



November 5th, 2009

Submission Elements

Nanos Research is pleased to submit the documentation and findings related to our engagement with the City of Ottawa on the Lansdowne Partnership Plan (LPP) initiative. The objective of the process was to gather feedback on the Lansdowne Partnership Plan as it was presented to the public.

The submission is comprised of the following documents:

1. The executive summary of research and input.
2. The report of the public opinion survey conducted by Nanos after the open house sessions.
3. The report of the focus group research conducted by Nanos before the open house sessions.
4. The report of the online eConsultation conducted by Nanos.
5. The summary of the open house input received by the City of Ottawa and provided to Nanos to code and tabulate.
6. The summary of the 3-1-1 input received by the City of Ottawa and provided to Nanos to code and tabulate.

Readers should note that in analyzing the documentation, greater weight should be placed on the public opinion survey because it is representative of views in the City of Ottawa, followed by the online consultations, the open house sessions and the 3-1-1 feedback.

The consultation feedback (items 4, 5 and 6) only represent the views of residents who self-selected themselves to share their opinions either through the open house sessions, Ottawa 3-1-1 or the online eConsultation. Those items can help inform Council on detailed views related to the proposal but should not be considered an accurate reflection of public sentiment towards the proposed initiative.



Lansdowne Touch-Points by the Numbers

1,003 randomly selected residents participated in a public opinion survey.

4 focus groups were conducted prior to the consultation.

4,420 comments posted on the Lansdowne eConsultation site.

81,498 visits to the Lansdowne eConsultation website.

1,039 registered participants in the Lansdowne eConsultation.

27,544 ratings were made of comments on the eConsultation site.

844 comment sheets were submitted through the open house sessions.

411 comments were submitted through the City of Ottawa's 3-1-1 service.

Key Take-Aways

Awareness more than nine of ten Ottawa residents have heard of the LPP (92.5%).

Impression residents in Ottawa are more likely to be neutral on the proposal, with marginally more residents having a negative rather than a positive impression of the LPP (22.5% negative, 18.7% positive, 49.6% neutral, 9.1% unsure).

Proximity the closer you live to Lansdowne the more likely you are to have a negative impression of it (i.e., Centretown 44.2% negative, 8.0% positive; Kanata 21.9% positive, 9.5% negative).

Knowledge the greater one's self described knowledge of the LPP the more likely you are to have a positive impression (all Ottawa 5.2 out of 10, high knowledge 6.2, medium 5.3, low knowledge 4.3).

Action residents are more likely to think that it is time to move forward (53.1% move forward, 40.8% no rush, 6.1% unsure). The top unprompted piece of advice "just do it/so many delays" (23.2%).



Comfort with LPP Elements

Green space scored the highest with a 7.51 out of 10

A permanent farmer's market scored a 7.48 out of 10

Underground parking scored 6.91 out of 10

Renovate the Civic Centre scored a 6.66 out of 10

Open air football/soccer stadium scored a 6.62 out of 10

Renovate Frank Clair stadium scored a 5.88 out of 10

Retail space scored a 5.21 out of 10

Residential component scored a 5.01 out of 10

Office space scored a 4.74 out of 10

Movie theatre scored a 4.71 out of 10

Hotel scored a 4.63 out of 10

Differences by Channels

Open house comments were against the proposal (57.0% opposed, 39.2% in favour, rest neither).

3-1-1 submissions were favourable in 53% of the cases and unfavourable in 28.2% of the cases.

eConsultation participants were generally negative or concerned about the LPP. For example, in the vision for Lansdowne section (which attracted 41% of all the comments in the online consultation) participants who opposed the proposal outnumbered supporters by three-to-one.



Executive Summary of City-Wide Survey

Methodology: Random telephone survey of 1,003 residents in Ottawa conducted between October 17th and 19th, 2009. The random sample was stratified to ensure proper proportionate representation from each of the 23 wards in Ottawa. A random survey of 1,003 responses is accurate 3.1 percentage points, plus or minus, 19 times out of 20.

While virtually everyone in the City of Ottawa has heard about the Lansdowne Live proposal, actual attention to the issue and self-rated knowledge vary considerably. One in four (25%) are following the news about the proposal closely while a majority (56%) are following the news only somewhat closely. When it comes to knowledge, 16 per cent can be considered as having a high level of knowledge (8-10 on the 10 point scale).

The average impression rating of the Lansdowne Partnership Plan on a 10 point scale is 5.2. Residents in Ottawa are more likely to be neutral on the proposal with marginally more residents having a negative rather than a positive impression of the LPP (22.5% negative, 18.7% positive, 49.6% neutral, 9.1% unsure). Those who like the proposal do so primarily because they think it is good for the City (34%) and because they see positive elements like the inclusion of retail (29%). Those who have a negative impression say they have one primarily because they believe the proposal was established through an undemocratic process (18%) or that the proposal is ambiguous and needs improvement (14%).

In general, the positive attributes of the proposal, as viewed by all residents, are that it will be a positive change (11%), it will provide for a lively area (8%), and will allow for the a boost to the economy or the creation of jobs (7%). These positive attributes are balanced against the negative things which include, most prominently, that there is too much retail or commercial development proposed (11%), traffic issues (10%), cost (9%), parking and transportation problems (8%) and concerns that the there was a lack of competition (8%).

Public support is notably higher for elements of the Lansdowne Park proposal that are most consistent with the current uses of the space and those which limit development. The least liked elements relate to the addition of commercial elements to the site. Likewise, there is a consistent relationship between proximity to Lansdowne and views of the LPP (the closer the proximity the more negative the views) and knowledge and support (the greater the knowledge the more positive the impression).

- The highest support is for more green space (mean of 7.5/10) and a permanent farmer's market (7.5) followed by underground parking (6.9).
- The three sports facility related elements are next most favoured with the City renovating the Civic Centre (6.7) and an open-air football/soccer stadium (6.6) favoured somewhat over having the city renovate Frank Clair Stadium (5.9).
- The most disliked of the commercial proposals is the hotel (4.6), followed by the first-run movie theatre (4.7), office space (4.7) and residential component (5.0).
- A retail space at Lansdowne gets more support than the other commercial proposals but is not as supported as the sport or green space related elements of the plan (5.2).
- When it comes to having an arm's length corporation entirely owned by the City manage the new Lansdowne site, the public is more likely to be divided (mean of 5.1).

The public-private partnership approach is notably preferred over a city controlled project by more than a two to one margin (65% versus 26%) and the public is more likely to think that it is time to move forward (53%) than to think that there is no rush to renew Lansdowne Park (41%). There are also more people who think that Lansdowne



Park is a natural place for sports (52%) than think that a new sports facility should be located somewhere else in the city (39%).

Executive Summary of City-Wide Survey (Continued)

Although more people would prefer to move forward now, residents are divided about whether accepting an unsolicited proposal. Opponents (43%) slightly outnumber supporters (39%) in accepting an unsolicited proposal.

Given an opportunity, 79 per cent offered a recommendation to city council at the end of the survey. The recommendations are quite diverse, but the most cited recommendation was to just do it/too many delays (23%). After that the five recommendations with the most support are to reconsider the plan/alternatives (11%), to address transportation concerns (6%), to place more emphasis on green space and the environmental impact (5%), keep the public effect in mind (4%) and to review finances and keep costs down (4%).

Executive Summary of Focus Groups

Methodology: Four focus group discussions were conducted in Ottawa on September 16th and September 17th, 2009. Each session was 60 minutes in duration and was conducted in English. The sessions included a mix of primarily English and primarily French speaking participants. There was also a mix of male and female participants and as well as a mix of age groups.

Findings: Participants generally viewed Lansdowne as a valuable public asset being under-utilized, and most had a high level of awareness about the LPP. There were supporters and opponents of the proposal in all groups, with opinions shaped by a range of issues:

- Supporters were divided between those eager to see Lansdowne redeveloped immediately, and those with misgivings about specific elements such as sole-sourcing. Detractors commonly said the site should be converted to green space.
- Participants were most commonly apprehensive about the plans for project financing and transportation. There were also less dominant concerns about retail development, the stadium and arena, projected timelines, and the provision of green space.
- Participants were generally skeptical about the feasibility of the transportation strategy, commonly citing existing traffic congestion, and the lack of rapid transit service to Lansdowne. Many liked the idea of shuttle-bus services for major events, but questioned whether Ottawa residents would forego their cars.
- Many participants were concerned about the possible impact of new retail stores on neighborhood businesses, while others said the project would be a big improvement to the existing site. There was particularly strong support for the farmers' market. Plans for a boutique hotel drew a mixed reaction – some in favor of a tourist draw to the area, others concerned a hotel would not fit the character of the site.
- Participants were divided on the proposal for the stadium and arena. Some said the City should update the facilities in which the public is already heavily invested, while others were concerned about the potential costs to taxpayers of upgrading the stadium, especially for a CFL football franchise they viewed as unpredictable. Detractors said transportation issues make the site unsuitable for major sports events.
- A majority of participants had a favorable view of the proposed expansion of green space along the Rideau Canal. Some, particularly residents of Capital Ward, wanted more green space than what is proposed in the LPP, but this was a minority view.
- Many participants were concerned about the city government managing a project of this size, often citing cancellation of the light-rail project that was in the news during the focus research.
- Participants generally had a favorable view of the group proposing the LPP, while some detractors believed the developers were only interested in profiting at taxpayers' expense.
- The dominant reasons cited for proceeding with LPP were the proposal has something for everyone, and it is better than nothing happening to Lansdowne Park. Those against the City proceeding most commonly said they did not agree with sole-sourcing the project, or they disagreed with the entire vision for the park.

Executive Summary of eConsultation

The Lansdowne Partnership Plan public consultation over the Internet – the “eConsultation” – was conducted on behalf of the City of Ottawa between September 28th and October 11th, 2009, and elicited 4,420 comments from participants. Readers should note that participants were self-selected. Therefore, while these findings provide insights into the detailed views of those who participated, the eConsultation should not be viewed as a representative reflection of the opinions Ottawa residents as a whole but only of those that participated in the online Consultation.

- **Vision for Lansdowne:** The overall redevelopment plans attracted 41% of all the online comments. Online participants opposed to the proposal outnumbered supporters three-to-one, with those totally against the plan (26%) representing the largest single viewpoint. Participants in the online consultation also expressed dissatisfaction with the lack of competition for the development (14%), concerns over a possible increased tax burden (7%), and a perception the developers would reap the gains while taxpayers would bear the risk (7%). Of those with a favorable view, one in six (16%) believed the plan under consideration was the best option available to the City. Others (2%) thought it would be a source of both pride and additional tax revenue, while 1% believed it would bring pro sports back to Ottawa.
- **Preserving Heritage Buildings:** Maintaining the historical integrity of existing facilities was a key thread in the online dialogue. Opposition to relocating the Horticultural Building was the most prevalent opinion (18%), followed closely by objections to the proposed uses of the Aberdeen Pavilion (16%), except for the farmers’ market (6%).
- **Green Space & Sustainability:** One in seven online participants on this topic felt there was insufficient green space in the proposed redevelopment, and almost as many were opposed to the “front yard” concept that would integrate Lansdowne with the Rideau Canal along Queen Elizabeth Driveway. About 10% thought the LPP proposal was a good green plan.
- **Stadium and Arena Revitalization:** The largest single sentiment on this issue (15%) was that a professional sports facility should be located elsewhere, followed by support (10%) for refurbishing the Civic Centre and Frank Clair Stadium. Online participants raised traffic congestion, parking and refurbishment costs as reasons to rethink, if not abandon, restoration of the sports facilities. Opinion was evenly split (5%) on whether pro football and soccer would be sustainable in Ottawa.
- **Retail & Commercial Development:** A significant proportion of online participants (22%) said the proposal includes too much retail development. Some (8%) were opposed to what they view as a shopping mall being constructed at Lansdowne, and about an equal number expressed concerns about traffic congestion. Only 6% supported the retail development plans.
- **Governance Structure:** Participants in the online consultation expressed various concerns about the proposed deal between the developers and the City. The dominant sentiment was the arrangement was unfair (15%), followed by doubts a municipal corporation could adequately govern the development.
- **Transportation:** The impact of the Lansdowne redevelopment on public transit, traffic congestion and parking was a recurring theme in the online consultation. Asked to address the transportation issue specifically, fully 50% of online participants voiced significant concerns, compared to only 6% who were in favor of the plan or who dismissed traffic problems as an inevitable part of the urban environment.
- **Business Model:** Almost three out of ten online participants were concerned the City was exposing itself to significant financial risks, while 23% thought the absence of competitive bidding for the development was wrong. Only 5% applauded the deal.



Executive Summary - Open House Comment Forms

Background information: A total of 844 comment sheets were provided by the City of Ottawa to Nanos Research. Each comment sheet included eight sections where citizens could provide feedback and respondents did not necessarily provide feedback in all eight sections. Readers should note that the feedback below is only representative of the 844 comment sheets submitted to the City and reviewed by Nanos Research.

Comments in the Vision for Lansdowne Section

- **Overall perceptions of LPP vision mixed** - Our analysis of the open house participant feedback shows that close to six in ten (57%) forms registered opposition to the Vision for Lansdowne as currently presented. This compares to four in ten (39%) which included a comment in favour of the proposal vision.
- **LPP is too commercial** - Further, one in five (21%) open house forms submitted noted that the LPP, as currently configured, was too commercial in scope/did not include sufficient green space.
- **Costing concerns** - Eight percent of the open house forms noted a concern that the financial scope of the project was too large and that taxpayers, ultimately, would bear the risk if the development failed/ran into difficulties.
- **Other issue mentions** – Overall, five percent of the open house forms noted that the development will create traffic/congestion/pollution problems for the neighbourhood while a comparable number noted that the additional retail which would be built would benefit the community.

Comments in the Heritage Section

- **Divided on heritage proposals** – Feedback provided on this topic points to a division of opinion on the heritage preservation proposals. While 48% of open house forms noted their support for the proposal an equal number (46%) were opposed to the recommendations put forth in the LPP.
- **Heritage preservation important** – One in five (19%) open house forms cited that any proposed changes must ensure that the architectural heritage of the Horticulture Building and the Aberdeen Pavilion be preserved, making it the third ranked comment registered in this section.
- **Commercialism trumps green space** – Ten percent of comment forms cited the belief that the project was too commercialized and not enough green space was set aside for public use.

Comments in the Green Space and Sustainability Section

- **More green space** – By a nearly two-to-one margin feedback in this section were more likely to cite that there was insufficient green space included in the Lansdowne Partnership Plan (63%).

Comments in the Stadium and Arena Revitalization Section

- **Opposed to stadium revitalization plan** – Of the open house forms submitted 56% were opposed to the plan to construct a multi-use facility for sporting and entertainment events, seventeen points higher than the number of forms that noted support for the revitalization plan (39%).
- **Financial concerns** – One in six (17%) open house submissions in this section noted that the revitalization project was too expensive (this was the third most cited comment). As a corollary to this concern, the fear that taxpayers would bear the cost of any future financial difficulties also emerged.
- **Traffic/noise problems** – One in seven (13%) of the feedback in this section asserted that the LPP development would create significant traffic/congestion and noise problems for the community.

Executive Summary - Open House Comment Forms (Continued)

- **Other issues** – Other opinions expressed included the belief that the multi-use facility would need to be used by a number of professional sports teams if it was to be financially viable (11%). Five percent of the feedback in this section thought professional sports teams would not be viable in Ottawa.

Comments in the Retail and Commerce Approach Section

- **Significant opposition to plan** – Analysis of the comments submitted through the open house sessions indicate that two thirds (65%) of the feedback submitted opposed the retail and commercial plan proposed in the Lansdowne Partnership Plan. This compares to only one in four (25%) which supported of the planned approach.
- **Retail mix unpopular** – Nearly four in ten (38%) of the comments in this section were concerned the proposed retail development will include too much retail square footage, including too many big box format stores.
- **Local retailers will be hurt** – One in four (26%) thought the retail development at Lansdowne would hurt existing businesses in the area.

Comments in the Governance Section

- **Governance structure opposed** – More than six in ten (62%) were opposed to the proposed governance structure of the Lansdowne Partnership Plan, more than twice the number who supported it (29%).
- **Lack of open competition cited** – One in five (21%) objected to the lack of an open design competition for the redevelopment of Lansdowne and thought it undermined the credibility of the entire process.

Transportation

- **Lack of parking/transit infrastructure a concern** – Overall six in ten (59%) noted there was insufficient parking/transit and road infrastructure in the LPP to accommodate post construction needs, three times (20%) the number who commented sufficient transit/parking had been allocated in the development plan.
- **Traffic/congestion a problem** – In a similar vein, slightly more than half (54%) of the comment forms noted that the LPP development would cause significant traffic/congestion problems in the area.

Comments in the Business Model Section

- **Viability of business model in doubt** – A significant number (59%) of comment forms for the open house sessions noted their opposition to the business model which would steer the LPP process. This compares to only one in four (26%) which noted support for the proposed business model.
- **Taxpayer liability** – One third (33%) of participants were concerned that taxpayers would, ultimately, have to foot the bill for any future cost over-runs/difficulties the development encountered.
- **Private sector the only winner** – One in four (24%) open house forms noted the belief that the private sector as the only winner in the Lansdowne Partnership Plan process and that the city/taxpayers would not reap any benefits from this plan.



Executive Summary – 3-1-1 Feedback

Background: A total of 411 individuals contacted Ottawa’s 3-1-1 system to share their views. Comments were made without prompting on issues but merely reflected the feedback provided by individuals who contacted the Ottawa 3-1-1 service. Readers should note that the feedback below is only representative of the 3-1-1 comment submitted to the City and reviewed by Nanos Research.

To follow are the key findings of the 3-1-1 feedback:

- **Generally positive view of LPP** - Our analysis of the 3-1-1 feedback received indicates that more than half (53%) of the individuals who contacted the 3-1-1 network said they were in favour of the LPP as part of their feedback. In the context of the total number of comments received, one in four (25%) of all comments supported the Lansdowne Partnership Plan. Favourability scores were nearly double the number of individuals who stated they opposed the Lansdowne Partnership Plan (28%) as part of their feedback.
- **Significant traffic/congestion concerns** – Aside from general support/oppose feedback on the LPP, concerns over its impact on local traffic/parking was the most prevalent specific issue mentioned by residents at one in four (25%). It is apparent that, aside from a discussion of the merits of the LPP, 3-1-1 submissions had noticeable reservations over how the anticipated additional traffic volume would be accommodated by the existing road/transit infrastructure.
- **Visual aesthetic of area will be enhanced** – Roughly one in five (19%) 3-1-1 contacts who provided feedback stated the LPP will result in the beautification of the area, marginally more than the number who expressed concerns over the location/loss of green space/ugly (16%).
- **Financial viability concerns – 3-1-1 contacts** were nearly twice as likely to express concerns over the long term financial viability of the Lansdowne Partnership Plan (13% of respondents) than those who were of the opinion that the financial plan presented was realistic (7% of respondents).
- **Lack of competitive bid process an issue** – One in seven (15%) 3-1-1 contacts, unprompted, opposed to the single-sourcing of the LPP to OSEG
- **Impacts on local retailers** – Roughly one in six (17%) individuals who provided feedback through the 3-1-1 service expressed their reservations that either existing businesses in the area will be harmed by this development (9%) or that there was too much retail space (8%) and/or office space (2%) allocated to the existing plan (8%). This compares to only 4% of 3-1-1 callers who expressed the view the new development would benefit local/small businesses in the area.