

Renoir's Portraits: Impressions of an Age

Visitor Profile and Economic Impact Study

Summary

Partners:

National Gallery of Canada

Canadian Tourism Commission

Department of Canadian Heritage

Research Resolutions



I. INTRODUCTION

The National Gallery of Canada mounted a very successful major exhibition C Renoir Portraits C between June 27 and September 14, 1997. The exhibition, featuring 61 Renoir paintings, attracted almost 340,000 visitors from the local area, other Canadian provinces, the USA and other countries.

The Exhibition was promoted by the National Gallery throughout Canada and North America and was a major promotional theme for peak summer season advertising by Ottawa Tourism. To determine the economic benefit associated with the exhibition at the community and provincial levels, and to provide information about the profile of visitors who attended the Renoir Exhibition, the National Gallery of Canada commissioned Research Resolutions to undertake a Study Of The Economic Impact of the Renoir Portraits Exhibition.

Financial support for the project was provided by the following partners:

Canadian Tourism Commission (CTC)
Department of Canadian Heritage (DCH)
National Gallery of Canada

The primary objectives of the study were as follows:

- a) to determine the profile of Renoir Portraits Exhibition attendees; and
- b) to provide an estimate of the economic impact of the event in the Ottawa/Hull Census Metropolitan Area (CMA 505¹), Ontario and Quebec.²

Consumer spending estimates of attendees surveyed as they left the National Gallery after viewing the Renoir Portraits Exhibition constituted the primary source of economic benefit estimates. Survey procedures and data management methodologies analogous to those pioneered at the Barnes Exhibit (Art Gallery of Ontario, 1995) were used to ensure that comparisons could be made between the two events and to provide estimates of impact that reflect incremental benefits B that is, economic activity that took place because the Renoir Exhibition was at the National Gallery of Canada during the summer of 1997.³

Findings of the study are included in the volumes:

Volume I -- Executive Summary covering key findings and a brief overview of the study methodology;

Volume II -- Detailed report outlining visitor profiles and expenditures; and

Volume III -- Technical Appendix, describing the methodology, including details of the survey

Research Resolutions



design, completion rate, editing and weighting rules and procedures used in the project.



II. AN OVERVIEW OF THE STUDY DESIGN

Key features of the survey process are listed below.

The interviewing periods were randomly selected to ensure all time periods throughout the 11 weeks of the Renoir Portrait Exhibition were reflected in the sample.

Eighteen separate time slots, varying by day of week and time of day, were selected as interviewing periods over the course of the Exhibition.

To ensure that estimates for visitors from locations outside Ontario and Quebec were based on a sufficient number of interviews to yield stable, reliable results, visitors from these locations were oversampled. The data were adjusted to represent the true proportion of visitors from each origin.

Over the 11 week run, 5,495 household parties, representing 10,952 individuals were interviewed as they entered the Renoir Exhibition. Through this brief tally interview, information on household party size and place of residence was captured. These interviews also identified the designated respondent from selected household parties that would be interviewed in greater depth at the end of the visitor's stay at the National Gallery of Canada (Exit Survey). Information based on the tally data is considered accurate within $\pm 1.3\%$ at the 95% level of confidence.

Interviews of a more in-depth nature were completed with a sample of the household visitor parties included in the tally process. Nine hundred and forty two (942) household visitor party representatives who claimed to have had a decision-making role in the trip decision and could report on trip and spending characteristics participated in this longer interview just before leaving the National Gallery. This sample size is considered accurate within $\pm 3.3\%$ at the 95% level of confidence.

The starting point for all expenditure estimates is the total amount spent in Ontario and Quebec by the household members on the trip or outing that included the visit to the Renoir Exhibition.

Not all money spent in Ontario and Quebec by a Renoir Exhibition visitor is attributable to the Renoir Exhibition. The incremental impacts of the Renoir Exhibition include only the proportion of reported expenditures in Ontario and Quebec that corresponds to the respondent's impression of the degree of influence the Renoir Exhibition had on the decision to visit Ottawa/Hull CMA. Adjustments were also made for visitors' substitution of a Renoir Exhibition visit for a different cultural or recreational event and for trip substitution for non-local visitors (substitution effects).

III. An Overview of the Economic Impact of the Renoir Exhibition

A. *Visitors to the Renoir Exhibition*

Almost 340,000 people visited the Renoir Exhibition at the National Gallery of Canada between June 27, 1997 and September 14, 1997.

More than one-third of Renoir Exhibition visitors came from the Ottawa/Hull Metropolitan Area (131,100) and a further one-half lived in other parts of Ontario (71,900) or Quebec (99,600). Canadians from other provinces constituted a relatively small proportion of all visitors (11,400), while those from the USA (13,400) and other countries (12,600) combine to represent about one-in-twelve visitors to the Exhibition (Table 1).⁴

Visitors from every Canadian province, 27 US states and many overseas countries saw the Renoir Exhibition at the National Gallery of Canada.

B. *Total Economic Activity in Ontario & Quebec*

Close to \$67 million were spent in Ontario and Quebec by visitors on the trips or excursions that brought them to the Renoir Exhibition (direct consumer spending).

This \$66.6 million in expenditures created ripple effects throughout the economies of Ontario and Quebec that stimulated the production of \$69.2 million of goods and services (value added).⁵

Almost 1,700 jobs (person years of employment) were required to produce the \$69.2 million of output. These jobs, in turn, generated \$44.3 million in wages and salaries within Ontario and Quebec (Table 2).

A total of \$26.8 million in federal, provincial and municipal taxes was generated. The Ontario tax share of total taxes was \$6.8 million and Quebec's share was more than \$2.8 million. Federal taxes exceeded \$12 million (Table 2).

C. Economic Activity Attributable to the Renoir Exhibition

To arrive at the economic impact that was generated by the Renoir Exhibition itself, it is necessary to separate the economic activity that would have occurred even if the Renoir Exhibition had not been at the National Gallery from the activity that is directly associated with the Exhibition.

Out-of-town visitors who went to the Renoir Exhibition were in the Ottawa/Hull CMA for a variety of reasons. Some came to the city on business trips or to visit friends and relatives, and only incidentally visited the Renoir Exhibition. Others came primarily or solely to see the Renoir Exhibition. Additionally, local residents might have spent their recreation and entertainment money on other events in Ontario or Quebec, if the Renoir Exhibition had not been available.

To estimate the economic benefit generated by the Renoir Exhibition itself, adjustments, in accordance with the level of influence the Renoir Exhibition had in motivating the trip for out-of-town visitors and/or local residents' decision to take part in a cultural activity, were made in estimating the incremental economic activity in the two provinces that was generated by the Renoir Exhibition.

The Renoir Exhibition produced \$33.2 million of goods and services (value added) throughout Ontario and Quebec.

\$33.2 million of goods and services (value added) directly attributable to the Renoir Exhibition were created by the ripple effects of \$31.5 million in consumer spending in Ontario and Quebec that occurred solely because the Renoir Exhibition was showing at the National Gallery of Canada.⁶

In other words, if the Renoir Exhibition had not been at the National Gallery of Canada, the two provinces would not have enjoyed the economic benefits -- \$33.2 million in value added, additional jobs, wages and salaries, and tax revenues -- created by \$31.5 million in direct consumer spending (Table 2)

The Renoir Exhibition directly produced about 825 person years of employment in Ontario and Quebec.

Approximately 825 person years of employment were required to produce the \$33.2 million in goods and services directly associated with the Renoir Exhibition. This employment yielded wages and salaries in Ottawa/Hull of close to \$12 million, and in other parts of Ontario and Quebec of approximately \$9.4 million (Table 2).

Tax revenues increased by \$12.7 million directly because of the Renoir Exhibition.

Taxes directly associated with the Renoir Exhibition totalled almost \$12.7 million for the three levels of government, combined. Ontario's provincial taxes increased by \$3.2 million and Quebec's share of provincial taxes was \$1.2 million. Federal taxes approached \$5.7 million directly because of the Renoir Exhibition (Table 2).

More than one-half of the economic activity associated with the Renoir Exhibition took place within the Ottawa/Hull CMA.

Of the \$33.2 million in economic activity directly associated with the Renoir Exhibition, \$17.7 million are associated with businesses in the Ottawa/Hull CMA. The remaining \$15.5 million benefited Ontario and Quebec economic sectors located outside the Ottawa/Hull CMA. (Table 3).

The Renoir Exhibition resulted in substantial exports.

Twenty-five percent (25%) of the \$31.5 million in consumer spending that occurred in Ontario and Quebec solely because of the Renoir Exhibition at the National Gallery was done by people who live outside Ontario and Quebec. The Renoir Exhibition generated almost \$8.0 million in consumer spending from outside the two provinces. The Exhibition induced about \$2.7 million in spending within Ontario/Quebec by visitors from the USA, a further \$3.3 million from residents of other countries, and about \$1.7 million from residents of other Canadian provinces.

Ontario residents who live outside Ottawa/Hull spent almost \$10 million because the Renoir Exhibition was at the National Gallery, and Quebec residents from outside the local area spent just over \$11 million (Table 4).

Many sectors of the economy benefited from the Renoir Exhibition.

As a direct result of the Renoir Exhibition at the National Gallery, \$10.7 million were spent on food and beverages, primarily in restaurants and bars in Ontario and Quebec.⁷ The retail sector enjoyed \$6 million in purchases of souvenirs, clothing and other goods. Entertainment and recreation facilities, including the National Gallery of Canada and other cultural events had receipts of over \$4 million because the Renoir Exhibition was in Ottawa. Hotels and other forms of accommodation in Ontario and Quebec sold about \$7.2 million in lodging because of the Renoir Exhibition (Table 5).

The local economy, including restaurants, hotels and other cultural attractions, benefited from the Renoir Exhibition.

Within the Ottawa/Hull CMA, restaurant sales increased by about \$6.8 million, hotels and other commercial accommodations enjoyed \$4.8 million in revenue and other cultural attractions had sales of almost three-quarters of a million dollars as a direct result of the

Renoir Exhibition at the National Gallery. The retail sector in the municipality, excluding kiosks and the bookstore at the National Gallery, benefited from an additional \$1.6 million in consumer spending because the National Gallery hosted the Renoir Exhibition (Table 5).

D. Room Nights

Almost a quarter million hotel/motel room nights were spent in Ontario and Quebec by Renoir Exhibition visitors.

Over the course of the Exhibition, visitors spent more than half a million "room nights" in Ontario and Quebec (511,500). Almost one-quarter of these were spent in hotels and motels in the two provinces (120,700). Hotels and motels in the Ottawa/Hull CMA benefited most from the Exhibition (81,300). Bed and breakfast establishments in the Ottawa/Hull CMA also benefited from the Exhibition (8,500 room nights) (Table 6).⁸

The homes of friends and relatives in the two provinces accommodated Renoir Exhibition visitors for more than half of all room nights spent in Ontario/Quebec (273,100). Some Renoir Exhibition visitors used their own private cottages for accommodation, reflecting both the summer season and the proximity of Ottawa/Hull CMA to cottage areas in both Ontario and Quebec (45,100 room nights).

E. The Renoir Exhibition & The National Gallery of Canada

Almost 9-in-10 visitors were satisfied with the Renoir Exhibition.

While 9-in-10 visitors who claimed to be satisfied with the Exhibition, almost 5-in-10 visitors gave the Renoir Exhibition the highest possible overall satisfaction rating -- ten out of ten! Only 1-in-100 visitors (1%) expressed any dissatisfaction with the Exhibition (Table 7).

The Exhibition drew almost 90,000 visitors through the doors of the National Gallery for the very first time.

One-seventh of these newcomers live in the Ottawa/Hull CMA (13,800), about one-fifth live in other parts of Ontario (20,400) and more than one-third live in other parts of Quebec (31,500) (Table 8).

Interest in returning to the National Gallery is quite high.

More than three-quarters of Renoir Exhibition visitors expect to return to the National Gallery of Canada within a year or so (Table 8).

Newspapers were the primary source of information about the Renoir Exhibition.

More than 4-in-10 visitors claim to have first heard about the Renoir Exhibition in a newspaper, and almost 3-in-10 first learned of it from friends or relatives. This informal information channel was particularly important for visitors from outside Ontario and Quebec (Table 9).

F. Other Findings

Many other attractions in the Ottawa/Hull area benefited from the Renoir Exhibition.

Almost half of the Renoir Exhibition visitors from outside the municipality went shopping in Ottawa/Hull (96,500), more than a third went to Parliament Hill (78,600), and only slightly fewer went to other museums or art galleries while on their trip to Ottawa/Hull (60,800). The casino attracted about 16,500 non-local visitors, and festivals or fairs in the region attracted 27,400 (Table 10).

The Renoir Exhibition visitor is highly educated, middle-aged or older, and most likely to be a woman.

Almost three-quarters of the Renoir Exhibition visitors have at least one university degree, one-half are between the ages of 40 years and 59 years, and a further one-fifth are 60 years of age or over. Seven-in-ten visitors to the Exhibition were women (Table 11).

Glossary

Directly Attributable to the Renoir Exhibition

Refers to the portion of the tourism-related sectors' economic activity that would not have taken place if the Renoir Exhibition had not been at the National Gallery in Ottawa.

Direct Impact

Refers to the impact that tourist spending has on the front line businesses serving these tourists (i.e., the tourism-related sectors).

Employment

The jobs that are *attributed to the Renoir Exhibition* are generated by CTRI's economic impact model which converts Renoir visitors' expenditures in a particular industry to jobs according to the industry's production process and part-time/full-time ratios.

GDP

This figure refers to the total value of wages and salaries, profits and indirect taxes (less subsidies) generated in the industries involved in the production process that is initiated with tourist spending. Market price estimates of GDP, including direct, indirect and induced impacts are reported for the Renoir Exhibition.

Gross Output

Refers to the total sales achieved by all industries (direct and indirect) that participate in the production process initiated by tourist spending.

Indirect Impact

Refers to the economic impact resulting from the expansion of demand from the industries involved in the direct supply of goods and services to tourists to other industries.

Induced Impact

Refers to the economic impact associated with the re-spending of labour income and/or profits earned in the industries that serve tourists directly and indirectly.

Municipal Taxes

Refers to business and property taxes collected by municipalities. Although in the long-term these taxes are correlated with the economic health of the community, in the short-term, these taxes may not be related to the community's economic fluctuations.

Tourism Related Sectors



Refers to the sectors that supply the goods and services consumed by tourists. These sectors are: transportation (air, rail, bus and local), accommodation services, food and beverage services, amusement and recreation services, retail and 'other' services (car rental, travel agents). Although these sectors supply the goods and services consumed by tourists, they also supply goods and services consumed by non-tourists. As such, not all of the these sectors' revenues and jobs are attributed to tourist spending.



Tables

Table 1

Origin Of Renoir Exhibition Visitors		
	340,000 Visitors	
Canada	314,000	92%
Ottawa/Hull CMA	131,100	39%
Ottawa	114,600	34%
Hull	16,500	5%
Other Ontario	71,900	21%
Other Quebec	99,600	29%
Other Canadian Provinces	11,400	3%
USA	13,400	4%
Other Countries	12,600	4%

Source: Research Resolutions Detailed Tabulations, page 1, adjusted to include non-general admission visitors to the Renoir Exhibition.

Table 2

The Economic Benefits in Ontario & Quebec of the Renoir Exhibition at the National Gallery of Canada		
	Gross Impacts	Incremental Impacts
Net Economic Activity (value added)	\$69,200,000	\$33,200,000
Employment (person years)*	1,700	823
Wages & Salaries	\$44,300,000	\$21,000,000
Federal Taxes	\$12,100,000	\$5,700,000
Provincial Taxes**	\$9,700,000	\$4,400,000
Municipal Taxes***	\$5,100,000	\$2,600,000
Expenditure Impacts (consumer spending)	\$66,600,000	\$31,500,000

Gross Impacts are based on all spending in Ontario and Quebec on the trip that included the visit to the Renoir Exhibition. Incremental Impacts are based on the portion of spending in Ontario and Quebec that occurred solely because the Renoir Exhibition was at the National Gallery of Canada. Net economic activity includes direct, indirect and induced impacts. Source: Research Resolutions Estimates, Canadian Tourism Research Institute (CTRI) tourism economic impact models, Tables #1(A), 25.
*Employment is full time, full year equivalents. **Provincial taxes in Ontario and Quebec. ***Municipal taxes throughout Ontario and Quebec. All dollar figures are rounded to the nearest 100,000.

Table 3

Distribution of Incremental Impacts Across Ontario & Quebec		
	Ottawa/Hull CMA	Other Ontario/ Other Quebec
Expenditure Impacts (consumer spending)	\$23,000,000	\$8,600,000
Net Economic Activity (value added)	\$17,700,000	\$15,500,000
Employment (person years)	488	335
Wages & Salaries	\$11,600,000	\$9,400,000
Municipal Taxes	\$1,800,000	\$800,000

Incremental Impacts are based on the portion of spending in Ontario and Quebec that occurred solely because the Renoir Exhibition was at the National Gallery of Canada. Source: Research Resolutions Estimates, Canadian Tourism Research Institute (CTRI) tourism economic impact models. All dollar figures are rounded to the nearest 100,000.

Table 4

Sources of Consumer Spending in Ontario & Quebec				
	Gross Expenditure Impacts		Incremental Expenditure Impacts	
	\$66,600,000		\$31,500,000	
Place of Residence	\$	%	\$	%
Ottawa/Hull CMA	\$3,400,000	5	\$2,700,000	9
Other Ontario	\$16,800,000	25	\$10,000,000	32
Other Quebec	\$13,900,000	21	\$11,100,000	35
Other Canadian Provinces	\$6,900,000	10	\$1,700,000	5
USA	\$6,700,000	10	\$2,700,000	8
Other Countries	\$18,900,000	28	\$3,300,000	11

Gross Impacts are based on all spending in Ontario and Quebec on the trip that included the visit to the Renoir Exhibition. Incremental Impacts are based on the portion of spending in Ontario and Quebec that occurred solely because the Renoir Exhibition was at the National Gallery of Canada. Source: Research Resolutions Detailed Tabulations, pages 78-1/2; 80-1/2. Canadian Tourism Research Institute (CTRI) tourism economic impact models. All dollar figures are rounded to the nearest 100,000. Percentages may not add to 100% due to rounding.

Table 5

Categories of Consumer Spending in Ontario & Quebec				
	Gross Expenditure Impacts		Incremental Expenditure Impacts	
	\$66,600,000		\$31,500,000	
Category of Expense	\$	%	\$	%
Accommodation	\$14,400,000	22	\$7,200,000	23
Restaurants & Groceries	\$20,700,000	31	\$10,700,000	34
Transportation In Ontario/ Quebec	\$12,200,000	18	\$2,400,000	8
Parking, Taxis, Public Transit	\$800,000	1	\$400,000	1
Recreation & Entertainment	\$5,700,000	9	\$4,000,000	13
Retail	\$10,300,000	16	\$6,000,000	19
Other	\$2,400,000	4	\$600,000	2

Gross Impacts are based on all spending in Ontario and Quebec on the trip that included the visit to the Renoir Exhibition. Incremental Impacts are based on the portion of spending in Ontario and Quebec that occurred solely because the Renoir Exhibition was at the National Gallery of Canada. Transportation in Ontario/Quebec includes auto expenses, vehicle rental and commercial carrier fares for transportation within the two provinces. Source: Research Resolutions Detailed Tabulations, pages 78-1/2; 80-1/2. All dollar figures are rounded to the nearest 100,000. Percentages and spending estimates may not add to 100%/total due to rounding.

Table 6

Room Nights Spent in Ontario & Quebec by Renoir Exhibition Visitors*				
	Total	In Ottawa/ Hull CMA	In Other Ontario	In Other Quebec
All Types	511,500	239,500	135,800	136,200
Total Paid Roofed	159,000	95,800	29,100	34,000
Hotel/Motel	120,700	81,300	16,900	22,500
B&B	16,700	8,500	4,500	3,800
Camping	17,800	7,900	5,300	4,700
VFR	273,100	129,400	83,800	59,900
Private Cottage	45,100	3,600	16,200	25,300
All Other	16,500	2,800	1,400	12,300

Source: Research Resolutions Detailed Tabulations, page 70-1. All figures are rounded to the nearest 100. *A night spent by a household visitor party is considered to be a "room night".

Table 7

Overall Satisfaction with the Renoir Exhibition							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Positive	87%	85%	86%	91%	96%	92%	82%
Neutral	11%	13%	12%	9%	4%	8%	17%
Negative	1%	2%	2%	-	-	1%	1%
Average	8.9	8.8	8.8	9.1	9.2	9.1	8.5

Source: Research Resolutions Detailed Tabulations, page 22-1/2. Averages are based on a ten point bi-polar numeric scale where 10 is very satisfied and 1 is very dissatisfied. Positive = 8/10; Neutral = 7/5; Negative = 4/1.

Table 8

Experience With The National Gallery of Canada		
	Total Visitors	
Newcomer To The National Gallery	89,400	27%
Residents Of Ottawa/Hull	13,800	
Residents Of Other Parts Of Ontario	20,400	
Residents Of Other Parts Of Quebec	31,500	
Return To National Gallery In Next 12 Months		
Very Likely	160,800	49%
Somewhat Likely	84,200	26%

Source: Research Resolutions Detailed Tabulations, pages 85/86-1/2.

Table 9

First Source of Information about the Renoir Exhibition							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Newspapers	43%	30%	47%	53%	26%	16%	17%
Friends/Relatives	26%	24%	26%	24%	44%	46%	39%
Television	8%	9%	6%	11%	3%	1%	1%
Billboards/Posters	4%	6%	2%	2%	4%	9%	13%
Radio	4%	6%	3%	4%	4%	4%	-
Tourist Information Office	1%	*	1%	1%	1%	6%	6%
Hotel/Other Local Source	1%	-	*	-	5%	6%	9%

Source: Research Resolutions Detailed Tabulations, page 90-1. *Less than 0.5%.

Table 10

Other Activities in the Ottawa/Hull Area		
	Non-Local Visitors	
Walk Around To See Architecture & Scenery	112,700	54%
Go Shopping	96,500	47%
Go To Parliament Hill	78,600	38%
Do Sightseeing By Car or Bus	64,800	31%
Visit Friends	62,200	30%
Visit Museum/Art Gallery Other Than National Gallery of Canada	60,800	29%
Visit Relatives	56,500	27%
Attend Festival/Fair	27,400	13%
Go To The Casino	16,500	8%
Attend Cultural Performance	12,300	6%

Source: Research Resolutions Detailed Tabulations, page 99-1/2.

Table 11

Profile of Renoir Exhibition Visitors	
Education	Total Visitors
Graduated University/Post Graduate Courses	72%
Household Income	
Over \$75,000	39%
\$50,000 - \$75,000	29%
Under \$50,000	32%
Gender	
Women	70%
Men	30%
Age	
Under 40 Years Of Age	31%
40 To 59 Years Of Age	47%
60 Years Of Age Or Older	22%
Average Age	47 Years
Language	
Language First Learned & Still Understood - English	58%
Language First Learned & Still Understood - French	31%
Household Party Size	
Average Household Party Size	1.9 People

Source: Research Resolutions Detailed Tabulations, pages 102-1/2. Household income has been re-percentage on total providing a response.

NOTES

¹ For purposes of this project the Ottawa-Hull CMA includes the following Census Divisions/ Subdivisions: **Ontario** CD06; **Quebec** 79; 78 110; 78 140; 78 170; 75 420; 75 405; 80 120. These definitions exclude a small segment of the CMA in Ontario: 02 039 (Town of Rockland) and 02 037 (Clarence Township). CD 06 is being used for the Ottawa portion of the CMA since it is the basis for construction of Ontario's tourism economic impact model.

² Economic impacts were measured using economic impact models developed for Ontario (MEDTT) and Quebec (CTRI), modified to take into account the Quebec portion of the CMA (Hull).

³ *Net* touristic economic activity is a measure of all consumer spending on a trip that included a visit to the Renoir Exhibition, but *incremental* economic benefits include only those portions of expenditure that took place as a result of the Exhibition. For example, trip spending for a person on a business trip, who would have come to Ottawa or Hull for business reasons, would all be included in *net* measures, but would be discounted to the level that reflects spending that would not have occurred if the Renoir Exhibition had *not* been at the National Gallery of Canada. Other substitution effects were also taken into account in determining the portion of spending that is attributable to the Renoir Exhibition. See the Technical Appendix for more details.

⁴ While total visitation to the Renoir Exhibition is estimated to be 340,000 not all of these visitors attended the Exhibition during traditional open hours. Those who came to galas and other after hours events had no opportunity to fall within the surveyed population. The population of visitors to the Renoir Exhibition that did fall within the sampling frame for the project, and the figure used in projections and estimates of economic benefit is 328,582. All estimates of visitors and spending shown in the text and tables have been rounded to the nearest 100 (visitors) or 100,000 (spending).

⁵ This expenditure includes spending at the National Gallery and related off-site expenses by local residents as well as all spending in Ontario and Quebec by non-local visitors on the trip that brought them to the Renoir Exhibition. Only trip expenses that occurred within the two provinces were captured in the survey. "Outings" or "excursions" are same-day trips by local residents (residents of the Ottawa/Hull CMA). Catering for events at the National Gallery held in association with the Renoir Exhibition is also included in this estimate.

⁶ The volume of expenditure impact that can be said to have occurred in Ontario and Quebec *solely* because the Renoir Exhibition was at the National Gallery of Canada is less than total spending because some money would have been spent whether the Renoir Exhibition were in Ottawa or not. To obtain an estimate of how much spending the Renoir Exhibition generated for the two provinces -- spending that would not have occurred without the Exhibition -- the role of the Exhibition in the visitor's trip decision-making process, trip and activity substitution effects were taken into account. See the Technical Appendix for more details.

⁷ Groceries purchased in stores are also included in "Food/Beverages".

⁸ Visitor household party nights are used as a surrogate for "room nights".