice surface, parking and washrooms. A detailed statistical analysis, meanwhile, revealed that the quality of the ice maintenance, the on-ice rest areas and change rooms and parking were the key drivers of satisfaction among Skateway users. Thus, efforts to make improvements in these areas — to the extent possible — should be associated with the greatest improvements in overall user satisfaction.

Without prompting, the NCC was named as the agency responsible for the Skateway by a majority of users. No other organization was named by more than 5% of users, and about three in 10 were unable to answer the question. Total awareness

of the NCC — combining unaided and aided awareness — was over eight in 10.

The majority of Skateway users were also able to name at least one Skateway sponsor, most often the Royal Bank of Canada, followed by Casino du Lac-Leamy, CJOH, Alcatel and Clarica. Almost seven in 10 users were aware of the contribution boxes and just over four in 10 had contributed at some point. Among those who contribute, about one-third do so once per year, and half do so more often than that.

The most commonly referenced source of information about the Skateway is users' own past experience, followed by radio, television and newspapers. The NCC website was named by about one in five users as the source they usually used to get information about winter activities on the Skateway.

Tell Us What You Think!

If you have any questions or comments about this report, please contact Halim Abi Khaled by phone at (613) 239-5347 or by e-mail at habikh@ncc-ccn.ca.