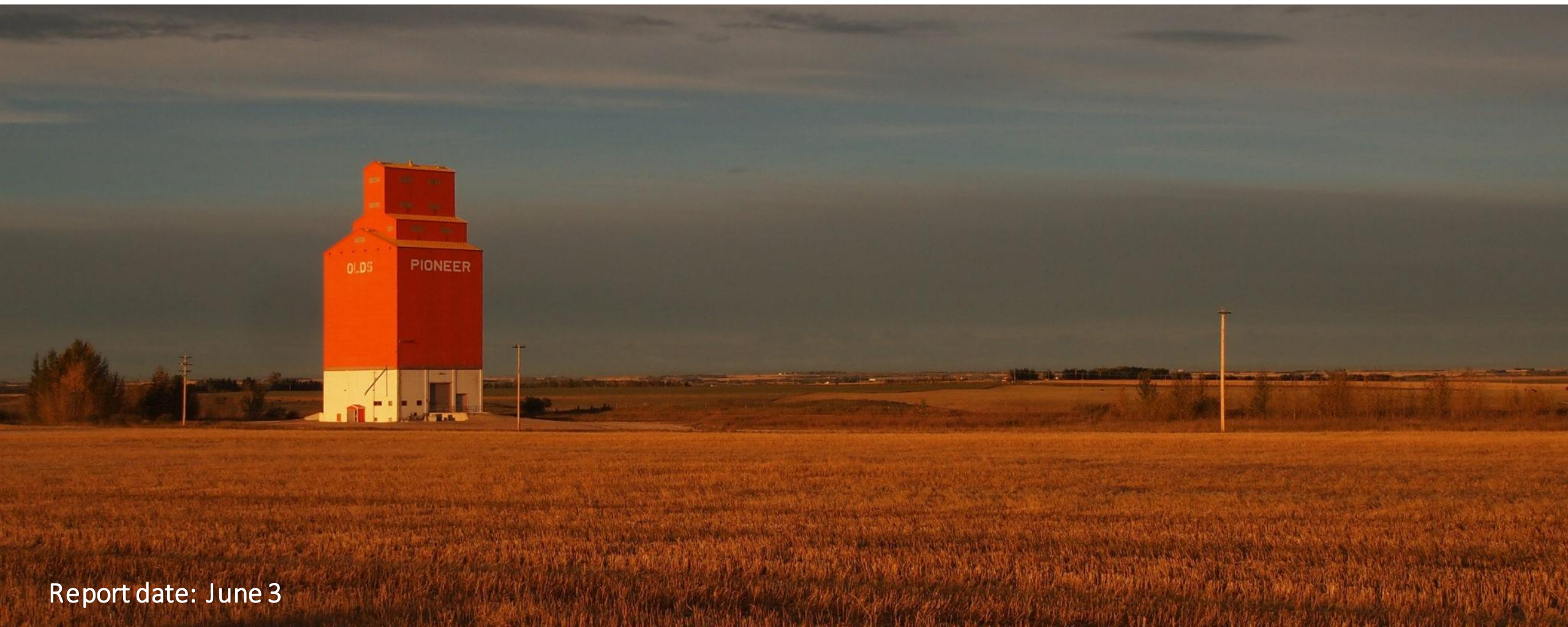


Canadian Public Survey – May 2022



Report date: June 3

As part of a broader heritage sector RESET initiative, the National Trust for Canada conducted research with the Canadian public via an online omnibus survey May 18-24, 2022.

The research objective was to generate additional insights about the public's mindset and beliefs about the heritage sector, building on initial public survey data that was gathered in a prior survey in 2020. Outcomes of the research will help inform actions and messaging designed to engage the public and build support for heritage conservation efforts.

Survey details:

- Online survey, eleven closed-ended quantitative questions
- Nationally conducted in English and French with 1,000 Canadian adults 18+ years of age (28% 18-34, 35% 35-54, 37% 55+)
- Regional representation of respondents reflects population distribution
- Male 49%, Female 51%

RANGE OF QUESTIONS ASKED

- Interest in heritage conservation
- Perceptions of who is responsible/involved with heritage conservation
- Degree of familiarity with heritage conservation organizations
- How successful the heritage conservation sector has been in its efforts
- Heritage places subjects of interest
- Reasons to conserve heritage places
- Heritage stories of interest
- Interest in additional information
- Likelihood of visiting a heritage place in next 12 months
- Agreement/disagreement with a range of attitudinal statements regarding heritage conservation
- Areas of potential concern related to heritage conservation

SHOWN TO ALL RESPONDENTS AT SURVEY START

To ensure a consistent understanding of heritage sector terminology, survey respondents first had to read the introduction below prior to answering any questions. For the purposes of this report, “heritage conservation” and “heritage places” will be used throughout, however this may vary with the exact wording of the questions as seen by respondents.

- For each question’s exact wording, please refer to the “notes” section for each charted page in this document.

Introduction

The following survey deals with the topic of heritage buildings, sites and landscapes, and older neighbourhoods and districts in Canada.

For the purposes of this study...

“Heritage preservation” (also called **“Heritage conservation”**) means the work done to identify, mindfully use or extend the life and value of heritage places and their associated stories.

“Heritage places” include landscapes, sites, areas of land, buildings and structures, archaeological sites and other physical places that have cultural, historical, spiritual or symbolic associations.

“Older neighbourhoods and districts” are areas where people live and work that are not newly constructed developments.

DETAILED RESULTS



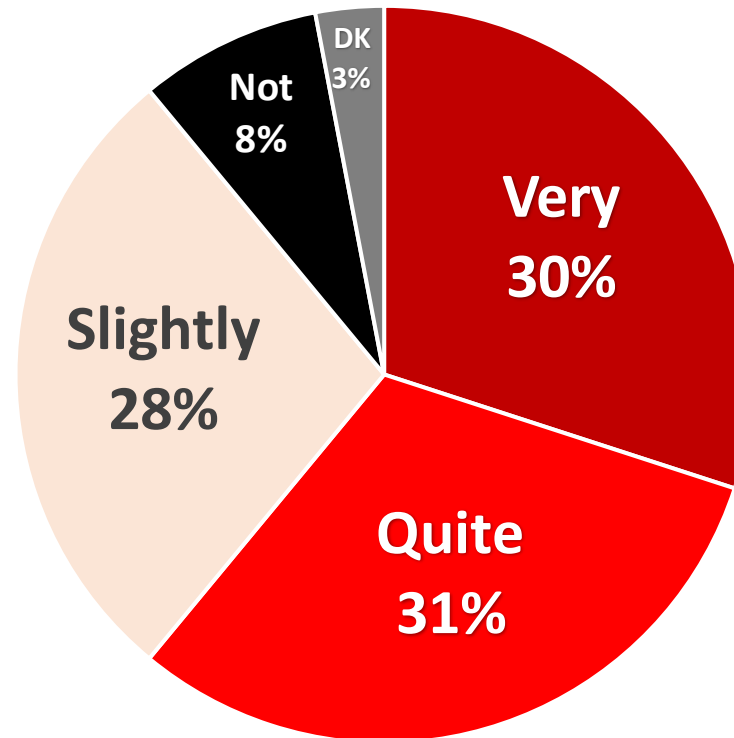
PUBLIC INTEREST IN HERITAGE CONSERVATION

Those most interested in heritage places tend to be well educated, familiar with a number of heritage organizations, intend to visit locations, and have the highest household incomes.

- The opposite also holds true with those who are the least interested being less familiar with heritage conservation organizations, less educated, and being in the lowest income bracket.

NB: There no age, gender or regional skews to higher or lower levels of interest versus national average.

How interested are you in the efforts to conserve heritage places?



Top 2 Box: 61% Interest

Top 2 Box interest skews higher:

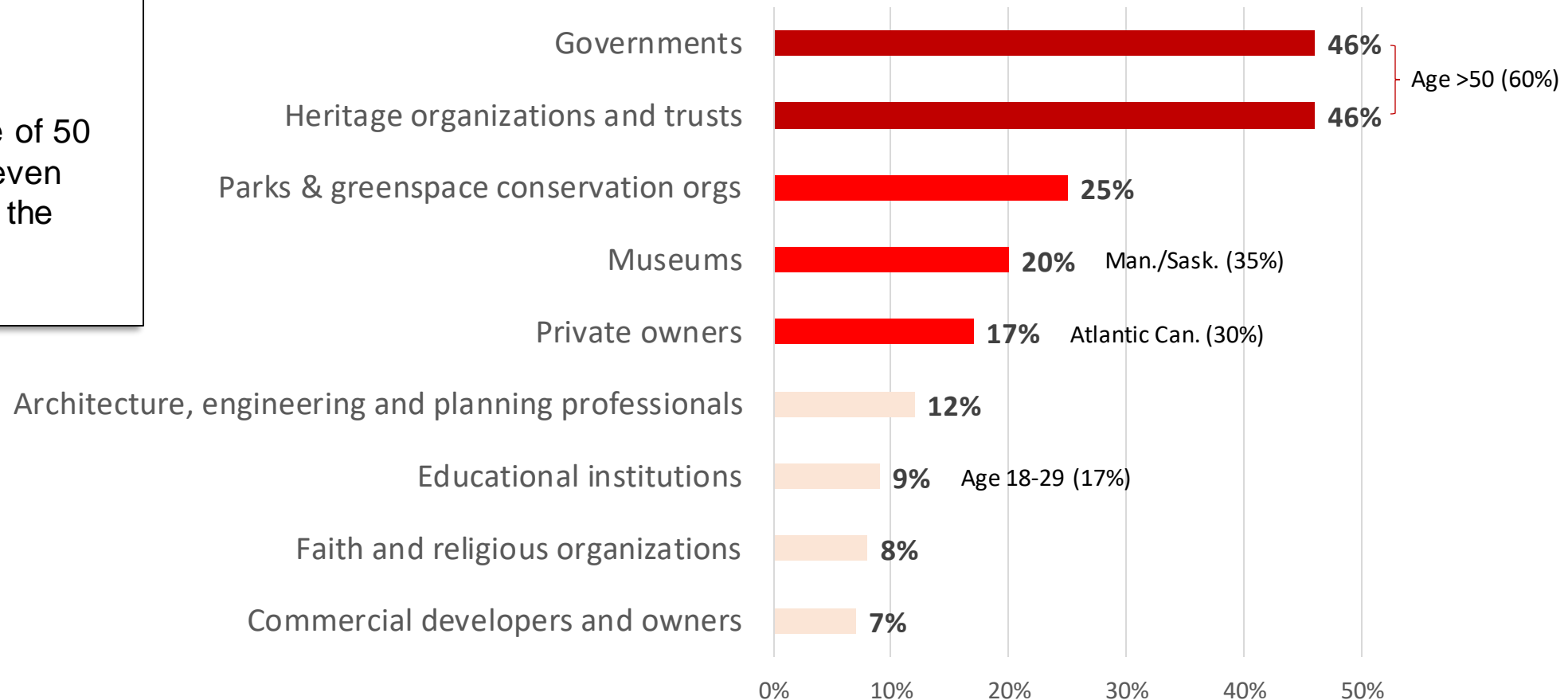
- **85%** for those who are likely to visit a heritage place within 12 months
- **80%** for Post-grads
- **78%** for those who know of 5+ heritage organizations
- **72%** for those who believe it is less wasteful to update existing buildings vs. building new ones
- **69%** >\$100K HH Income

WHO IS INVOLVED & RESPONSIBLE FOR HERITAGE CONSERVATION

Government and heritage-related organizations are presumed to be the primary organizations actively involved in heritage conservation.

- Those over the age of 50 assume this to an even higher degree than the national average.

Who is most involved and/or responsible for heritage conservation?

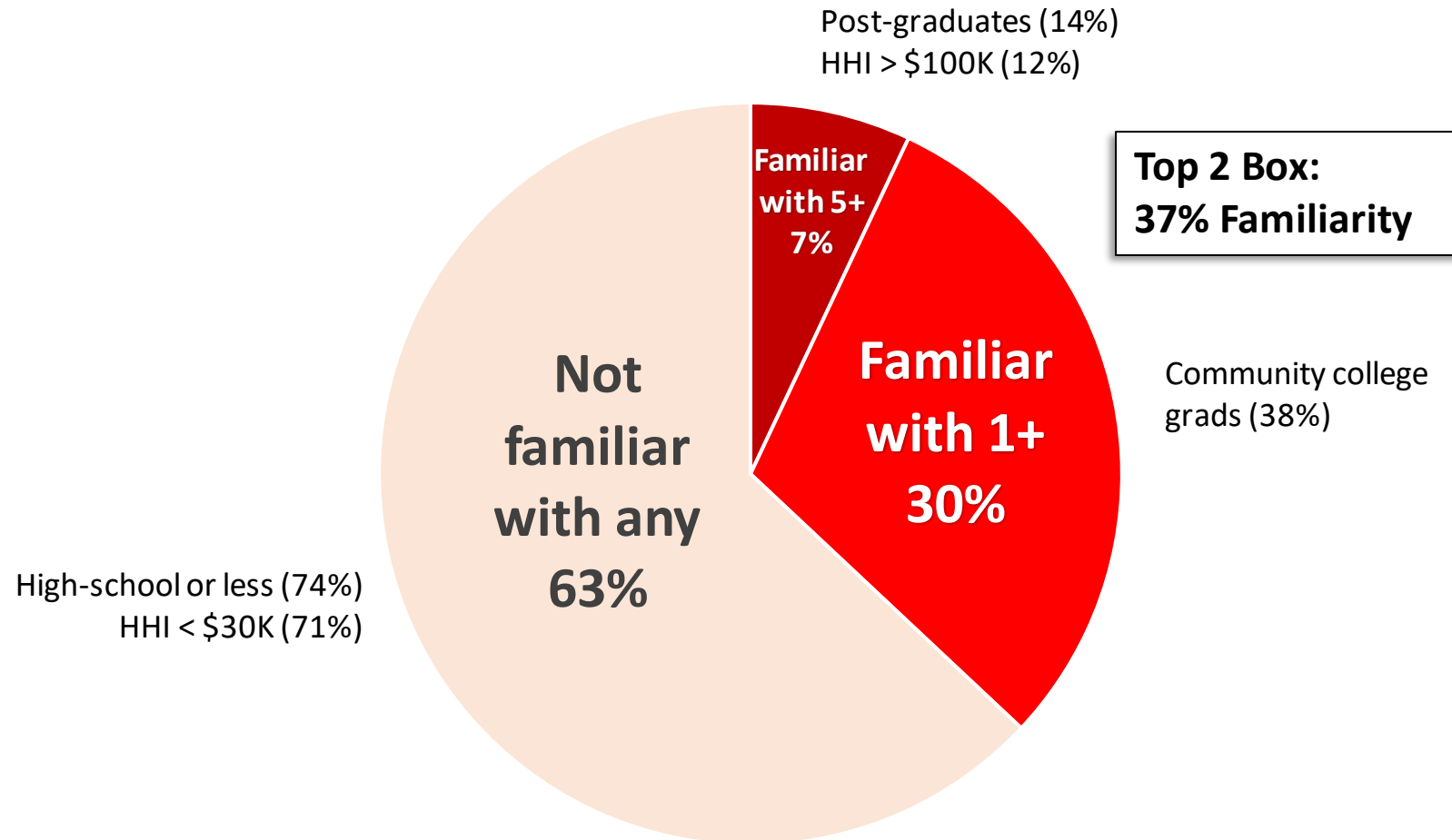


FAMILIARITY WITH HERITAGE CONSERVATION ORGANIZATIONS

While 61% of the Canadian public express “interest” in heritage conservation, fewer have familiarity (37% total familiarity) with specific organizations involved in the sector itself.

- Those who are familiar with 5 or more organizations are similar in profile to people who are the most interested in heritage conservation (higher education and higher income).

How familiar are you with heritage conservation organizations?

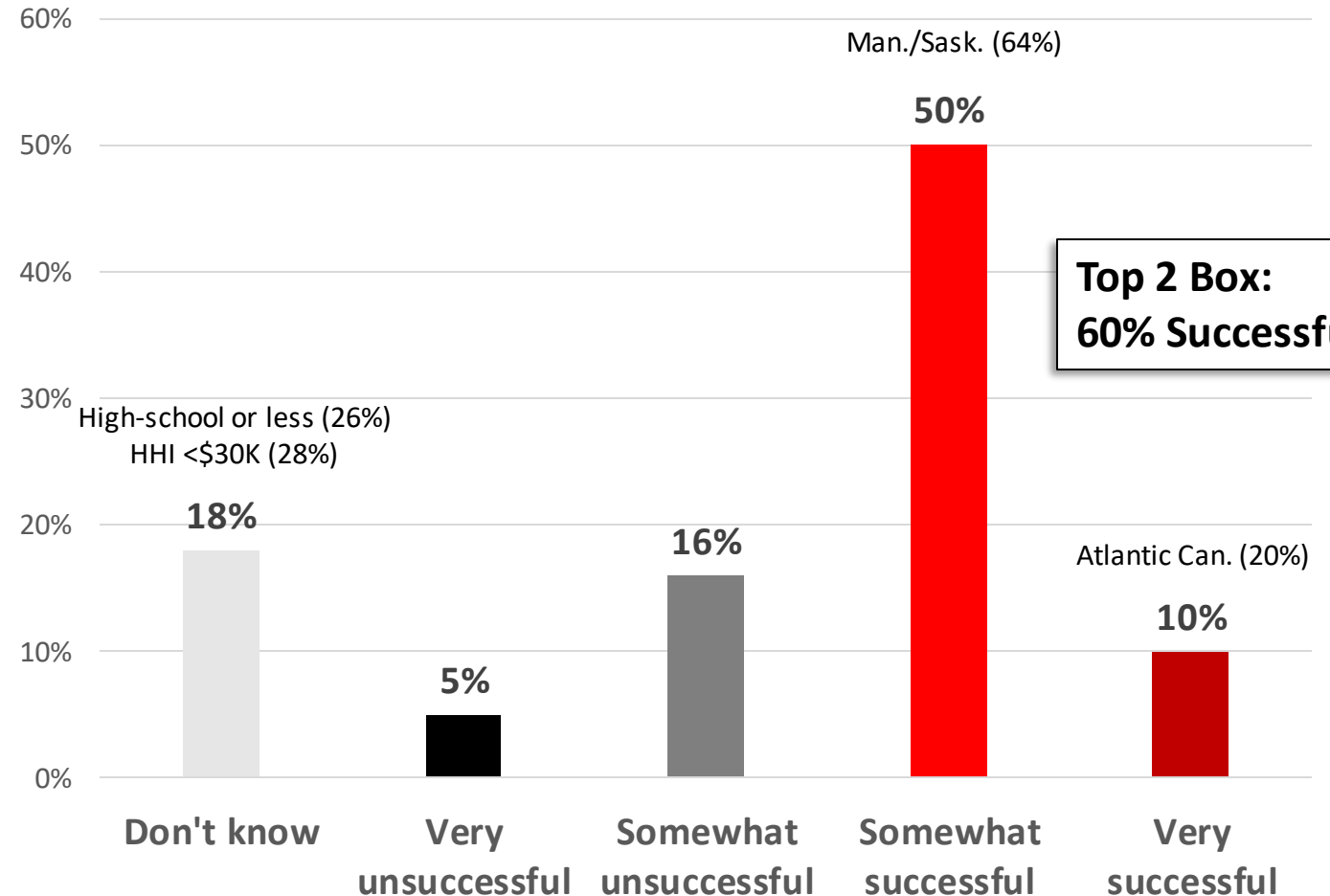


PERCEIVED SUCCESS OF HERITAGE CONSERVATION EFFORTS

Overall, more than half of Canadians believe that heritage conservation efforts are successful, particularly so in Atlantic Canada and in Manitoba and Saskatchewan.

- Those who intend to visit a heritage place in the next 12 months are also more likely to perceive heritage conservation efforts as being successful (by 13 percentage points above national average).
- Those who are unsure have less interest in heritage conservation, less education and lower household incomes.

How successful are heritage conservation efforts?



HERITAGE CONSERVATION SUBJECTS OF INTEREST

The Canadian public has the most interest in the beauty, historical importance, stories, and reuse of heritage buildings versus other subjects.

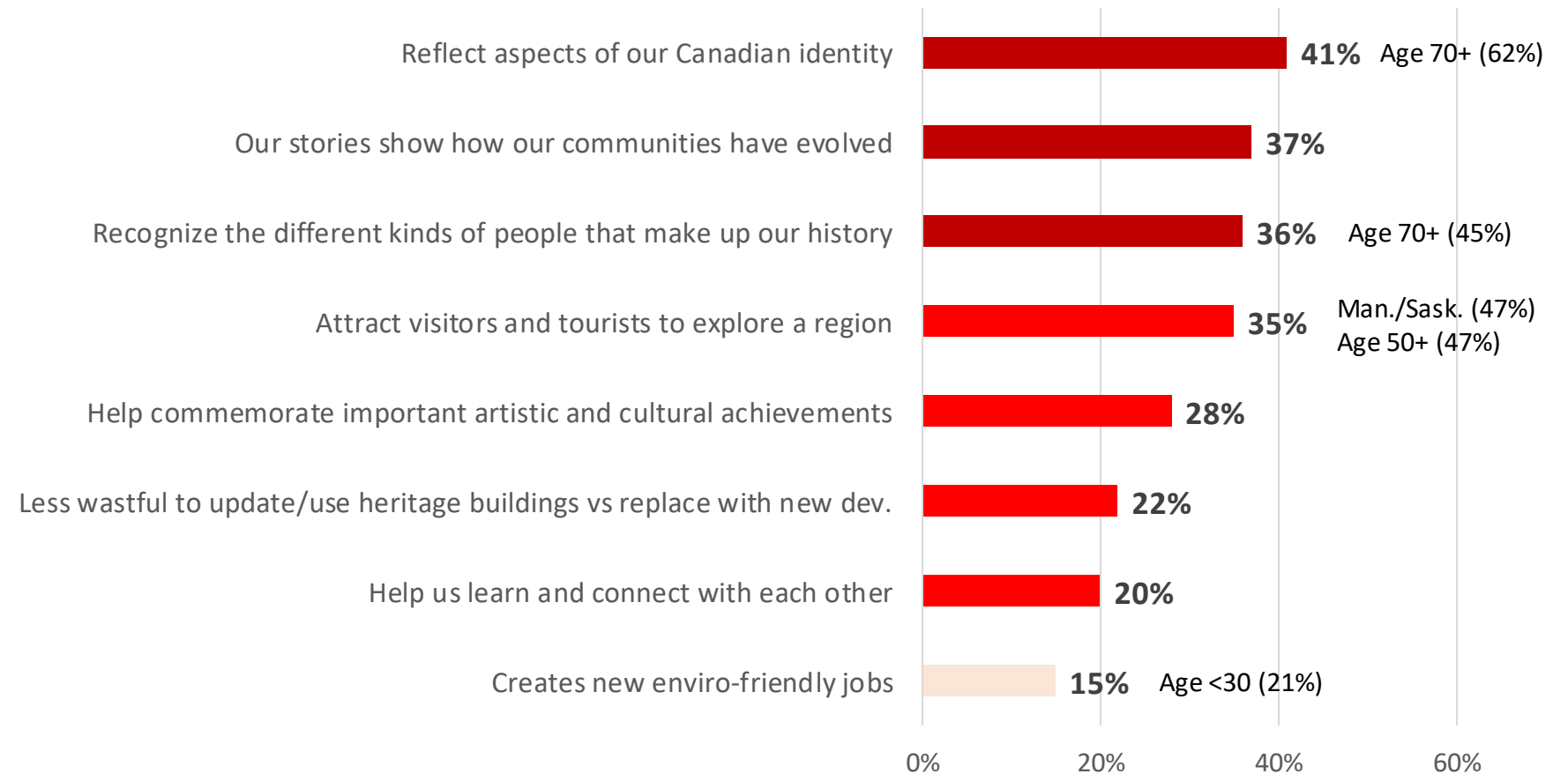
- Interest in the historic aspects of heritage sites, and preserving them, increases with older cohorts.
- Conversely, the youngest cohort over-indexes in interest related to fighting climate change.

Which heritage conservation subjects are of interest to you?



Building on the subject areas which garner the highest interest, the top reasons why heritage conservation is important relate to Canada, its identity, history, stories, and people.

What are the most important reasons to conserve heritage places?



THE KINDS OF HERITAGE STORIES OF MOST INTEREST

The heritage stories that most interest Canadians are those about different people from the country's history and how they were a part of shaping the country and its history.

What kinds of heritage stories are most interesting to you?

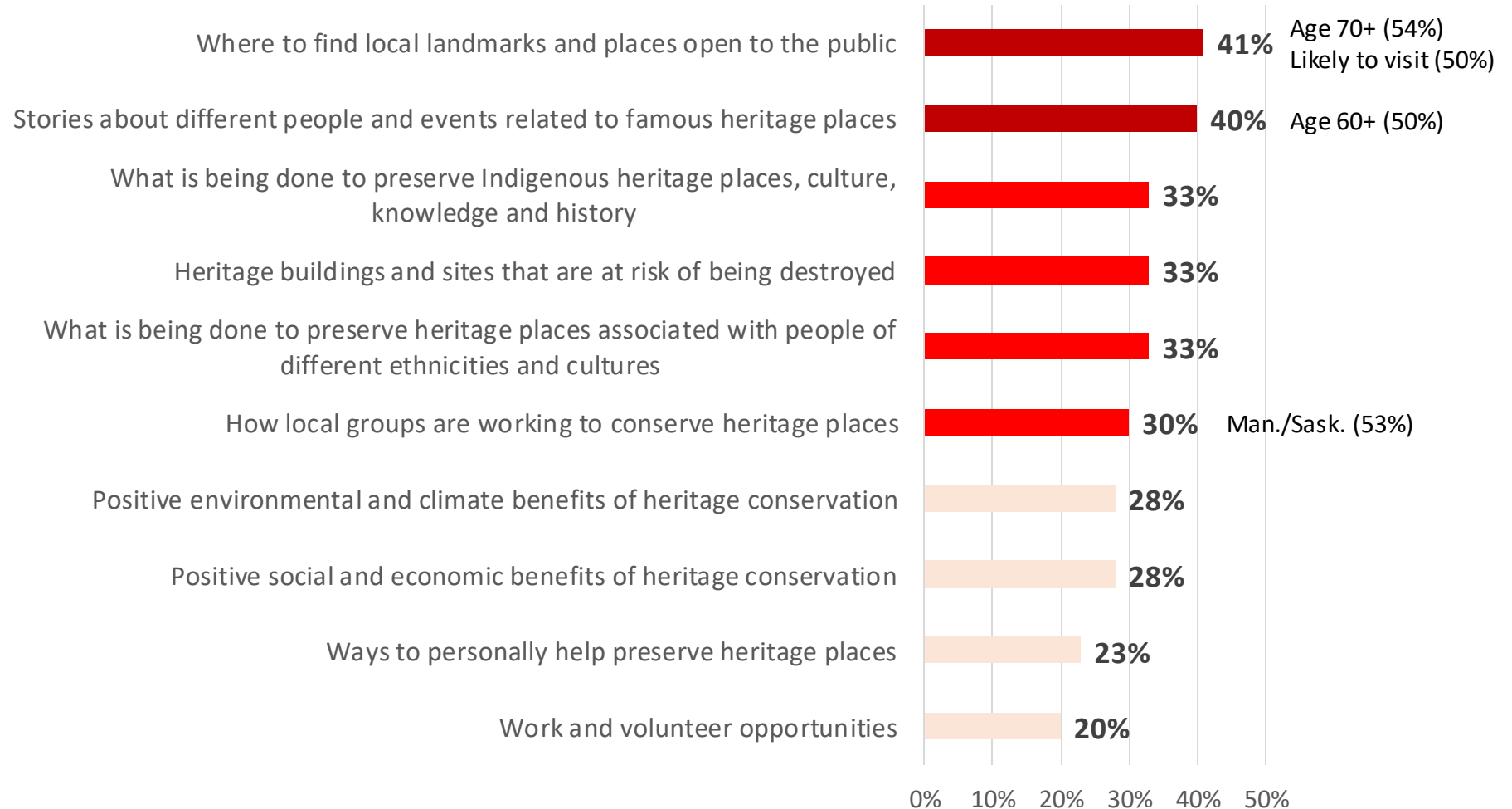


WHAT THE PUBLIC WANTS TO KNOW MORE ABOUT

Canadians are most interested in knowing more about where to find and see heritage places and learn their stories, followed by what work is being done to preserve heritage places.

- Fewer people want to know more about the specific kinds of functional benefits of heritage conservation, and ways to get personally involved.

What are you interested in knowing more about?



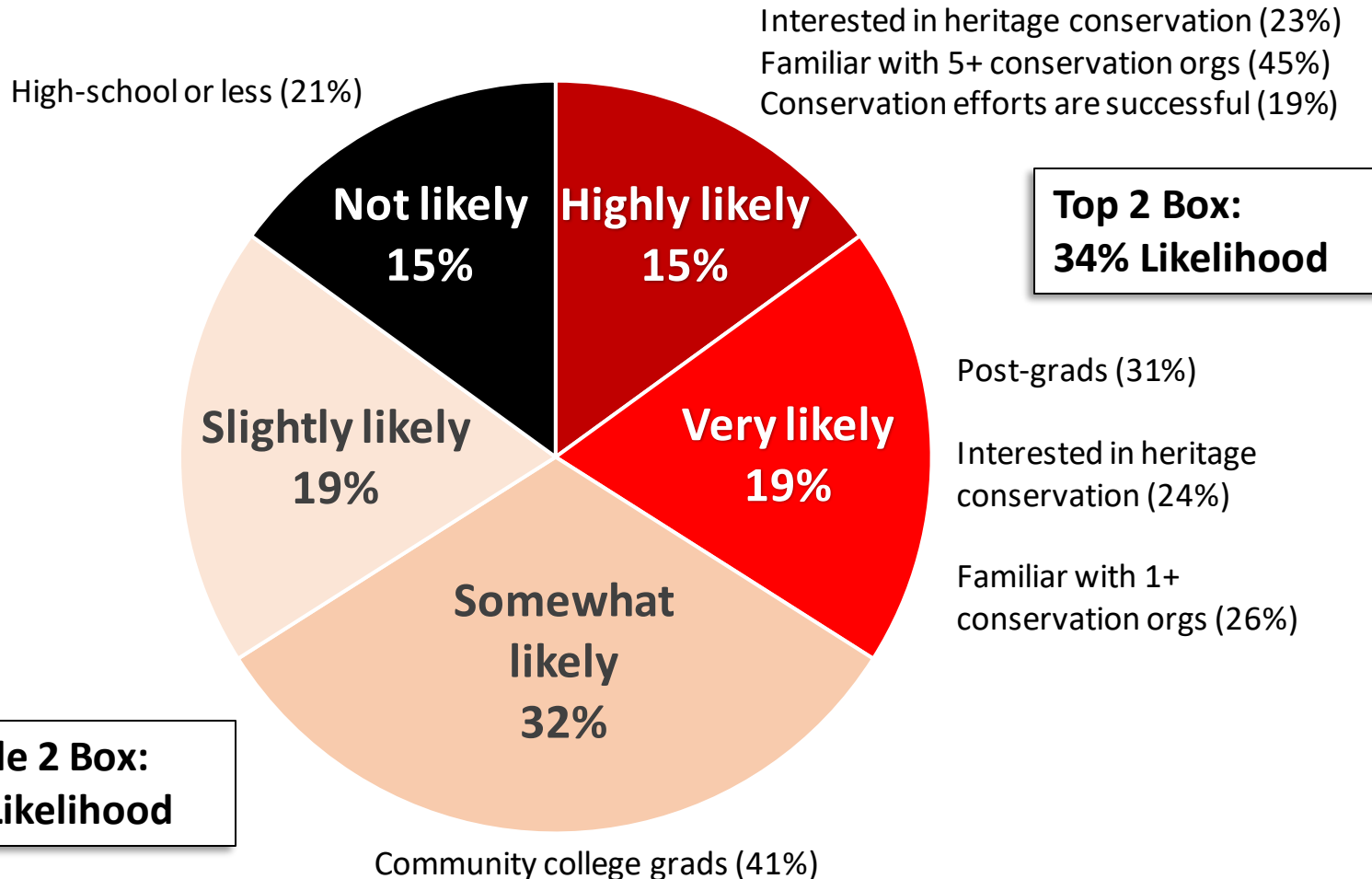
LIKELIHOOD OF VISITING A HERITAGE PLACE

The more interested and familiar one is in heritage conservation, the greater the likelihood of visiting a heritage place in the next year.

85% state there is some likelihood they will visit a heritage place in the next year.

- 34% are the most likely to do so.

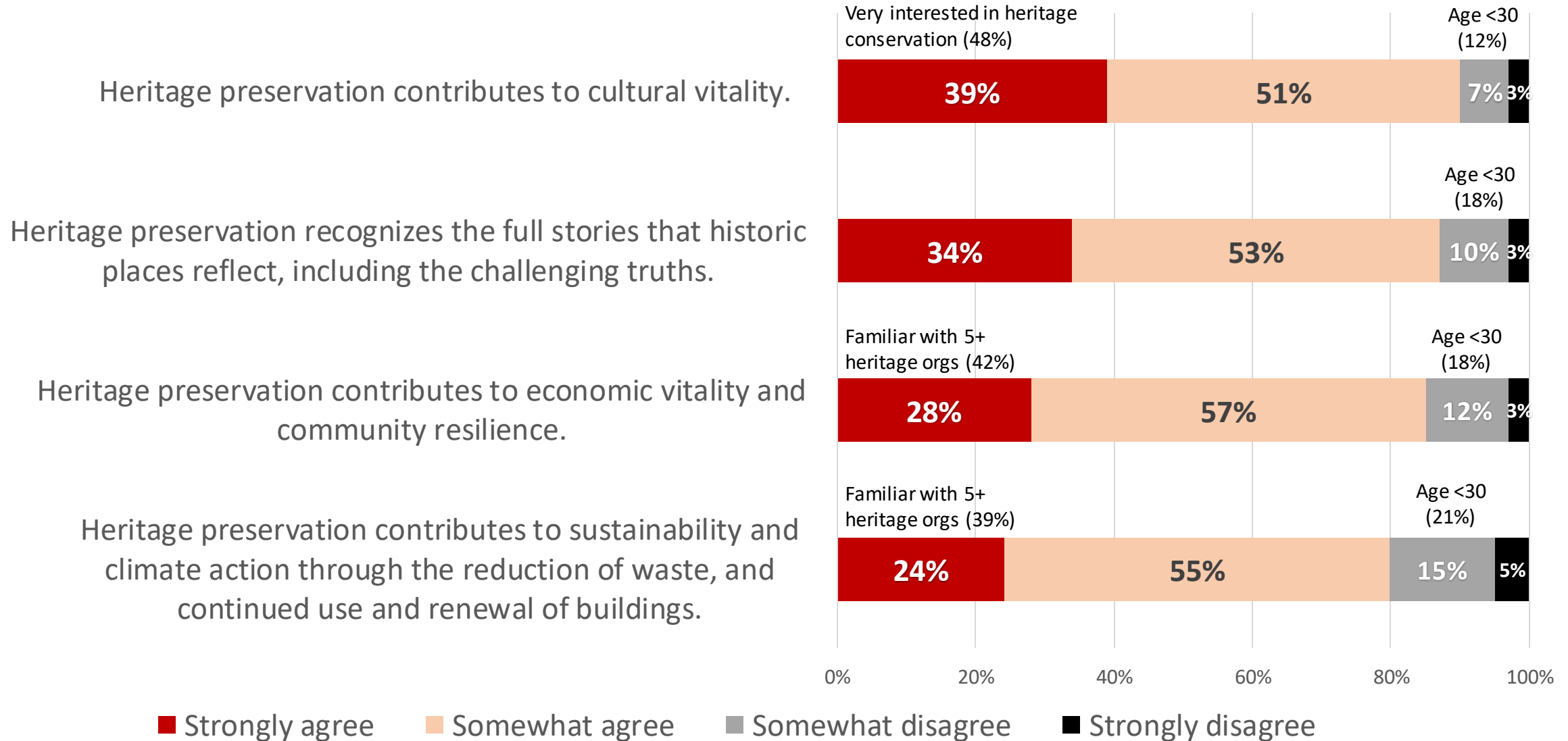
How likely is that you will visit a heritage place in Canada in the next year?



**Top 2 Box:
34% Likelihood**

**Middle 2 Box:
51% Likelihood**

AGREE / DISAGREE STATEMENTS ABOUT HERITAGE CONSERVATION



AGREE / DISAGREE STATEMENTS ABOUT HERITAGE CONSERVATION

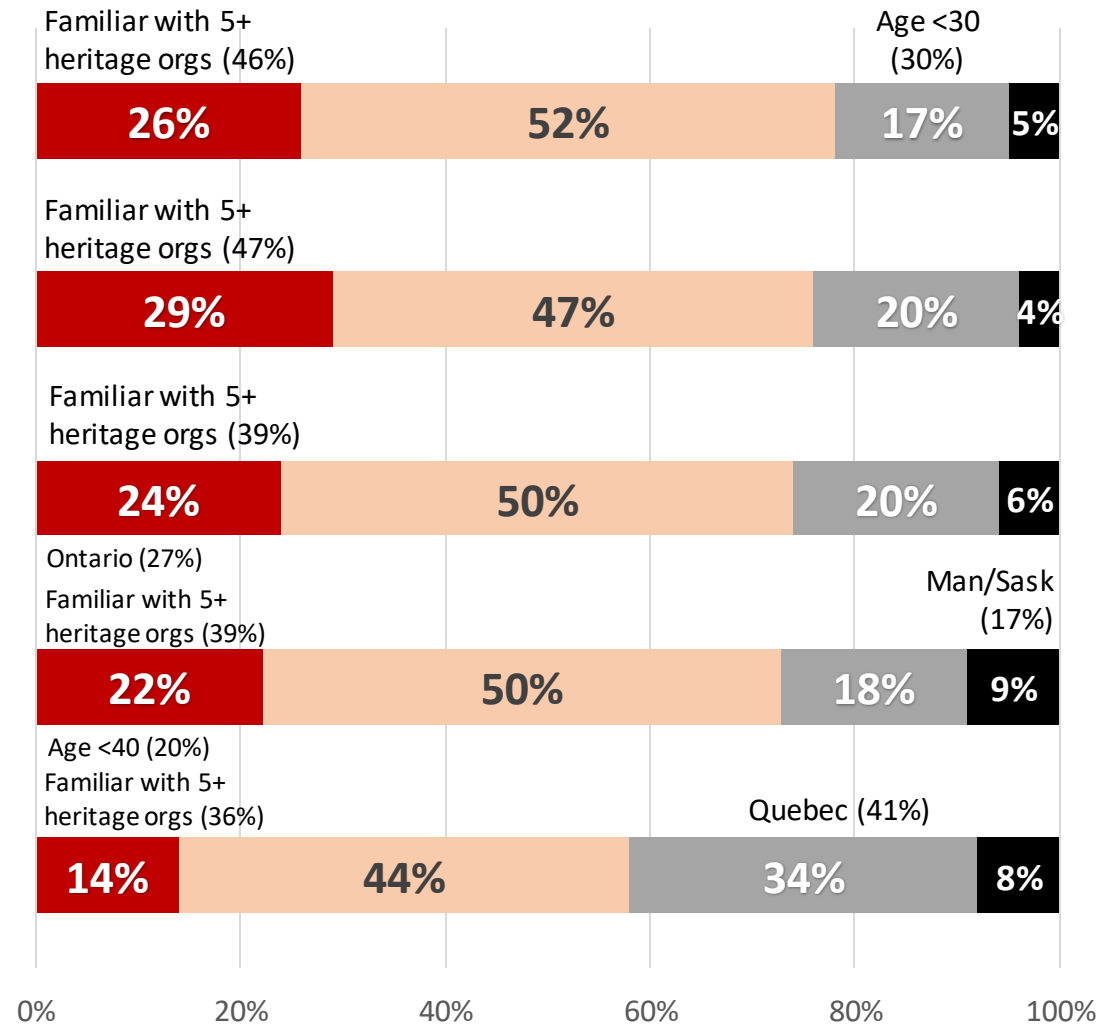
Heritage guidelines must allow as many older buildings as possible to be adapted to reduce carbon emissions.

Heritage preservation is open and available to everyone.

Saving existing buildings and heritage places from demolition is a significant contribution to climate action.

Heritage preservation needs guidance and advice from Indigenous Peoples to better respond to the climate crisis.

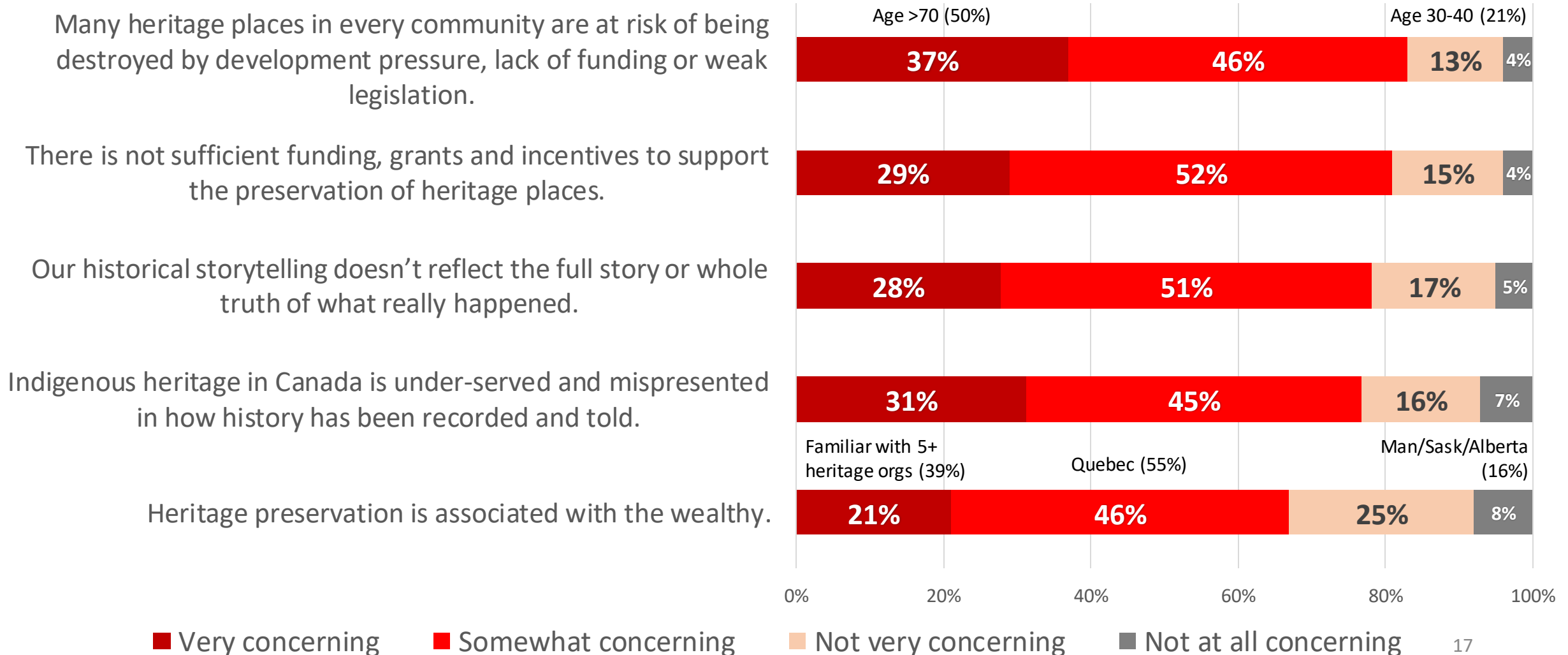
Heritage stories and interpretations are dominated by biased perspectives.



■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree

PERSONAL CONCERN REGARDING HERITAGE CONSERVATION

How concerning to you personally are each of the following statements?



TAKEAWAYS FROM AGREE/DISAGREE/CONCERN STATEMENTS

- The statements generating the most agreement relate to how heritage helps contribute in vital ways; culturally, communally, and economically. Notably, those under the age of 30 run counter to the average and exhibit heightened disbelief with these same statements by over-indexing in disagreement.
- A high percentage (Top 2 Box 87%) believe heritage preservation does recognize full stories including the challenging truths. Relatedly, the phrase related to heritage being biased generated the highest level of disagreement (Bottom 2 Box 42%).
- People who are familiar with five or more heritage organizations dramatically over-index in strongly agreeing with the majority of statements versus the national average. Of particular note, this also applies to the statement related to heritage being biased in that they are more apt to agree that heritage conservation is dominated by bias.
- The threat of heritage places disappearing elicits the highest concern for people (followed logically by concerns over lack of funding for heritage conservation), while the suggestion that heritage conservation is associated with the wealthy generates the lowest amount of concern.

FACTS & INSIGHTS SUMMARY



KEY FACTS

- 61% of Canadians are significantly interested in heritage conservation.
- 41% of Canadians say the #1 most important reason to conserve heritage places is to reflect aspects of our Canadian identity.
- 83% are concerned by the risk of heritage places disappearing.
- 34% suggest a strong likelihood they will visit a heritage place in the next 12 months.
- 46% of Canadians believe responsibility for heritage conservation rests with government and conservation organizations.
- 37% are familiar with one or more heritage conservation organizations.
- 60% of Canadians believe heritage conservation has been successful in its efforts to date.
- 40% most want to know more about where to find heritage places to visit that are open to the public, and the stories about the people and events related to heritage places.
- 37% are interested in buildings and structures of historical importance.
- 37% are interested in stories about the people and events who affected history.

GENERATING INTEREST IS THE KEY TO BUILDING A MOVEMENT

- Overall, the general public continues to underscore that the heritage conservation themes of greatest interest are those of the people and stories connected to heritage places. Environmental benefits of heritage conservation do then follow, and it is important to note that environment and climate change may serve as targeted themes with younger audiences as they demonstrate greater interest in those aspects of heritage conservation.
- The threat of heritage places disappearing, particularly in the face of insufficient funding, is what will continue to spur action – it remains the sector’s “call-to-action”.

DEVELOPERS ARE NOT ON THE PUBLIC’S RADAR, BUT SHOULD BE

- Commercial developers rank the lowest in terms of who the public perceives as being responsible and involved with heritage conservation, yet, they are critical gatekeepers of how change can take place. The data reveals that “Heritage Reset” efforts must raise them further up on the public’s consciousness as being a more important player in the overall solution.

SOCIAL JUSTICE PERCEPTIONS ARE GOOD, IF NOT NECESSARILY GREAT

- The public is generally positive about the sector, and there is not a large contingent expressing significant concerns about the sector’s practices from a social justice, privilege or bias perspective. Nonetheless, there are fewer people ardently in agreement with the sector’s practices versus those who are more reservedly supportive, which can be interpreted as a cautionary flag which should be heeded.

THANK YOU

Research questionnaire development, analysis and reporting

APER+URE 1

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APPENDIX: 2020 Canadian Public Survey



+ APERTURE1

Expanding the Audience for Heritage/Historic Places

May 20, 2020 – Omnibus research report

hellosos.com

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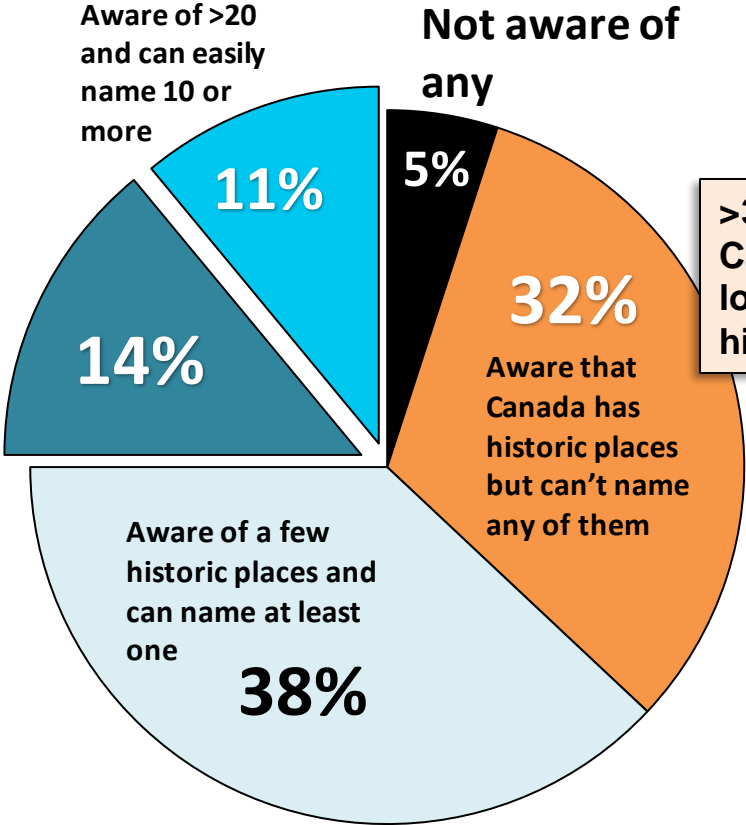
aperture1.com

Awareness & familiarity of Canadian historic places

63% of Canadian have sufficiently good awareness of heritage sites and historic places such that they are able to name a few of them.

25% of Canadians are highly aware of historic places.

Aware of at least 10 historic places and can name most



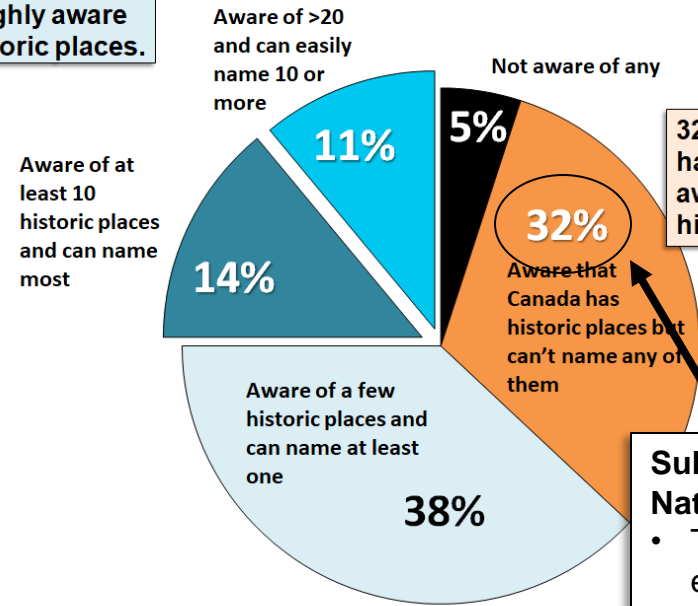
>32% of Canadians have low awareness of historic places.

Q1: From the list of statements below, which one best describes your familiarity with heritage sites, historic buildings, and older neighbourhoods and districts in Canada?

Audiences with lower awareness

Those without post-secondary education, lower income earners, and seniors were more likely to be unable to name any of Canada's historic places.

25% of Canadians are highly aware of historic places.



32% of Canadians have low awareness of historic places.

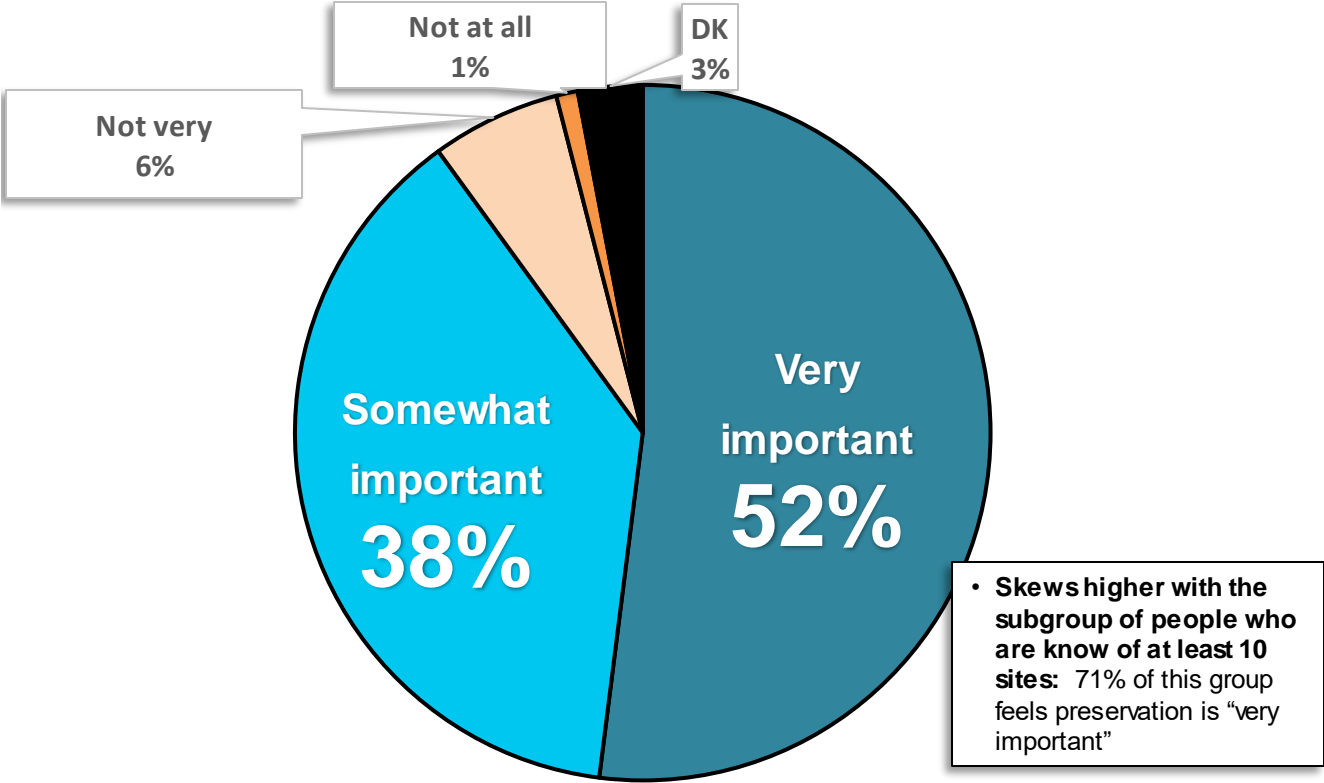
- Subgroups who skew higher than the National Average:**
- Those without college / university education: 42%
 - Lower income range \$25-50K/yr: 44%
 - Manitoba/Saskatchewan: 49%
 - Quebec: 39%
 - Age 70+: 46%

Q1: From the list of statements below, which one best describes your familiarity with heritage sites, historic buildings, and older neighbourhoods and districts in Canada?

How important is it to preserve sites and buildings?

90% of Canadians feel it is important to preserve/adapt our country's heritage sites, historic buildings, and older neighbourhoods and districts.

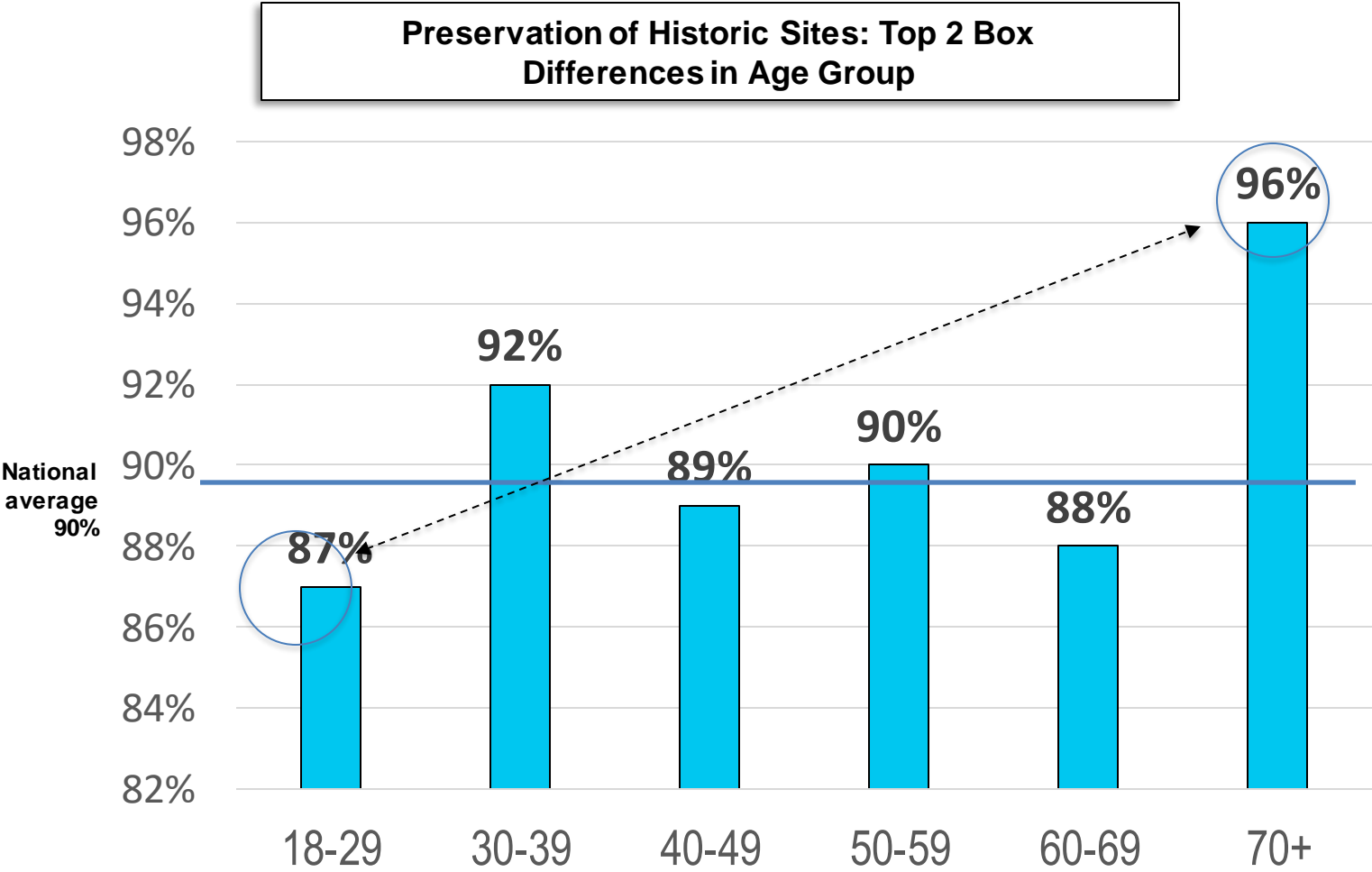
Importance of Preserving Sites & Buildings



Q2: How important is it to you that Canadian heritage sites, historic buildings, and older neighbourhoods and districts are preserved?

Younger and older define the spectrum on importance

Those who feel that preservation is “very/somewhat important” differs the most between the very youngest and very oldest age groups.

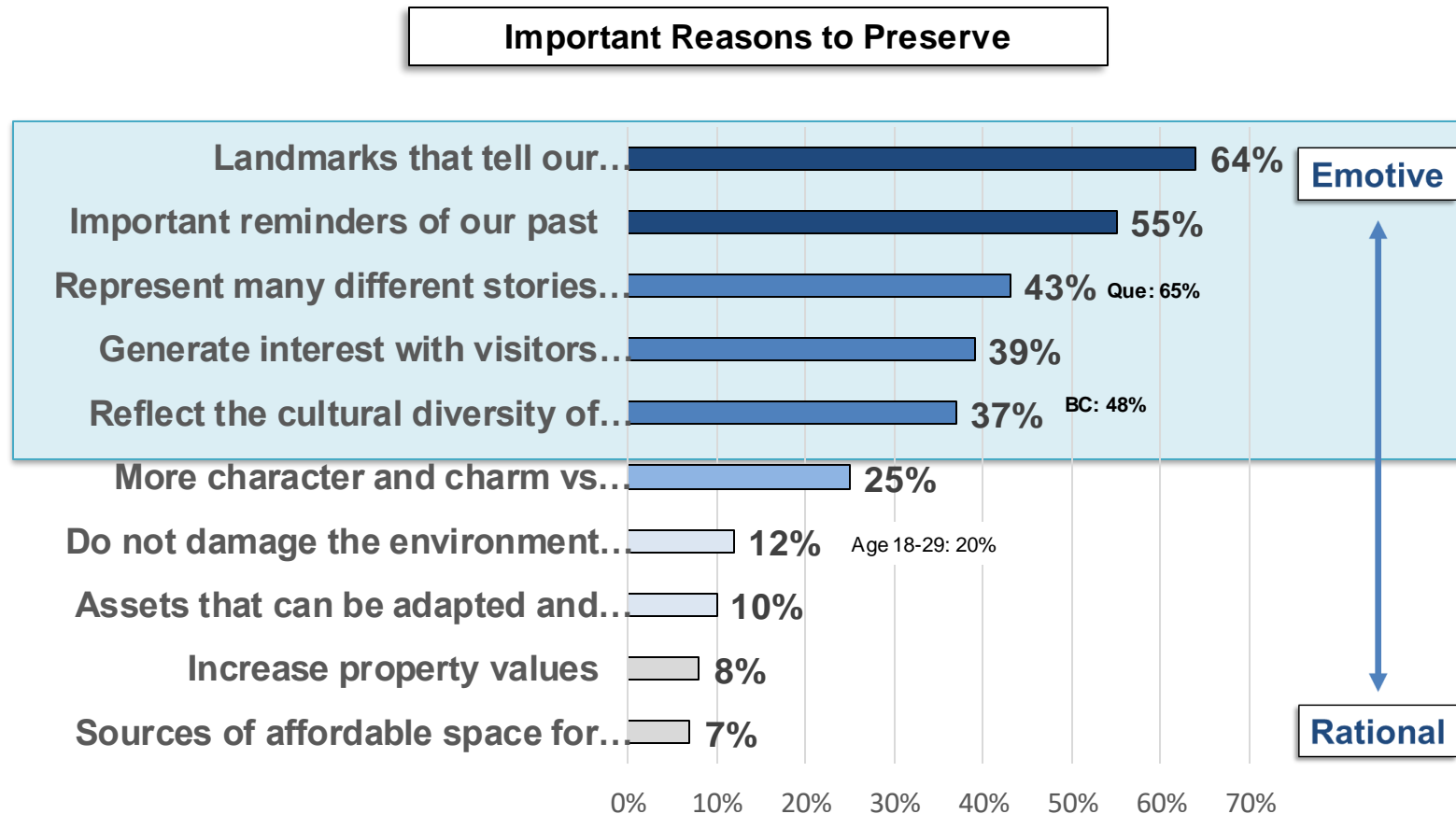


Q2: How important is it to you that Canadian heritage sites, historic buildings, and older neighbourhoods and districts are preserved? (Top 2 Box Scores)

What are the most important reasons to preserve?

People feel it is important to preserve/adapt sites because of their role in the telling of Canada's story, its people, and its history.

- Appears to be more emotionally engaging for people vs rational support points.



Q3: From the list below, please select the 3 reasons you feel are the most important when it comes to preserving Canadian heritage sites, historic buildings, and older neighbourhoods and districts?

Do people recognize the environmental benefits?

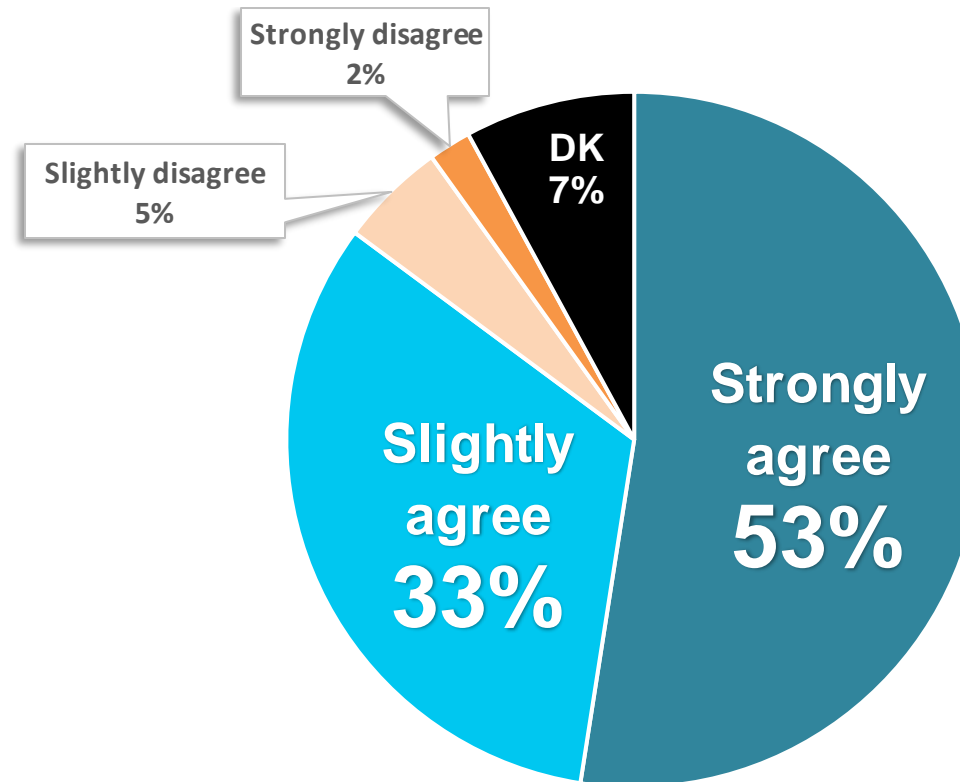
86% of Canadians agree that preserving/adapting heritage sites and historic buildings is more environmentally-friendly than building new ones (Top 2 Box score of “strongly & slightly agree”).

- This increases to 96% with those aged 70+.

On a standalone basis, people clearly support the environmental merits behind preserving sites.

- On a relative basis (Q3 on prior page), other considerations get rated even higher than the environment.

Agree / Disagree that Preserving Historic Buildings is More Environmentally-Friendly vs. Demolition/Construction



Q4: How much do you agree or disagree with the following statement?
Preserving Canadian heritage sites and historic buildings is more environmentally-friendly than demolishing them and constructing a new building.

What proof points best support a need to preserve?

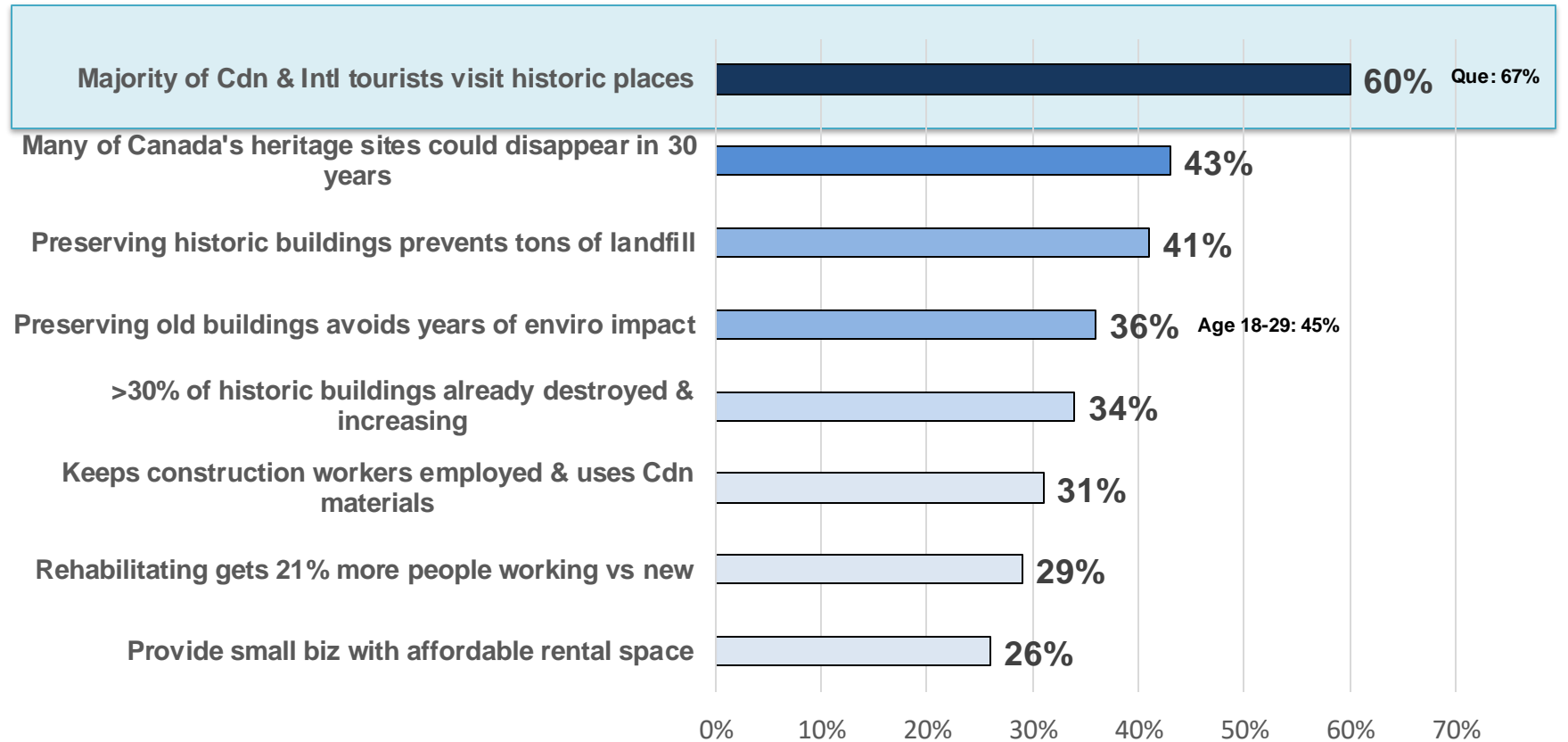
Proof Points in Support of Preservation

“Badge of Pride”

Tourism attraction seen as a strong fact in support of preservation & adaptation.

Strongest proof point claims:

1. Tourism
2. Loss rate
3. Environment

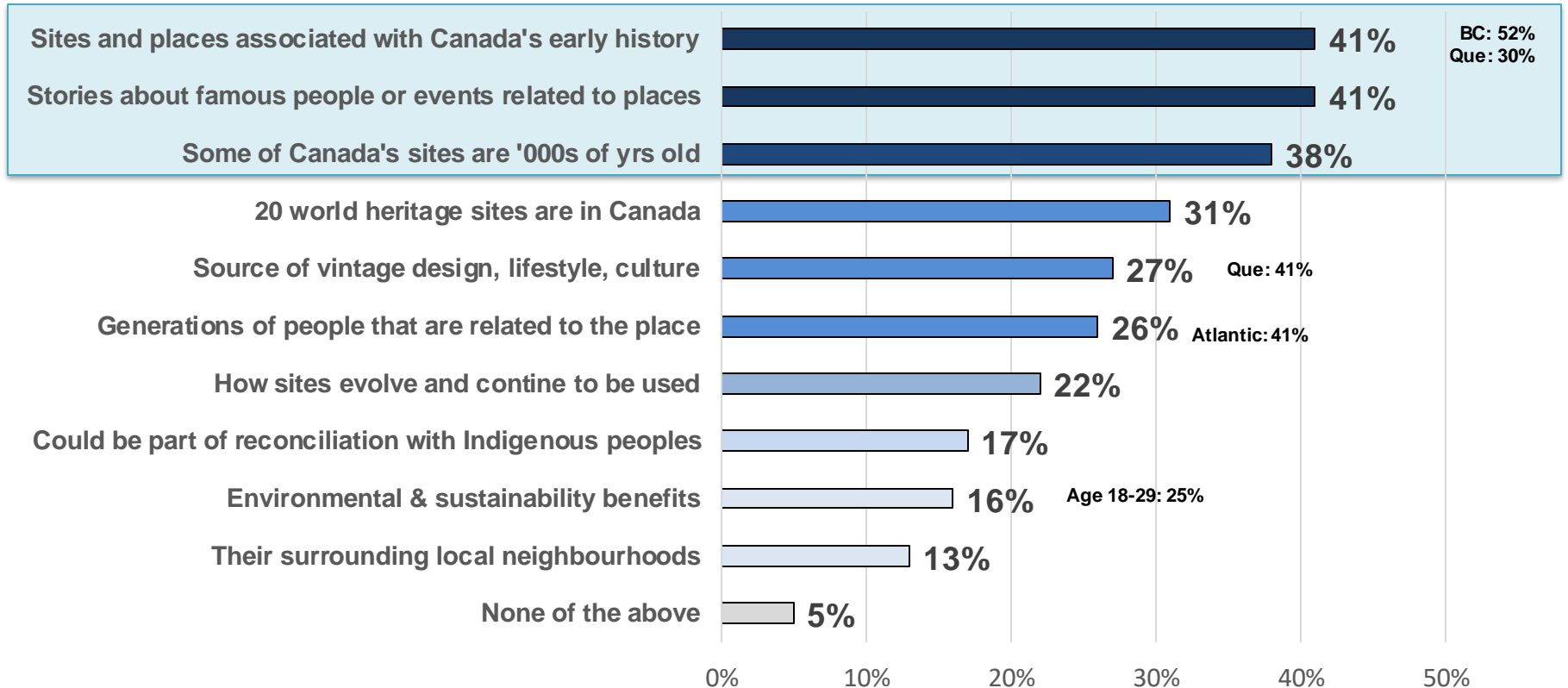


Q5: Here is a list of facts related to the conservation of Canadian heritage sites and historic buildings. From this list please select the 3 facts that you feel best support the argument to preserve these sites and buildings.

What generates interest & engages people to find out more?

Canada's history, past events, and stories of its people drives the most engagement and interest in finding out more.

Drivers of Engagement to Find out More



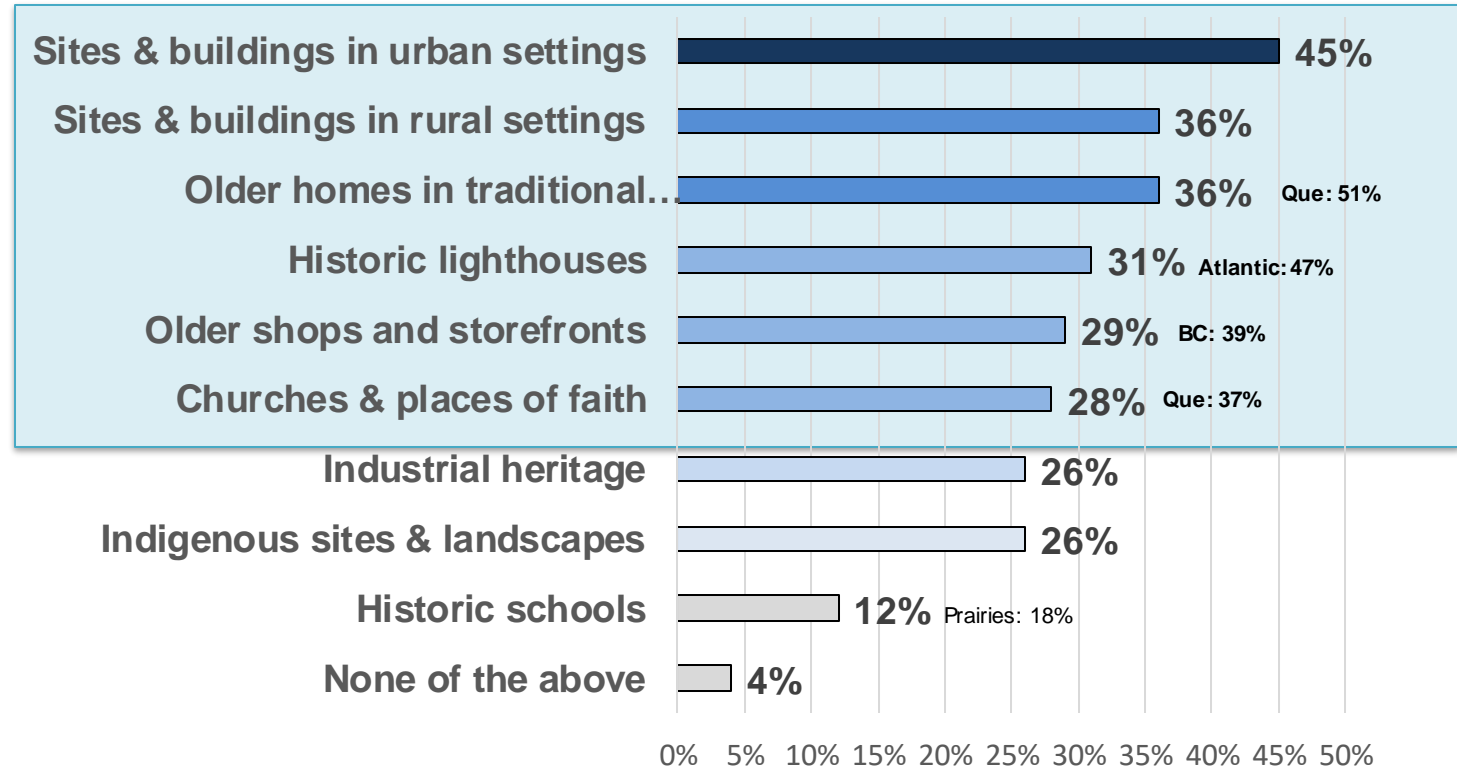
Q6: Which of the following might interest you in finding out more about Canadian heritage sites, historic buildings, and older neighbourhoods and districts?

The kinds of places that generate interest

What interests Canadians about heritage sites & historic places varies significantly by region.

What is seemingly most found in a region is what that region finds most interesting.

Places Of Interest

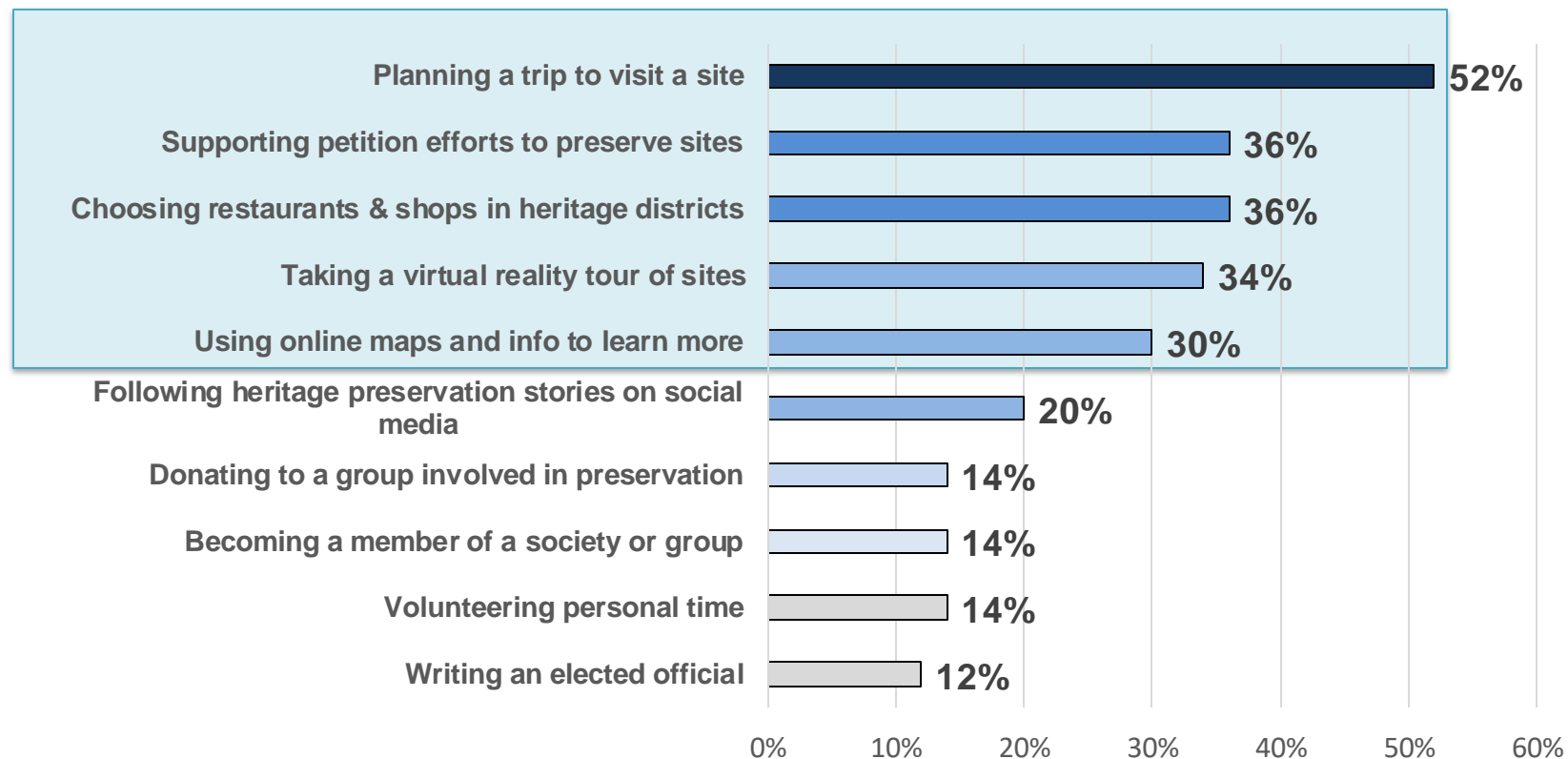


Q7: Which of the following types of Canadian historic places and historic buildings might be of most interest to you?

Getting involved means experiencing the site

Canadians would be more likely to get involved by experiencing sites firsthand over volunteer and advocacy work.

Ways that Canadians Might Get Involved



Q8: Which of following would you consider doing in order to help support the preservation of Canadian heritage sites, historic buildings and older neighbourhoods and districts?

Key facts

- 90% of Canadians feel it is important to preserve heritage sites and historic places.
- 86% of Canadians agree preserving a historic building is more environmentally-friendly than demolishing it and building something new.
- 64% believe heritage sites and historic places help tell our country's collective story.
- 63% of Canadians have by-name awareness of the country's heritage sites and historic places.
- 60% of Canadians believe historic sites and historic places are important for tourism as they represent places of interest for people to visit.
- 52% of Canadians are interested in visiting a heritage site and historic place as a way to get more involved in the movement.

Key insights

- People feel the overall purpose of preservation (the “why”) is to ensure Canada’s story continues to be told, experienced and learned.
 - They find this a more emotionally engaging, reason-to-believe versus some of the more rational arguments about the benefits of preserving and adapting historic places which serve as support, but aren’t the overarching most important reason to preserve and adapt.
 - People don’t want to see sites disappear quickly because that could accelerate the fading of Canadian history, and a loss of things that everyone can take part in sharing and experiencing.
 - And they believe this story is a compelling reason to visit sites for fellow Canadians as well as international tourists when they visit Canada.
- Relatedly, the majority of people would be most likely to support heritage movements by experiencing the sites and places themselves first-hand – as something to do and see; as an attraction and source of interest.
- The fact that preservation is good for the environment is recognized as a positive benefit, especially with younger generations. While environmental-friendliness isn’t the main reason people feel sites should be preserved (ensuring the country’s story continues to be told ranks even higher), it does serve as a strong supporting argument.
- The fact that people regionally find different kinds of historic places interesting reflects the rich fabric of the country. People celebrate their localized places of interest as badges of pride, and they serve as important attractions and attributes of where they live for others to see.