

Public Attitudes to Lansdowne 2.0

Prepared for the Ottawa Sports and Entertainment
Group

October 31, 2023



Methodology

- This study was conducted online using EKOS' probability-based research panel, *Probit*
- The field dates for this survey are October 20-27, 2023
- In total, a random sample of 1,076 residents of the National Capital Region (NCR) aged 18+ responded to the survey
- The margin of error associated with the total sample is ± 3.0 percentage points, 19 times out of 20
- All the data have been statistically weighted by age, gender, region, and educational attainment
- Note that figures may not sum to exactly 100% due to rounding
- This research was sponsored by the Ottawa Sports and Entertainment Group



- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Executive summary (i)

- A clear plurality of the public incorrectly believe that Lansdowne is owned by OSEG; only one in five recognize that Lansdowne is owned by the City of Ottawa
 - There is evidence that some of the concerns over the cost of Lansdowne 2.0 may be rooted in the incorrect assumption that the city is investing in privately-owned facilities
- Survey results reveal broad public support for Lansdowne 2.0
 - By a two-to-one margin (59% versus 29%), NCR residents are in favour of the project
 - This margin widens slightly (62% versus 28%) when respondents are given the chance to reflect
 - This finding holds true despite the fact people recognize revenue neutral framing is no longer possible



Executive summary (ii)

- Lansdowne 2.0 receives majority support city-wide, though with higher levels of opposition in Central Ottawa, the Glebe, and Old Ottawa East/South
 - A citizen engagement exercise may be required with these residents
- The majority view is that the old facilities at Lansdowne need replacement and that Lansdowne 2.0 is an improvement over the existing infrastructure
 - Most components of Lansdowne 2.0 receive clear support as things that need to be done (e.g., replacing the arena and north-side stands, additional housing, improvements to public areas)
- Transportation improvements and investment in the city public realm at Lansdowne are two items that attract city-wide support

Executive summary (iii)

- Seven in ten NCR residents have visited Lansdowne in the past year
 - The public see clear advantages to Lansdowne over other Ottawa venues



- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Perceived ownership of arena/stadium

- Results reveal a great deal of confusion over who owns the arena and stadium at Lansdowne
 - Just one in five NCR residents (22%) correctly recognize that the facilities are owned by the City of Ottawa
 - Nearly half (47%), meanwhile, believe the sports infrastructure at Lansdowne is owned by OSEG
 - Three in ten either believe the arena and stadium are owned by another entity (2%) or are unsure (29%)
 - Those who live in the Glebe/Old Ottawa East/Old Ottawa South and East Ottawa are more apt to recognize that the facilities are owned by the City (but still only 41% and 34%, respectively)



Perceived ownership of arena/stadium

Q. *To the best of your knowledge, who owns the arena and stadium at Lansdowne?*





- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues**
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Comparative rankings of Ottawa venues (i)

- Respondents were presented with five Ottawa venues – Lansdowne, the Byward Market, Westboro, the Canadian Tire Centre, and the Parliamentary Precinct – and asked to rate each one in terms of general appeal, safety, and capacity to attract talent to Ottawa
 - Lansdowne ranks at or near the top on all three criteria
- Lansdowne ranks first in terms of general appeal, with over half of NCR residents (53%) giving it a favourable review in this area, compared to just one in ten (11%) who are dissatisfied
 - By comparison, the Byward Market ranks second in terms of appeal (with 44% ranking it as good or excellent)

Comparative rankings of Ottawa venues (ii)

- Likewise, two-thirds (66%) are highly satisfied with the level of safety offered at Lansdowne, compared to just 4% who feel Lansdowne is unsafe
 - In terms of safety, Lansdowne ranks well ahead of Westboro (54%), the Parliamentary Precinct (50%), and the Byward Market (14%) but slightly behind the Canadian Tire Centre (70%)
- Lansdowne also places first in terms of its ability to attract and retain people to the region
 - One-third (33%) give Lansdowne top marks in this area, comparable to Westboro (31%), the Parliamentary Precinct (30%), or the Byward Market (29%)



Ottawa venues ranked by appeal

Q. *How would you rate each of the following areas of Ottawa in terms of appeal as an entertainment district?*



Ottawa venues ranked by safety

Q. *And how would you rate each of the following areas in terms of safety?*



Venues ranked by capacity to attract talent

Q. *To what degree do you think each of the following features help attract and retain people?*



- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship**
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Lansdowne visitorship (i)

- Results reveal that seven in ten NCR residents (71%) have visited Lansdowne at least once in the past year
 - One in five (19%) have visited the park just once in that timeframe, while one in four (25%) have been two to three times
 - One in eight (12%) have visited Lansdowne four or five times in the past year, while one in seven (15%) have made six or more visits

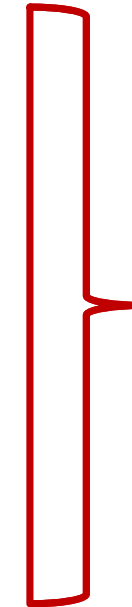


Lansdowne visitorship (ii)

- Naturally, results vary heavily by region
 - Those who reside in the Glebe/Old Ottawa South/Old Ottawa East are by far the most likely to have made multiple visits (68% have visited the park six or more times)
 - Attendance is also comparatively higher among those who live in West Ottawa (28% have been six times or more), Central Ottawa (27%), and South Ottawa (23%)
 - Residents of Orleans, Quebec, and Barrhaven are least likely to have ventured to Lansdowne in the past year (54%, 58%, and 61%, respectively, have visited Lansdowne at least once in the past year)

Lansdowne visitorship

Q. *In the past year, approximately how many times have you visited Lansdowne/TD Place?*



**71% have visited
Lansdowne in the
past year**





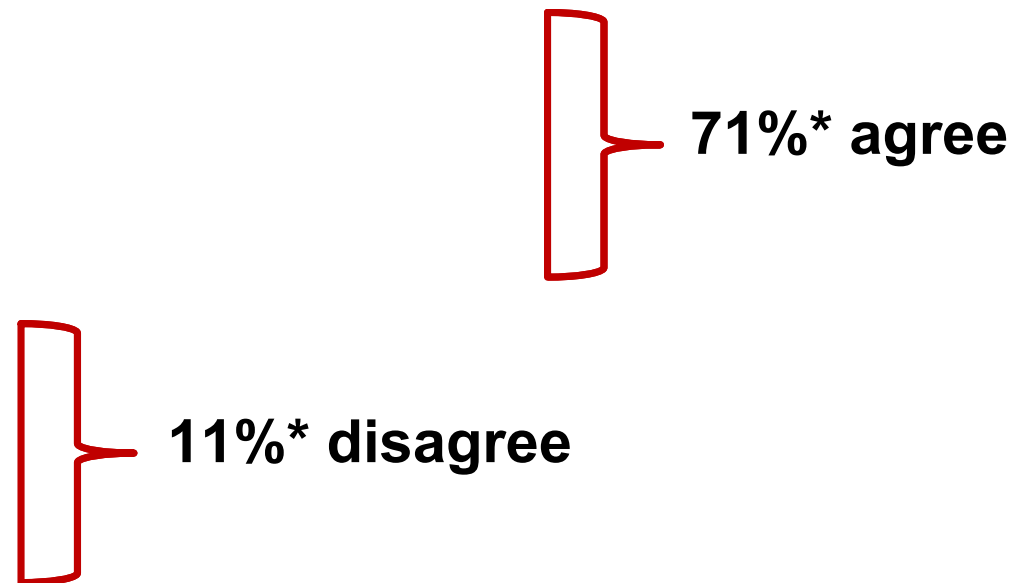
- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities**
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Perceived need to replace facilities

- A clear majority of NCR residents concur with the City's conclusion that Lansdowne's Civic Centre arena and north-side stadium stands need to be replaced
 - Fully seven in ten (71%) agree with the City's assessment, compared to just 11% who disagree
 - Disagreement is comparatively higher in the Glebe/Old Ottawa East/Old Ottawa South (38% disagree) and Central Ottawa (25% disagree) though, both cases, a majority of residents agree that replacement is needed

Perceived need to replace facilities

Q. *The arena and stadium at Lansdowne are owned by the City of Ottawa. In a 2021 report, the City concluded that Lansdowne's Civic Centre arena and north-side stadium stands, which opened in 1967, is obsolete and need to be replaced. To what extent do you agree or disagree with this assessment?*



** Due to rounding, the sum of percentages may be slightly different from the expected total*





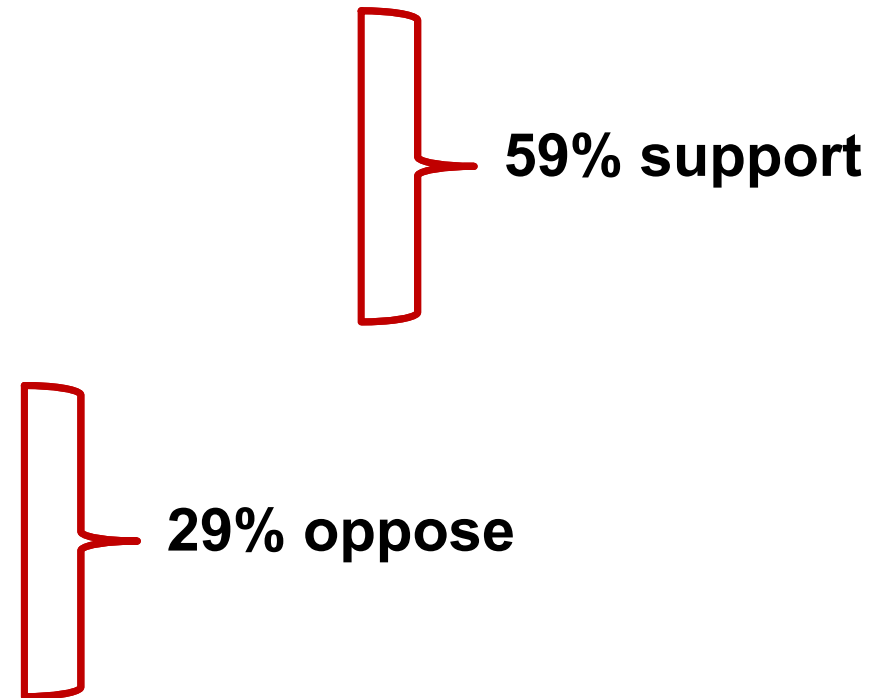
- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0**
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Support for Lansdowne 2.0

- By a two-to-one margin, NCR residents support the proposed Lansdowne 2.0 development
 - A majority of NCR residents (59%) support the proposed project, including 23% who *strongly* support it
 - Meanwhile, three in ten (29%) are opposed, while one in eight (12%) have no opinion on the matter

Support for Lansdowne 2.0

Q. *Based on what you know, to what extent do you support or oppose the proposed Lansdowne 2.0 development?*





- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area**
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Support by area

- Lansdowne 2.0 enjoys majority or plurality support in all regions of the NCR
 - Opposition is comparatively higher in the Glebe/Old Ottawa East/Old Ottawa South (48% oppose the development, though 50% support it) and Central Ottawa (42% versus 43%)

Support by area of Ottawa

Q. *Based on what you know, to what extent do you support or oppose the proposed Lansdowne 2.0 development?*





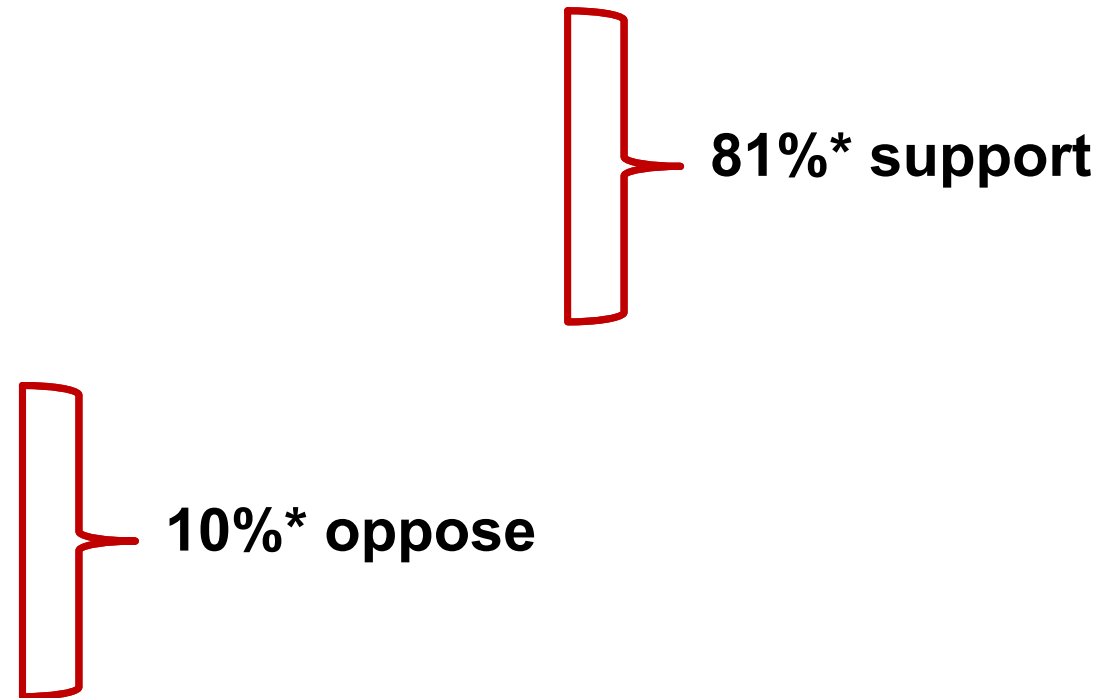
- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements**
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Support for individual elements

- Results reveal broad public support for all the major elements of Lansdowne 2.0
 - Fully eight in ten (81%) would support improvements to the public realm at Lansdowne, compared to just 10% who are opposed
 - Seven in ten are in favour of replacing the Civic Centre arena (73%) and the north-side stands (70%), compared to just 16% who are opposed in each case
 - Results reveal somewhat more division on additional housing, though NCR residents still favour the proposal by a two-to-one margin (63%, compared to 27% who oppose the added housing)
- Each of these elements receives clear majority support in all regions of the city, though opposition to replacing the arena and north-side stands is somewhat higher in the Glebe/Old Ottawa East/Old Ottawa South and Central Ottawa

Support for enhancing public elements

Q. *To what extent do you support or oppose enhancements to the public realm/park at Lansdowne?*

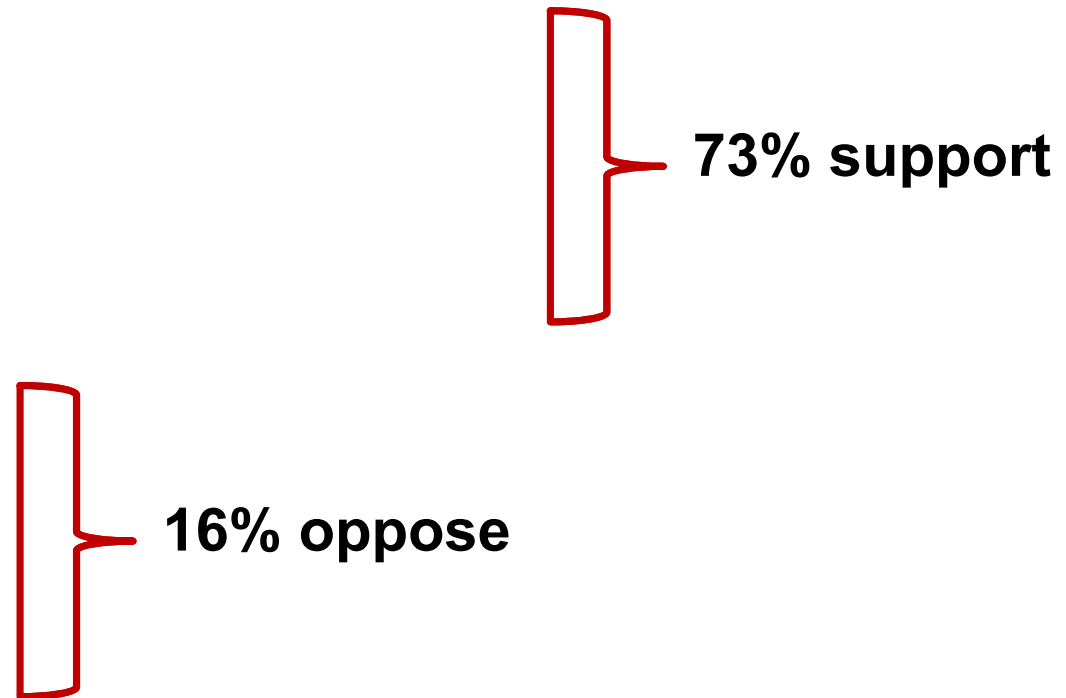


** Due to rounding, the sum of percentages may be slightly different from the expected total*



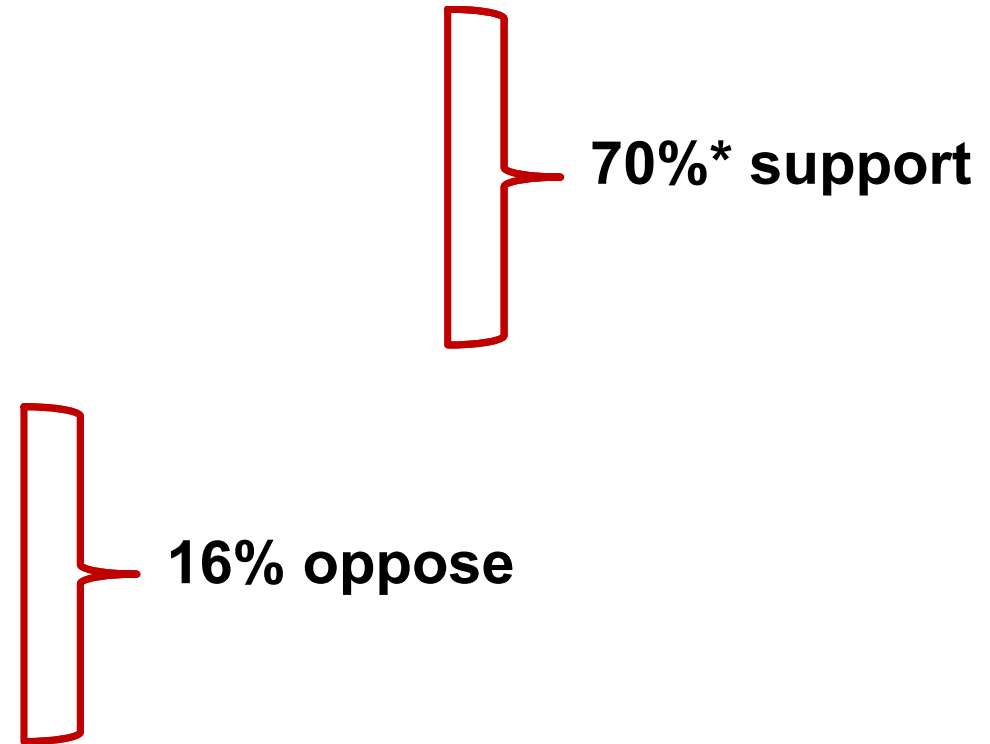
Support for replacing Civic Centre arena

Q. *To what extent do you support or oppose replacing the 56-year-old Civic Centre arena with a modern, mid-size arena?*



Support for replacing north-side stands

Q. *To what extent do you support or oppose replacing the 56-year-old north-side stands?*

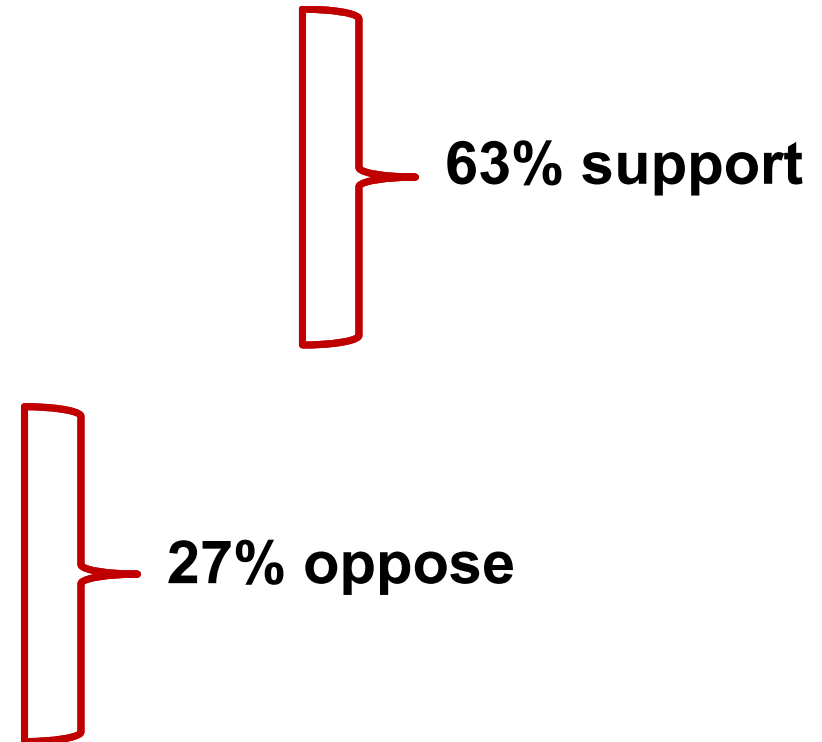


** Due to rounding, the sum of percentages may be slightly different from the expected total*



Support for additional housing

Q. *To what extent do you support or oppose additional housing at Lansdowne?*





- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0**
- 10) Alternatives to Lansdowne 2.0
- 11) Post-Survey Support for Lansdowne 2.0

Perceived benefits of Lansdowne 2.0 (i)

- Lansdowne 2.0 is widely anticipated to bring benefits to Ottawa's sports and entertainment industry, tourism, the local economy, and Ottawa's quality of life
- Eight in ten NCR residents believe Lansdowne will strongly or moderately benefit Ottawa's sports and entertainment life
 - Half (51%) anticipate a strong improvement in this area and 29% expect a moderate improvement
- Just over two in three feel Ottawa's tourism industry and the local economy will benefit from the project (68% and 69%, respectively)
- Six in ten residents believe the project will enhance Ottawa's quality of life
 - Three in ten (31%) believe quality of life will be greatly improved and 29% say it be moderately improved

Perceived benefits of Lansdowne 2.0 (ii)

- Regionally, residents of the Glebe/Old Ottawa East/Old Ottawa South and Central Ottawa are more pessimistic regarding the development's impacts on tourism, the economy, and quality of life

Perceived benefits of Lansdowne 2.0

Q. *To what extent do you believe Lansdowne 2.0 will add to each of the following?*



General attitudes to Lansdowne 2.0 (i)

- In this section, respondents were presented with a series of statements regarding Lansdowne 2.0 and asked to rate the extent to which they agree or disagree
- Notably, by a margin of nearly three to one, Lansdowne 2.0 is seen as an improvement over the existing site
 - Over half (52%) agree with this assessment, compared to just 18% who disagree
 - Residents of the Glebe/Old Ottawa East/Old Ottawa South and Central Ottawa are roughly twice as likely to disagree that Lansdowne 2.0 is an improvement (37% in each case, compared to 18% on average)
- There is a clear public consensus that any developments to Lansdowne should include enhancements to public transit (82% agree, compared to just 6% who disagree)



General attitudes to Lansdowne 2.0 (ii)

- Six in ten NCR residents (60%) agree that Ottawa needs a medium-sized, central facility for sports and entertainment (compared to just 12% who disagree), while half (50%) believe the hockey arena and event centre belongs at Lansdowne (compared to 10% who disagree)
- Just over half (53%) agree that the city should be making strategic investments such as Lansdowne (versus 20% who disagree), though it should be recalled that only 22% of NCR residents correctly recognize that the City of Ottawa owns the facilities at Lansdowne, while 47% believe they are owned by OSEG
 - Residents of Central Ottawa are more apt to reject this view (40% disagree)

General attitudes to Lansdowne 2.0 (iii)

- Just under half (47%) agree that having an entertainment destination like Lansdowne helps retain and attract people to Ottawa (compared to 23% who disagree)
- NCR residents are more divided on the value for money offered by Lansdowne 2.0
 - Just three in ten (30%) agree that Lansdowne represents good value for money for citizens and taxpayers, compared to 34% who disagree
 - Interestingly, as illustrated on Page 46, this sentiment turns positive once the funding model is understood (again, it should be noted that only one in five NCR residents recognize that these are city-owned facilities, meaning most residents believe them to be public investments in private facilities)
 - Residents of Central Ottawa are more apt to disagree (56%)

Attitudes to Lansdowne 2.0

Q. *Please rate the extent to which you agree or disagree with the following statements:*

New developments to Lansdowne should include enhanced public transit

Ottawa needs a medium-sized, central facility for sports and entertainment

It is a good idea for the City of Ottawa to make strategic investments such as Lansdowne to attract more visitors and tourism to Ottawa

Lansdowne 2.0 is an improvement over the existing site

The hockey arena/event centre, which is home to the Ottawa 67's, belongs at Lansdowne

Having an entertainment destination like Lansdowne helps to retain and attract residents and employees to Ottawa

Overall, Lansdowne 2.0 represents good value for money for citizens and taxpayers



Preferred portion of cost borne by City

- Respondents were told that the estimated cost of Lansdowne 2.0 is approximately \$400 million and asked what proportion of the cost the City should be paying, recognizing that Lansdowne is City-owned
 - Two-thirds (65%) believe the City should cover at least some portion of the costs, while just one in six (17%) believe the City should pay nothing
 - One in six (17%) believe the City should cover one-quarter of the costs, while 25% believe the City should contribute half the costs
 - One in eight (13%) believe the City should be responsible for three-quarters of the cost, and one in ten (10%) believe the City should foot the entire bill
- Residents of Central Ottawa are more likely to say the city should not pay any portion of the cost (33%)

Preferred portion of cost borne by City

Q. *The estimated cost of Lansdowne 2.0 is approximately \$400 million. Recognizing that Lansdowne is owned by the City of Ottawa, what proportion of the cost do you believe the City should be paying?*

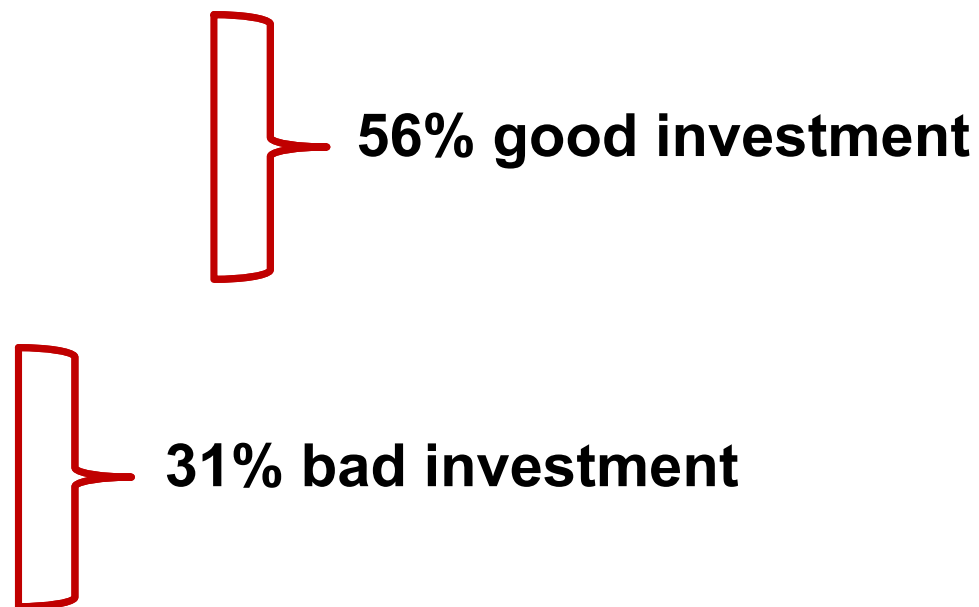


Perceived value of investment

- Interestingly, despite divisions over the value of Lansdowne 2.0 found earlier, a majority of NCR residents (56%) believe Lansdowne 2.0 represents a good investment for the City, compared to 31% who see it as a bad investment
 - This finding suggests that some of the concerns over the costs of Lansdowne 2.0 might be rooted in confusion over who owns Lansdowne or uncertainty over how much the project would cost
 - Residents of Central Ottawa are more likely to see Lansdowne 2.0 as a bad investment (50%)

Perceived value of investment

Q. *Of the \$400 million cost, \$300 million will come from the partnership and Lansdowne revenues, while \$100 million will come from City general revenues. All things considered, do you believe this is a good investment or a bad investment for the City of Ottawa?*





- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0**
- 11) Post-Survey Support for Lansdowne 2.0

Alternatives to Lansdowne 2.0

- Results reveal little support for any of the alternatives to Lansdowne 2.0
- When respondents were given a forced choice between proceeding with Lansdowne 2.0 and terminating its partnership with OSEG, more than half (56%) opted for the former, while just one in five (22%) would favour parting ways with OSEG
- The vast majority (72%) would oppose demolishing the arena and stadium and selling the land to private developers, compared to just one in five (18%) would support this action

Support for maintaining OSEG partnership

Q. If the Ottawa City Council does not move forward with Lansdowne 2.0, one outcome could be that the partnership between the City and OSEG will end, putting an end to the sports (67's, Redblacks, Atletico, Blackjacks, and PWHL), entertainment, and cultural activities that take place at Lansdowne. Which of the following two statements comes closest to your own point of view?

The Ottawa City Council should move forward with Lansdowne 2.0 and continue its partnership with OSEG

The Ottawa City Council should not renew the City-owned infrastructure at Lansdowne and end its partnership with OSEG

DK/NR



Support for demolishing stadium

Q. *To what extent would you support or oppose demolishing the City's football stadium and arena and selling the land to private developers to build more retail and residential space?*

 **18% support**

 **72% oppose**





- 1) Executive Summary
- 2) Perceived Ownership of Arena
- 3) Comparative Ranking of Ottawa Venues
- 4) Lansdowne Visitorship
- 5) Perceived Need to Replace Facilities
- 6) Support for Lansdowne 2.0
- 7) Support by Area
- 8) Support for Individual Elements
- 9) Perceived Benefits of Lansdowne 2.0
- 10) Alternatives to Lansdowne 2.0
- 11) **Post-Survey Support for Lansdowne 2.0**

Post-survey support for Lansdowne 2.0

- At the end of the survey, respondents were asked once again whether they support or oppose the proposed Lansdowne 2.0 development to determine whether the information presented in the survey had an impact on public support
 - The margin of support for Lansdowne 2.0 widens slightly from 30 points (59% support versus 29% oppose) to 34 points (62% support versus 28% oppose)

Post-survey support for Lansdowne 2.0

Q. *Based on what you have seen, to what extent do you support or oppose the proposed Lansdowne 2.0 development?*

Beginning of survey

End of survey





For more information:

FRANK GRAVES

EKOS Research Associates

fgraves@ekos.com

(613) 235-7215